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Shared Work Files

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This Delphion Help Center page specifically addresses Shared Work Files. See the [Work Files Essentials](#) page for information on [creating](#), [adding](#), [deleting](#), [merging](#), and [cloning](#) Work Files.

See [Work File Annotations](#) for information on how to add comments and attachments to Work Files.

What are Shared Work Files?

Work Files are customized lists of patents you create to work with in any manner you choose — Work Files are saved indefinitely for you. When you create a Work File, you can combine the results from multiple searches into a consolidated list, choose just a few patents, enter multiple patent numbers, or import a list of patents from another application. (See the [Work Files Essentials](#) page for more information on Work Files.)

Shared Work Files are Work Files you have already created that you want to share with others. Shared Work Files are created by an "owner" and *shared* with one or more "recipients."

Whenever the owner edits a Shared Work File, the same edited version is seen by all recipients. Recipients have view-only access to a Work File that has been shared with them.

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What you can do with Shared Work Files

With Shared Work Files, you can collaborate with others for a variety of purposes, such as:

- Sharing patent research with team members
- Providing clients with access to your work-in-progress
- Reviewing portfolios with outside counsel

- Communicating competitive discoveries with colleagues
- Keeping everybody on your project team "on the same page"
- Letting outside audiences view your licensable patents
- Sharing long lists of patents with others without having to export and email them

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Who you can share Work Files with

Delphion Unlimited and Premier subscribers can share their Work Files with other Delphion users. Delphion Basic users can see Work Files that have been shared with them, but cannot initiate Work File sharing.

If an unregistered user tries to access a shared Work File, a Delphion registration page will display letting them complete the free Basic registration process.

You can share Work Files with individuals, your entire company or group account, or with a wider audience via a web page. See [Selecting recipients for Shared Work Files](#) for more information on sharing options.

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Sharing Work Files with Derwent records

If you are an Unlimited or Premier user on a group/contract account and you have a group/contract subscription to Derwent on Delphion, you can share the Derwent records in your Work File with individuals or with your company or group. Recipients will then be able to view the Derwent records in the Work File regardless of their own subscription level. Recipients will not incur Derwent Record View charges for records viewed from within a Work File that has been shared with them.

No one can share Derwent records from a Work File with the public through the public URL option. If your Work File contains both patent office and Derwent records, you may share it with the public. However, only the patent office records will be viewable from the web page created. If your Work File contains only Derwent records and you attempt to share it with the public, the web page that you create will show "No hits found."

If you are an Unlimited or Premier subscriber (group/contract or individual/credit card) and you use Derwent on a *Pay-per-use basis*, you cannot share Derwent records. If you share a Work File that contains both patent office and Derwent records, the patent office records will be available to those you shared with, but the Derwent records will not. If you share a Work File that has only Derwent records, nothing in the Work File will be viewable to those with whom you shared.

Find out more about group/contract accounts and Derwent subscriptions [here](#).

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How to share Work Files

This instruction assumes you have already created the Work File you want to share. See the [Work Files Essentials](#) page for information on creating Work Files.

1. On the **Work File Administration** page, go to the **Actions** column for the Work File you want to share. Click **Share**.

ID	Name	Modified	Description ▲	Patent Items	Derwent Items	Actions		
<input type="checkbox"/> 6	light fiber	2004-11-24	us granted & apps, front pages	-	25	Edit	Annotate	Share
<input type="checkbox"/> 2	fiber optic	2004-11-24	us granted, front pages	8870	210	Edit	Annotate	Share
<input type="checkbox"/> 4	dark fiber	2004-11-24	us granted, front pages	7	21	Edit	Annotate	Share
<input type="checkbox"/> 3	laser optic	2004-11-15	us granted, front pages	773	-	Edit	Annotate	Share

Merge selected files by:

OR (combines records and eliminates duplicates)

AND (includes only records that appear in ALL selected Work Files)

AND NOT light fiber (eliminates records that appear in this Work File)

Hide selected files Show all hidden files Delete selected files Clone selected file (only one)

2. The **Share Work File** page displays.

Share Work File

- ### Review Work File information

Work File Name: light fiber (ID: 6)

Description: us granted & apps, front pages

Currently shared with: (Not yet activated by) <kittle@delphion.com>

This is the full list of current recipients of this Shared Work File. The name of the user who has activated sharing is shown, OR 'not activated' is indicated.
- ### Select recipients for Shared Work File

Share with individuals:

Enter new email address:

Choose existing address:

Recipient list:

 - kittle@delphion.com
 - cpoulos@delphion.com
 - eric@delphion.com
 - jmansfield@delphion.com

Remove To remove recipient, highlight address, then click Remove.

New individuals added to this recipient list will receive an email containing a link which, when activated, will add this Work File to their Work Files list. This link can only be activated once. Individuals will only receive one email, regardless of how often you update the Recipients list.
- Create public page at this URL:**

https://walrus.delphion.com/public_list?wref=2067860&did=izXzWAPHic%3d%0a (Preview)

Select to create a page on the Delphion website where the public can view this Work File. Copy and paste this URL to make available to broad audiences. Users not already registered with Delphion will be asked to register before viewing the Work File.
- Notify owner when others make annotations:**

Select to have email sent to you when recipients create or edit annotations for this Work File.
- ### Enter email information

Your name & email: "jeff morrow" <jmorrow@delphion.com>

Subject for email: Shared Work File on Delphion Research

Email message: I thought this Work File on Delphion Research might be of interest to you.
- ### Share your Work File

Click Share/Update to send email notification to new recipients, activate sharing or save changes.

3. The **Share Work File** page is divided into four sections. Review the information in **1 Review Work File information** to be sure that you have selected the correct Work File for sharing.
4. Complete **2 Select recipients for Shared Work File**. See [Selecting recipients for Shared Work Files](#) for detailed information.
5. If you are sharing with individuals, complete **3 Enter email information**. If you are sharing with your whole company or group or with the public, there are no emails generated so this information is not used.
6. Complete **4 Share your Work File** to initiate Work File sharing.

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Selecting recipients for Shared Work Files

You can share Work Files in three ways. In all cases, recipients must log in or register to view the Shared Work File (see [Who you can share Work Files with](#)).

All three sharing options are accessed from the **Share Work File** page, in the **Select recipients for Shared Work File** section:

- [Share with individuals](#)
- [Share with your company or group](#)
- [Create public page](#)

You can use multiple sharing options at the same time, you are not limited to just using one of these options. For example, you can share with selected individuals while at the same time using the public share option. Or you can share with your whole company or group and selected other individuals.

Work Files can also be shared multiple times, see [Working with Work Files you have already shared](#) for information on this process.

Share with individuals

Choose this option when you want to share with one or more individuals.

1. Use the **Share with individuals** section of the **Share Work File** page (shown following) to construct a **Recipient list** of the email addresses of those with whom you want to share your Work File.

2. Select addresses from the **Choose existing address** area (see NOTE following). Click the associated blue arrow to move one or more of the addresses into the **Recipient list**. Ctrl click to select multiple addresses.
3. Enter a new email address in the **Enter new email address** text box and click the blue arrow to move the address into the **Recipient list**.
4. To remove addresses from the **Recipient list**, select the address you want removed and click **Remove**. Ctrl click to select and remove multiple addresses.
5. Complete section **3 Enter email information**.
6. Under section **4 Share your Work File**, click **Share/Update** to initiate Work File sharing.
7. Recipients will be notified by email.

NOTE: Addresses of individuals with whom you are currently sharing any Work Files are shown in the **Choose existing**

address area. The entries will change as you, the owner, share new Work Files and delete previously shared Work Files. If you delete the only Work File you have shared with an individual, that individual's address will be removed from the list. You will then need to use the **Enter new email address** text box to put that address back on the **Recipient list**. If you have shared with your company or group, the list of company or group addresses will not be shown in this field.

Recipients will receive an email containing an activation link which, when activated (clicked), will add the Work File you shared with them to their list of Shared Work Files. This link can only be activated once. See [Special security measures make Work File sharing safe](#) for more information on the email and the activation link.

When the link is activated, the recipient is prompted to log in and is then taken to their Work File Administration page where their "new" Work File is added to their Shared Work Files list. See [Working with Work Files which have been shared with you](#) for information on what recipients can do with their Shared Work Files.

Share with your company or group

Choose this option when you want to share your Work File with everyone in your company or group account.

NOTE: If you are not a registered user under a company or group account, this option will not appear on your **Share Work File** page.

1. Check the **Share with your company or group** box (shown following).

Share with your company or group:	<input checked="" type="checkbox"/> Select to add this Work File to the Shared Work File list of each Delphion user within 'Delphion Inc.'. No emails will be generated.
--	--

2. Under section **4 Share your Work File**, click **Share/Update** to initiate Work File sharing.
3. The Work File you share will be added to the Shared Work File lists of all users in your company or group account — there will be no email notification.

When you use company or group sharing, all subscribers within your company or group account will see this Work File added to their Work File Administration page under the heading Shared Work Files. See [Working Work Files that have been shared with you](#) for information on what recipients can do with their Shared Work Files.

NOTE: Your company or group administrator can request that Delphion disable this option (for your whole company or group). If the option is disabled, it will not appear on your **Share Work File** page.

Create public page

Choose this option to create a publicly accessible web page (on the Delphion Research website) containing the Result Set view of the Work File you are sharing.

NOTE 1: Users who view a publicly accessible web page will not have the Work File added to the **Shared Work File** section of their **Work File Administration** page.

NOTE 2: No one can share Derwent records from a Work File with the public through the public URL option (see [Sharing Work Files with Derwent records](#) above).

1. Check the **Create public page at this URL** box (shown following).

Create public page at this URL:	<input checked="" type="checkbox"/> https://walrus.delphion.com/public_list?vlref=2067169&did=M5tX2NPn62o%3d%0a (Preview) Select to create a page on the Delphion website where the public can view this Work File. Copy and paste this URL to make available to broad audiences. Users not already registered with Delphion will be asked to register before viewing the Work File.
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2. Copy and paste this URL into any media you wish to use to share the link with your intended audience. For example, you can send the link in an email to your clients or prospects, you can post the link to your own website or intranet, you can post the link to your newsgroup, or you can print the link in a brochure or mailing.

NOTE: If you neglect to copy the URL at this point in the process, you can always see it on the **Share Work File** page that remains accessible from the **Share** link on your **Work File Administration** page.

3. Optionally, click the **Preview** link (following the URL) to preview the web page created on the Delphion website (example shown following).

Current Results | PDF Express | Data Extract | Snapshot | Clustering

Work File: Fire Detector (shared) Edit this Work File | [Annotate](#) [help](#)

Description: Fire Safety Research
Owner: Cindy Poulos <cpoulos@delphion.com>

470 matches found Displaying results 1 - 20 of 470

<< First Page < Previous Page [Next Page](#) > Last Page >>

Add selected items to Work File:
 all 470 items

PDF	<input type="checkbox"/>	Publication	Title (To sort a column, click label at top)	Assignee	Pub. Date	IPC Code ▼
	<input type="checkbox"/>	USD368041	Smoke detector	Calectro AB	1996-03-19	
	<input type="checkbox"/>	USD358109	Fire detector	Hochiki Kabushiki Kaisha	1995-05-09	
	<input type="checkbox"/>	USD357203	Fire detector	Hochiki Kabushiki Kaisha	1995-04-11	
	<input type="checkbox"/>	USD357202	Fire detector	Hochiki Kabushiki Kaisha	1995-04-11	

4. Under section **4 Share your Work File**, click **Share/Update** to initiate Work File sharing.

NOTE: Your company or group administrator can request that Delphion disable this option (for your whole company or group). If the option is disabled, it will not appear on your **Share Work File** page.

Summary of sharing options

Type of sharing	Email automatically generated?	Added to recipient's shared work file list?	Initial access point after login?
Individuals	Yes	Yes	Work File Administration page
Company or group	No	Yes	Work File Administration page
Public	No	No	Work File Results Set

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Revoking sharing access

- [Revoking sharing access from individuals](#)
- [Revoking sharing access from company or group accounts](#)
- [Revoking sharing access from the public](#)

See [Working with Work Files you have already shared, View, Edit, Clone, Merge, Delete](#) for information about *deleting* Work Files.

Revoking sharing access from individuals

Revoking individual sharing means that an individual will no longer have access to a Work File that had been shared with them and the Work File will be removed from their Shared Work File list.

Revocation of individual sharing does not delete the Work File from the owner's list of available Work Files, nor does it revoke company/group or public sharing privileges that may be in affect.

This instruction assumes that you are the owner of the Work File.

To revoke individual sharing:

1. Go to the **Share Work File** page for the Work File for which you want to revoke an individual's privileges.
2. Scroll to the **Share with individuals** field.
3. In the **Recipient list**, highlight the address(es) for which you want to revoke sharing.

4. Click **Remove**.
5. Scroll to the bottom of the page and click **Share/Update**.
6. The selected individuals will no longer have access to this Work File; it will be removed from the Shared Work File list.

NOTE: If this is the only Work File you have shared with this individual, their name/address will disappear completely from this **Share Work File** page. If you are currently sharing other Work Files with this individual, their address will stay active in the **Choose existing address** field.

Revoking sharing access from company or group accounts

Revoking company or group sharing means that company/group members will no longer have access to a Work File that had been shared with them. The Work File will be removed from their Shared Work File lists.

Revocation of company/group sharing does not delete the Work File from the owner's list of available Work Files, nor does it revoke any individual or public sharing privileges that may be in affect.

This instruction assumes that you are the owner of the Work File.

To revoke company or group sharing:

1. Go to the **Share Work File** page for Work File for which you want to revoke public sharing.
2. Scroll to the **Share with your company or group** field.
3. Remove check from check box.
4. Scroll to the bottom of the page and click **Share/Update**.
5. The company/group will no longer have access to this Work File; it will be removed from the Shared Work File list of each member.

Revoking sharing access from the public

Revoking public sharing means the public will no longer have access to the web page on the Delphion website that displays the Work File Result Set for the Work File that had been shared. People who have the URL and try to access it will receive an error message.

Revocation of public sharing does not delete the Work File from the owner's list of available Work Files, nor does it revoke any individual or company/group sharing privileges that may be in affect.

This instruction assumes that you are the owner of the Work File.

To revoke public sharing:

1. Go to the **Share Work File** page for Work File for which you want to revoke public sharing.
2. Scroll to the **Create public page at this URL** field.
3. Remove check from check box.
4. Scroll to the bottom of the page and click **Share/Update**.
5. The URL that displays the Work File Result Set is no longer enabled for public viewing. Users trying to access the page will receive the following error message: "The Work File you are attempting to view is not enabled for public access."

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Special security measures make Work File sharing safe

- [Sharing with individuals](#)
- [Company or group sharing](#)
- [Public sharing](#)

Sharing with individuals

When Sharing with individuals is used, the owner of a Shared Work File can always tell who has seen that Work File.

Emails are sent to each address on the **Recipient list** (see [Working with Work Files you have already shared, Sharing again](#) for exceptions to this). Each email contains a *unique* link that can only be activated *once*. Once the link has been activated, another person cannot activate sharing using that link, even if the original recipient forwards the email to them.

The owner of the Work File that has been shared can *always* tell if a link has been activated and who actually activated it by looking at the **Work File Share** page for that Shared Work File. In the **Review Work File information** section, in the **Currently shared with** field, there is a list of the addresses to which the unique activation links were sent (shown following).

1
Review Work File information

Work File Name: dark fiber (10: 5)

Description: all collections, FT

Currently shared with: (Not yet activated by) <cpoulos@delphion.com> "Eric van Stegeren" <eric@delphion.com>
(Not yet activated by) <jmansfield@delphion.com>

This is the full list of current recipients of this Shared Work File. The name of the user who has activated sharing is shown, OR 'not activated' is indicated.

In parentheses, next to each email address, the address of the person who actually activated the link is displayed. If the link has not yet been activated, it will show "not activated." If the original recipient of a Shared Work File email forwards it to another person without activating the link, the other person could activate the link and access the Shared Work File. However, in this case, the Work File owner could see that the activator was not the same as the intended recipient, and take action if appropriate.

For example:

Information displayed in the Currently shared with field	Address to which original email was sent	Person who activated link
jjohnson@xyz.com (Not activated)	jjohnson@xyz.com	Link is not yet activated
ssmith@xyz.com (Sue Smith)	ssmith@xyz.com	Sue Smith
bjones@xyz.com (doug waters)	bjones@xyz.com	doug waters

Company or group sharing

Security for company or group sharing is controlled by the fact that the Work File is only made available to those users who are registered under the same account as the Work File owner. Using this option, Shared Work File information is never distributed via email.

A company or group administrator can request that Delphion disable this option for the whole company or group. If the option is disabled, it will not appear on the **Share Work File** page for any users on the account.

Public sharing

The public sharing process generates a web page (on the Delphion website) that is accessible to the general public. The only requirement is that the person viewing this page log in or register as a Delphion user.

A company or group administrator can request that Delphion disable this option for the whole company or group. If the option is disabled, it will not appear on the **Share Work File** page for any users on the account.

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Working with Work Files you have already shared

Once you have shared a Work File, the Shared Work File icon displays in the **Actions** column on your **Work File Administration** page reminding you that this Work File has been shared. You can click the **Share** link to view the **Share Work File** page for the Work File.

- [Checking status of the share process](#)
- [Sharing again](#)
- [View, Edit, Clone, Merge, Delete](#)

Checking status of the share process

On the **Share Work File** page, in the **Currently shared with** field, you will see the addresses of those with whom you shared the Work File and whether they have activated the Work File or if their unique link as been activated by someone else. See [Special security measures make Work File sharing safe](#) for more detailed information on this field.

If you have shared this Work File with your company or group or with the public, that information will also be reflected in the **Currently shared with** field.

Sharing again

From the **Share Work File** page, you can share this Work File again (with additional recipients).

Using the tools provided (see [Selecting recipients for Shared Work Files](#) for details), you can add individuals, add your company or group, or activate public sharing.

When sharing with individuals, the Recipient list shows those with whom you have already shared this Work File. Additional names can just be added, there is no need to delete existing names from the list — existing recipients will not receive any additional email notifications.

No matter which sharing option you originally used (individual, company or group, or public), you can share again using another method. Existing recipients will not receive any additional email notifications. Shared Work Files will not appear more than once in any recipient's Shared Work File list.

View, Edit, Clone, Merge, Delete

A Work File that has been shared can be:

- *Viewed.* The Delphion Result Set for the Work File displays.
- *Edited.* The edits are reflected for all recipients.
- *Cloned or merged.* The new, cloned or merged Work File is entirely separate from the original. Any edits made to the new Work File will not be visible to the recipients of the original Shared Work File.
- *Deleted.* When a Work File that has been shared is deleted by the owner, it is deleted for all recipients.

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Working with Work Files that have been shared with you

- [Accessing](#)
- [Viewing](#)
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Accessing

Work Files can be shared with you in three different ways: by email, with your whole group, or from a web page.

If you receive an email notifying you that a Work File has been shared with you and giving you a link to that Work File, you must click the link in the email and log into Delphion in order to activate sharing on that Work File. After you have clicked the link the first time and logged into Delphion, the Shared Work File will be added to your **Work Files Administration** page for subsequent access and review.

If a Work File is shared with your whole group, the Shared Work File automatically appears on your Work Files Administration page.

If a Work File is shared from a web page, the person sharing the Work File creates a web page that displays a link to the Result Set of that Work File. A Work File shared in that manner is not added to your **Work Files Administration** page.

Access your **Work Files Administration** page from the blue **Work Files** button under the Delphion logo on any page of the Delphion Research portion of the Delphion website.

On your **Work File Administration** page, Work Files that have been shared with you display the **Shared Work Files** icon.

Viewing

From the **Work Files Administration** page, you can click the linked number of Patent Items or Derwent Items to view a Work File that has been shared with you. As a recipient of a Shared Work File, you have view-only access and cannot make any edits to the Work File. The display will be a Delphion Result Set and all of the Result Set tools and options will be available to you. See the [Result Set Features](#) help page in the Delphion Help Center for information on these tools and options.

Cloning

When you **Clone** a Work File that has been shared with you, you are making a copy that will be considered *your* personal Work File. If the original Work File is edited by the owner, your new, cloned Work File will not be updated because it is a completely separate Work File.

The words "Clone of" will display in the Work File description, but, as with any clone, giving it an entirely new name will help avoid confusion.

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