An International Conference for
Patent Information Professionals

# THE UNCONFERENCE:
## Choose Your Own Patent Adventure

# 2023
# ANNUAL
# CONFERENCE

## April 30 – May 3
Westin Alexandria | Alexandria, Virginia

## SUNDAY, APRIL 30

| | |
|---|---|
| 11:00 am - 4:50 pm | Workshops (LexisNexis, Clarivate, Aptean GenomeQuest, IFI CLAIMS, Minesoft, BizInt Smart Charts) |
| 6:30 pm - 9:00 pm | Welcome Reception |

## MONDAY, MAY 1

| | |
|---|---|
| 7:00 am - 8:00 am | Breakfast and Open Exhibits |
| 8:00 am - 8:15 am | Welcome and Introductions (Martha Yates, PIUG Planning & Program Chair) |
| 8:15 am - 9:30 am | Keynote Talk: Patenting Actions that Speak Louder than Words (Mike Pellegrino, Pellegrino & Associates) |
| 9:30 am - 10:00 am | The Green Perspective (Devin Salmon, IFI Claims Patent Services) |
| 10:00 am - 10:05 am | IFI CLAIMS Patent Services Product Review |
| 10:05 am - 10:30 am | Break and Exhibits |
| 10:30 am - 11:00 am | Searching Antibody-Drug Conjugates in CAS STNext® (Mike Axton, CAS) |
| 11:00 am - 11:05 am | CAS Product Review |
| 11:05 am - 11:50 am | Unconference Session Number 1 |
| 11:50 am - 12:50 pm | Lunch and PIUG Award Presentations |
| 12:50 pm - 1:20 pm | Revolutionizing the Future: Navigating the Landscape of Machine Learning and AI Patents (Michael Carey, F. Chau & Associates) |
| 1:20 pm - 2:20 pm | AI: Will it help or hurt? (Martha Yates, Nils Newman, & others) |
| 2:20 pm - 2:25 pm | BizInt Solutions Product Review |
| 2:25 pm - 3:20 pm | Break and Exhibits |
| 3:20 pm - 3:50 pm | Advanced Search Techniques in the CAS MARPAT Markush Chemical Structure Database (David Saari, CAS) |
| 3:50 pm - 4:35 pm | Unconference Session Number 2 |
| 4:35 pm - 4:50 pm | Wrap-up |
| 5:05 pm - 8:30 pm | Dinner Cruise on the Potomac |

## TUESDAY, MAY 2

| | |
|---|---|
| 7:00 am - 8:00 am | Breakfast and Open Exhibits |
| 8:00 am - 8:15 am | Welcome Remarks |
| 8:15 am - 8:45am | Back to Basics: Why Patent Documentation Standards Matter [virtual only] (Stephen Adams, Magister Ltd.) |
| 8:45 am - 9:15 am | Boolean or ML-based search – Both! (Heiko Wongel) |
| 9:15 am - 9:35 am | How Do I Deliver My Search Results? (Matt Eberle and Diane Webb, BizInt Solutions, Inc.) |
| 9:35 am - 9:40 am | Aptean GenomeQuest Product Review |
| 9:40 am - 10:15 am | Break and Exhibits |
| 10:15 am - 10:35 am | What GPT Means for the Innovation Process (Gaby Lai, PatSnap) |
| 10:35 am - 10:40 am | Clarivate Product Review |
| 10:40 am - 11:00 am | Aptean GenomeQuest Sequence & Full Text Document Searching (Stephen Allen, Aptean GenomeQuest) |
| 11:00 am - 11:05 am | Minesoft Product Review |
| 11:05 am - 11:25 am | A Whole New World of Patent Research: What's Next on the Horizon at Minesoft? (Andrew Klein, Minesoft) |
| 11:25 am - 12:10 pm | Unconference Session Number 3 |
| 12:10 pm - 1:10 pm | Lunch and Exhibits |
| 1:10 pm - 1:40 pm | Ten Years of the Cooperative Patent Classification (CPC) system (Jose Alconchel Ungria, EPO and Derris Banks, USPTO) |
| 1:40 pm - 1:45 pm | PatSnap Product Review |
| 1:45 pm - 2:30 pm | Unconference Session Number 4 |
| 2:30 pm - 3:15 pm | Break and Exhibits |
| 3:15 pm - 3:45 pm | How Far Patent Searching Has Evolved (Ron Kaminecki, Kaminecki IP) |
| 3:45 pm - 4:30 pm | Unconference Session Number 5 |
| 4:30 pm - 4:45 pm | Wrap-up and Closing Remarks |
| 4:45 pm - 6:00 pm | Reception: Appetizers & Beverages |

## WEDNESDAY, MAY 3

| | |
|---|---|
| 6:30 am - 7:15 am | Breakfast |
| 7:15 am - 3:00 pm | Workshops (EPO & USPTO, CAS STNext Patent Forum) |

# Message from the Chair

It is my pleasure to welcome you to the PIUG 2023 Annual Conference. Due to some unavoidable circumstances, I am not able to join the meeting in person. However, the Planning Committee under the leadership of Martha Yates has planned an excellent program for this meeting.

PIUG decided to have this meeting in person as we feel that an in-person experience is preferred by most attendees. While attendance at this meeting is better than last year, it is far below our expectations. We are very interested in your input on how to improve attendance. Please feel free to share in person with any of the committee members or in the PIUG Community pages.

We will have a slightly different format for the meeting this year. There will be some speakers but there will also be five unconference sessions. Please make sure to vote on the unconference sessions that you would like to participate in, which will allow for enhanced interactions with other participants.

I hope you will take advantage of the workshops planned both before and after the plenary program. These workshops aim to provide information on services and databases available from the vendors. Most of these vendors will also be participating as Exhibitors and will be available throughout the meeting. Please make use of these events according to your interests.

The in-person plenary sessions will be held on Monday and Tuesday. We are excited to have Mike Pellegrino as our keynote speaker, who will talk about the emerging field of behavioral patent analysis. We also have several other great speakers scheduled throughout the meeting. I would  like to thank each of the speakers in advance for their contributions. In addition, I am very grateful to Devin Salmon, Barbara Miller, Yateen Pargaonkar and Martha Yates for putting together this great program.

Based on input from participants, we have planned an evening dinner cruise and river tour on Monday evening. This takes the place of gala dinner and awards ceremonies of the past. I hope you will take advantage of this complimentary event also. I am definitely disappointed to miss it.

My sincere thanks to our Administrative Coordinator, Ken Koubek, who worked many days and nights with the hotel staff, vendors, speakers and others to make this meeting possible. I would also like to thank other PIUG members who have volunteered to take care of other items related to the Annual Meeting, including Chris Baldwin, Ron Kaminecki, Dominic DeMarco, Shelley Pavlek and Diane Webb.

Finally, on behalf of the PIUG, I personally want to acknowledge tremendous support from our sponsors and exhibitors, without whose generous and ongoing support our PIUG conferences could not take place. I concur with a past statement from Shelly Pavlek - "that our sponsors and exhibitors are full partners in PIUG's efforts to flourish and fulfill our mission to 'support, assist, improve, and enhance the success of patent information professionals'. This Conference, where delegates, speakers, and sponsors join together, represents our mission in action."

Our Gold sponsors for the PIUG 2023 Annual Conference include: CAS and IFI Claims. Our Silver sponsors include: Aptean GenomeQuest, BizInt Smart Charts, Clarivate, Minesoft and PatSnap. Our Bronze sponsors include Lexis-Nexis and VantagePoint. This year's exhibitors include: DorothyAI, IPactory, Questel, Lighthouse IP and Sun IP. Please make sure to take advantage of the opportunities to learn more about their offerings to help you with your work.

Please note that our Annual Business Meeting will take place on Wednesday, May 17th from 11 am to 12:30 pm ET. The meeting will be open to all registrants and PIUG Members. We hope to see many of you online for that event.

The PIUG Board is thrilled that you are able to join us and your fellow patent information professionals for a terrific technical program to get to know and exchange experience and expertise with your colleagues from around the globe.

With my very best wishes,
*Kartar Singh Arora, PIUG Chair, 2022-2024*

## PIUG 2023 PLANNING & PROGRAM COMMITTEES

**Program Committee:** Martha Yates (Chair), Devin Salmon, Barbara Miller and Yateen Pargaonkar

**Planning Committee:** Martha Yates & Ken Koubek (Co-Chairs), Chris Baldwin, Ron Kaminecki, Kartar Arora, Jane Thompson

**Stu Kaback Business Impact Award Committee:** Kartar Arora (Chair), Chris Baldwin, Martha Yates

**Brian Stockdale Award Committee:** Dominic DeMarco (Chair), Ken Koubek

**Evaluations:** Shelley Pavlek

**Gifts:** Ken Koubek

**Meeting Book:** Diane Webb

**Sponsorship & Exhibits:** Jane Thompson (Chair) & Ken Koubek

**Webpages:** Ken Koubek

**Workshops:** Martha Yates

## SUNDAY, APRIL 30 – WORKSHOPS

| | |
|---|---|
| **11:00 am - 11:50 am** | **LexisNexis**: Gain Invaluable Insights into Sustainable Technologies |
| **12:00 pm - 12:50 pm** | **Clarivate**:  Defensive Patent Searching: Anticipate and Avoid Pitfalls Throughout the IP Lifecycle |
| **1:00 pm - 1:50 pm** | **Aptean GenomeQuest**:  Complete Search Coverage with Sequence & Full Text Document Searching |
| **2:00 pm - 2:50 pm** | **IFI CLAIMS Patent Services**: How IFI CLAIMS Incorporates the Ever-Shifting Data Into Its Repository |
| **3:00 pm - 3:50 pm** | **Minesoft**: A Familiar Song in a New Key-word: More Efficient Technology Searching Using Full-Text Indexing |
| **4:00 pm - 4:50 pm** | **BizInt Smart Charts**: Create IP Reports Integrating Your Key Sources |

📄 Your notes below

## MONDAY, MAY 1 – MORNING

**8:15 am - 9:30 am**   Keynote Talk: Patenting Actions that Speak Louder than Words *(Mike Pellegrino, Pellegrino & Associates)*

**9:30 am - 10:00 am**   The Green Perspective *(Devin Salmon, IFI Claims Patent Services)*

**10:00 am - 10:05 am**   Product Review – IFI CLAIMS Patent Services

**10:30 am - 11:00 am**   Searching Antibody-Drug Conjugates in CAS STNext® *(Mike Axton, CAS)*

📄 Your notes below

## MONDAY, MAY 1 – MIDDAY

| | |
|---|---|
| **11:00 am - 11:05 am** | Product Review – CAS |
| **11:05 am - 11:50 am** | Unconference Session Number 1 |
| **12:50 pm - 1:20 pm** | Revolutionizing the Future: Navigating the Landscape of Machine Learning and AI Patents *(Michael Carey, F. Chau & Associates)* |

📄 Your notes below

## MONDAY, MAY 1 – AFTERNOON

**1:20 pm - 2:20 pm**    AI: Will it help or hurt? *(Martha Yates, Nils Newman, & others)*

**2:20 pm - 2:25 pm**    Product Review – BizInt Smart Charts

**3:20 pm - 3:50 pm**    Advanced Search Techniques in the CAS MARPAT Markush Chemical Structure Database *(David Saari, CAS)*

**3:50 pm - 4:35 pm**    Unconference Session Number 2

📄 Your notes below

## TUESDAY, MAY 2 – EARLY MORNING

**8:15 am - 8:45 am**   Back to Basics: Why Patent Documentation Standards Matter [virtual only] *(Stephen Adams, Magister Ltd.)*

**8:45 am - 9:15 am**   Boolean or ML-based search – Both! *(Heiko Wongel)*

**9:15 am - 9:35 am**   How Do I Deliver My Search Results? *(Matt Eberle and Diane Webb, BizInt Solutions, Inc.)*

📄 Your notes below

## TUESDAY, MAY 2 – LATE MORNING

**9:35 am - 9:40 am**   Product Review – Aptean GenomeQuest

**10:15 am - 10:35 am**   What GPT Means for the Innovation Process *(Gaby Lai, PatSnap)*

**10:35 am - 10:40 am**   Product Review – Clarivate

**10:40 am - 11:00 am**   Aptean GenomeQuest Sequence & Full Text Document Searching *(Stephen Allen, Aptean GenomeQuest)*

📄 Your notes below

## TUESDAY, MAY 2 – MIDDAY

| | |
|---|---|
| **11:00 am - 11:05 am** | Product Review – Minesoft |
| **11:05 am - 11:25 am** | A Whole New World of Patent Research: What's Next on the Horizon at Minesoft? *(Andrew Klein, Minesoft)* |
| **11:25 am - 12:10 pm** | Unconference Session Number 3 |
| **1:10 pm - 1:40 pm** | Ten Years of the Cooperative Patent Classification (CPC) system: a historical perspective and future developments *(Jose Alconchel Ungria, EPO and Derris Banks, USPTO)* |

📄 Your notes below

## TUESDAY, MAY 2 – AFTERNOON

**1:40 pm - 1:45 pm**    Product Review – PatSnap

**1:45 pm - 2:30 pm**    Unconference Session Number 4

**3:15 pm - 3:45 pm**    How Far Patent Searching Has Evolved *(Ron Kaminecki, Kaminecki IP)*

**3:45 pm - 4:30 pm**    Unconference Session Number 5

📄 Your notes below

## WEDNESDAY, MAY 3 – WORKSHOPS

**7:15 am - 8:50 am**   EPO & USPTO Workshop

**9:00 am - 3:00 pm**   CAS STNext Patent Forum (CAS)

📄 Your notes below

# ▼ ATTENDEES BY NAME

*Adams, Stephen* .................................... *Magister Ltd.*
Akuamoah, Akua ................................ Aptean GenomeQuest
Allen, Stephen ................................... Aptean GenomeQuest
Axton, Michael ................................... CAS
Baldwin, Christopher ......................... Clarivate
Banks, Derris ...................................... USPTO
Bantle, Laura ..................................... Clarivate
Bar El, Daniela ................................... D&Y IP
Baycroft, Jessica ................................ IFI CLAIMS
Bersch, Jeff ........................................ TricorBraun
Blasi, Peter ........................................ CAS
Brown, Jim ......................................... FIZ Karlsruhe
Brown, Katie ...................................... LexisNexis IP
Campbell, Tim .................................... Minesoft
Carey, Michael ................................... Chau | IP
*Cheeseman, Elaine* ............................. *CAS IP Services*
Chhetri, Dilip ..................................... USPTO
Clager, Michael .................................. Procter & Gamble
Colquitt, Aaron .................................. Evalueserve
D'Ambra, A.J. .....................................
Davis, Andrea ..................................... Bodkin IP
de Bruijn, Michiel .............................. LexisNexis IP
DeMarco, Dominic .............................. DeMarco IP
Dickens, David ................................... Lighthouse IP
Eberle, Matt ....................................... BizInt Smart Charts
*Elenich, Laura* .................................... *Procter & Gamble*
French, Darryl .................................... CAS
Gallas, Monica .................................... Bill & Melinda Gates Ag Innov
Gillis, Kevin ........................................ Questel
Gilman, Chad ...................................... Fish & Richardson
*Guo, ShouXue* ..................................... *Dow*
Hallam, Malcolm ................................ ExxonMobil
Harrold, Cinda ................................... CAS
Hertzog, Scott .................................... CAS
Heus, Henk ......................................... GQ Life Sciences
Iacurci, Lily ........................................ IFI CLAIMS
Johnson, James .................................. The Chamberlain Group
*Johnson Philipsen, Judith* .................. *TPR*
Jurgan, Anne ...................................... Sun IP
Kaminecki, Ron .................................. Kaminecki IP LLC
Kandi-Masakidi, Amandine .............. Questel
Klein, Andrew ..................................... Minesoft
Koubek, Ken ....................................... PIUG
Kowsky, Carrie ................................... MAHLE
Lai, Wei Yun ....................................... PatSnap
Linder, Elliott .....................................
Liu, David ........................................... Shell Inc. USA
Livingston, Geoff ............................... Evalueserve
markley, mark .................................... Search Technology
Melninkaitis, Thomas ......................... CAS IP Services
*Mendelson, Seth* ................................. *Eisai*

Merkle, Anna ...................................... CAS
Messaros-Langub, Karen ................... CAS
Miller, Dwayne ................................... Clarivate
Miller, Jim .......................................... University of Maryland
Nagardeolekar, Aditi ......................... Saint-Gobain
Neifert, Tim ........................................ USPTO
Newman, Nils ..................................... Search Technology
*Osborne, Bonnie* ................................. *CAS*
Padmanabhan, Meenu ....................... Bayer
Pargaonkar, Yateen ........................... Abbott Laboratories
Park, Sang Jae .................................... IPACTORY
Park, Sang mi ..................................... IPACTORY
Patel, Pallav ....................................... IP Simplified
Pavlek, Shelley ................................... Bristol-Myers Squibb
Pellegrino, Michael ............................ Pellegrino & Associates
Quinn, Shandon ................................. Clarivate
Rohan, Dawn ...................................... Faegre Drinker
Ronen, Yonit ...................................... D&Y IP
Ropke, Ken ......................................... Minesoft
Saari, David ....................................... CAS IP Services
Salmon, Devin .................................... IFI CLAIMS
Seibel, Menyan ................................... Procter & Gamble
Shofner-Meyer, Sharon ...................... DorothyAI
Singh, Awantika ................................. Bayer CropScience
Skovholt, Jonathan ............................ Ensemble IP
*Smith, Victoria* ................................... *Novartis*
Snead, Ric .......................................... Search Technology
*Sporer, Catherine* ............................... *Stepan Co.*
Stevenson, Janice ............................... IFI CLAIMS
Sun, Shuixian ..................................... WINS/IPPH
*Tefera, Wongel* ................................... *Zoetis*
*Thompson, Jane* ................................. *Eisai*
Valentino, Nicholas ............................ LexisNexis IP
Vineall, Edward .................................. PatSnap
Wadsworth, Curt ................................ DorothyAI
Wang, Manxue .................................... Wang
Ward, James ....................................... PatSnap
Webb, Diane ....................................... BizInt Smart Charts
Willmore, John ................................... BizInt Smart Charts
Wongel, Heiko .................................... Wongel IP
Yates, Martha ..................................... Bayer CropScience
Yoo, Janghyun .................................... IPACTORY

*Remote attendees noted in blue italics*

## ▼ ATTENDEES BY COMPANY

*Remote attendees noted in blue italics*

| | |
|---|---|
| Abbott Laboratories | Yateen Pargaonkar |
| Aptean GenomeQuest | Akua Akuamoah |
| Aptean GenomeQuest | Stephen Allen |
| Bayer | Meenu Padmanabhan |
| Bayer CropScience | Awantika Singh |
| Bayer CropScience | Martha Yates |
| Bill & Melinda Gates Ag Innov | Monica Gallas |
| BizInt Smart Charts | Matt Eberle |
| BizInt Smart Charts | Diane Webb |
| BizInt Smart Charts | John Willmore |
| Bodkin IP | Andrea Davis |
| Bristol-Myers Squibb | Shelley Pavlek |
| CAS | Michael Axton |
| CAS | Peter Blasi |
| CAS | Darryl French |
| CAS | Cinda Harrold |
| CAS | Scott Hertzog |
| CAS | Anna Merkle |
| CAS | Karen Messaros-Langub |
| *CAS* | *Bonnie Osborne* |
| *CAS IP Services* | *Elaine Cheeseman* |
| CAS IP Services | Thomas Melninkaitis |
| CAS IP Services | David Saari |
| Chau \| IP | Michael Carey |
| Clarivate | Christopher Baldwin |
| Clarivate | Laura Bantle |
| Clarivate | Dwayne Miller |
| Clarivate | Shandon Quinn |
| D&Y IP | Daniela Bar El |
| D&Y IP | Yonit Ronen |
| DeMarco IP | Dominic DeMarco |
| DorothyAI | Sharon Shofner-Meyer |
| DorothyAI | Curt Wadsworth |
| *Dow* | *ShouXue Guo* |
| *Eisai* | *Seth Mendelson* |
| *Eisai* | *Jane Thompson* |
| Ensemble IP | Jonathan Skovholt |
| Evalueserve | Aaron Colquitt |
| Evalueserve | Geoff Livingston |
| ExxonMobil | Malcolm Hallam |
| Faegre Drinker | Dawn Rohan |
| Fish & Richardson | Chad Gilman |
| FIZ Karlsruhe | Jim Brown |
| GQ Life Sciences | Henk Heus |
| IFI CLAIMS | Jessica Baycroft |
| IFI CLAIMS | Lily Iacurci |

| | |
|---|---|
| IFI CLAIMS | Devin Salmon |
| IFI CLAIMS | Janice Stevenson |
| IP Simplified | Pallav Patel |
| IPACTORY | Sang Jae Park |
| IPACTORY | Sang mi Park |
| IPACTORY | Janghyun Yoo |
| Kaminecki IP LLC | Ron Kaminecki |
| LexisNexis IP | Katie Brown |
| LexisNexis IP | Michiel de Bruijn |
| LexisNexis IP | Nicholas Valentino |
| Lighthouse IP | David Dickens |
| *Magister Ltd.* | *Stephen Adams* |
| MAHLE | Carrie Kowsky |
| Minesoft | Tim Campbell |
| Minesoft | Andrew Klein |
| Minesoft | Ken Ropke |
| *Novartis* | *Victoria Smith* |
| PatSnap | Wei Yun Lai |
| PatSnap | Edward Vineall |
| PatSnap | James Ward |
| Pellegrino & Associates | Michael Pellegrino |
| PIUG | Ken Koubek |
| Procter & Gamble | Michael Clager |
| *Procter & Gamble* | *Laura Elenich* |
| Procter & Gamble | Menyan Seibel |
| Questel | Kevin Gillis |
| Questel | Amandine Kandi-Masakidi |
| Saint-Gobain | Aditi Nagardeolekar |
| Search Technology | mark markley |
| Search Technology | Nils Newman |
| Search Technology | Ric Snead |
| Shell Inc. USA | David Liu |
| *Stepan Co.* | *Catherine Sporer* |
| Sun IP | Anne Jurgan |
| The Chamberlain Group | James Johnson |
| *TPR* | *Judith Johnson Philipsen* |
| TricorBraun | Jeff Bersch |
| University of Maryland | Jim Miller |
| USPTO | Derris Banks |
| USPTO | Dilip Chhetri |
| USPTO | Tim Neifert |
| Wang | Manxue Wang |
| WINS/IPPH | Shuixian Sun |
| Wongel IP | Heiko Wongel |
| *Zoetis* | *Wongel Tefera* |

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IFI's clients are in constant and continuous communication with the IFI primary database providing access to quality, up-to-date global patent data, the flagship dataset of the CLAIMS Direct platform. IFI's proprietary data architecture is the key to creating the industry's most complete and accurate view of a patent – all with virtually no client intervention. We address inaccuracies and formatting issues before the records enter our global patent database to create standardized data which can easily be integrated with existing applications, other datasets, or analysis software.

**SILVER**

Aptean GenomeQuest enables companies to search worldwide patent literature for biological sequences. Its database, GQ-Pat, is the largest repository of sequences cited in patents. IP professionals and law firms use GenomeQuest to perform freedom to operate, patentability, validity, and prior art searches. GenomeQuest serves 18 of the top 20 pharmaceutical companies and all five top agrochemical companies, with a customer base of nearly 200 leading life science and biotechnology organizations.

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Minesoft develops global patent databases & solutions, winning the prestigious Queen's Award for Enterprise in 2009 and 2015 for outstanding growth internationally. PatBase is a sophisticated global searchable patent database offering analytics. A new NPL solution broadens searches beyond patents whilst a new Semantic Search facility further aids patent discovery and subject searching. Chemical Explorer offers a text-mined searchable database of chemical structures and chemical terminology extracted from over 11 million full-text patents.

Founded in 2007, PatSnap is the company behind the world's leading Connected Innovation Intelligence platform. PatSnap is used by more than 10,000 customers in over 50 countries around the world to access market, technology, and competitive intelligence as well as patent insights needed to take products from ideation to commercialization. Customers are innovators across multiple industry sectors, including Biotechnology, Medical devices, Pharmaceuticals, Chemical, Electronics Manufacturing, Automotive, Consumer Goods, Aviation & Aerospace, Education, Legal Firms.

**BRONZE**

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