Getting Started
With Docket Navigator

DocketNavigator

Introduction

We've designed this guide to introduce you to the various components of Docket Navigator and help make your litigation research as efficient as possible. We hope you find it useful and informative, and that you come away with a deeper understanding of how to make the most of your subscription.

💡 **Key Concept**

There are two types of binders:

- Quick Profiles
- Custom Searches

Quick Profile binders are detailed, one-click summaries of Cases, Courts, Judges, etc. Custom Search binders let you tailor your own searches.

But what is a binder? Simply put, a binder is just a way to order and collect search results on a web page. Each set of search results is stored in a tab, which is listed under the binder's Table of Contents and can be filtered by multiple criteria that you can customize.

NAVIGATION

HOME ICON

If you get lost at any point or want to start over, just click on the ship's wheel in the top left corner to get back to the homepage.

NAVIGATION MENU

Move around within Docket Navigator using the navigation icon located in the top right corner. Here, you'll find all of the places you might need utilize to run a search, build a binder or manage your alerts.

CUSTOM SEARCH

Use any of our twelve custom search types and thousands of filter combinations for unprecedented precision in your research. After clicking view results, you'll arrive at a binder that you can save, edit, or add new searches to.

QUICK PROFILE

Quick profiles are the easiest way to get started. Type in a specific target, such as a single Case, Court, Judge, etc., and instantly get a binder filled with pre-selected searches and charts describing that target.

BINDER WALL

If you've saved a binder, or created an alert, you can find it on the Binder Wall.

DOWNLOADS

Whenever you click 'download,' you'll find your downloaded material here. Also, if you are a Plus subscriber, you can find Special Reports here.

ANALYTICS

Customized charts and graphs that allow you to visualize large data sets, reveal trends, and provide insight for improved decision-making.

MANAGE ALERTS

Manage all of your alerts in one place from the Alerts page.

OVERVIEW OF BINDER COMPONENTS

FILE MENU

The File Menu contains tools that affect the entire binder, such as alert activation, exporting or saving.

UNSAVED CHANGES INDICATOR

This small colored circle lets you know that you've made changes to the binder that haven't been saved yet. Just click **SAVE** in the **FILE** menu to save your changes.

ADD NEW SEARCH

The New Search Tab button allows you to add new searches to the binder or start completely over with a new binder.

TAB CONTROLS

These are settings and options for an individual tab.

TABLE OF CONTENTS

The Table of Contents drawer is a list of all the tabs in your binder. You can add, delete, rename or rearrange the tabs by right clicking on them or by clicking Options.

💡 *A binder is just a web page where you can organize your searches into tabs.*

TAB

A tab is a single set of search results in a Table of Contents.

BINDER INFORMATION

Click on the binder information button to add details about your binder such as a description or client code that will help you identify it later.

RESULTS PANE

The results pane is the window that displays your search results. Each time you click a search tab in your Table of Contents, the results will load here.

💡 *Give context to your work product by adding tab labels and binder names.*

QUICK PROFILES

① In the **QUICK PROFILE** section of the Search page are several options for searching: patent, case, party, firm, judge and court. For example, click in the **COURT** box.

② Type in **CAND** in the box.

③ Click **CALIFORNIA NORTHERN DISTRICT** when you see it pop up as a suggestion.

This brings us to a pre-built binder. But you can also get to pre-built binders in by doing either of the following:

- Click on a keyword (like a judge or party name), or case number in the Docket Report

- Click on a keyword (like a judge or party name), or case number from any list of results in the database

---
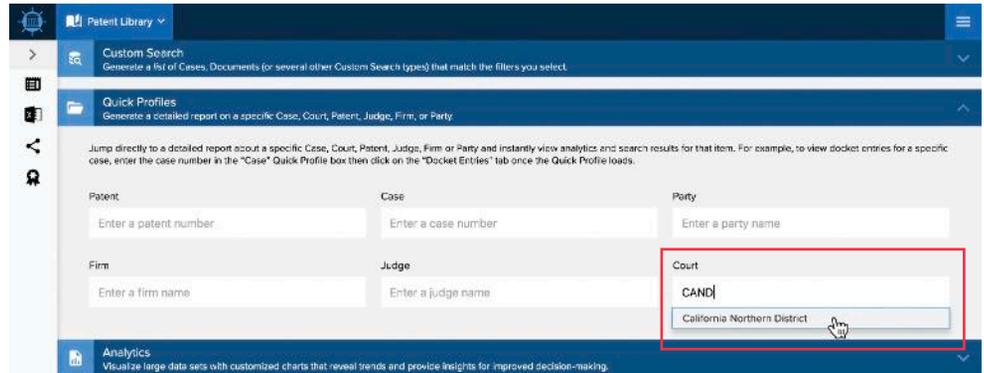
💡 To 'save' or to 'save as'?

If you load a binder that was pre-built, you might want to save a copy of it for yourself. If so, the Save As option under the FILE menu is the way to do that. Once you Save As and become the "owner" of the new binder, any further changes should be saved via FILE > SAVE. The same applies to binders that someone else shared with you.

TIP: Save As always creates a NEW binder, so only use it when you're wanting to claim ownership of a copy of a binder.

Custom Search binders are those that you build "from scratch" by running a search at the Custom Search dock. After you save your binder, you'll have your own "private" URL in our system for that binder which never changes.

1 In the **CUSTOM SEARCH** section of the search page, click **CASES**.

2 In the **COURTS** box, type **MAD** and press enter. Select **MASSACHUSETTS DISTRICT** as the court. Click **SAVE** at the bottom right of the box to close it.

Courts				CLEAR	✕

MAD 🔍 < >   1 matches   SELECT ALL MATCHES

▼ ☐ U.S. District Courts (USDC)
   ☐ Court of Federal Claims (COFC)
▼ ☐ 1st Circuit (1CIR)
   ☑ Massachusetts District (MAD)
   ☐ Maine District (MED)

3 To see only active cases, select **ACTIVE** > **SAVE** in the Case Status filter box.

Case Status
Active
🖾 begin typing   ⌄

4 Click **VIEW RESULTS** at the top right of the page.

5 Click the **FILE** menu at the top left of the page and select **SAVE**. You now have your own custom URL where your binder is stored.

WHAT'S IN A URL?

Notice the components of the URL in your browser's address bar.

Once you save your own binder, it will be given a binder number with a private URL. In the example below, the 161710 is the number of the binder. The last digit after the slash mark is the tab number. When you click on the different tabs in your binder, the last number will change according the tab you're on, but the binder number will remain the same.

  ■ ...docketnavigator.com/patent/binder/161710/0

The pre-built, public* binders look a little different. For example, a Judge pre-built binder will contain "judge" in the URL:

  ■ ...docketnavigator.com/patent/judge/14649/0

A case pre-built binder will look like this:

  ■ ...docketnavigator.com/patent/case/192902/0

Anyone can load a URL from a "public" binder. But for binders that YOU own, either because you created it from scratch, or saved a copy of a pre-built binder, YOU are the only one that can load that URL unless you share it with someone.

💡 *Typically public, pre-built binders are Quick Profiles.*

CUSTOMIZING BINDERS

RENAME THE BINDER

Select **FILE** > **RENAME** and type in a new name or just click the binder name at the top of the page, edit, and press enter.

RENAME A TAB

Select **OPTIONS** > **RENAME** and type in a new name or just click the tab name at the top of the results pane, edit, and press enter. You can also rename, delete or copy a tab by right-clicking a tab in the Table of Contents.

SAVE & CUSTOMIZE

To begin customizing a binder, first save it as your own by clicking:

FILE > **SAVE AS**.

CHANGE THE TAB ORDER

To change the order of the tabs in your Table of Contents, just click the tab you want to move and drag up or down, then release.

ADD A FOLDER

To add a new folder, click **NEW FOLDER** at the bottom of the Table of Contents. You can then rename the folder, move it around by clicking and dragging, move tabs into it, etc.

DELETE A TAB

Delete a tab by either right-clicking the tab in the Table of Contents and selecting **DELETE** or click **OPTIONS** > **DELETE TAB**.

SAVE TO

Move a tab from one binder to another or create a new binder with only this one tab.

CONTROLS FOR TABS

A tab is a single set of search results in a Table of Contents. A binder can have multiple tabs in its Table of Contents, or just a single tab. **The controls located at the top of the results pane apply only to that single set of results.**

FILTER DRAWER

To add, remove or edit search parameters click the **FILTERS** button. You can open up the filter editor or just apply quick filters by using the check-boxes.

OPTIONS MENU

The **OPTIONS** menu has controls related to the tab as well as related searches and analytics shortcuts.

PRINT TAB

Print a single pane of results by clicking **PRINT**.

DOWNLOAD PDF

Download a single PDF by clicking the icon. Bulk download PDFs by checking the small checkbox next to the documents and then **OPTIONS** > **DOWNLOAD SELECTED**. You can also select all by clicking the box at the top of the column.

VIEW DOCUMENT PROFILE

Click this link to see the docket entry and annotations our attorneys have written associated with the document.
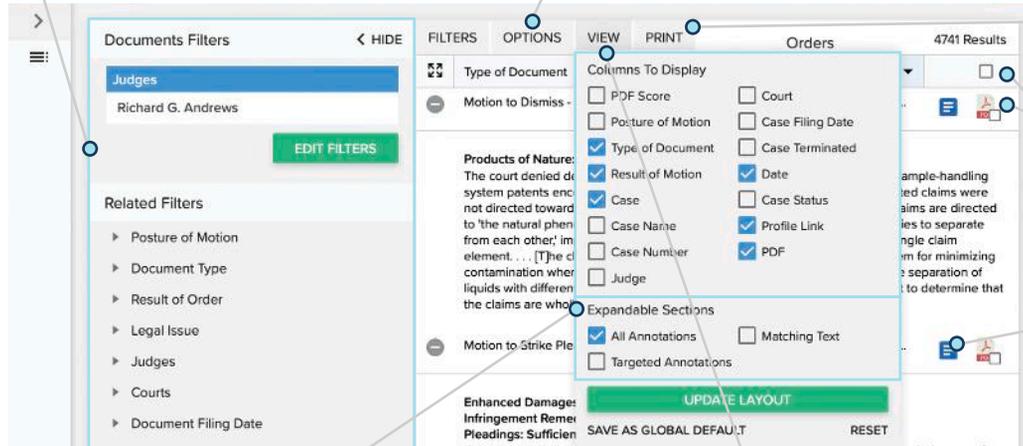
EXPANDABLE SECTIONS

The **EXPANDABLE SECTIONS** allow you to add additional information to your search results. Any option selected under the **EXPANDABLE SECTION** will appear when the 'plus' icons are expanded, and will also create an additional tab of results when exporting to XLS.

> 💡 *Click the expand button* ⛶ *to expand all the icons at once. Click again to collapse.*

CHOOSE YOUR COLUMNS

To specify which columns should appear in your search results, click the **VIEW** button at the top of the results pane. Check or un-check the columns you want to appear, and click **UPDATE LAYOUT** to implement the changes. If you want apply those setting as the default for all searches of the same type, click **VIEW** > **SAVE AS GLOBAL DEFAULT**.

> 💡 *Each search type has its own column options, so make sure you check them for different types of searches!*

LEGAL ISSUES

A critical turning point for most users is when they understand the difference between "Document Type" and "Legal Issue" and how to use them to pinpoint specific types of decisions.

- **Document Type** refers to the procedural vehicle – usually a pleading or motion -- used to request relief from a court or agency. Examples include FRCP 12(b)(6) motions to dismiss for failure to state a claim, motions for summary judgment, motions to stay, and motions for judgment as a matter of law. There are more than 400 different Document Types, organized hierarchically.

- **Legal Issue** refers to the legal rules or doctrines the court or agency applies to resolve the dispute. Legal Issues are assigned when the judge or agency applies the legal issue as a basis for the decision and provides some analysis supporting the decision. Legal Issues are *not* assigned when a court or agency simply renders a decision with no supporting explanation or analysis. Examples include direct infringement, the doctrine of equivalents, lost profits, and the rules governing the admission of expert evidence. There are more than 1,200 different Legal Issues, organized hierarchically.

WHEN ARE DOCUMENT TYPE AND LEGAL ISSUE FILTERS USED?

Imagine we've been asked to find all rulings on 35 USC § 101 (patent subject matter eligibility) motions by Judge Gilstrap. The challenge here is that is that there really is no such thing as a "35 USC § 101 motion." Section 101 could be addressed in a variety of motion types, such as a FRCP 12(b)(6) motion to dismiss for failure to state a claim, a motion for judgment on the pleadings, or a motion for summary judgment of invalidity. So rather than search by Document Type -- since there could be multiple and we may not even know what they are -- we would search instead by the Legal Issue "35 USC § 101." Searching by the Legal Issue would yield all rulings in which the court stated in the decision that 35 USC § 101 was the underlying basis for the decision.
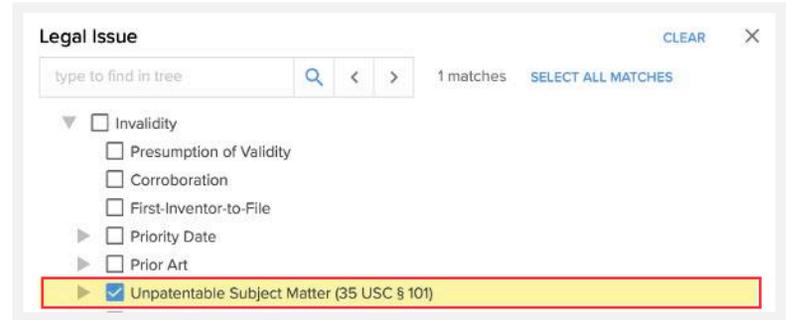
Now imagine we've been asked to find all decisions on 35 USC § 101 by Judge Gilstrap that occurred when ruling on a FRCP 12(b)(6) motion to dismiss for failure to state a claim. By adding a Document Type filter, we can limit the results to those types of orders.
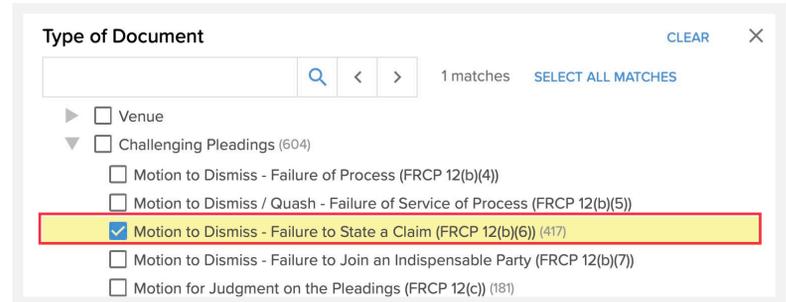
LEGAL ISSUES

Once we've selected a Judge filter (Judge Gilstrap), a Document Type filter (Motion to Dismiss – Failure to State a Claim) and a Legal Issue filter (Unpatentable Subject Matter), we can see there are 18 decisions that match those criteria.

Using the document type and legal issue filters simultaneously can yield exponentially more accurate results. While the Document Type filter pulls all orders containing a requested legal event (e.g., Rule 12(b)(6) motion to dismiss), the Legal Issue filter further refines that search to only those documents that include specific legal doctrines (e.g., unpatentable subject matter).

Using both filters is analogous to using the latitude and longitude lines on a map—with both of them, a user can pinpoint an exact location on the map rather than moving along an entire axis in search of a specific data point.

FILTER OPTIONS

IMPORTING A LIST FOR CRITERIA

You can import lists of patents, party names, or case numbers as filters. Look for the little black upload arrow next to certain filters and follow the instructions in the dialog box to import your list.

DEFINING ROLES

For even more power, check out the little white arrows next to filter titles. There you can set Parties as Patentees or Patent Challengers, and Firms or Attorneys as representing either.
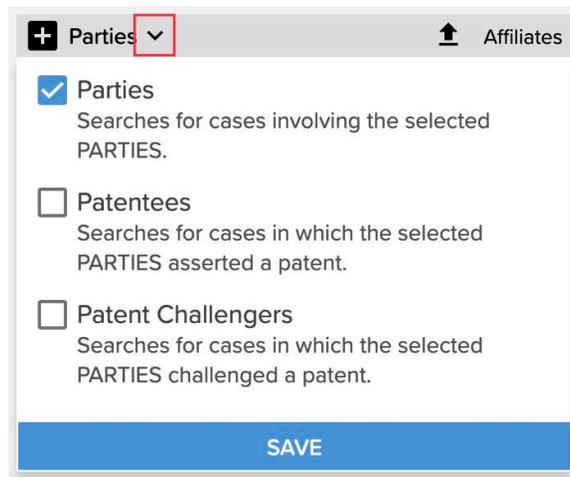
'IS EXACTLY,' 'BEGINS WITH,' AND 'CONTAINS'

You can specify if the displayed party's name "is exactly, begins with, or contains" by selecting your preferred option. Just start typing in a Parties filter box and you'll see the options.

AFFILIATES

You can also include Affiliates in your search results if they were named in a Corporate Disclosure Statement filed in a case by the party you're using as the primary filter. Just click the box under Affiliates.

ADVANCED FILTERS

We've put the most commonly used filters on the main page but if you don't find what you're looking for, click the **ADVANCED FILTERS** tab.

FILTER OPTIONS

THE INS & OUTS OF ANDS & ORS

One powerful way to refine a search is with AND operators between filters. For example, if you wanted to find cases involving Samsung AND Apple, you can do that by clicking the plus icon to the left of the filter. Doing so will create another filter box of the same type.

- Filters entered into separate boxes will be separated by AND operators.

- Filters entered within the same box will be separated by OR operators:
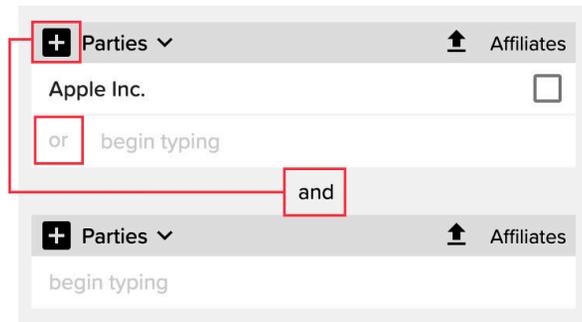
CREATE ALERT

If you have an established workflow and just need to set up an alert without viewing the results of a search, just click the **CREATE ALERT** button and set your frequency from the options displayed.

USING A SEARCH AS A FILTER FOR ANOTHER SEARCH

Several searches allow you to use other search results as a filter in a new search. For example, you could create a list of patents in the 705 patent classification, then use that list of results as a filter for a list of cases in a new search.

1 To use previous search results, click **EDIT FILTERS** in the filters drawer.

2 Select **USE PREVIOUS SEARCH RESULTS**.
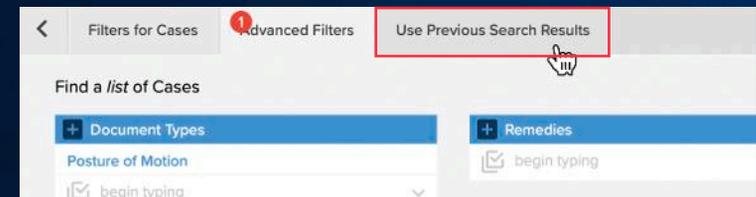
When using a previous set of results as a filter, it's important to realize that you are making a copy of the filters from the previous results, so if you edit the filters on the previous results afterward, it will not update the copied filters. Let's say that in the example above using the 705 patent classification, that list might produce 2,500 patents. The Cases sub-search would find all cases involving those 2,500 patents, but if you changed the 705 patent class to the 706 patent class in the original search, the Cases sub-search would NOT update to find the cases involving the 706 patent class.

EXPORTING

If you chose to export a binder or specific tabs in a binder from the FILE menu, the database will package those up as an XLS or PDF and post them to your Downloads page for easy retrieval.

The files will display as "PENDING" until the job is finished. Once the display switches to "DOWNLOAD," just click the DOWNLOAD button and the file will be sent to your local drive. You will also be sent an email with a link to the file once it is ready to download.

If you chose to export multiple court document-PDFs, those will be posted on the Downloads page as well. Just click the DOWNLOAD button and the zip-file will be sent to your local drive.

It's important to understand the difference between search results in a tab and court document-PDFs. To clarify:

- Exporting the PDFs will give you the actual court documents.
- Exporting search results will give you a list of the descriptions of the PDFs.

To export the results from all or multiple tabs to a spreadsheet, click **FILE > EXPORT BINDER TO XLS**.

To export the results from all or multiple tabs to a PDF, click **FILE > EXPORT BINDER TO PDF**.

To export multiple court document PDFs to a zip-file, select the PDFs you want to export in bulk, then click **OPTIONS > DOWNLOAD SELECTED**.
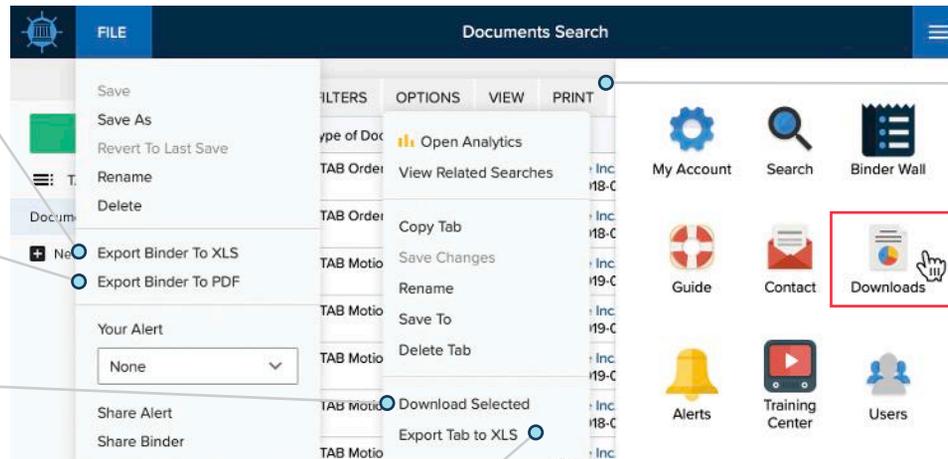
To create a PDF or print the current tab, click **PRINT** at the top of the results pane.

To export the results from a single tab to a spreadsheet, click **OPTIONS > EXPORT TAB TO XLS** at the top of the results pane.

CREATING ALERTS

CREATING ALERTS FOR YOURSELF

1 Click the **FILE** menu.

2 Under **YOUR ALERT**, select something other than NONE.

CREATING ALERTS FOR OTHERS

1 Click the **FILE** menu.

2 Select **SHARE ALERT**.

3 Click the boxes next to usernames in your group.

4 Click the green **TURN ON ALERT** button at the top of the list and choose a frequency for the alert.
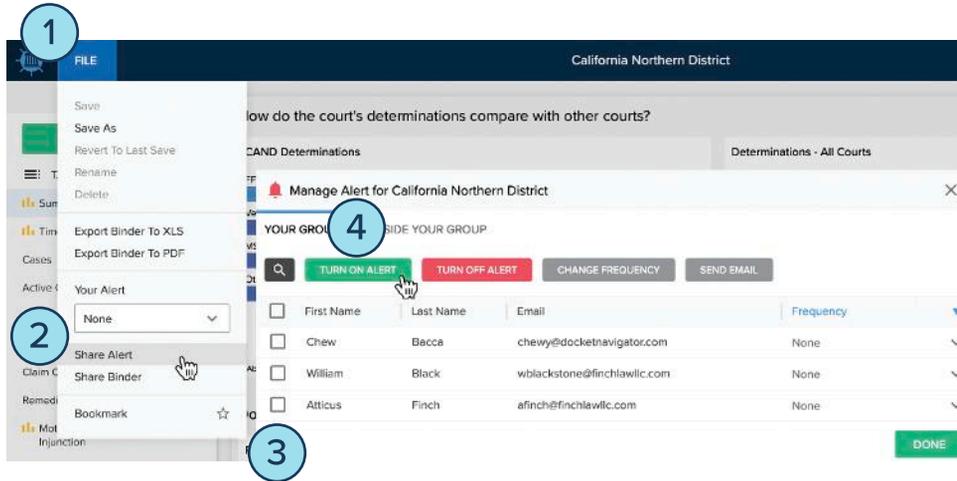
SHARING BINDERS

Once you create and save your first binder, you might want to share it with others.

1 Click the **FILE** menu.

2 Select **SHARE BINDER**.

3 Select the users you want to share with.

4 Click **UPDATE ACCESS**.

They'll receive an email with a link to your binder and will be able to see all the amazing charts and graphs you've created.

Don't worry though. They will **NOT** be able to make changes to your binder. Only the binder owner can make changes to it, so there's no way anyone can mangle your hard work.

MANAGING BINDERS

HOW CAN I FIND AND MANAGE MY BINDERS?

To find binders that you have saved, bookmarked or that have been shared with you, click on the Binder Wall icon from the main menu. You can also access your most recent binders from the main search page.

Click the magnifying glass and type in a word or exact phrase to find binders with those search terms in the title.

If the bell icon is red, that means there is an active alert for the binder. Click the bell to manage or create an alert on the binder.

Hover over the share icon number to see who the binder has been shared with. To share or unshare the binder, click the icon.

If the bookmark icon is yellow, the binder has been set as a "favorite." Click the star to set or unset as a favorite.

Click the copy icon to make a copy of the binder.

MANAGING ALERTS

WHERE CAN I FIND A LIST OF MY ALERTS?

All of the binders that you have an alert on can be found by accessed by clicking on Alerts from the main menu.

Click to add or remove a specific user to selected alerts.

Click to adjust the frequency of selected alerts.

Click to delete selected alerts.

If you are an admin, use this toggle to filter the list of alerts to only your alerts or to include all of your group's alerts.

Click to export your list of alerts to an XLS spreadsheet.

Click in the search box to find alerts with specific text in the title.

Click a column header to sort by that field. Click again to reverse order.

Click to open the list of recipients and potential recipients. Make changes as necessary in the dialog box.

SHORTCUTS TO SPEED UP YOUR WORK-FLOW

OPEN ANALYTICS

Many searches can be converted into an analytics search as long as the same filters are available in both search types. For example, you can convert a "Cases" search to a "Cases by Year" analytics chart with just a couple of clicks. Just click **OPTIONS** > **OPEN ANALYTICS** to see which analytics targets are available for the filters you're using. Click the tabs you want to create, then click **OPEN TABS** at the bottom of the list to start the conversion. New tabs will appear in your Table of Contents for each new analytics option that you selected.

COPY TAB

You can create an exact copy of any tab in your Table of Contents. This is helpful when you need to perform several similar searches. For example, you might run a Cases search with a specific party filter set to "Patentee." Rather than having to create another tab from scratch with that party as the "Patent Challenger," just click **OPTIONS** > **COPY TAB** on your first results pane. That will create an identical tab in your Table of Contents AND will jump you automatically to that tab. Then just edit your filters to set the party as the Patent Challenger.

RELATED SEARCHES

Many searches can be converted into a different type of search as long as the same filters are available in both search types. For example, you can convert a "Cases" search to an "Accusations" search with just a couple of clicks. Just click **OPTIONS** > **VIEW RELATED SEARCHES** to see which search targets are available for the filters you're using. Click the ones you want to create, then click **OPEN TABS** at the bottom of the list to start the conversion. A new tab will appear in your Table of Contents for each new search target that you selected.

DOCUMENT TYPES EXPLAINED

WHAT IS THE DIFFERENCE BETWEEN THE "DOCUMENT TYPES" AND "CASES WITH DOCUMENT TYPES" FILTERS?

Knowing how these filters work will take you to a new level of research. The difference in those two filters is that "Document Types" will return rulings on the type of motion you select, or pleadings that you select. The "Cases with Document Types" in the Advanced Filters tab will return documents in cases with the type of ruling/pleading you specify. For example, the latter will only return results IF a specific type of document also exists in the case. Here are some examples:

I WANT TO SEE ALL CLAIM CONSTRUCTION RULINGS IN CASES THAT HAD A VERDICT.

For this example, try:

1 Filters for Documents

2 Document Type = **CLAIM CONSTRUCTION (MARKMAN)**.

3 Advanced Filters

4 Cases with Document Type = **VERDICT**

My results would therefore be claim construction rulings in cases in which a verdict was rendered.

I WANT TO SEE VERDICTS IN CASES THAT WERE APPEALED TO THE FEDERAL CIRCUIT.

For this example, try:

1 Filters for Documents

2 Document Type = **VERDICT**

3 Advanced Filters

4 Cases with Document Type = **NOTICE OF APPEAL**

My results would therefore be verdicts in cases in which a notice of appeal was filed.

About Docket Navigator

For more than a decade, Docket Navigator has been a must-have patent litigation intelligence platform for more than 15,000 judges, lawyers and legal professionals. Recently expanded to cover trademark, copyright, and antitrust litigation, Docket Navigator is the only service that reports every significant event, in every case, every day.

Our U.S. based legal editors curate litigation data by hand, recording up to 29 different types of data for each court document and up to 19 different types of data for each case. The result is the most detailed, most accurate, and most comprehensive litigation database available. The *Docket Report* and custom Docket Alerts keep you up to date every day, while our research database, Special Reports, and enhanced analytics help you make more informed, data-driven decisions.

CONTACT US | TRAINING CENTER | USER GUIDE | LOG IN

Who subscribes to Docket Navigator?

AMLAW 100 Firms	88%
100 Busiest Patent Litigation Firms	75%
100 Busiest Patent Litigation Attorneys	87%

15,577
Subscribers & Counting

108,757
Active Alerts

22,424,774
Docket Reports Delivered