

# PatBase Express Guide

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# **About PatBase Express**

PatBase Express provides the same comprehensive data as PatBase with over 135 Million documents, increasing every day, with a streamlined and intuitive interface.

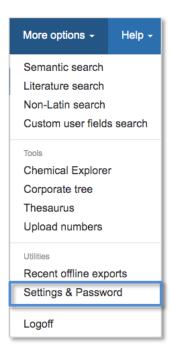
Organised into patent families to save time and reduce duplication, it includes easy-to-use search forms, intelligent refining and visualisation tools.

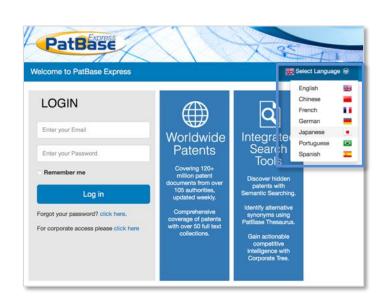
PatBase Express is designed to optimise research productivity, enabling users to search with little to no training required.

# **Selecting your preferred language**

Click on "More options" and then "Settings & Password" on the menu bar to select the interface language of preference. Or "Select Language" from the login page.

Please note, this will only change the interface language and not the searching capabilities. The interface is available in the following languages: English, Japanese, Chinese, French, German, Spanish and Portuguese.





To start searching within PatBase Express there is a bar displayed at the top of the screen, where you can select the appropriate search forms, more options or help files.

# **Searching in PatBase Express**

# **Stop words**

Stop words are words that an indexing program does not index. In PatBase Express the Boolean operators "AND" "OR" and "NOT" are stop words. Therefore, they should not be included as part of a keyword search. If it is necessary to search any of the Boolean operators as a keyword, search them in quotations, i.e. "AND", "OR", "NOT".

# **Truncation**

Use truncation when searching keywords that may have plurals or are derivatives of a word.

Truncation symbol	Description	Example
?	Matches one character	Ear? Finds ears, earn etc.
*	Unlimited left or right-hand truncation	Burn* Finds burn, burnt, burning etc.
%	Matches one or zero characters	Colo%r Finds color, colour, colon, colore etc.
~ / #	Stemming extends a search to cover grammatical variations on English words	Apply~ Finds applying, applies etc.
-	Indexed and will search as if it is a space as well.	Hydro-chloric acid Finds hydro-chloric acid or hydro chloric acid
,	Are the same as hyphens, and other punctuation	Mozart's Finds Mozart s or Mozart's
-	Searches for all punctuation variations, a space or no space	Non_stick pan Finds non-stick pan, nonstick pan or non stick pan
!	Optional character	Colo!r Finds color or colour

# **Proximity operators**

Use the Wn connector in a search to specify that one word must occur within n words of the other.

Field qualifier	Description	Example
Wn	One word within <b>n</b> words of another	(Rotor w5 drill)
WFn	One word within <b>n</b> words of another (forward only)	(Vehicle WF3 wheels)
NOTWn	Words must not be within n words of each other in any direction	(apple notw10 pie)
NOTWFn	Words must not be within n words of each other in forward direction	(seat notwf8 belt)
NEAR	One word within 5 words of another	(Engine NEAR fuel)
SPACE	Adjacent in this order	(motor engine)

#### Search

Once you've logged in to PatBase Express you will be directed to the "Search" page.

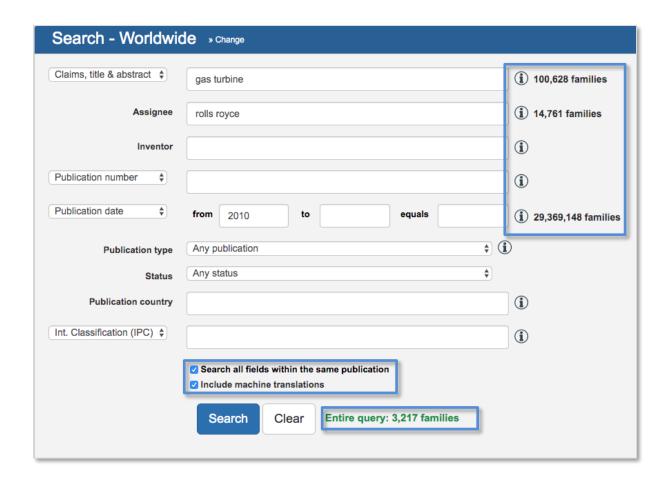
Terms can be entered into each search box and combined with Boolean or proximity operators. If no operator is used, the terms will be searched adjacent to one another.

icons on the right-hand side of the search form provide an explanation and examples of how to enter search criteria.

Multiple fields are combined using the "AND" operator.

As PatBase Express is a family database, the fields might hit different publications within the same family. To ensure that the all fields appear in the same publication, tick the checkbox at the bottom of the page that says, "Search all fields within the same publication".

Ticking the box to "Include machine translations" will search across machine translated **and** original text. As you complete the different fields, the number of results for each separate field is shown on the right-hand side. At the bottom of the page, the total number of results for the entire query is shown.



#### Search

Select from the drop-down menu whether you would like to search within the full text; claims, title & abstract; title & abstract; claims; descriptions; or examples.

Latin or non-Latin keywords can be used.

### Assignee

Searches both the standard and non-standard patent assignee fields. Boolean and proximity operators can be used. Run the search for Latin or non-Latin assignees.

For example: 西门子 OR SIEMENS

#### Inventor

Searches both the standard and non-standard Inventor field. Boolean and proximity operators can be used. Run the search for Latin or non-Latin inventors.

### Publication number

The publication number is the number assigned to a patent when the patent application is published. For example: US2015078368, CN107665914, W018021031

### Please note, do not leave a space between the country code and number.

### Priority number

The priority number is usually one or more of the application numbers, for which priority rights are claimed. The priority number is usually the first application number to be assigned in a patent family, from which a period of 12 months is given, during which time subsequent patent filings can be made to different patent offices around the world.

For example: CN201620809087U (20160728), DE201710205195 (20170328)

### Application number

The application number is the number assigned to a patent when the patent application is filed.

For example: WO2017EP75358 TW20170118857 EP20160181606

Date Searching (publication date, priority date, application date)

Format	Example
YYYY	2017 (searches all dates in 2017)
YYYYMM	201808 (searches all dates in August 2018)
YYYYMMDD	20160321 (searches only 21st March 2016)

<sup>&</sup>quot;From" will search dates later than the entered date.

By entering dates in both the "From" and "To" boxes, dates will be searched within the range given. To search only on a specific day, month or year, use the "Equals" box.

### **Publication country**

To limit your search to families containing only certain countries, search by country code, e.g. DE, US, WO.

#### Kind code

Allows you to search the kind code of the document in conjunction with a country code. For example:

EPB1 will retrieve families that have a European B1 publication EPA\* will retrieve all European A publications (applications) A1 A2 etc. USC\* will retrieve all American C Publications (re-examinations)

<sup>&</sup>quot;To" will search dates earlier than the entered date.

### Classifications

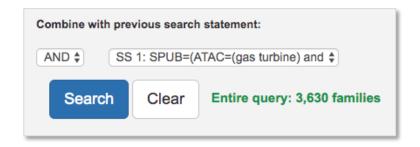
The Strasbourg Agreement, a WIPO-administered treaty, established the International Patent Classification (IPC) which divides technology into approximately 70,000 subdivisions, e.g. C12N5/06.

Please note, although on some documents the IPC symbol is printed with a blank after the 4th position, in PatBase Express, the symbol must be entered in the search field without any blanks.

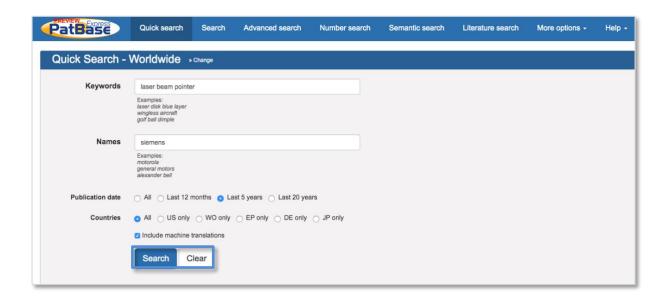
The Cooperative Patent Classification (CPC) is used by the European Patent Office (EPO) and the United States Patent and Trademark Office (USPTO). It was jointly developed by the two offices and based in a large part on the existing European Classification System (ECLA) and on the USPC, respectively. The CPC is based on the IPC, but much more detailed, e.g. B21J15/28.

# Combining searches

It is possible to combine search statements from previous searches with the settings input into the advanced search tool. This allows greater sophistication when conducting searches, involving the combination of multiple fields.



### **Quick Search**



The quick search form is for simple searching using keywords and names of applicants, inventors, dates and countries. Before clicking "Search", tick the checkbox for "Include machine translations" to run your search across the original and machine translated text.

#### Keyword search

Enter keywords to search. Latin or non-Latin keywords can be used.

Please note, stemming is automatically added to your search criteria. Entering the word or phrase in quotation marks, e.g. "computer screen", will search for the words or phrase together.

By default, unless otherwise set by your system administrator, the basic search form will search the keywords within the title, abstract and claims.

#### Names

A search in the name field will search for the Applicant and Inventor. Automatic truncation is applied so that some additional name variations will be retrieved. Latin or non-Latin names can be searched.

As you start to enter a name of an applicant or inventor, a list of suggestions will appear beneath the text box. To use any of the suggested names which may be relevant to your search, select the name by clicking on it and it will appear in the text box.

As with the keyword searches, entering a name in quotation marks will search for exactly that. E.g. Searching for "David Bell" will not retrieve Bell David or Bell D.

#### Dates

This allows users to specify which period of time they would like to search within from the following choices: All, Last 12 months, Last 5 years or Last 20 years.

By default, this is set to All.

#### **Countries**

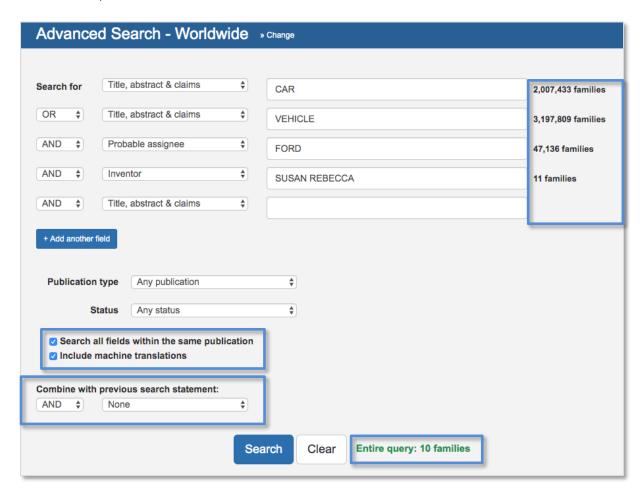
Select whether to search across all jurisdictions or restrict your search to families with US, WO, EP, DE or JP information. By default, this is set to All.



Alternatively, navigate to the top of the search form and click >> Change (as above). You can then choose a specific jurisdiction to search within.

#### **Advanced search**

The "Advanced search" form allows you to easily combine search criteria using drop-down menus with the Boolean operators "AND", "OR" and "NOT.



Begin entering your criteria in the first drop-down, this can be combined with different Boolean operators and search criteria by selecting from the additional drop-down options to build your search query. As you complete the different fields, the number of results for each separate field is shown on the right-hand side. At the bottom of the page, the total number of results for the entire query is shown. Latin and non-Latin documents are indexed together so your search can combine Latin and non-Latin assignee/inventor names and keywords.

Click on "Add another field" to add additional criteria to your search.

As PatBase Express is a family database, the fields might hit different publications within the same family. To ensure that the all fields appear in the same publication, tick the checkbox at the bottom of the page that says, "Search all fields within the same publication". Ticking the box to "Include machine translations" will search across machine translated **and** original text.

In addition, you can combine steps with searches previously run within your session.

Once you have entered your search criteria, click "Search" (or click on "Clear" to reset the form).

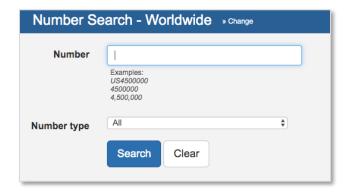
#### **Number search**

#### Number

You can enter the 2-letter country code prefix, or you can simply enter a number. If you enter the number without the country code, the system will search through all countries.

### Number type

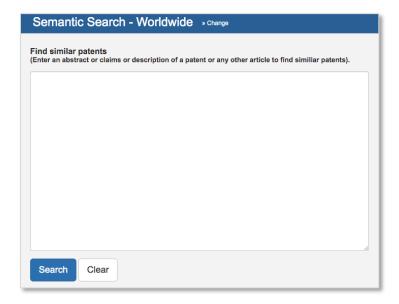
Select from the drop-down menu which type of number you would like to search from the following options: All, Publication number, Application number (US serial numbers are allowed), Priority number.



### **Semantic search**

The "Semantic search" provides a way to quickly identify key concepts within a patent of interest and incorporate them into your PatBase Express search strategy.

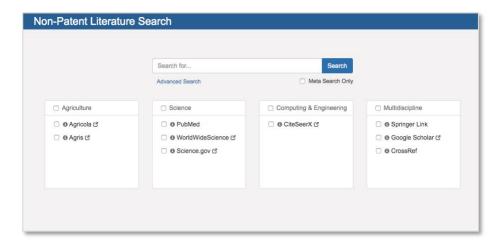
Enter or paste the text from the abstract, claims or description of a document into the search box and press *Search*. The minimum requirement to complete a Semantic Search is 20 words. Selecting the *Search* button will search the database for any documents whose claims, abstract or description match the text input in the search box.



#### Literature search

The "Literature search" form provides access to non-patent literature sources.

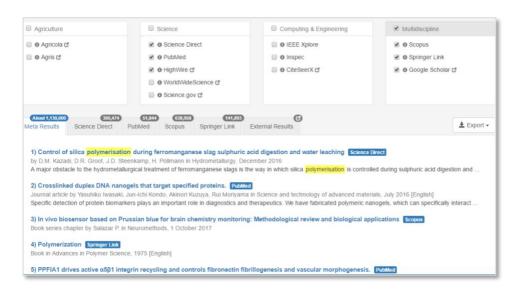
When running a non-patent literature search via the literature search form, firstly select the area in which to perform the search. The source options are available from the top of the page.



The different options available are agriculture, science, computing and engineering, and multidiscipline.

To perform a search, enter relevant keyword(s) in the search bar, select the source(s) to explore and press *Search*. Selecting *Meta Search Only* will collate all results into one result set rather than splitting by document source.

Your results will be displayed under a series of tabs. The meta results tab collates all results and removes any duplicates; subsequent tabs cover each individual resource. Click on the tabs to display the list of matching results including representative information from the local source. If the searched keyword(s) appears in the title or displayed section of the abstract it will be highlighted as shown below.



The titles link through to the searched source. Results can be exported in both Excel and RIS formats.

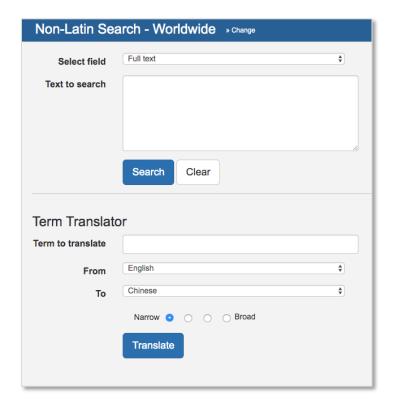
# More options

There are other search forms included in "More options" including "Non-Latin search".

The search forms displayed in the toolbar or under "More options" depend on the screen resolution.

### **Non-Latin search**

Non-Latin Search enables users to run keyword searches in native languages: Chinese, Japanese, Korean, Russian and Thai, as well as machine translations.



Select the appropriate language and sections of documents from the drop-down menus, enter the keywords into the "Text to search" box and press the "Search" button.

Term translator allows translation of terms from Chinese, English, French, German, Japanese, Korean, Portuguese and Spanish into Chinese, Japanese, Korean, Russian and Thai.

Enter the term to translate, choose language to translate from and choose how narrow or broad the translation should be. Click "Translate", this will generate the translation which can be added to the non-Latin search box above.

The non-Latin keywords can be combined with Latin keywords. All keywords entered (whatever the language) will be searched across all original and machine translated text.

#### **PatBase Thesaurus**

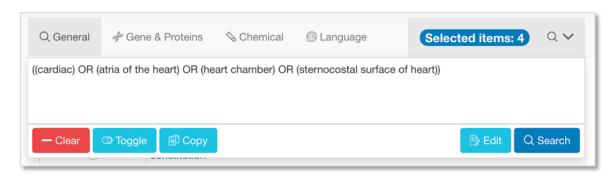
The PatBase Thesaurus look-up helps finding synonyms for searching. It can be a useful tool to broaden or refine searching depending on how terms are combined with operators.

The Thesaurus can be accessed from the drop-down "More options" menu.

The PatBase Thesaurus allows users to identify and add synonyms, keywords, acronyms and translations of particular terms to a PatBase Express search strategy. It has a type-ahead functionality to help identify terms or synonyms of interest and include these in a search.

The Thesaurus is split into four different thesauri covering general terms, gene & proteins, chemical terms and languages. Each section can be found along the top, select the relevant tab to start exploring.

Each option provides a search bar along the top, in which the search term(s) of interest can be entered and selected from the options provided in the type-ahead or searched as entered. Once you have selected the synonyms or similar words you would like to search in PatBase Express, the "Search in PatBase" tab in the right-hand corner. Here you can edit your query before searching in PatBase Express.



Clear – will clear the search bar.

Toggle – allows selected terms to be removed.

Copy – will copy the selected terms.

Edit – opens up the selected terms in an editable search box, Boolean operators can be changed, a field qualifier added etc.

Search – will run the search in PatBase Express.

#### General

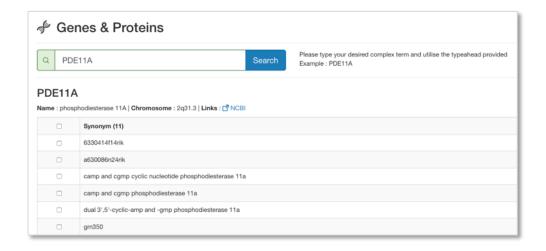
The general search option finds synonyms and similar words to search within PatBase Express. As a term is entered a type-ahead will appear, select a term from here or search the entered term(s).

Depending on the type of word, a selection of synonyms and similar words will appear. Tick the boxes next to the terms of interest and they will be added to your "Selected Items" in the top right-hand corner.



# Gene & proteins

Enter a gene or protein of interest to display a list of relevant synonyms. General information about the searched gene or protein is provided above the available synonyms along with a link to NCBI for detailed information.



#### Chemical

The *Chemical Search* provides a fast and easy way to find relevant synonyms and numbers to enhance chemical searching within PatBase Express.

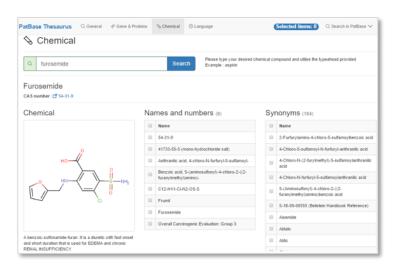
Enter a chemical name, trade name or CAS registry number to find synonyms and corresponding numbers. Autosuggest is applied to the search box, which means as soon as a name or number is entered a list of synonyms will appear.

For example: Furosemide CAS number = 54-31-9

The next page will display the corresponding chemical structure and description along with a list of different names, numbers and synonyms of the chemical.

Choose from the list of names, numbers or synonyms by ticking the appropriate checkbox (multiple boxes can be selected). Once the selection has been completed click on "Selected items" displayed at the top of the display boxes.

An editable text box will appear with the relevant command language. Users should review the search string and then click *Search* to continue with the search.

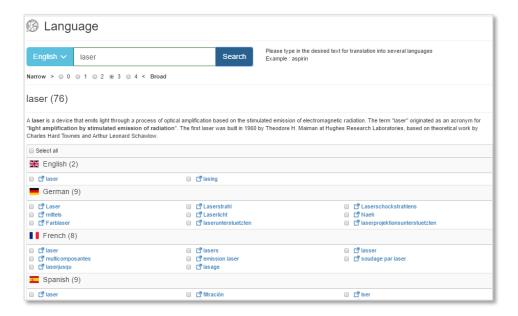


# Language

The *Language* option allows keywords to be translated from and into the following widely used languages: Chinese, English, French, German, Japanese, Korean, Portuguese, Spanish, Italian, Swedish, Dutch, Polish, Russian, and Danish.

To use the Language search option, enter term(s) to translate, select which language to translate from and how narrow or broad the translation should be, then press *Translate*. A list of the translated terms will be generated, you can select multiple terms to add to your search query.

Please note, the translated terms are linked to Wikipedia, this can help to check that the translated terms chosen correspond to the intended term.



# **Upload Number**

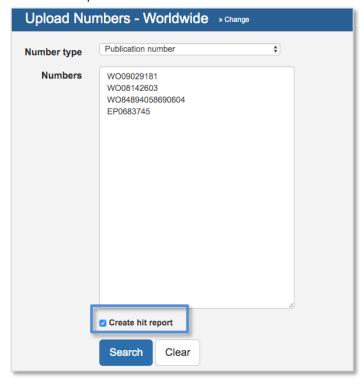
A search can be run in PatBase Express by uploading a list of publication numbers or application numbers. To do this click on "Upload numbers" under "More options".

Select the number type and enter the number(s).

One number can be entered per line or each number can be separated with a comma. Kind codes are allowed.

For a status report on the availability of uploaded numbers within PatBase Express check "Create hit report" found below the search box before selecting *Search*.

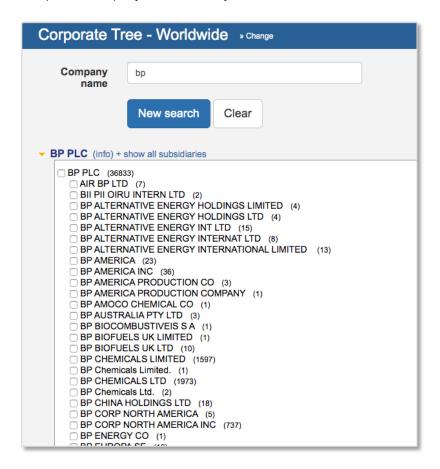
After the numbers are searched, a number upload report will clearly display the number of families found per uploaded number. Any numbers which were not found will be highlighted in red. Your results will be displayed below the hitlist.





# **Corporate Tree**

The Corporate Tree can be found under "Tools" in the "More options" menu. Use the corporate tree for a quick identification of related parent and subsidiary companies which can then be included in one assignee search. Enter an assignee name and submit the search to display the corporate tree for the company, be it a parent company or a subsidiary.



A link to show all related subsidiaries is provided. Click this to expand. All or some affiliated assignee names can then be selected to search in PatBase Express.

In addition, next to the parent company name you can hover over (info) to see information about the company. This is provided by Wikipedia.

Please note, data for the Corporate Tree in PatBase Express is derived from a corporate relationship database compiled and maintained by Minesoft & RWS.

#### **Utilities**

#### **Previous Searches**

Previous searches can be combined and rerun with a new search, options are at the bottom of the "Advanced Search" and "Search" screens.

The past searches will remain listed until you log out of PatBase Express or until the browser is closed.

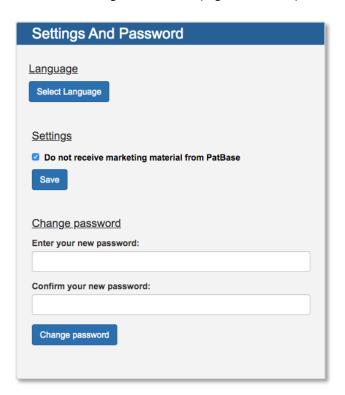
# **Recent Offline Export**

Once under this section, you can see a list of all the exports you have made, the format and the number of records.

Settings & Password

Under "Settings", you can select your language preference – this will only update the language of the interface, not the searching capabilities.

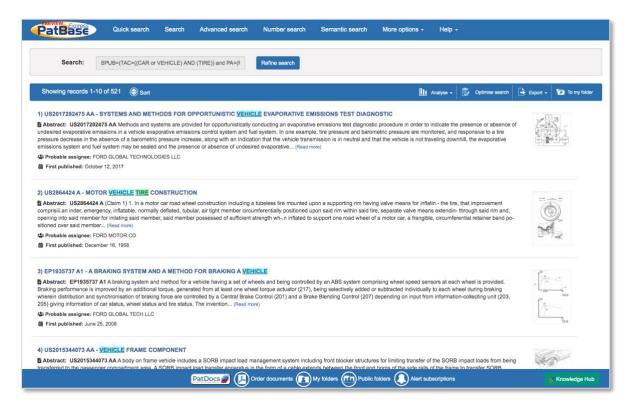
From time to time, Minesoft will send out emails to users with our bi-annual newsletter, product updates and tips & tricks. If you don't want to receive these emails, you can contact your account manager or untick this box on the Settings & Password page. You can opt back in at any time.



To change your password, enter and confirm your new password on this page. We recommend that all new users do this when they first log-in.

# **Viewing Results**

Once you search, using any of the options above, search results are displayed initially in a list format with the patent number, title, abstract, probable assignee, first published date and a representative image for each record. Keywords will be highlighted within the title and abstract.



Mouse over the image to enlarge it and click to open the mosaic.

By default, these are sorted by relevance, there is also an option to sort by date (newest records first). The earliest publication date is noted at the bottom of the brief overview displayed for each record.



You can navigate through the list by clicking on next >> or << prev (previous), alternatively you can navigate page by page. Alternatively, use keyboard shortcuts  $\mathbb N$  for next record, and  $\mathbb P$  for previous record.

# Viewing a record within results list

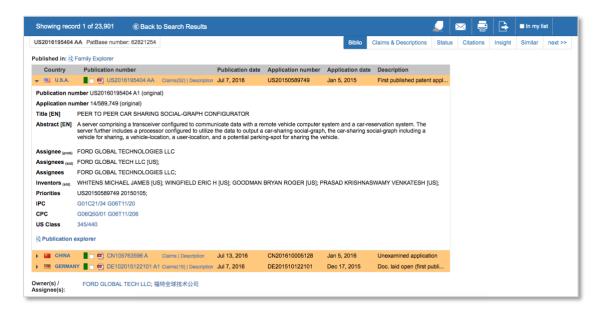
Clicking on the title of the record will open the record for further examination. Navigate through records by clicking on "Next" or "Prev" (previous) buttons towards the top right-hand corner of the page. Alternatively, use the keyboard shortcuts **N** for next record, and **P** for previous record.

Click through the buttons in the top right-hand corner of the page to toggle between Biblio, Claims & Descriptions, Legal Status, Citations and Insight.

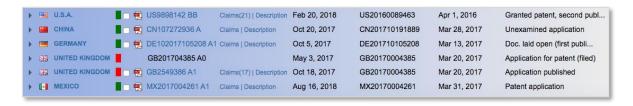
A link to "Similar patents" is also available. Similar patents are defined as patents cited or classified by patent examiners. Clicking on the "Similar" link will search and display similar records.

Inventor and Assignee names are hyperlinked. Clicking on these hyperlinked names will run a new search in PatBase Express and display the results.

Administrators on a PatBase Express account have the option to enable the display of Dead or Alive tags on records in the family table to indicate the current status of a publication. If enabled by an account administrator, Dead or Alive tags will be displayed in the family table of a record. A red tag means the publication is expected to be dead and a green tag means the publication is expected to be alive.



When the publications are highlighted in orange, this means that they meet the entirety of your search criteria. When publications are highlighted in a blue gradient, this means they are a partial match.



If you wish to return to your search results at any time, click *Back to Search Results* found at the top of the screen.

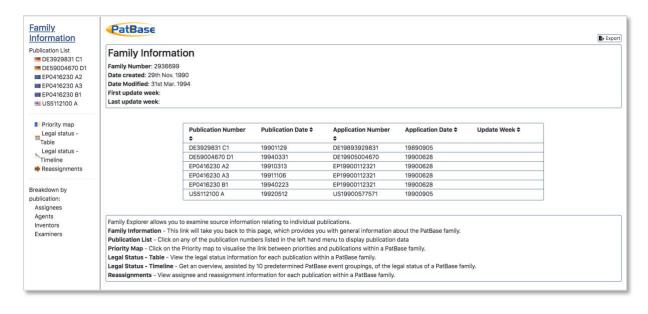
### **Family Explorer/Publication Explorer**

To see more information about the family, click on the "Family Explorer" icon at the top of the family table (when viewing a record).



A new window will open which allows you to examine source information relating to individual publications:

- Family Information This link will take you back to this page, which provides you with general information about the PatBase family.
- *Publication List* Click on any of the publication numbers listed in the left hand menu to display publication data.
- *Priority Map* Click on the Priority map to visualise the link between priorities and publications within a PatBase family.
- Legal Status Table View the legal status information for each publication within a PatBase family.
- Legal Status Timeline Get an overview, assisted by predetermined PatBase event groupings, of the legal status of a PatBase family.
- Reassignments View assignee and reassignment information for each publication within a PatBase family.



If you're only interested in finding out more about a specific publication, you can go directly through to this information by clicking on the "Publication Explorer" icon at the bottom of the publication information.



# **Ordering PDFs**

The ordering of full PDFs is available to those who have PatentOrder included in their subscription.

PDFs can be ordered by ticking the check boxes, shown in the family table, when viewing records. Simply click the check box next to the patent number you wish to order.



You can navigate through your search records, selecting PDFs, as required. When you have finished selecting PDFs, click on the "Order documents" button found at the bottom of the screen.

If you logged in using a User ID and password, then the PDF(s) will be delivered to your email address. If you have access to PatBase Express by IP verification, you will be asked for an email address for delivery.

#### **Additional record information**

Clicking on additional options displayed within the top right of the record will allow you to view more details about the record.

A PatBase Express record can be emailed to a colleague(s) by clicking on the envelope icon found above each record.

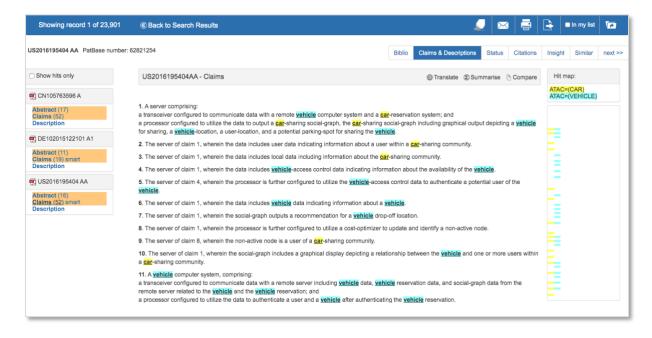
When you click on the icon a pop-up will appear. Enter recipient name(s), if you are sending the record to numerous recipients, please separate their addresses with a semi-colon. You can add notes, if required, to accompany the record. Click "Send email' beneath the message box to send. The recipient(s) will receive the email as a link. This will remain active for 14 days.

You can print a family record by clicking on the print icon.



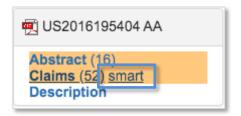
# **Claims & Descriptions**

Clicking on the "Claims & Descriptions" link reveals the family representative's first main claim (if available), shown in the main screen. You will also see all the available patent family members which are related to this particular record. These are listed down the left-hand side. Click on the part of the document you wish to see, and this will appear in the main screen. If you click on the publication number, this will take you to the page-by-page PDF.



#### **Smart claims viewer**

Smart claims viewer is accessible when viewing Claims & Descriptions by clicking on the "smart" icon. It serves to clearly identify independent claims and allows easy navigation through dependent claims.



# **Hit Map**

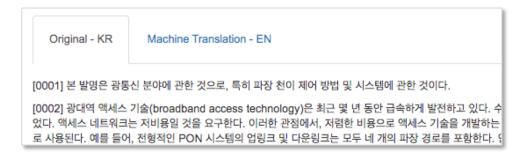
A hit map can be displayed to see where the keywords are located within the "claims" and "descriptions" of patent documents. This appears on the right-hand side of the screen. By clicking on the coloured bars (keyword hits) in the hit map, users will be taken automatically to that particular place in the full text. The hit map will show advanced highlighting terms if enabled, if no advanced highlighting is enabled, searched keywords (basic highlighting) will be shown.

#### **Machine Translations**

Machine Translation from English into other languages or vice-versa is available when viewing the claims and description, in the full text body of patent documents.

#### **Non-Latin text**

If there is original non-Latin text available, there will be tabs when viewing the full text where you can choose to view the original or machine translated text.

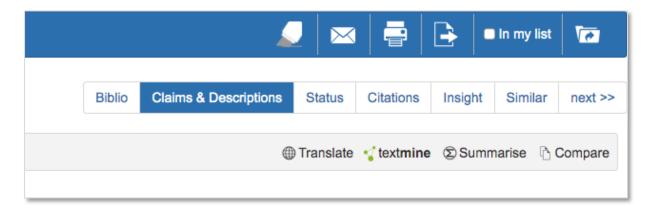


Please note, this is an automated translation; it is not intended to replace human translators.

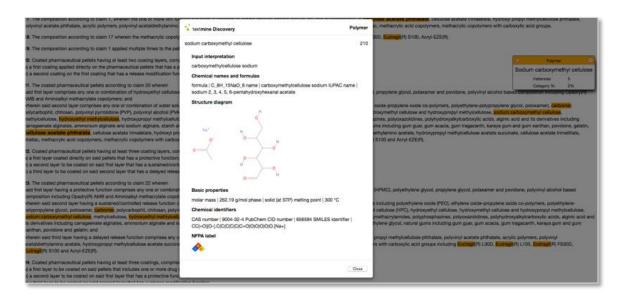
### **TextMine**

TextMine enables PatBase Express searchers to extract key chemical and scientific parameter terms from within patent documents and explore them thematically. Sine if the entities included are antibodies, genes & proteins, polymers etc.

You can access TextMine when viewing the claims and descriptions of a publication – the hyperlink is in the top right-hand corner.



The discovery bar on the left-hand side will list all of the entities found in the full text of the patent document. When an entity is selected, it will be highlighted, and you will be taken to an instance where it is mentioned in the document. Click on the entity where it appears in the text to open the Discovery window with further information about the structure.



#### **Auto-Summarise**

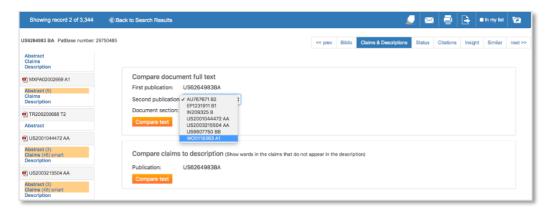
Select "Summarise" when viewing a section of the available full text, e.g. title/abstract, claims or description, to display an automatic summary of the text. Select the percentage options displayed above the text to choose a percentage of the highest scoring sentences to display in the summary. By default, a 10% summary of the text is displayed.

Select "View all" to see all of the available full text in the same window with the highest scoring sentences (the summary) highlighted. By selecting "Hide all" you will only see the auto-summary – the rest of the document will be hidden.

# **Compare**

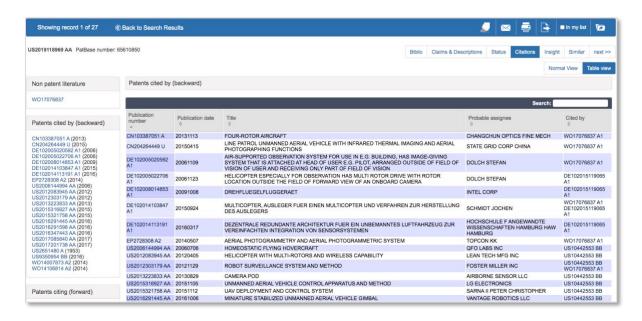
Select "Compare" to access the comparison tool. This allows you to compare the full text of a publication to another publication within the same family, e.g. an application to a granted patent. The first publication will be the one already opened, select the second publication from the drop-down menu and press "Compare text".

It is possible to compare the full text of a publication to another publication within the family, e.g. an application to a granted patent. The first publication will be the one accessed via the hyperlink, select the second publication from the drop-down menu and press "Compare text". Furthermore, the claims from a publication can be compared with the description of the same publication, simply press "Compare text" in the second box.



When looking at a set of compared results, any text that was in the original but is not in the publication being compared to will be highlighted in red. Any text that has been added to the publication being compared to but is not in the original publication, will be highlighted in green.

#### **Citations**



To view citations for a record of interest, click on the "Citations" link displayed at the top-right when viewing a record in PatBase Express. The Citation View for the family will appear clearly displaying the relationship between Backward and Forward citations for all publications within the family.

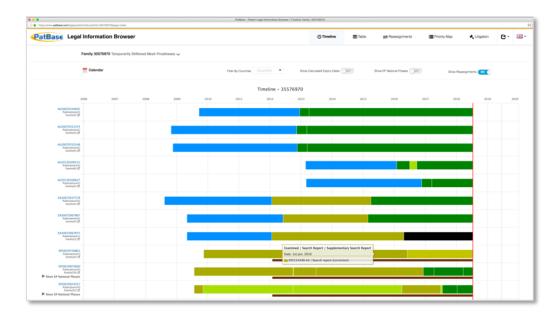
Click on "Table view" in the top right corner to view the "Backward" and 'Forward' citations in a table view. The table can be sorted by Publication number, Publication date, Title, Probable Assignee and "Cited by". There is also an option to search the table.

Click on the publication number within the citation display itself to view a summary of the bibliographic information for that particular publication. Three options are provided below the bibliographic summary. To view citations for that publication, select "View Citations".

The record can also be added to the results list by selecting "Add to my list" or select "View family" to view the record for the full family in a pop-up window.

Please note, citations currently include patent and non-patent documents where available.

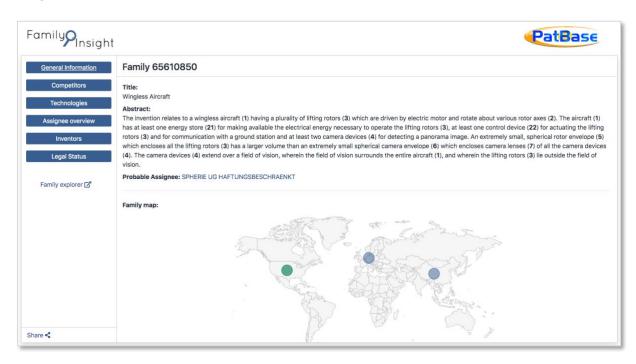
### **Status**



Clicking on "Status" links through to the legal status information for the family.

For more information about the legal status viewer, please refer to the legal status viewer user guide. Contact <a href="mailto:support@minesoft.com">support@minesoft.com</a> to get a copy or download from user guides section in the Minesoft Knowledge Hub.

# Insight



When you click on the "Insight" tab, a pop out window will open with an overview of the family that you are looking at.

This information includes:

### General Information:

Title, abstract, probably assignee and where the family members are filed.

### Competitors:

List of competitors, extracted from citation information

# Technologies:

List of technology sectors, by CPC classification codes, related to the family.

### Assignee overview:

Information on the probable assignee, including number of applications, publications and families. Top jurisdictions for filing in and application and grant velocity.

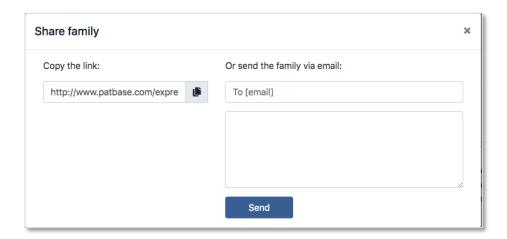
#### Inventors:

List of inventors for the family.

#### Legal Status:

Opens the Legal Information Browser.

This window can be shared with anyone, even those who aren't users. Click the "Share" icon in the bottom left corner and choose between copying the URL or sending directly to an email address.



# Similar patents

A link to similar patents, if available, will be displayed for each record. Similar patents are defined as patents cited or classified by patent office examiners in addition to these records sharing the exact same IPC's will be listed.

# Advanced highlighting

Create and apply customised highlighting scheme to search results using the Advanced Highlighting tool.

To access the Advanced highlighting tool, click on the \_\_\_\_ Advanced Highlighting icon at the top of a displayed full record. Enter the words to be highlighted in the appropriate highlighting colour boxes.

Once advanced highlighting has been applied, the Advanced Highlighting icon will change to  $\triangle$ .

Truncation, Boolean and proximity operators can be used to highlight words in relation to each other.

If the same highlighting colour needs to be applied to multiple keywords, they should be combined with the Boolean operator OR.

To highlight phrases that appear together, use proximity operators, e.g., smart WF1 card.

### Highlighting example:

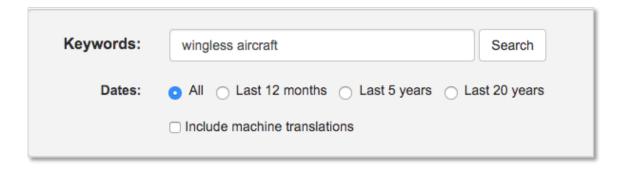
If highlighting: ((coolant\* w4 ring) and absorb), and highlighting the word shaft and wishing to apply the same colour to both, it is necessary to enter the following: (((coolant\* w4 ring) and absorb)) OR shaft within the same coloured text box.

Advanced highlighting will remain until it is edited or cancelled or when the session ends (logged out of PatBase Express). When advanced highlighting is applied, it will overwrite any existing highlighting from keyword searches. Selecting "Clear" will delete all the entries in the highlighting boxes.

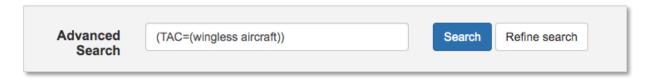
# Refine/Broaden searching from results page

Original search criteria will be displayed in the search box, above the list of records. To edit the search, click in the text box and edit the search, or click "Search" to rerun the query.

After running a quick search, there are more options to filter the results by date and to include or exclude machine translations, if wanted.



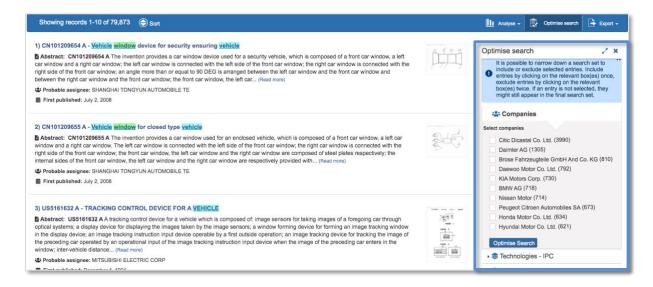
When using the more complex search forms, you'll need to select "Refine search" next to the search bar, which will take you back to the search form to make further edits.



Additional options displayed in the top-right above the results list allows you to visualise and/or analyse results further:

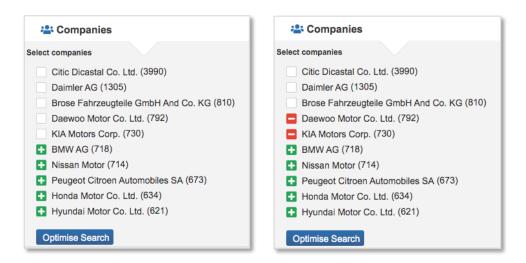
### **Optimise Search**

Click on "Optimise search" displayed in the results bar to refine searching by company, technology, publication date or country.



With Optimise, your result set can be filtered by company, technology area (by IPC or CPC code), date of publication and country or jurisdiction. These criteria can be included or removed. For example: if you want to include records from a specific company, click once until you see the green square with a white cross. To remove records from a specify company, click twice until you see the red square with a white line.

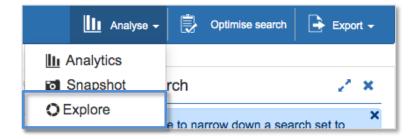
Click on the appropriate criteria and select the tick boxes for the options that you wish to include or remove, then select "Optimise Search" to refine your results by the chosen criteria.



# **Visual Explorer (Explore)**

The Visual Explorer is a clustering and visualisation tool offering an instant pictorial view from which you can explore the significance of results according to a breakdown by key criteria of interest, taken from the first 2000 records within a result set.

Click on "Explore" from the drop-down arrow next to "Analytics". By default, you will see a pictorial breakdown of keywords for your results set with links above the image to view a breakdown according to additional criteria.



Select a keyword of interest within the image to view records which contain this word.



Click on "Next" or "Previous" to navigate through records. Click on "Back to Visual Explorer" to return to the image.

In Visual Explorer, there is an option to view diagrams by:

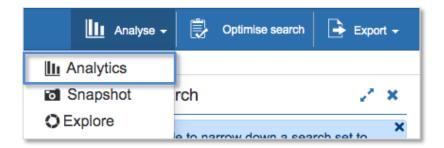
- Keywords This provides a visual breakdown of keywords occurring within the title and abstract, combined with the complete definition of the main IPCs occurring in the results set
- Applicants This provides a visual breakdown of the top 100 assignees occurring within the results set (inventor and assignee duplicates are automatically removed)
- *IPC Class* This provides a visual breakdown by the International Patent Classification (IPC) system within the results set
- *CPC Class* This provides a visual breakdown by the Corporative Patent Classification (CPC) system within the results set

Right click on the image and select the appropriate option to save image – useful for later incorporating into presentations or reports for a visual overview.

To return to the list of search results select "Back to search results" in the top right-hand corner of the screen.

# **Analytics**

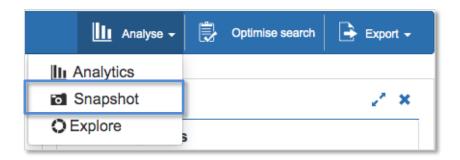
Please note, not all PatBase Express users have access to PatBase Analytics, if you are able to access Analytics, you will find the option when viewing a result set.



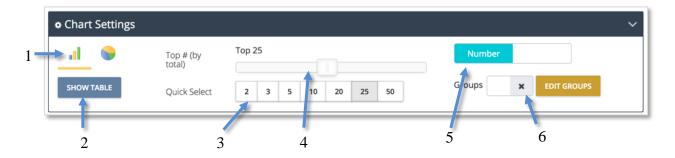
For more information about Analytics, please refer to the Analytics V3 user guide. Contact <a href="mailto:support@minesoft.com">support@minesoft.com</a> to get a copy or download from the useful documents list in PatBasics Express.

# Snapshot

Snapshot offers PatBase Express users a quick statistical breakdown of results. The option to view global patenting trends at a glance with respect to key areas of interest such as publication year, jurisdictions, various classifications and assignees/applicants highlights key areas of interest for further analysis. Select "Snapshot" from the drop-down menu under "Analyse" above the list of results in PatBase Express.



Whichever category you are looking at within Snapshot, whether it is by jurisdiction, year, assignee, inventor, classification, legal status or citations. You will have some variation of chart settings, like below:



- 1 Choose between viewing your results as a bar chart or pie chart, line charts are also available for certain results
- 2 Bring up the table view
- 3 Quick select number of categories to show, i.e. number of countries, different classification codes
- 4 Drag across to select exact number of categories to show
- 5 Choose between showing results in number format or percentage format
- 6 Activate or edit groups (more information below)

# **Working with Groups**

Using the groups feature is useful to clean up your result set. It's possible to group together inventors, assignees, classification codes and jurisdictions. For example, you might want to group together Norway, Finland, Sweden, Iceland and Denmark as Nordics.

The grouping functionality can be accessed from chart settings.



There is an option to toggle groups on and off and a further option to "EDIT GROUPS". After clicking on "EDIT GROUPS", a pop-up window will appear with a list of countries, or classification codes or inventors – depending on what chart you were looking at.



To create a new group, click on "New" under edit.

Type in the name for your new group, select which countries or inventors etc. you want to group together (making use of the search bar if needed) and click save.



Once saved, your new group will be added to the "MANAGE" column, you can use the buttons on the top right-hand corner of each group to edit (1), delete (2) or activate/deactivate (3).



# **Searching Information from Snapshot**

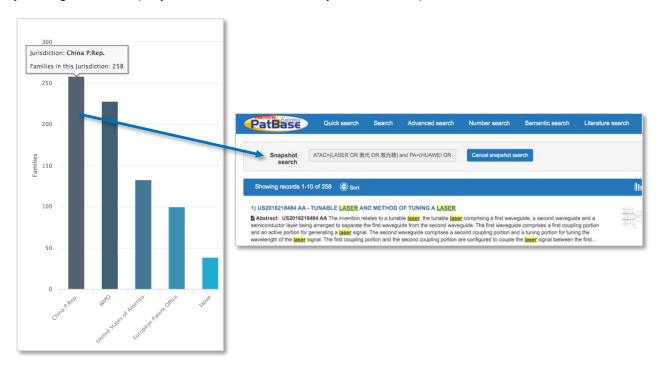
When viewing the charts in Snapshot, it's possible to take the data back into PatBase Express to drill down further. When viewing information that you want to look into further simply click on the relevant information, in this instance, Japanese publications.

PatBase Express will then run your original search query with this additional information.

Alternatively, run searches from the table view within Snapshot.

#### Chart view

When viewing results in chart view, hover the mouse over the relevant bar to be shown how many families are in the classification and – when grouping by sub-group, group or subclass – you will be shown a description of the code of interest. You can click on the bar to add the classification code to your original search query and run the new search in your PatBase Express window.



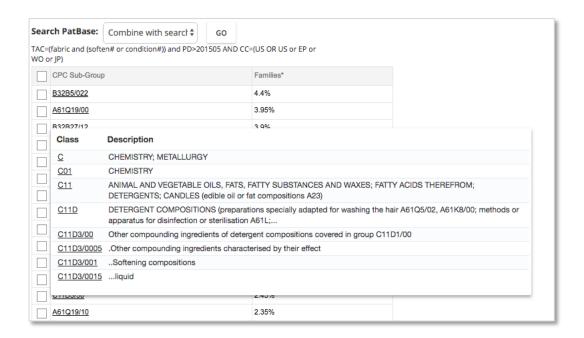
#### Table view

When viewing results in table view, you can select either sub-groups, groups, subclasses, fields and sectors of interest and search PatBase Express by either combining with your original search query running a new search or removing the class from your original search query. This can be done by ticking the boxes for the relevant classifications and then using the drop-down menu at the top of the table.

When your results are grouped by subgroup, group or subclass, you can hover

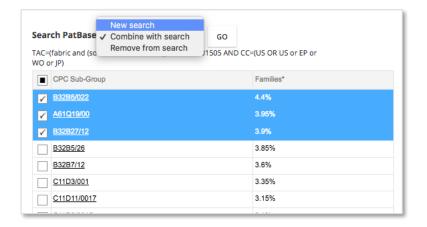
New search Search PatBase Remove from search TAC=(fabric and (so 1505 AND CC=(US OR US or EP or WO or JP) CPC Field Families' Basic materials chemistry 25.65% Textile and paper machines 20.85% Medical technology 14.4% Other consumer goods 13.45% Other special machines 12.45% Surface technology, coating 10.85% Organic fine chemistry 10.5% Chemical engineering 10.05% Macromolecular chemistry, polymers 8.85%

over the code of interest to be shown additional information about the code.



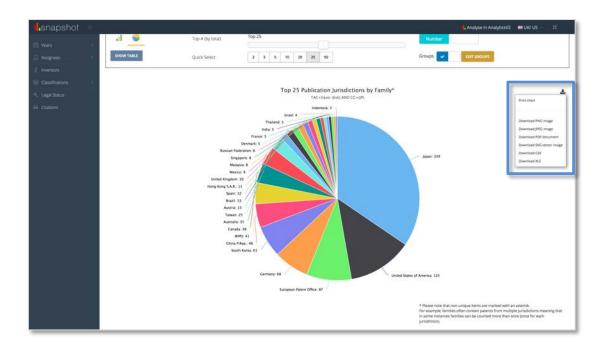
#### Tree view

When viewing results in tree view, you can select classification codes of interest and search PatBase Express by either combining with your original search query running a new search or removing the class from your original search query. This can be done by ticking the boxes for the relevant classifications and then using the drop-down menu at the top of the tree.

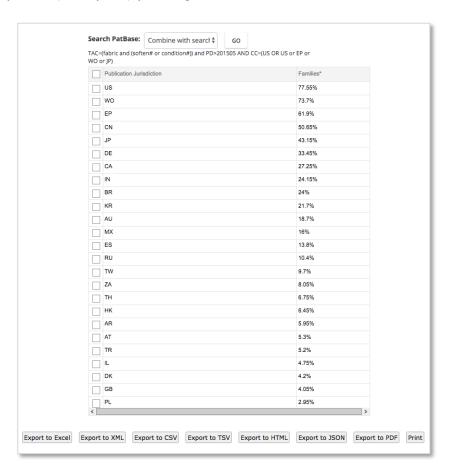


# **Downloading/Exporting**

When viewing results as a pie chart or bar chart, you can download the image as a PNG, JPEG, PDF, SVG, CSV, XLS file or you can print by simply clicking at the download button in the top right-hand corner.



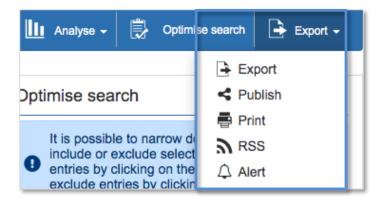
When viewing results in the Table view, you can export the information to Excel, XML, CSV, TSV, HTML, JSON, PDF or you can print by simply clicking the relevant button at the bottom of the table.



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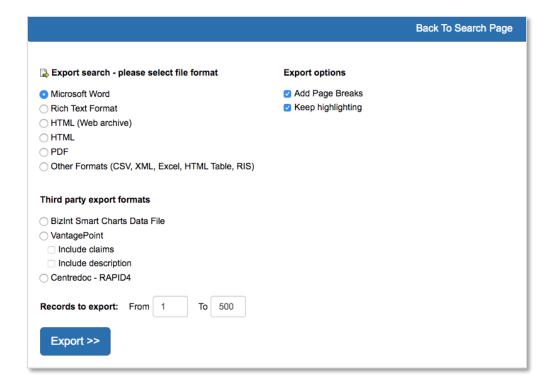
### **Share search results**

Search results can be exported directly from the Display results page or from "My List". To export from the Display results page, hover your cursor over the Export icon, some of the different methods of sharing the result set are included here.



# **Export**

To export your result set, select "Export". You'll be taken to a second page to choose your preferred file format (with some third party export formats included), your "Export options" and how many records you would like to export. This can be up to a maximum of 10,000 per day.



Once you have selected your preferences, you'll be taken to a third page, where you can confirm the email address the export is sent to. If your user ID is your email address, this will automatically be inputted, otherwise you will need to add your email address manually. The export will be performed offline so you don't need to wait for the export file to be generated.

Click "Order Export" to start the exporting process.

This means you do not	equested will be performed offline.  need to wait for the export file to be generated.  il address in the box below, links to your completed export will be sent to this address.
Your Email Address:	support@minesoft.com
	Order Export
	ge: 0/1500000 (not including this request) usage: 20/1500000 (not including this request)

#### **Publish search results**

Select "Publish" to generate a sharable link to a folder containing the current result set. This link can then be emailed to a colleague or client, if you wish to send the record to numerous recipients, please separate the email addresses with a semi-colon.

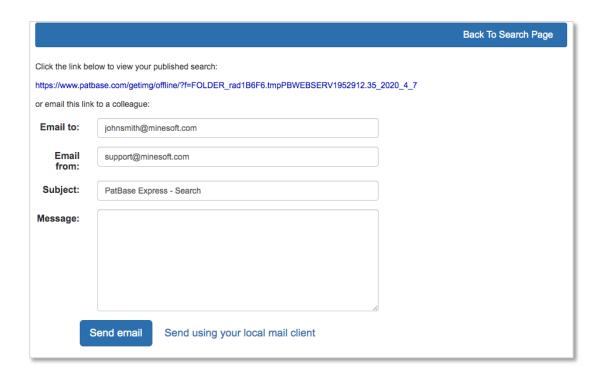
Alternatively, copy the URL and share yourself.

When opened, the receiver will have the option to "View in PatBase", "View in PatBase Express user" or "View in PatBase Folder Viewer" (for non PatBase users).

Please note, the link will be active for 6 months after sending.

Please note, up to 1000 records can be published.

Please note, if your company mail server does not permit an email originating from an external mail server to be delivered to your colleague using your own email address, please replace "Email from" address with info@minesoft.com.



### **Print Search Results**

Search results can be printed directly from the results page by clicking on the export drop-down and selecting print. You can also select which fields you wish to print. If you wish to print each record on a separate page, select this option. Choose how many records you wish to print and then select *Print*.

### **RSS feed**

RSS feeds allow you to see your search results for the current week without logging into PatBase Express. An RSS feed can be created directly from results page by clicking on the Export drop-down and selecting RSS. A pop-out window will appear where can modify the feed name, the description of the feed and how to categorise the results. Simply select "Create feed" to generate the link.

Please note, RSS feeds are limited to a maximum of 200 results per feed and will only search for results within the current update week.

# My Folders & My List

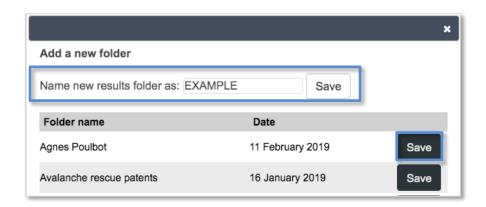
Private folders can be setup on individual PatBase Express user IDs.

### Creating a new folder

You can create a new folder when viewing a result set. Click on the "To my folder" icon found in the top right-hand corner of the page.



This will open up a pop-out window displaying all existing folders (if any) and at the top of the page give the option to create a new folder. All you need to do is simply enter a name for your new folder and then press *Save*.



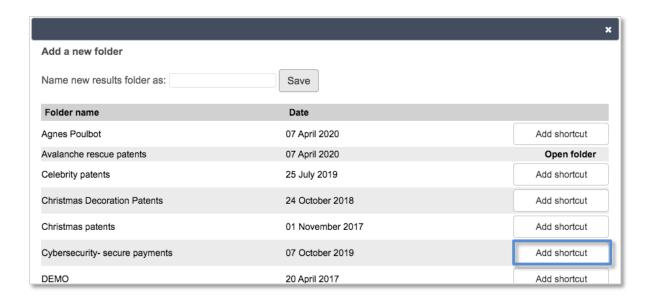
You can add your entire result set to one of your saved folders by simply clicking "Save" next to the relevant folder.

Please note, this method of saving results to a folder or creating a new folder will only appear for result sets less than 10,000 records.

For larger result sets, you can create a new folder when you are viewing a record. By clicking the "Folder Shortcuts" icon.



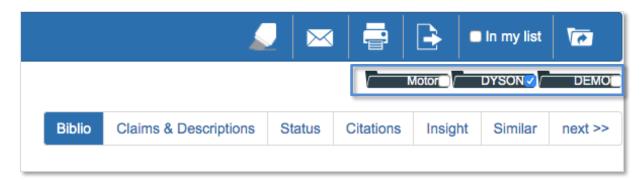
A pop-out window will appear where you can create a new folder. Also, from this window you can open folder shortcuts, which will allow you to quickly add single records to the relevant folders.



# Adding records to a folder

In order to add records to a folder you'll need to activate folder shortcuts, you can have up to 5 folder shortcuts active at any one time. To activate folder shortcuts and click on *Add shortcut* next to the relevant folders (the shortcuts will stay active within a session).

The selected folders will appear at the top of the page of each record.



Simply tick the boxes next to the folders in which a record should be added. If a record is already in a selected folder, a tick will appear in the box.

# Viewing a folder

To access the list of private folders, click on "My folders" found at the bottom of the page.



You will be taken to a page with a list of your saved folders. To view the contents of a folder either click on the folder name itself or select "open".

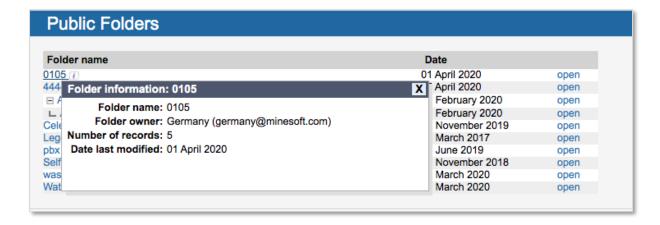
This will bring all the families within the folder to the results page, where they can be examined further.

### **Public Folders**

PatBase users can choose to share folders with all PatBase Express users (read-only access). If a folder has been shared by a PatBase user, then an additional folder icon will be displayed on the menu bar at the bottom of the page titled "Public Folders". Clicking on this icon will display a list of the shared folders.



When viewing the list of folders, hover over the information icon to see more details about the folder, e.g. number of records within the folder; folder owner (PatBase user who created the folder) and date last modified.



Click on "Open" against the relevant folder to view the records which will be displayed as a results list.

# My List

My List enables you to build up a temporary list of records to inspect later, or for exporting/publishing. Records remain in your list for 7 days. To add records to your list, select the checkbox next to "In my list" in the top right-hand corner, when viewing a record.



# **View My List**

To view the records that are in your list, click on the "My list" icon at the bottom of the page.



You will be taken to a page with the list of records that you have added over the past 7 days.



There is an option to remove individual records, if required, simply click "Remove from my list" at the bottom of each abstract.

```
1) Vehicle window device for security ensuring vehicle
CN101209654 A The invention prevides a car window device used for a security vehicle, ...
First published: July 2, 2008 - X Remove from my list
```

Further options to "Export my list", "View my list", "Publish my list" and "Clear my list" (clear all of the records from the list) are available.

By publishing a list, a shareable link is created, which is active for 6 months.

### Help

To access the help files, click on *Help* displayed in the top right of the tool bar, a new window will open, and a list of topics will appear listed on the left-hand side. Clicking on the topic of interest will display the relevant help file in the main screen.

Alternatively, why not check out our new online training resource, PatBasics Express, for more information on getting started on the platform.

Please contact <a href="mailto:support@minesoft.com">support@minesoft.com</a> if you have any questions.

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