

HOW TO SET UP AND CONDUCT AN ADOBE CONNECT INTERVIEW

This is a practical, how-to guide about generating enthusiasm with an examiner and setting up an interview that will use Adobe Connect. I've written elsewhere about why to use webcasting during an interview and even suggested a progression that minimizes the chance of time-consuming argument during. This guide provides the mechanics.

CONTACT THE EXAMINER

I pitch the examiner on joining me in a webcast during the closing seconds of the phone call to set up the interview. It's fair to tell the examiner, "There is a new tool that greatly improves telephone interviews, that examiners really like. When I send you an agenda, I'll also send you an invitation to join in an Adobe Connect session, so you can see on your computer exactly what I'm talking about. Have you used Adobe Connect or heard about it?" After you've practiced with a colleague, you should be able to speak enthusiastically about this tool and kindle an examiner's interest. Remember, always, that nothing compels the examiner to use Adobe Connect, if they don't want to. So be persuasive.

The standard invitation email that Adobe Connect generates isn't quite good enough, so send it to yourself and edit it. At least until we have a better touchstone, include in your invitation SPE David Wiley's name, for confirmation that the tool is approved. Attach a what-to-expect sheet that shows the examiner what will appear on her screen. Send it to the examiner by email, so she doesn't need to retype the URL. Send it at least a day in advance, so the examiner has time to get comfortable with being invited. Samples are available on our website.

PREPARE FOR THE INTERVIEW

For the interview, select all of the documents that you are likely to use. Inevitably, this includes the application and figures, office action (if any) and references all in PDF format. It also includes the claims in an editable word processor format.

When you webcast your desktop, organization of the documents for display is essential. In advance, because it takes a while, set the document titles, add bookmarks and cross-link the application to figures and the office action to references. All documents other than the claims should be in PDF format. These PDF documents should have titles added to the "General" tab of the "Document Properties" panel. Under the "Initial View" tab, the choice for "Show" in the properties panel should be set to "Title," instead of file name. This makes the list of documents under the "Window" pull down menu intelligible, even if you are using a document manager that assigns eight-digit file names to the documents.

Documents need to have bookmarks for instant access to important figures and passages. It is useful for figures and passages to have links (hyperlinks) that allow you to jump directly to the relevant support. This also works for linking an office action to passages in references on which it relies. If you are using Adobe Acrobat, the "preferences" for "documents" should be set so that

cross-links do not open in the same window, so that all of the documents that you need are open and ready for use. OCR all of the selected documents, so they are fully searchable. If non-patent literature (NPL) references were printed from webpages, then scanned from the printed pages, consider generating a PDF directly from the web page, so the NPL will be more legible. Have both versions available, in case you need to answer questions about why your version looks better (different) than the examiner's version.

It is helpful to have two screens when you are webcasting using Adobe Connect. One screen should be about 1200 by 1600 pixels, to match the screen resolution of examiners' desktops. The shared screen should have the same orientation – portrait or landscape – as the examiner's screen. Adobe Connect only shares one screen, so the other screen is available for staging content, while the examiner is looking at what is on display. If you love technology, consider getting one screen that functions like football commentator John Madden's board, so that you can draw on the screen and have the examiner immediately see your annotations. Wacom is one source for write-on screens.

PRACTICE INTERVIEW

Practice with a colleague before experimenting on the examiner. Learn the keyboard shortcuts for navigation among documents. In Windows: <alt-tab> cycles between programs; <alt>w<#> selects a particular document. In OS X: <cmd-tab> cycles between programs; <cmd-`> cycles among documents in a particular program. Have your colleague ask you a question and respond by switching to the document figure or passage that answers the question, until you can do it smoothly. You should consider the switching smooth when the change takes three seconds or so and you are using keystrokes or book marks instead of remembering the page number or guessing. Get used to the lag time between changing what appears on your screen and when the examiner sees the new image.

DAY OF THE INTERVIEW

On the day of the interview, get ready 20-30 minutes before the call. Make sure that all of the selected PDF documents are open and that your bookmarks take you to the right page, opened at the right size to be easily readable, with the bookmark panels visible. Make sure your word processor has the claims loaded and change tracking is turned on. Verify, after you start the session, that the Adobe Connect option to enable "full screen" display by the examiner is selected. Then call the examiner. When she answers the phone, don't start the substance of the interview until you have accepted her into the meeting and she confirms both that she sees your screen on hers and that she is using "full screen" display.

Following these mechanical steps, you should be well on your way to a productive Adobe Connect session with your examiner.

END NOTES

1) NEVER ask the examiner to share their desktop. The PTO prohibits this or should.

2) You are better off typing in anything that the examiner suggests, than giving the examiner control of your keyboard. The lag time is awkward for the examiner. Your anxiety level will be lower and the results more predictable if you do all of the typing.

3) Examiners are just people and are as varied as the rest of us. The best way to see this is conducting at least a few in person interviews. Even if you only have coffee with them or shake their hands, the personal connection can make the process more fun for both of you. Once you meet them, Adobe Connect will be an even more powerful tool.

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