



PatBase Analytics V3 Guide

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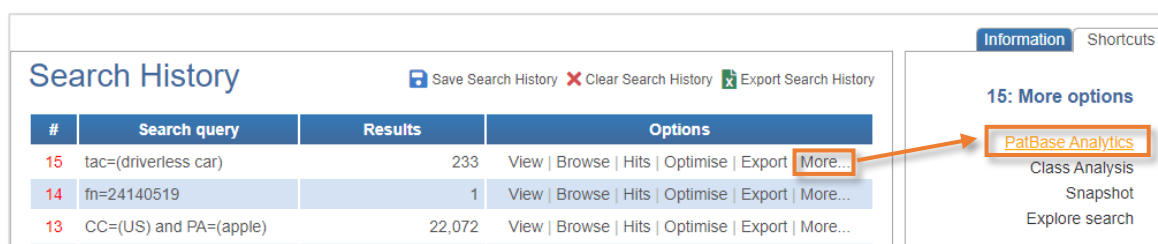
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About PatBase Analytics V3

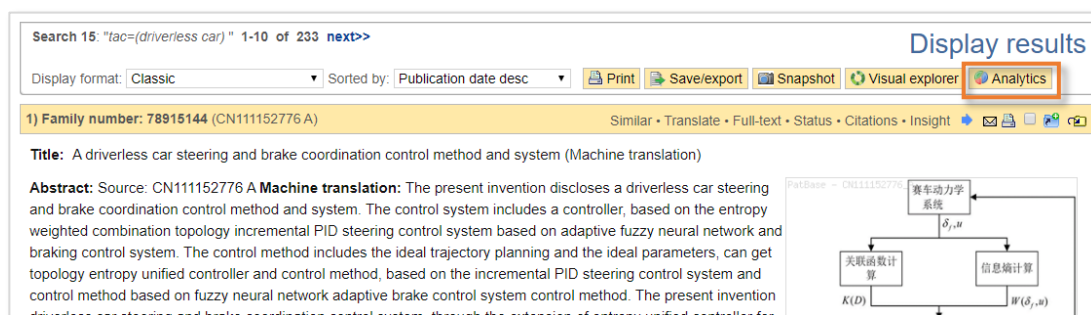
PatBase Analytics V3 offers an instant analysis of unlimited PatBase records. Large result sets can be analysed in a matter of seconds with no sampling applied. It is included, at no extra charge, with every PatBase subscription.

Accessing PatBase Analytics V3

Access PatBase Analytics V3 from the Search History page by selecting "More..." next to the search statement to be analysed, then select "PatBase Analytics" in the right-hand column.



Alternatively, select the  icon displayed at the top of the "View" and "Hits" page.



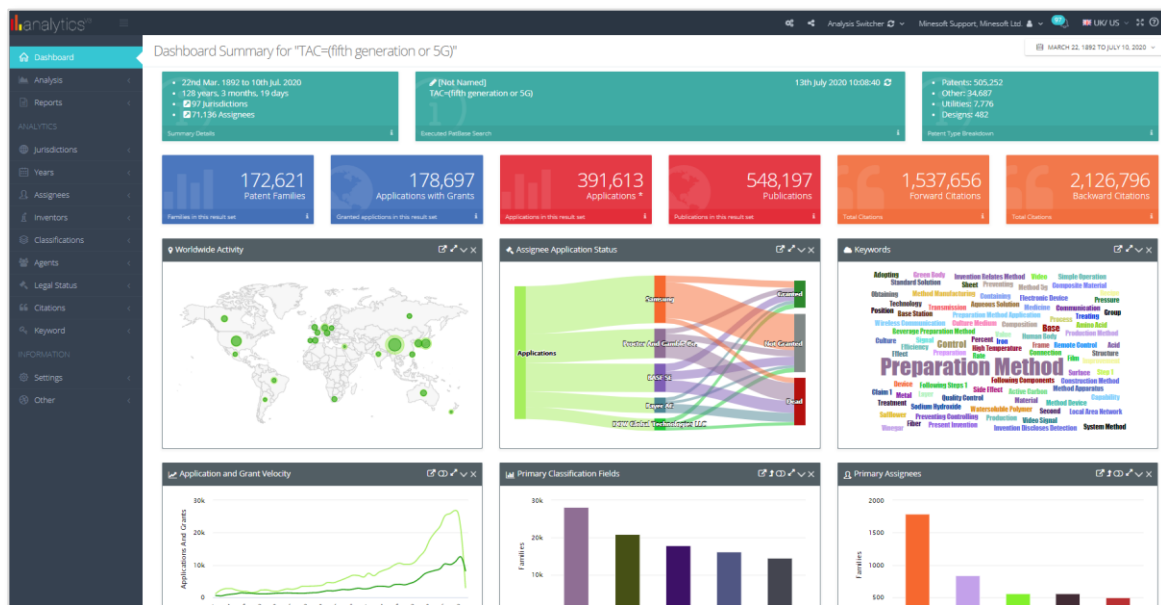
Selecting Analytics will immediately start the analysis in a new tab and direct users to the dashboard page. Similarly, entering **A** into the command line will also immediately start an analysis for the last run search on the search history page.



Dashboard page and widgets

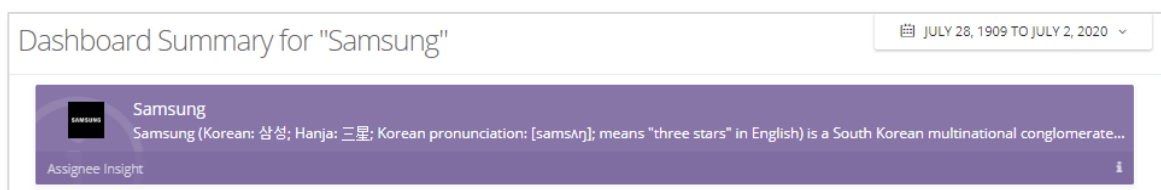
Dashboard page

The Dashboard page provides an overview of your analysis, which is shown in individual widgets. A selection of widgets will automatically be displayed when accessing PatBase Analytics.



Purple insight box

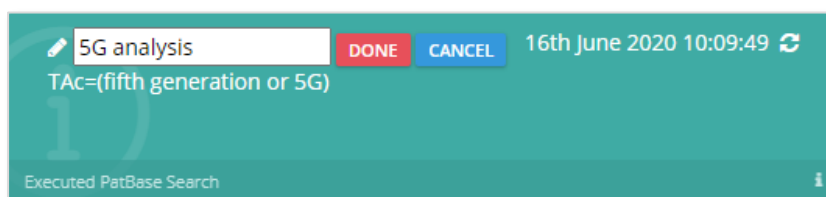
If running a single assignee or single jurisdiction analysis, an additional insight bar (purple box) may appear displaying the company logo or country flag icon along with some additional information.




Green information boxes

The green information boxes provide some basic details of your analysis, including the first and last publication date in the result set, the number of jurisdictions and assignees, as well as the executed PatBase search query and the patent type breakdown.

To name the analysis, click on the edit icon in the middle green information box and select “Done” to confirm.



The Jurisdiction/Assignee filter will create a new analysis based on the current analysis but with an additional refinement applied as per the selected criteria. Click on the filter  icon to open the jurisdiction or assignee filter pop-up. Select as many jurisdictions/assignees as required and click 'OK analyse'.

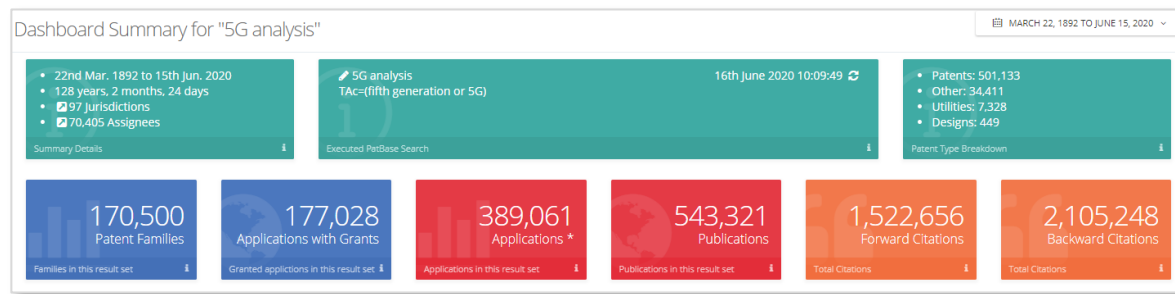


The analysis will refresh and a new [saved search](#) will be created.

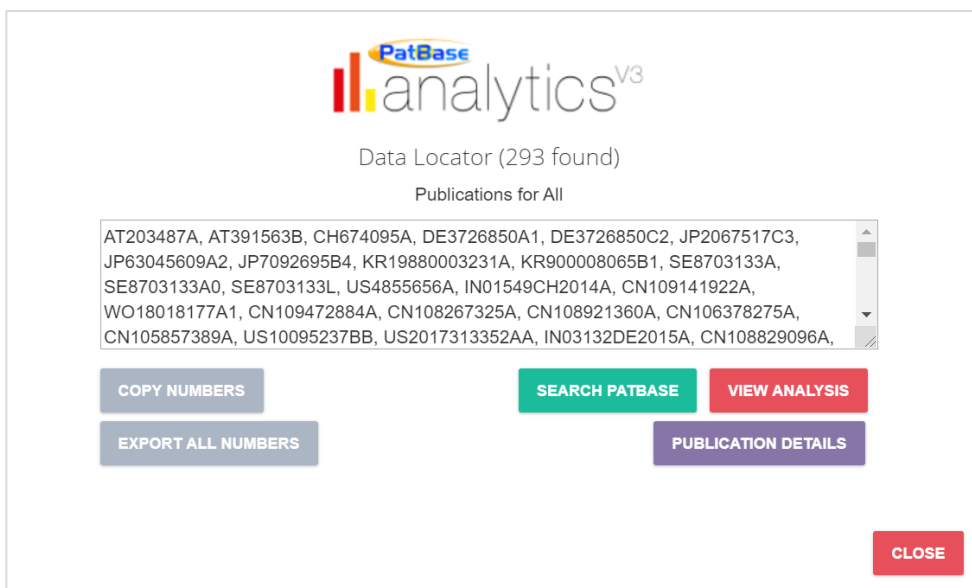
Please note: The filter is always applied against the probable assignee for each metric in question. This means that the family data must contain the selected probable assignee(s).

Blue, red and orange figure boxes

The number of patent families, applications, publications, grants, forward citations and backward citations is displayed in the blue, red and orange figure boxes.



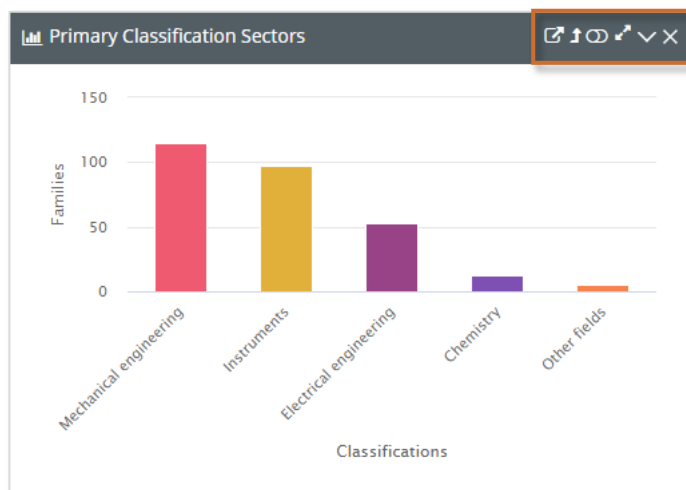
Click on a figure box to open the Data Locator tool. This will reveal relevant patent numbers for the selected figure box. Please refer to the [Data Locator tool](#) section for additional information.



Widgets

The widgets on the Dashboard provide a visual summary of the data analysed. Each widget has a set of Action Icons in the top right-hand corner of the widget.

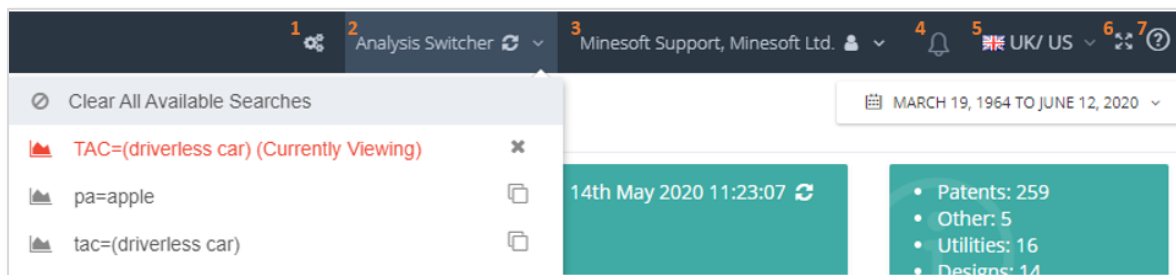
- 🔗 Link icon – directs to the corresponding detailed chart
- ↕ Flip icon – display bar chart horizontally or vertically (where applicable)
- 🔍 Toggle icon – toggle on to display data labels
- 🖥️ Expand icon – expand the chart to display in full screen view
- ⌵ Minimise icon – minimise widget from dashboard page
- ✕ Close icon – remove widget from dashboard page



Other Dashboard Features

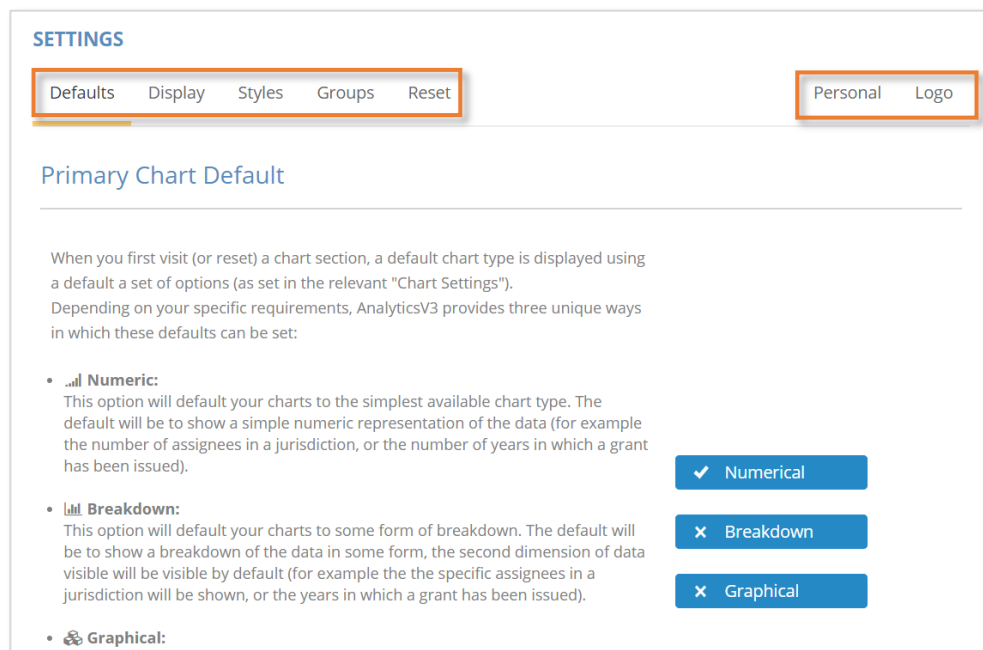
Additional functionality exists within the Dashboard to maximise the user experience including:

1. Dashboard settings – manage how the dashboard looks
2. Analysis switcher – switch between analyses within your current PatBase session
3. Notification and activity log menu – links to the notifications and activity page
4. Alert notification – new notifications alert, such as new publications for the analysis
5. Interface language – change the interface to English, Chinese, Japanese, Spanish, Portuguese, German or French
6. Full screen – enter full screen mode
7. Information – Analytics V3 information



Main settings

Access the Settings page from the Analytics menu on the left-hand side. Navigate through the settings tabs to modify default options, display, styles, groups and reset settings. Furthermore, personalise Analytics by adding your name, company, and a photo or logo.



Defaults

The Defaults section enables users to select the default settings for the charts, jurisdiction & legal status categories, chart settings, dashboard and general layout.

This includes three levels for the primary chart default settings, which have been designed to accommodate a range of users and requirements.

Primary Chart Default

- Numeric:** This option will default charts to the simplest available chart type. The default will be to show a simple numeric representation of the data (for example the number of assignees in a jurisdiction, or the number of years in which a grant has been issued). Designed for the user that wants to focus on the basic numbers.
- Breakdown:** This option will show a breakdown of the data with the second dimension of data visible by default (for example, specific assignees in a jurisdiction will be shown, or the years in which a grant has been issued). Designed for the user that wants to get stuck straight into the data breakdowns.

- **Graphical:** This option will default your charts to show a more graphical, visually interesting representation of the data. The default will be to show the data in a variety of forms, using a range of charts and layouts, focusing more on the visual aspect than the other two options (for example, less common chart types and 3D options where available will be used). Designed for the user that wants to create and download charts for presentations and reports, especially useful when the opportunity exists to present and explain the data, providing the possibility to be a little more creative with the chart's look and feel.

Standard Party Name Default

Choose to include or exclude non-standardised patent assignee and inventor names.

Please note: Standardised names are from the DOCDB file supplied by the EPO. Probable assignees are a sub-set of the standardised entities, and agents do not have standardised versions.

Jurisdiction and Legal Status Category Defaults

Choose to set the defaults for Jurisdiction and Legal Status as full names or the identifying codes (in the case of Jurisdictions ISO Alpha-2 codes and for Legal Statuses the PatBase codes).

Chart Setting Defaults

- **Extended maximum chart width:** The default maximum width is 3,000px. To show large quantities of data, the chart width can be extended to the maximum width to 20,000px.
- **Chart settings open or closed:** The chart settings box at the top of each chart page can be opened or closed by default. When closed there is more room for viewing and interpreting the graph and when open there is quicker access to the chart settings themselves.

Dashboard Chart Defaults

Choose to display 3D or 2D charts on the dashboard page.

General Layout Defaults

- **Switch menu location:** The Analytics menu can be switched from left-hand side to the right-hand side.
- **Breadcrumb or title:** The title at the top of the page can display the page title or the breadcrumb. The breadcrumb is useful to quickly locate where you are in Analytics V3 at any given time.

Display

These options manage what is, and what is not displayed by default on the Dashboard page of PatBase Analytics. This includes the Insights Bar, Information Bar, Figures Bar and the Widgets themselves.

Styles

Manage how PatBase Analytics V3 looks and feels by selecting the theme for the application and the style of the charts. There are 5 themes and 22 chart styles to choose from.


Groups

Launch the [Grouping App](#) to fully manage groups, including creating, editing and downloading or uploading groups files.

Within the group settings page, choose to toggle on or off jurisdiction, assignee, inventor, classification and/or agent groups. These groups can also be individually turned on and off in specific chart settings.

The screenshot shows a settings panel with five sections, each with a toggle switch and associated buttons:

- Use Jurisdiction Groups:** Toggle is ON (blue). Buttons: VIEW 2 GROUPS, EDIT.
- Use Assignee Groups:** Toggle is ON (blue). Buttons: VIEW 1 GROUPS, EDIT PROBABLE, EDIT PATENT.
- Use Inventor Groups:** Toggle is OFF (grey). Button: VIEW 0 GROUPS, EDIT.
- Use Classification Groups:** Toggle is ON (blue). Buttons: VIEW 1 GROUPS, EDIT CPC, EDIT IPC, EDIT F-TERMS, EDIT USPC.
- Use Agent Groups:** Toggle is OFF (grey). Button: VIEW 0 GROUPS, EDIT.

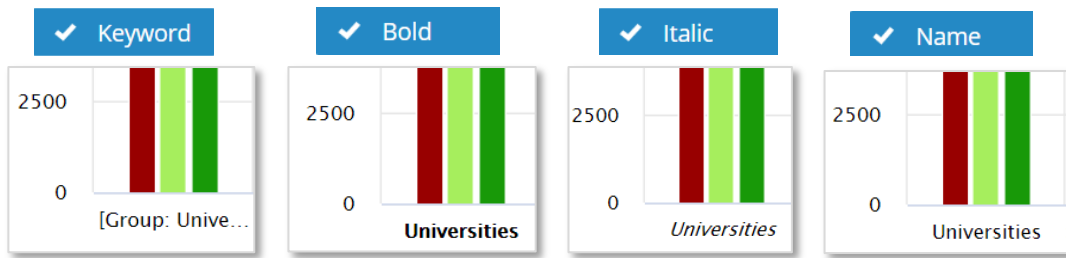
View existing groups by clicking the pop-up  icon.

The screenshot shows a pop-up window titled "Jurisdiction Groups" with a blue header. Below the header, it says "You have 2 Jurisdiction groups. To create, edit and manage your groups, please visit [Jurisdictions](#), or use the entity grouping app."

The main content area is divided into two columns:

- EUROPE:** A list of countries with their flags and codes: Albania (AL), Austria (AT), Belgium (BE), Bulgaria (BG), Croatia (HR), Czech Republic (CZ), Denmark (DK), Estonia (EE), Finland (FI), France (FR), Germany (DE), Greece (GR), Hungary (HU), Iceland (IS), Ireland (IE), Italy (IT), Latvia (LV), Lithuania (LT), Luxembourg (LU), Macedonia (MK), Malta (MT), Monaco (MC), Montenegro (ME), Netherlands (NL).
- WEBINAR EXAMPLE:** A list of countries with their flags and codes: Andorra (AD), Arab Emirates (AE), Anguilla (AI), Antigua And Barbuda (AG), Armenia (AM), Neth. Antilles (AN), Argentina (AR), Aruba (AW), Saudi Arabia (SA).

Choose how groups should appear in the charts, using the keyword "Group", bold, italic or name only.



Reset

Reset one or more of Analytics V3 settings, including the Analysis and Display settings.

Please note: Using any of these reset methods will permanently discard the corresponding current settings.

Personal & logo

Personalise the analytics display and reports by adding your name, company and photo or logo. It is recommended to upload either a passport style photo or company logo to add company branding on downloaded reports.

Please note: Uploaded images will be resized to 130 x 130 pixels - crop and or resize the image before uploading it to retain the correct aspect ratio.

Keyboard Shortcuts

To aid navigation around Analytics there are a number of keyboard shortcuts available. To use these shortcuts, hold down the **[Ctrl]** and **[Alt]** keys, and then press one of the following:

Navigation	
R	Reset current graph
S	Go to your saved searches

Primary defaults	
B	Switch to <i>Breakdown</i> display
N	Switch to <i>Numeric</i> display
G	Switch to <i>Graphic</i> display

Style	
Space	Change chart style

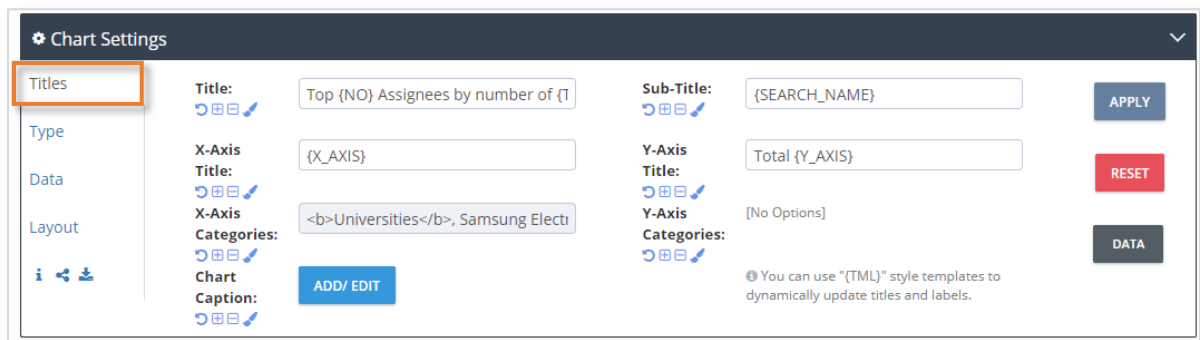


Chart Settings

Depending on the viewed analysis the chart settings above the chart will show different sets of options.

Title

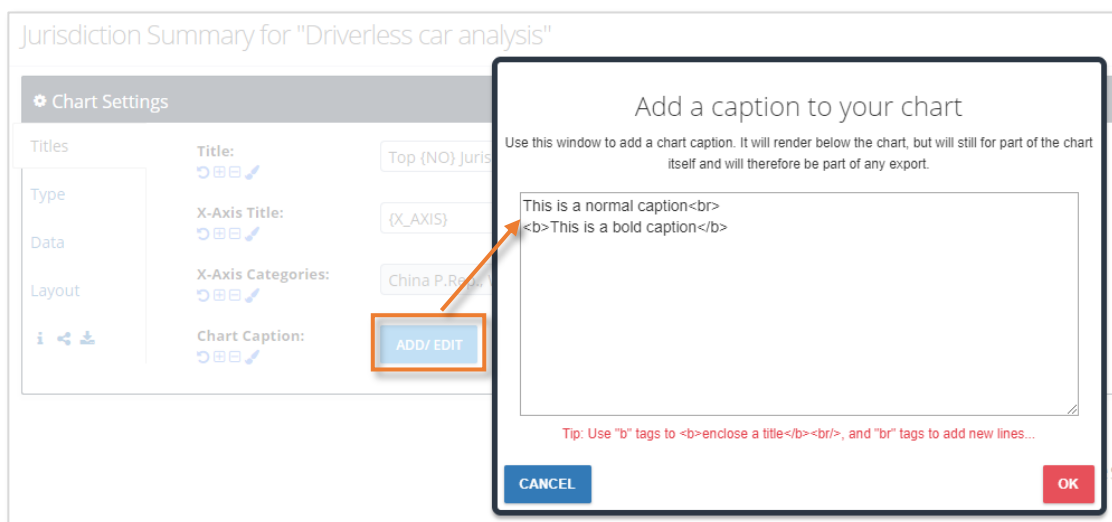
Rename the title, sub-title, axis-title of the chart in the corresponding text boxes.

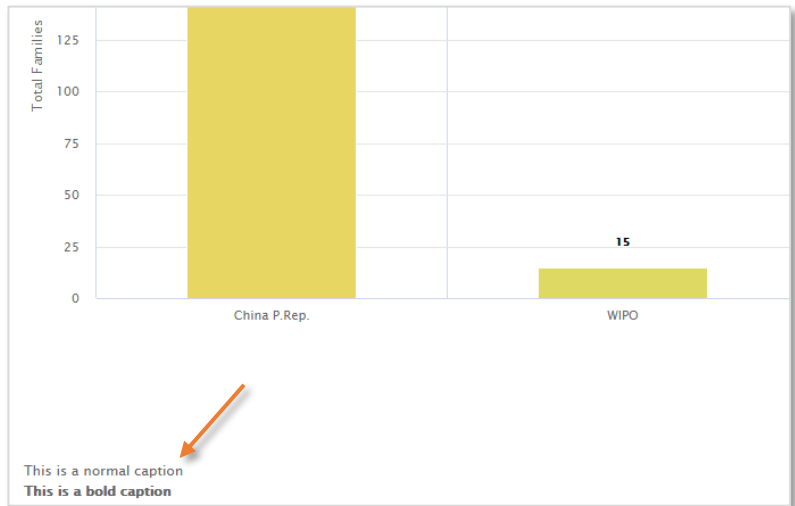


Adjust the font size of the title text(s) using the plus and minus icons and the text colour using the paint brush icon. Click the reset icon to revert to the original font size and colour.



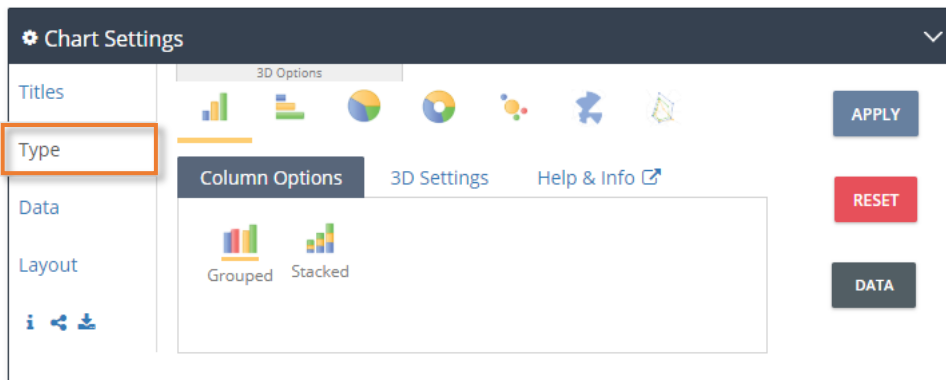
Select the "Add/Edit" button to include a chart caption. The added caption will appear in the bottom left-hand corner of the chart.



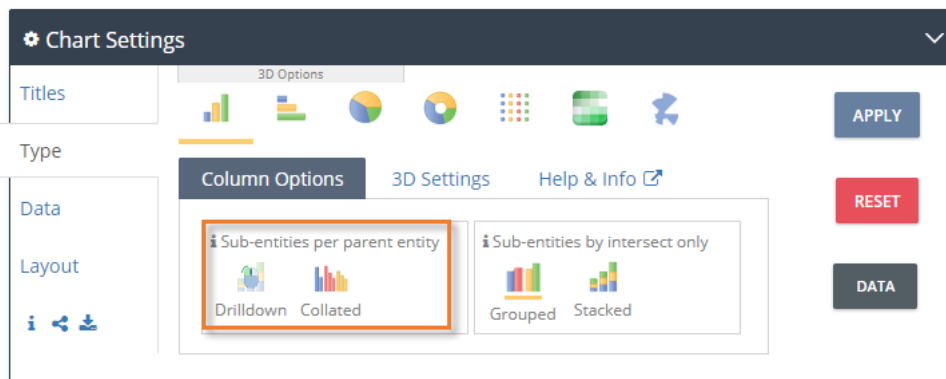


Type

Charts are available in numerous types and forms, such as column, pie, scatter etc., with the most appropriate chart displayed according to the primary chart [default setting](#). Select from the available chart types and, depending on the type selected, modify the chart using available options and 3D settings.

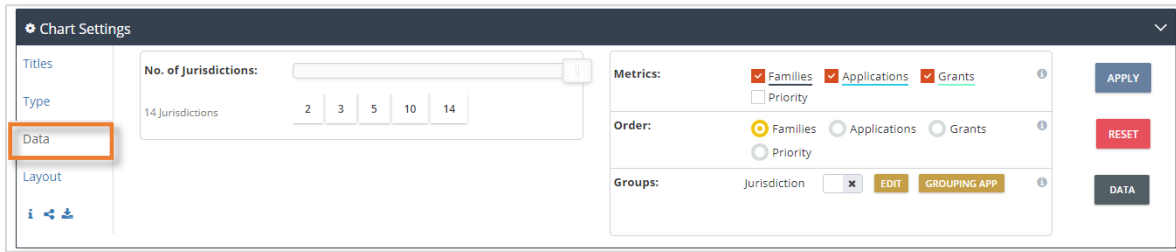


If viewing a drilldown chart (e.g. probable assignees by jurisdiction), additional options include using the mouse click to drilldown into the chart or displaying both sets of data in a collated chart view.



Data

Refine the amount of data to display in the charts using the slider bar or the quick select numbers. Select the unit of metrics to display in the chart, such as number of families, applications, grants and/or priority. An order of display can also be specified as well as the ability to edit and apply [groups](#).



Layout

Adjust the width, height and margin of the chart, as well as choose to include/exclude legend, data labels, x/y axis and grid lines.

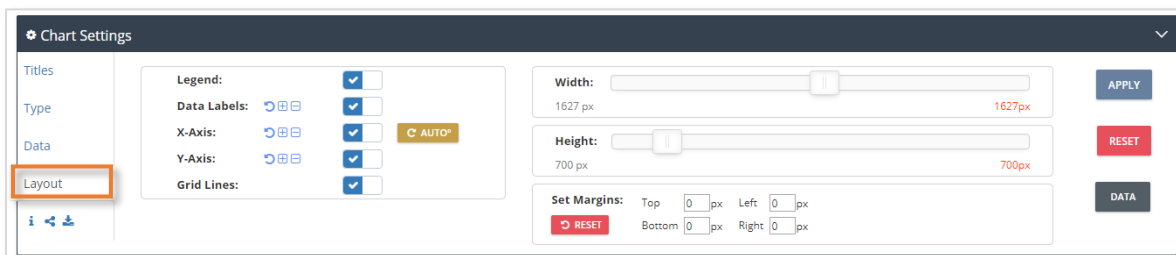
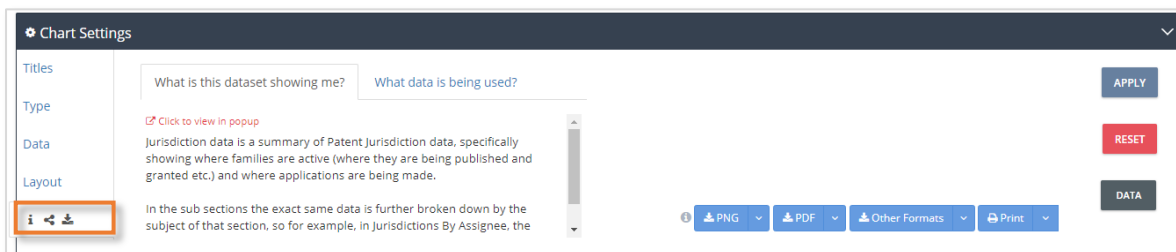


Chart information, share and download

Where available, information on what the dataset is showing and what data is being used for the chart is displayed here. Select to download or print the chart in JPEG, PNG or PDF format. Additional options are available in the drop-down menus.



Other chart settings

There are 3 buttons on the right-hand side of the chart settings box which are always present.

APPLY

Click “Apply” to push through any chart settings changes that do not immediately refresh and appear in the chart.

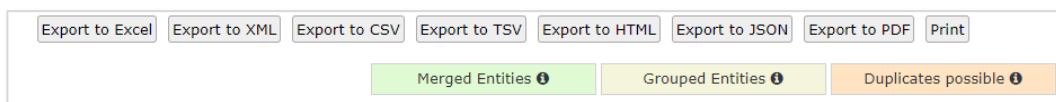
RESET

Discard any changes that have been made in the chart settings by clicking on “Reset”. This will refresh the page and display the original default chart.

DATA

View the raw data on which the chart is based on by clicking on the “Data”. To take specific data back into PatBase, select a data cell of interest to open the [Data Locator](#) tool.

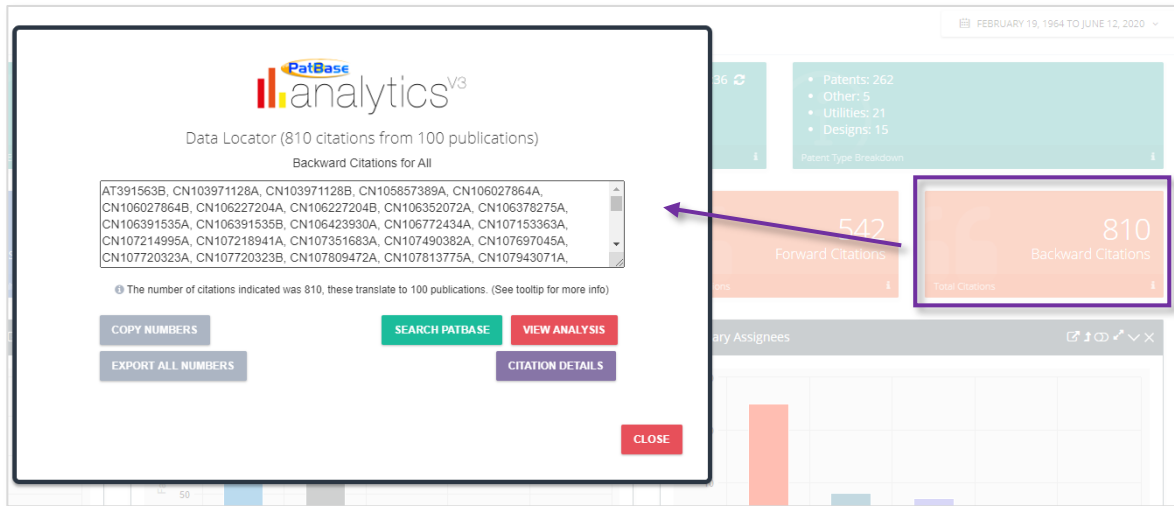
Raw data can also be printed or exported in various formats at the bottom of the page.



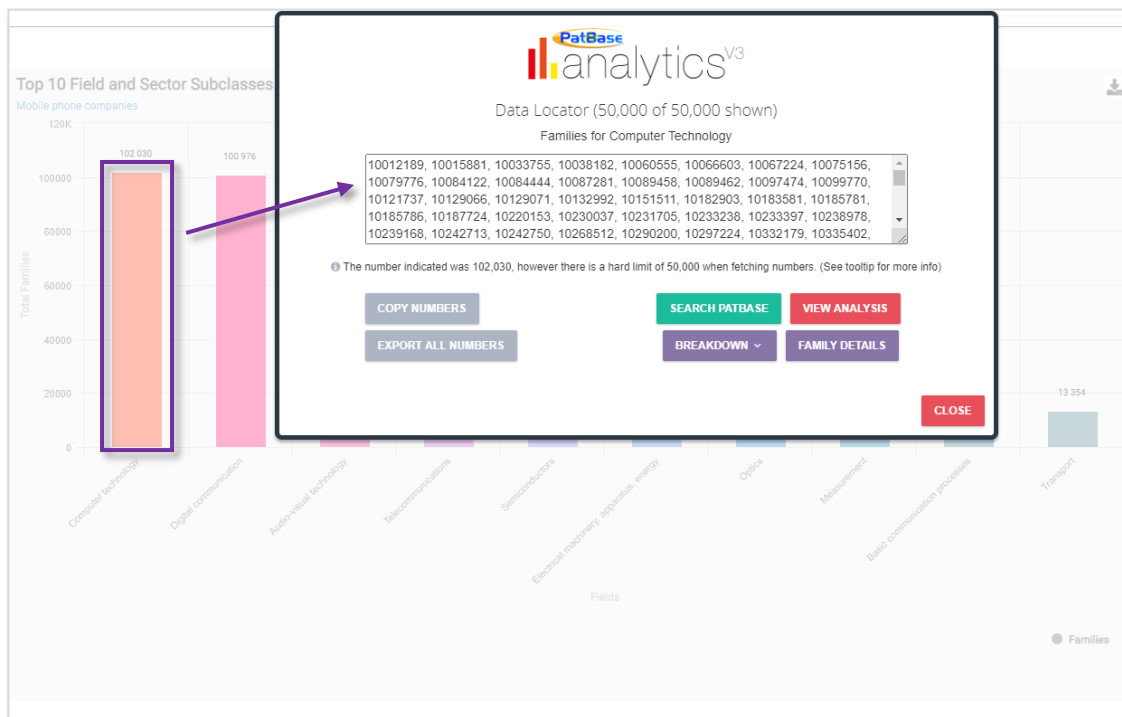
The Data Locator tool

The Data Locator tool extracts the data for the selected datapoint of interest to reveal relevant patent numbers. Users can easily copy the full list of numbers or export all numbers in CSV format. In addition, users can search this data in PatBase, run an instant analysis or view the details of the documents that make up this data point.

Click on the blue, red or orange figure box displayed on the dashboard page to open the Data Locator tool.



When viewing analysis charts, click on the chart data to open the Data Locator tool.



When viewing the raw data behind a chart, click on a datapoint cell in the table will open the data locator tool.

PatBase analytics^{V3}
Data Locator (8,614 found)
Families for Surface Technology, Coating

10173887, 10189331, 10227985, 10231720, 10257064, 10415690, 10634449, 10634670, 10639905, 10654257, 10679478, 10699975, 10707011, 10708504, 10760267, 10765366, 10791029, 10802081, 10822670, 10825814, 10842761, 10842967, 10847762, 10856806, 10886200, 10972378, 10979766, 10982865, 10988328, 10989894, 11002572, 11017673, 11027787, 11027941, 11033969, 11044532, 11056864, 11057796, 11078499, 11085722,

COPY NUMBERS SEARCH PATBASE VIEW ANALYSIS
EXPORT ALL NUMBERS BREAKDOWN FAMILY DETAILS

CLOSE

Control	11,031	18,427	10,310
Surface technology, coating	8,614	15,455	7,899
Textile and paper machines	7,293	12,597	7,528
Handling	6,990	10,384	6,658
IT methods for management	6,959	14,420	4,946
Mechanical elements	6,523	9,679	5,772

Please note: A maximum of 50,000 numbers can be fetched at the one time by the data locator tool.

Viewing family details

Additional details can be viewed for the families within the data locator list. For example, clicking on “Citation details” (forward citations) will display the families that have been citing the current analysis data set.

Viewing the details of the documents has many features. Utilise the checkboxes (Next to the representative title for the family) to analyse or search specific documents.

Show only matching data: No

6. Driverless Vehicle Steering Control Method And Apparatus China P.Rep., United States of America [VIEW ANALYSIS](#)
Further Information ▾

BAIDU ONLINE NETWORK TECH BEIJING CO LTD


Driverless Vehicle Steering Control Method And Apparatus

Family No.	63221802
Earliest Priority	China P.Rep./ 2016
Earliest Publication	China P.Rep./ 2016
Matching Citations (this family)	8 / 8
Citations Identified (total)	73 / 538


The present application discloses at least a the steering control method and apparatus for a driverless vehicle. In some embodiments, the method includes: acquiring in real time a current location of a driverless vehicle; finding, on a high precision map, a curvature radius of a turn on a road at the current location; acquiring a distance between a front axle and a rear axle and an axle length of the driverless vehicle in response to finding the curvature radius; determining a rotation angle of a steering wheel of the driverless vehicle based on the curvature radius, the distance between the front axle and rear axle, and the axle length; and controlling the steering wheel of the driverless vehicle to rotate by the rotation angle. This implementation can reduce the number of times the driverless vehicle is steered, thereby improving passenger experience of the driverless vehicle.


Cited documents (in this family):
[CN105857389A](#) (8) [US10095237B8](#) [US2017313352AA](#)


Citing documents (View in PatBase):
[CN107150691A](#) [CN107792071A](#) [CN108944899A](#) [CN108088686A](#) [CN109606467A](#) [CN107479550A](#) [CN107783533A](#) [CN107918388A](#)



67% Alive

Citation Categories:  A X Y

Citing Jurisdictions:  CN

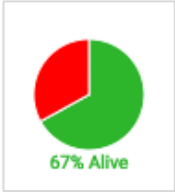
Citing Years:  2017 2018 2019

[CLOSE](#) [RETURN TO GRAPH/ DATA \[ESC\]](#)

Select “Further Information” in the right-hand corner to search for a family in PatBase, open the Legal Information Browser, Family Explorer, Citation Explorer, or Family Insight. The pie chart on the right-hand side represents the percentage of documents within the family that is still “Alive”.

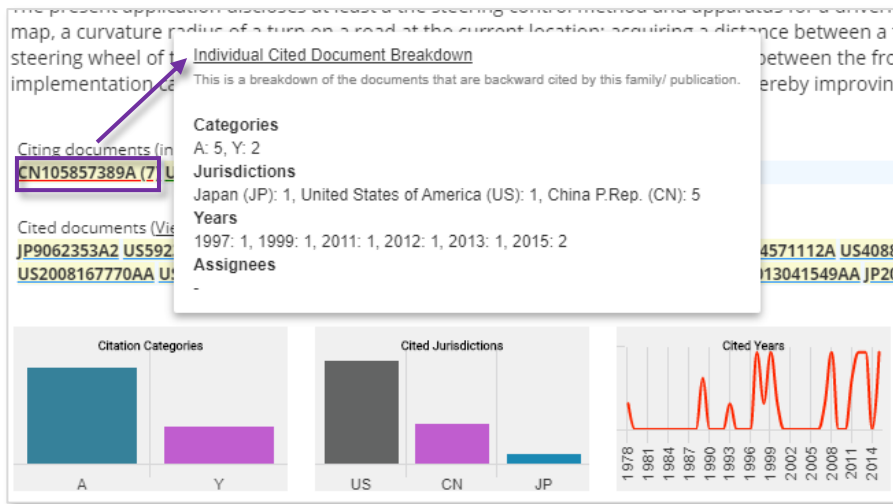
China P.Rep., United States of America [VIEW ANALYSIS](#)
Further Information ▾

- [Search in PatBase](#)
- [Legal Information Browser](#)
- [Family Explorer](#)
- [Citation Explorer](#)
- [Family Insight](#)



67% Alive

Citation information can be viewed for the family at the bottom. Hover over the citing document numbers to view the individual cited document breakdown or click on the document number to view in PatBase. There are also charts displaying the citation categories, cited jurisdictions, and cited years breakdown.



Cited document numbers can be bulk viewed in PatBase by clicking on the “View in PatBase” link.



Category breakdown

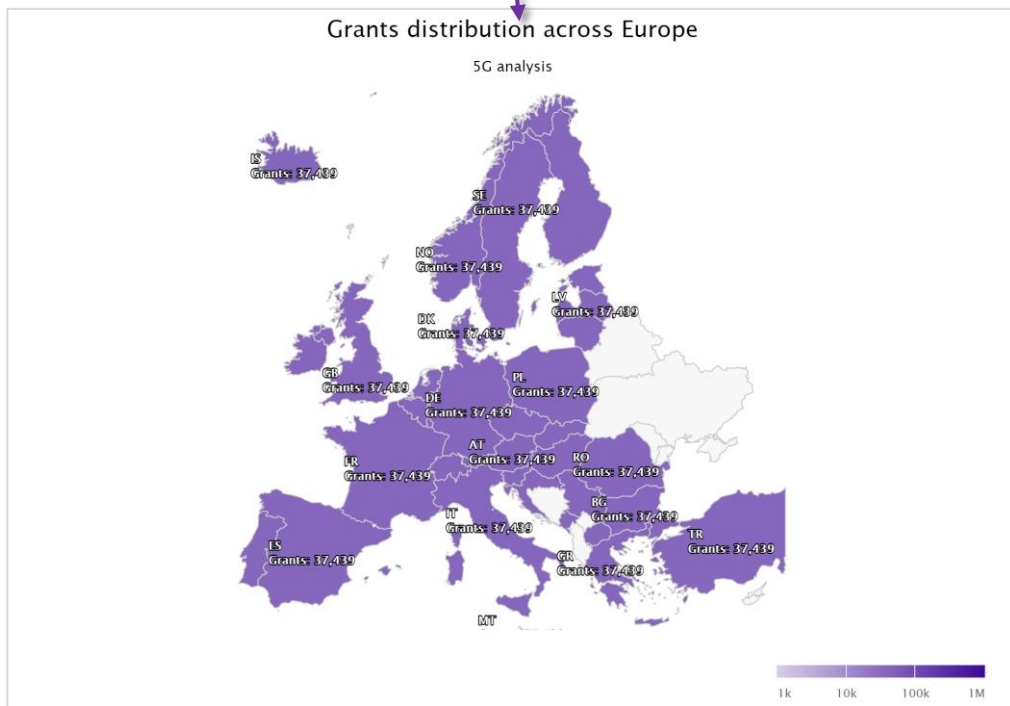
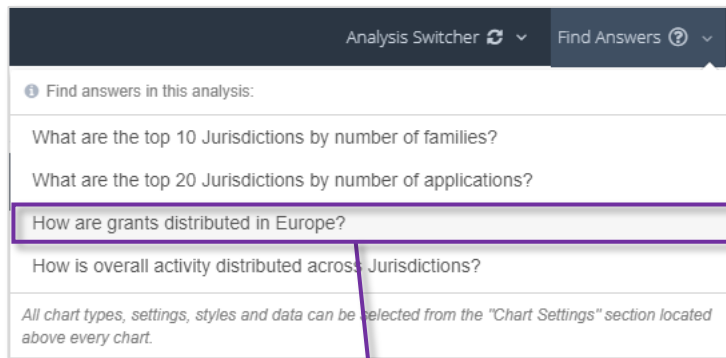
Select a category from breakdown list to see an instant analysis of the documents for the chosen area.

Analysis options

The Analytics menu on the left-hand side displays the 9 analysis options available in Analytics V3. Click on an analysis of interest to expand the menu and reveal sub sections broken down by the subject of that section.

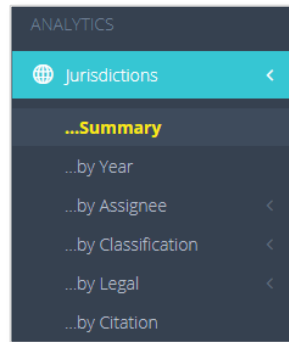
Find Answers

When viewing analysis charts, a “Find answers” option will appear in the top tool bar. Select any question of interest in the list to display an analysis chart with the answer.



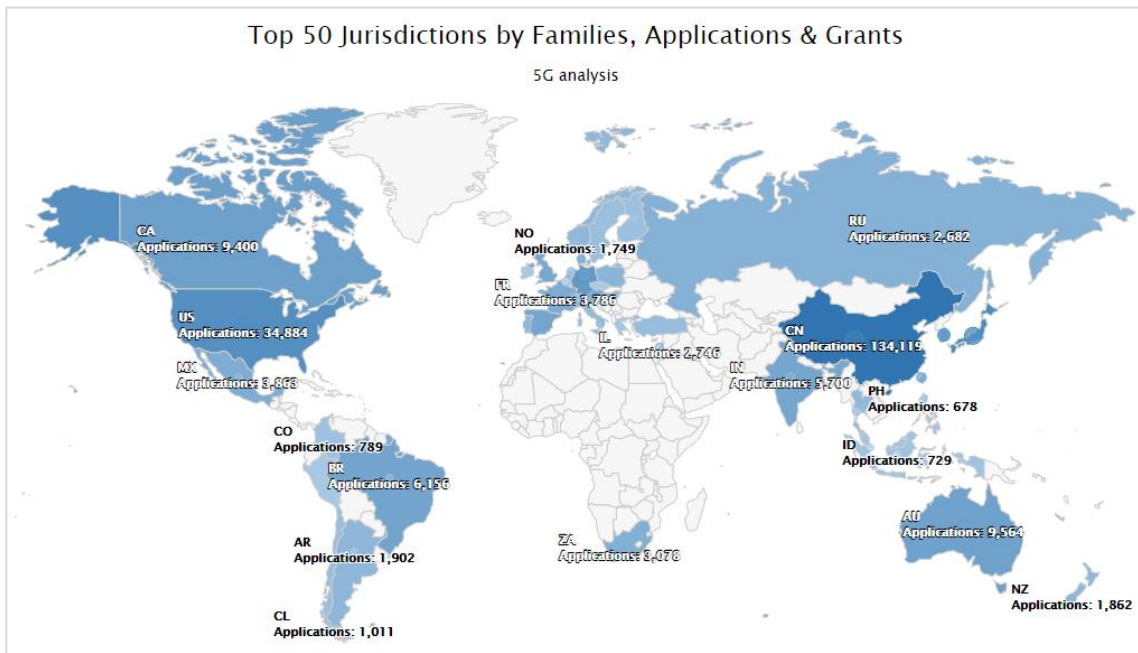
Jurisdiction analysis

The jurisdiction charts show specifically where families are active (where they are being published and granted etc) and where applications are being made. Clicking on Jurisdiction in the Analytics menu reveals sub sections with the exact same data but broken down by the subject of that section.



Jurisdiction Summary

A chart showing the number of families, applications, grants, and/or priority filings that have been filed in a specific jurisdiction. Data for families is represented by one or more publication(s) having been filed in a specific jurisdiction, and data for priority filings shows the number of families by earliest priority jurisdiction.



Jurisdiction by Year

A chart showing the number of families, applications, or grants (selected from the chart settings) filed over the past number of years in a specific jurisdiction.

Jurisdiction by Assignee

A chart showing the number of families, applications, grants, or priorities (selected from the chart settings) filed by the top jurisdictions (probable or patent assignee) in a specific jurisdiction.

Jurisdiction by Classification

A chart showing the number of families, applications or grants (selected from the chart settings) within a specific technology area (based on IPC and CPC classification codes) or with a specific CPC, IPC, Japanese F-terms or US classification code that have been filed in a specific jurisdiction.

Jurisdiction by Legal Status

...event group

A chart showing the **frequency**, number of publications or applications (selected from the chart settings) filed in a specific jurisdiction, broken down by the latest legal status event group (e.g. published, examined etc.).

Frequency: *Legal events can occur many times per publication, so you may want to see the number of applications or publications that have a certain event, but frequency will provide (in addition) the absolute total number of instances – not just calculated once for each metric.*

...dead or alive

A chart showing the number of alive and/or dead applications filed in a specific jurisdiction. Applications are assumed to be alive unless they contain a specific legal event notifying that they are no longer active.

... time to grant

A chart showing from quickest to slowest (or vice versa) application to grant time for the top jurisdictions.

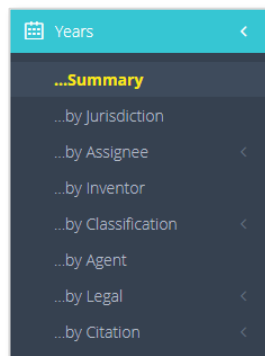
Jurisdictions by Citation

A chart showing the number of forward and backward citations (selected from the chart settings) filed in a jurisdiction.

Please note: *In the cases of jurisdiction/families and jurisdiction/applications, the total count of jurisdiction hits may exceed the total number of families and applications being analysed. This is because one family may have publications and/or applications in multiple jurisdictions.*

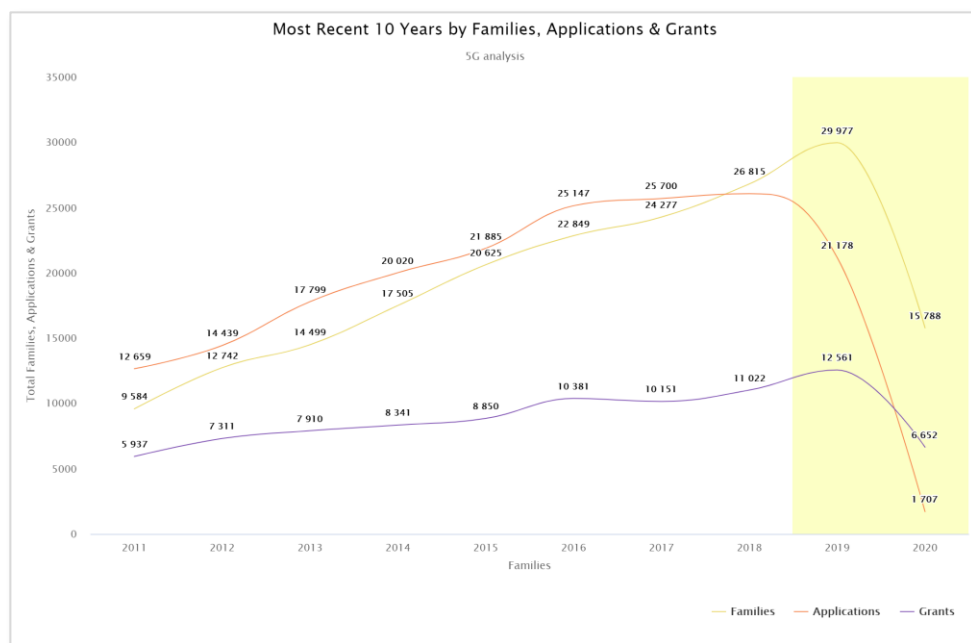
Years analysis

The years charts show data over time, with years normally on the x-axis. Clicking on Years in the Analytics menu reveals sub sections with the exact same data but broken down by the subject of that section.



Years Summary

A chart showing the number of families, applications, grants, and/or priority filings (selected from chart settings) that have been filed each year for the last number of years. The chart shows the number of families with published activities in any given year, the number of priorities by earliest (filing) date, the number of applications by application date and the number of granted patents by grant date.



Years by Jurisdiction

A chart showing the number of families, applications, grants, or priority filings (selected from the chart settings) which have been published over time in the top jurisdictions.

Years by Assignee

A chart showing the number of families, applications, grants, or priority filings (selected from the chart settings) which have been published over time by the top assignees.

Year by Inventor

A chart showing the number of families, applications, or grants (selected from the chart settings) which have been published over time by the top inventors.

Years by Classification

A chart showing the number of families, applications or grants (selected from the chart settings) which have been published within a key technology sector and field or with a specific CPC, IPC, Japanese F-terms or US classification code that have been filed over time.

Years by Agent

A chart showing the number of families, applications, or grants (selected from the chart settings) which have been published over time by the top agents.

Years by Legal...

...event group

A chart showing the frequency, number of publications or applications (selected from the chart settings) filed over time, broken down by the latest legal status event group (e.g. published, examined etc.).

...dead or alive

A chart showing the number of alive and/or dead applications filed over time. Applications are assumed to be alive unless they contain a specific legal event notifying that they are no longer active.

Years by citation

...summary

A chart showing the number of families, applications, or grants (selected from the chart settings) filed over time, broken down by forward and backward citations.

...Probable assignee citing (forwards)/cited (backwards)

A chart showing the number of forwards/backwards citations (publications) or applications filed over time by the top probable citing/cited assignees. This is a breakdown of the forward citations as shown by the forwards/backwards charts in the years by citation summary chart.

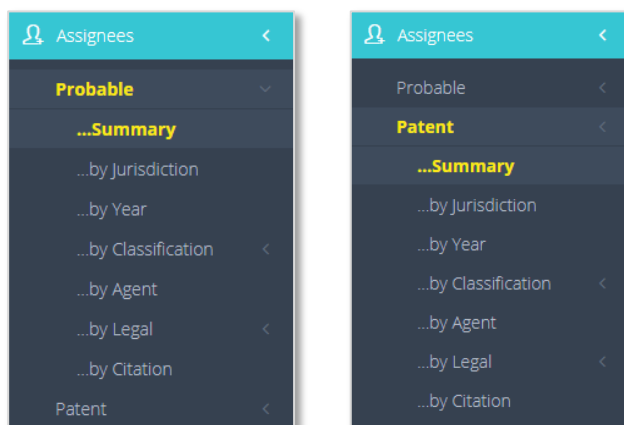
Please note: *There may be data external to the current result set displayed in the chart. The years shown are publication years of the forward citing documents/backward cited documents - and not the years of the cited/citing documents in the result set. This means that multiple years in this set could potentially all cite a single year in the result set. Also note, the years by citation summary chart shows the absolute total for each year - this chart only shows the data for the set number of assignees in any given year.*

Assignees analysis

The assignees charts show data ordered by probable or patent assignees.

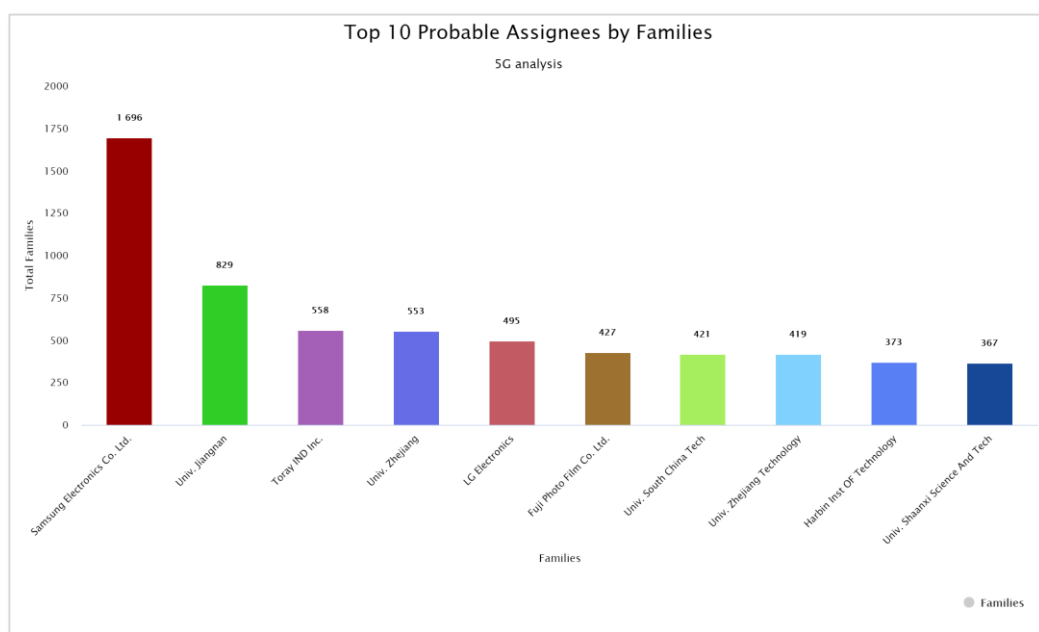
- **Probable assignee** – the most likely current owner of the patent family based on reassignment information and the most recent publications appearing in the family.
- **Patent assignee** – the assignees from the various patent documents that make up a family.

Clicking on Assignees in the Analytics menu and selecting either probable assignee or patent assignee, reveals sub sections with the exact same data but broken down by the subject of that section.



Assignees Summary

A chart showing the number of families, applications and/or grants (selected from the chart settings) that have been filed by the top assignees.



Assignees by jurisdiction

A chart showing the number of families, applications, or grants (selected from the chart settings) which have been filed in the top jurisdictions by the top assignees.

Assignees by year

A chart showing the number of families, applications, or grants (selected from the chart settings) filed over the past number of years by the top assignees.

Assignee by classification

A chart showing the number of families, applications or grants (selected from the chart settings) which have been filed in a key technology field and sector or with the top IPC, CPC, Japanese F-terms or US classification codes by the top assignees.

Assignee by Agent

A chart showing the number of families, applications, or grants (selected from the chart settings) which have been filed by the top prosecuting agent by the top assignees.

Assignees by Legal

...event group

A chart showing the frequency, number of publications or applications (selected from the chart settings) filed by the top assignees broken down by the latest legal status event group (e.g. published, examined etc.).

...dead or alive

A chart showing the number of alive and/or dead applications filed by the top assignees. Applications are assumed to be alive unless they contain a specific legal event notifying that they are no longer active.

...time to grant

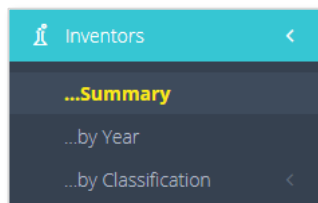
A chart showing from quickest to slowest (or vice versa) application to grant time filed by the top assignees.

Assignees by Citation

A chart showing the number of forward and backward citations (selected from the chart settings) filed by the top assignees.

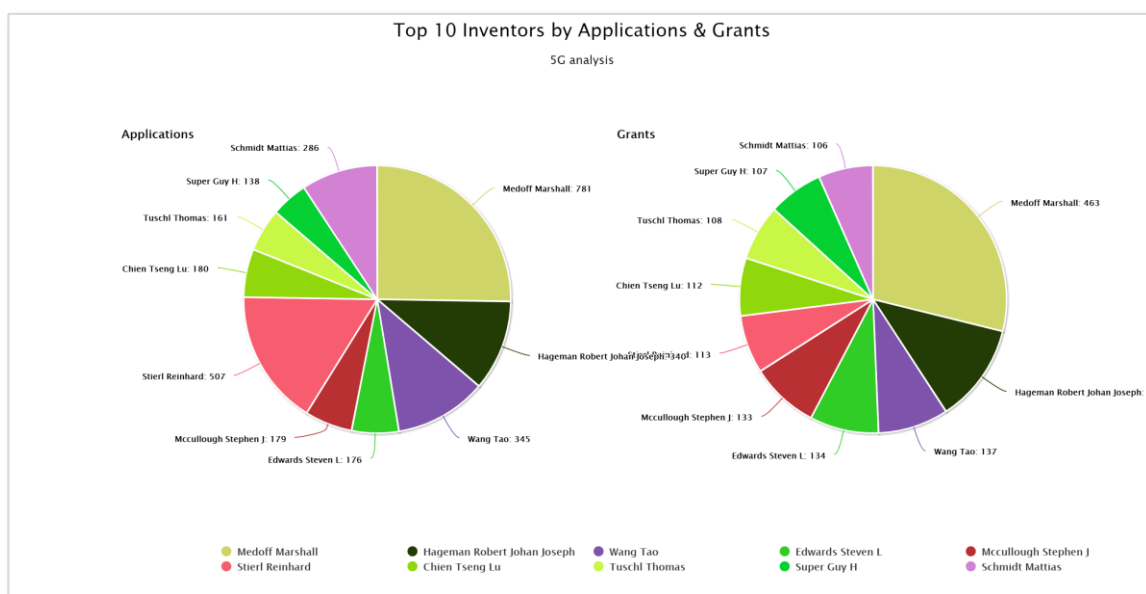
Inventors analysis

The inventors chart show data on inventor activity through the number of filings. Clicking on Inventors in the Analytics menu, reveals sub sections with the exact same data but broken down by the subject of that section.



Inventors Summary

A chart showing the number of families, applications and/or grants (selected from the chart settings) that have been filed by the top inventors.



Inventors by Year

A chart showing the number of families, applications, or grants (selected from the chart settings) filed over the past number of years by the top inventors.

Inventors by Classification

A chart showing the number of families, applications or grants (selected from the chart settings) which have been filed in key technology fields and sectors, or with the top IPC, CPC, Japanese F-terms or US classification codes, by the top inventors.

Classifications analysis

The classification charts show data through technology fields and sectors or individual classification systems. Clicking on Classification in the Analytics menu, reveals sub sections with the exact same data but broken down by the subject of that section.

The technology sectors and fields and in-house groupings of the classification groups and subclasses create a higher-level classification. Hovering over the charts will display a tooltip summary of the classification being viewed, clicking the associated data will open a popup window with a full description of the classification in question.

Field and sector

Fields and Sectors are overall groupings, each containing many classifications. Sectors being the higher-level umbrella term e.g., chemistry, and fields the sub-level of Sectors, e.g., surface technology, coatings. Select the grouping to display in the chart from the chart settings menu under the data tab.



IPC/CPC/F-terms/USPC classifications

For individual classifications, the first letter represents the "section" and when combined with a two-digit number represents the "class". The final letter in the class makes up the "subclass" followed by a one-to-three-digit "group", and a number with at least two digits representing a "sub-group".

IPC classification hierarchy example

Section: A – Human Necessities

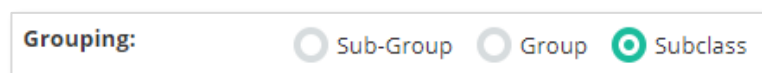
→ **Classes: A01** - Agriculture; Forestry; Animal Husbandry; Hunting; Trapping; Fishing

→ → **Subclasses: A01C** - Planting; Sowing; Fertilising

→ → → **Main groups: A01C1/00** - Apparatus, Or Methods Of Use Thereof...

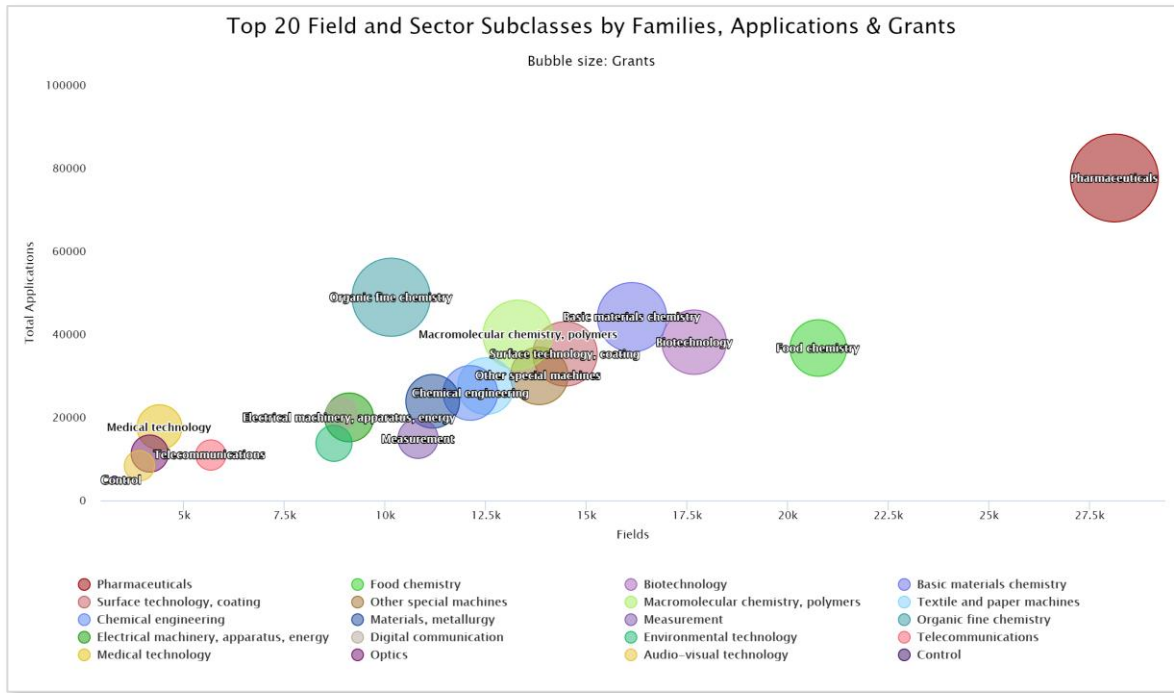
→ → → → **Subgroups: A01C1/04** - Arranging Seeds On Carriers, E.g. On Tapes, On Cords

Select the grouping to display in the chart from the chart settings menu under the data tab.



Classifications Summary

A chart showing the number of families, applications and/or grants separated into the top technology field and sector or with the top IPC/CPC/F-terms/USPC classification codes.



Classifications by Year

A chart showing the number of families, applications or grants (selected from the chart settings) in the top technology field and sector or with the top IPC/CPC/F-terms/USPC classification codes which have been published over the last number of years.

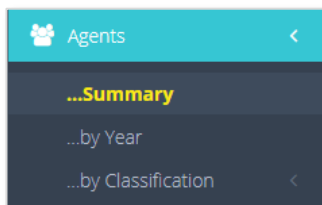
Classifications by Assignee

A chart showing the number of families, applications or grants (selected from the chart settings) in the top technology field and sector or with the top IPC/CPC/F-terms/USPC classification codes which have been published by the top assignees.

Please note: Each main classification is only counted once for each family.

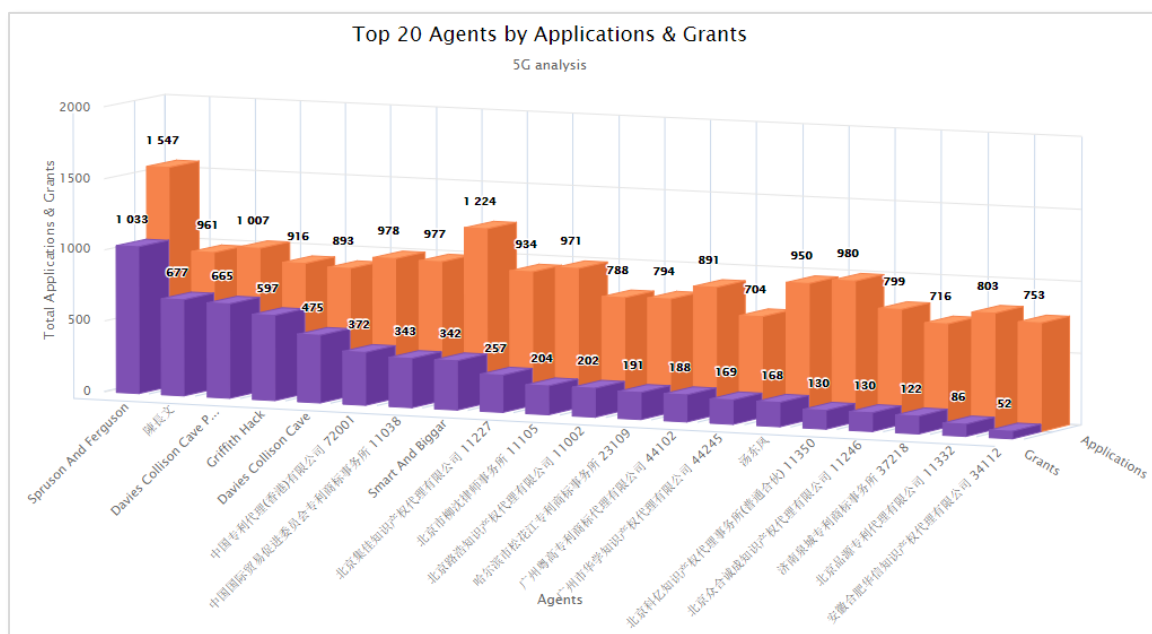
Agents analysis

The agent charts show data on agent activity through the number of filings. Clicking on Agents in the Analytics menu, reveals sub sections with the exact same data but broken down by the subject of that section.



Agents Summary

A chart showing the number of families, applications and/or grants (selected from the chart settings) broken down by the top prosecuting agents.



Agents by Year

A chart showing the number of families, applications, or grants (selected from the chart settings) which have been prosecuted by the top agents which have been published over the last number of years.

Agents by Classification

A chart showing the number of families, applications or grants (selected from the chart settings) which have been prosecuted by the top agents in the top technology field and sector or with the top IPC/CPC/F-terms/USPC classification codes.

Legal status analysis

The Legal Status charts are based on PatBase legal status event groups such as "Published" and "Granted". The Legal Status groupings are based on the PRS codes from INPADOC and the patent office codes from each National Patent Office. They are then allocated into a category to make them easier to manage. All the groups are counted, totalled, and graphed in several ways in each section.

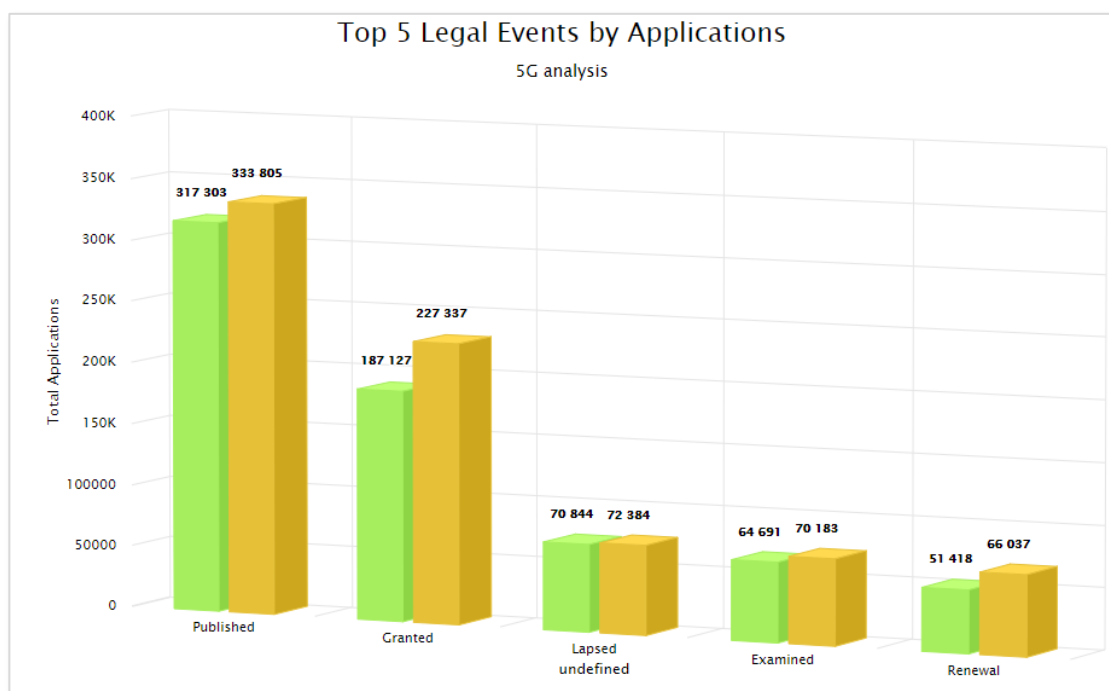
Please note: the legal status event groupings were put together by Minesoft and RWS to group INPADOC and National Patent Office event codes into a set of consistent groups.

Legal status disclaimer: The legal statuses displayed are only those that are known to us, this means that it is possible that there are unknown legal events and/ or litigation statuses. This data does not constitute legal advice in any way, a qualified attorney should be consulted for advice on patent legal status.

Clicking on Legal Status in the Analytics menu, reveals sub sections with the exact same data but broken down by the subject of that section.

Legal Status Summary

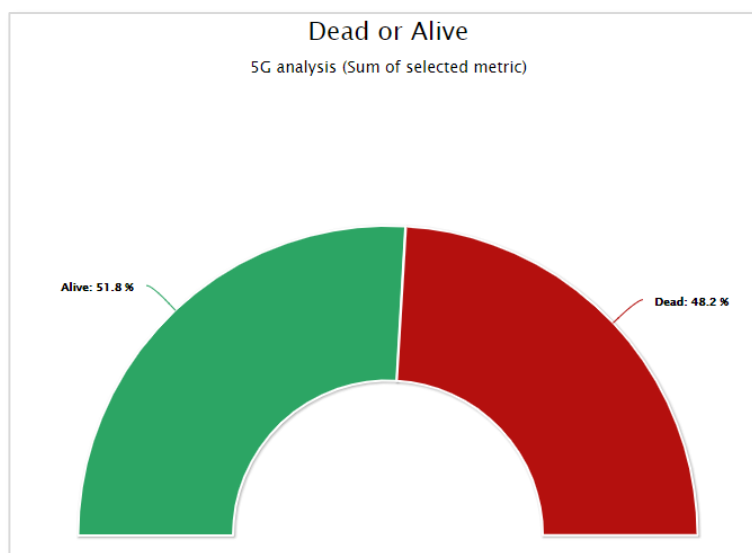
A chart showing the frequency, number of publications or applications broken down by the latest legal status event group (e.g. published, examined etc.).



Dead or Alive

...Summary

A chart showing the number of publications which are dead or alive from a legal status perspective.



...for jurisdictions

Please see [Jurisdictions](#) by Legal Status... dead or alive.

...for assignees

Please see [Assignees](#) by Legal Status... dead or alive.

...for years

Please see [Years](#) by Legal Status... dead or alive.

Dead/Alive disclaimer: The dead/alive tag is derived from the INPADOC database produced by the European Patent Office, as well as National Patent Office data where available. Minesoft and RWS do not warrant or assume any legal liability or responsibility for the accuracy or completeness of the data. A qualified attorney should be consulted for advice on patent legal status.

Please note: Not every application is accounted for in the dead/alive charts - especially when samples are used for large numbers of applications. The data is collated by looping back through the years from present day. When a publication is first determined as alive, it is assumed that it has always been alive since filing. This means that in cases where patents are revoked and then reinstated in a different year, the most recently detected "alive year" will be the one reported.

Litigation

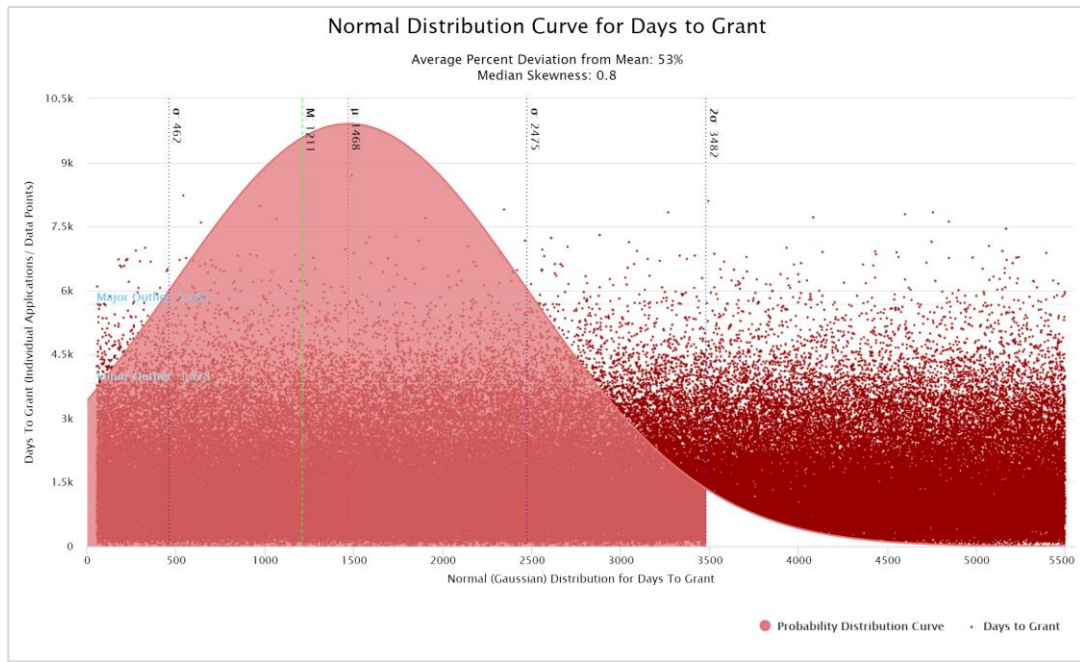
A chart showing the number of instances for each litigation status.

Please note: Litigation statuses are counted for every publication instance involving litigation. For example, litigation listed against 3 involved publications, then the associated litigation status will be shown 3 times.

Time to Grant

...distribution

A chart showing the normal distribution curve for days to grant.



...for jurisdictions

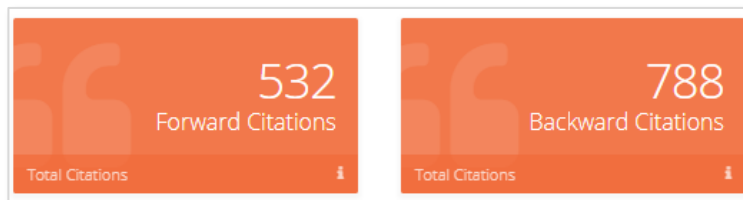
Please see [Jurisdictions](#) by Legal Status... time to grant.

...for assignees

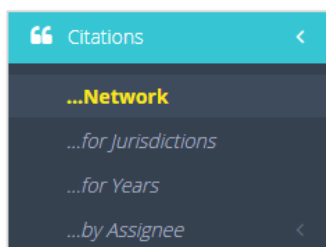
Please see [Assignees](#) by Legal Status... time to grant.

Citation Analysis

The citation charts show data through backwards and forwards citations. The absolute total number of citations for all families in the result set is shown on the dashboard page.



Clicking on Citations in the Analytics menu, reveals sub sections with the exact same data but broken down by the subject of that section.



Citations for Jurisdictions

Please see [Jurisdictions](#) by Citation.

Citations for Years

Please see [Years](#) by Citation.

Citations by Assignees

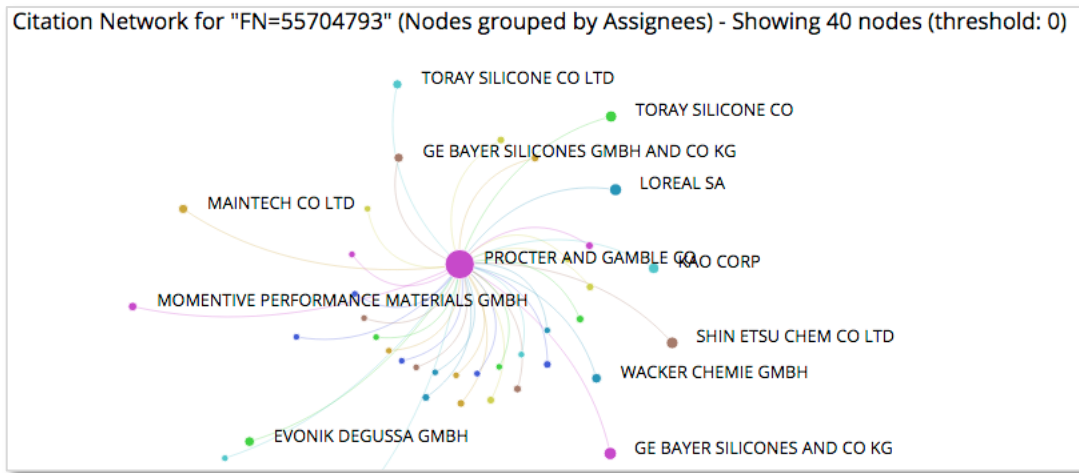
Please see [Assignees](#) by Citation.

Citation Network

The Citation Network Explorer creates visual representations of complex patent citation networks. This tool creates a graph network for citations of the set of families in your result-set.

The first thing to know is that while all nodes represent a specific assignee, there are two main types of node:

- **Parent nodes** – formed from at least one family from the currently analysed result set (i.e. if an assignee in the search is cited or citing that it is a *Parent Node*).
- **Citation nodes** – consist only of a citing (or cited) assignee (i.e. if the assignee does not otherwise appear in the result set). Please refer to the network below which is formed from just one family (55704793), the assignee of the family is *Procter and Gamble* which therefore forms the sole parent node (in the centre).



The Citation Network is a graphical representation of citations (represented as edges) between selected entities (represented as nodes). It is constructed as a Network Graph using nodes and edges. The nodes currently only represent assignees.

The size of the node is relative to the total number of citations to (or from) that node. An assignee with lots of citations appears as a large node, and assignee with fewer citations appears as a smaller node.

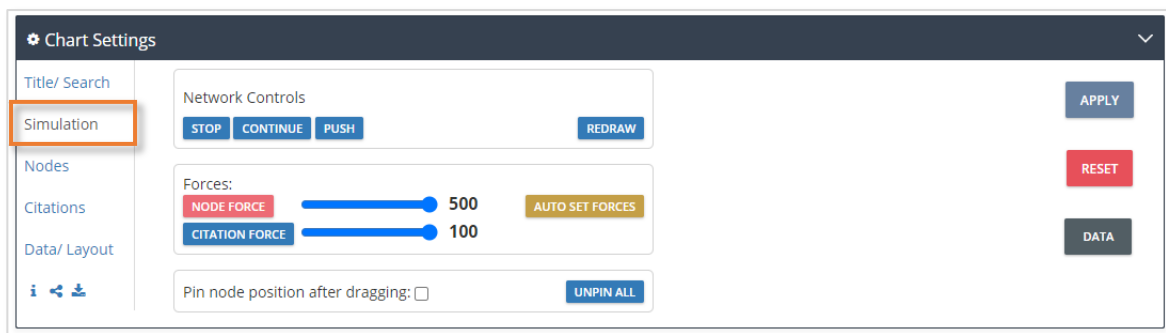
The links, known as "edges" in a network graph, represent the citations to or from each of the nodes. To be precise - a single edge represents any number of citations from one assignee to another. So, an edge between two nodes is representing at least one citation of the selected direction (either forward or backward).

The absolute number of edges therefore shows the unique number of citing (or cited) assignees. One edge represents a unique assignee to assignee link (set of citations).

Please note: A maximum of 500 families can be reasonably displayed in a single network. If above the maximum, a random sample of 500 families will be used to create a representative network.

Simulation settings

The network is based on simulated "forces", these separate the nodes, stop nodes overlapping and define the length of the edges. For example: larger nodes exert a proportionately larger outward "pushing" force (called Node Force), this means that they clear some space around themselves and are therefore more readily identified.



The simulation settings enable users some control over these fundamentals of the simulation.

Network controls

- Stop – turn off all currently applied forces, this has the effect of stopping all current node interactions, if there are any
- Continue – turn on all current forces, this has the effect of starting (or un-pausing) all current node interactions
- Push – gives all the forces a little "shove" by slightly re-powering the strength of the forces (this added power will then degrade as normal)
- Redraw – this will simply redraw the active network using the current settings

Forces

- Auto set forces – will automatically adjust the Node and Citation Forces until all nodes sit nicely within the Network Panel
- Node force – this is the repulsive force between nodes, the larger the force the more the nodes repulse each other
- Citation force – determines the length of the citation links, the larger the force the longer the citation links appear

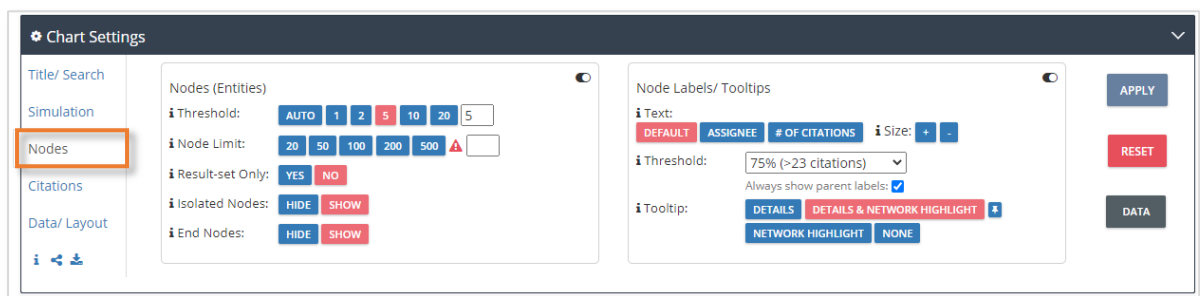
Pinning

- Pin node position after dragging – nodes are pinned in place once dragged to a location. Tick the checkbox to turn off this behaviour. All pinned nodes can be unpinned by using the *Unpin All* button

Nodes settings

The Node Menu provides control over the number (and the type) of nodes to be displayed, easily creating a network that can readily be interpreted on screen. Users are controlling what part of the complete network that is being rendered to the screen, the entire network exists, users are just selecting which part to view.

Manage the node labels by toggling them on or off, setting the threshold, size, and control the node tooltips and network highlighting.



Threshold

- The threshold number of citations required for a node to be included in the network graph.
- A custom number can be entered in the box at the end.
- The "Auto" option will automatically select a threshold that means that the number of

nodes falls below the Node Limit.

Node limit

- The node limit, this is the maximum number of nodes allowed.
- This needs to be carefully managed, as too many nodes can become unintelligible, and/or significantly slow down your browser.

Result-set only

- The “Result-set Only” setting will switch between accounting for only nodes and citations that originate within the current result-set or not.
- When this is set to “No” all citations are used - regardless of their origin, when it is set to “Yes”, only citations which originate from within the current set will be counted.

Isolated nodes

- Choose to hide or show Isolated Nodes.
- Isolated Nodes are nodes with zero citations, they therefore do not form part of network at all. The reason that these occur is that they may have one (or more) citations, but not from (or to) any of the other nodes currently shown in the network.
- They will have a connecting node, but any number of settings may cause the connecting node to not be shown.

End nodes

- Choose to hide or show End Nodes.
- End Nodes are nodes with only one citation. Therefore, they do not form part of an extended network.

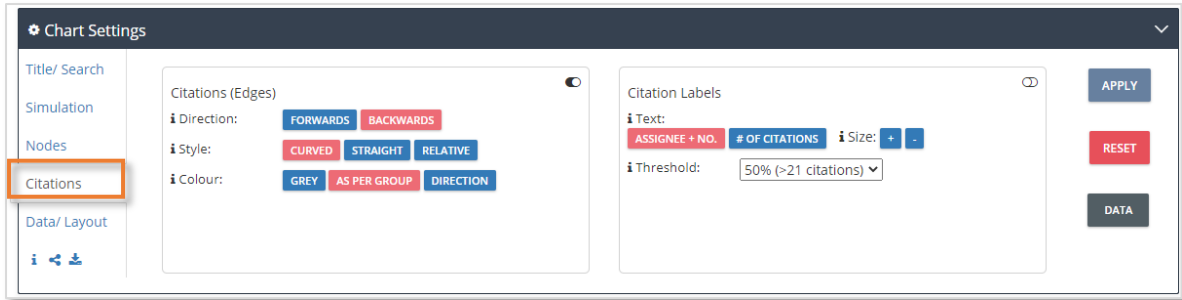
Nodes Labels/Tooltips

- Text – set the contents of the node labels. This is literally what label text will contain, either the assignee name, the number of citations or a combination.
- Size – adjust the size of the node labels.
- Threshold – the threshold above which node labels are shown. For example, when 25% is selected labels will be shown for nodes which have several citations that fall in the top 25% when compared to the maximum
- Tooltip – this is the mouseover for the network itself (what happens when hovering over a node). Details are displayed in a tooltip; the network highlight option highlights the network adjacent to the current node. Select both or none. The pin will pin the tooltip to the edge of the network so that it does not obscure the network itself.

Citation settings

The citations menu focusses on the citations – the “edges” in the network

The main feature is the Direction (Forward/ Backward) toggle - any network will display only forward or backward citations - the default being forward. The *Style* option changes the type of edge straight/ curved or relative (this option renders the edge with a width relative to the number of citations that it represents).



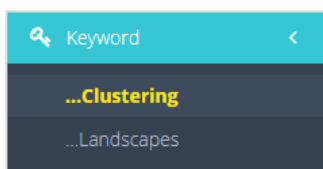
The colour option is either all grey, "as per group" (which is set to assignee in this version), or as per the direction blue for forward citations and red for backward citations.

Note that the citation labels are off by default, you can use the marked toggle to switch them on (marked on the image above). There are also size and threshold options for these labels.

Keyword analysis

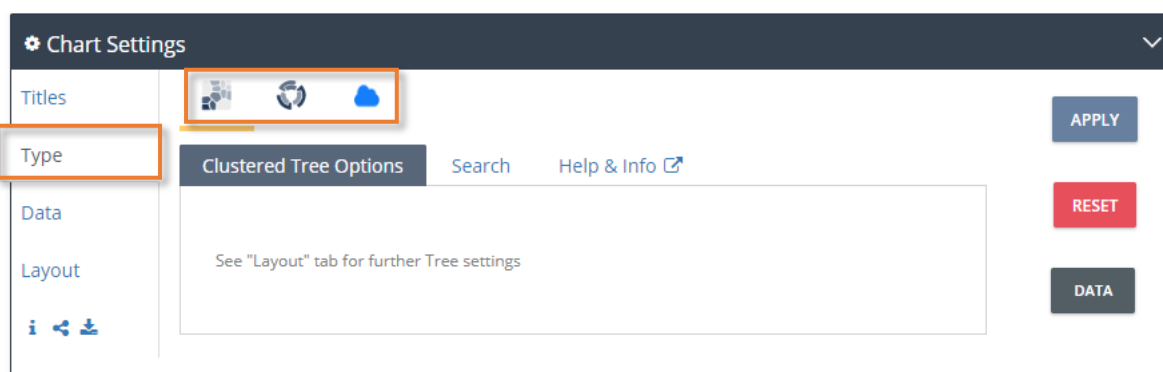
The keyword charts show data through the most frequently occurring keywords or concepts in clustering or landscape chart view.

- **Keywords** - uses the most commonly occurring keywords (found within titles and abstracts).
- **Concepts** - uses concepts semantically derived from the top classification codes.



Clustering

Keyword clusters can be displayed in either a tree, circle or word-cloud, based on the selection made in the chart settings.

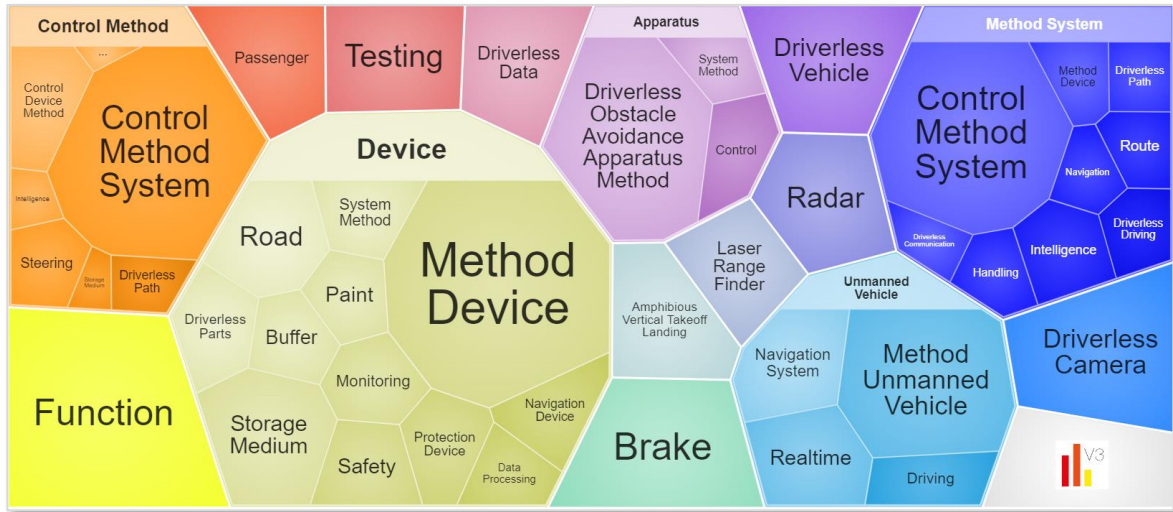


Up to 10,000 documents (families) containing appropriate data have been selected and are contained in these clusters.

Please note: Some families do not contain an appropriate abstract, in which case they cannot be used by the clustering software; in addition, there is an upper limit of 10,000 families that can be clustered, if above the maximum, these additional families will not be considered in the analysis.

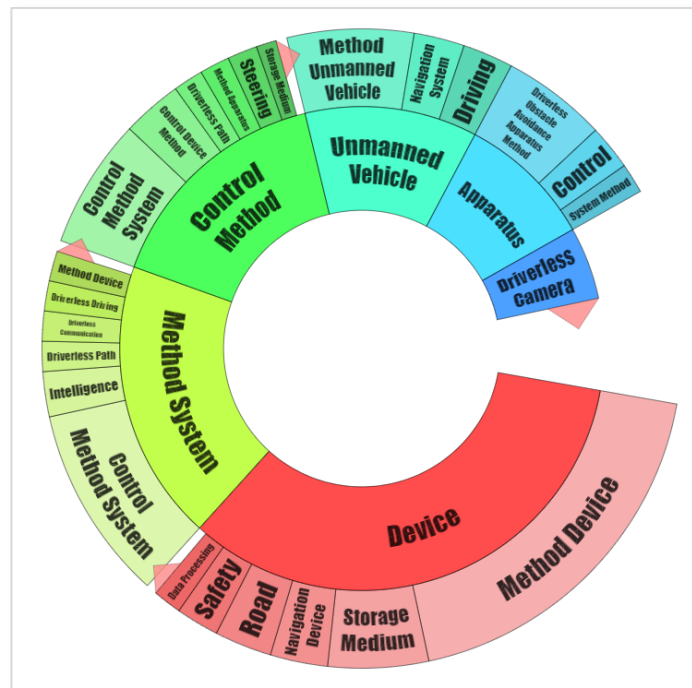
Clustered Tree

By default, the clustered tree is displayed when clicking into keyword clustering analysis. This is an implementation of the hierarchical Voronoi Tree map with animated transitions, zooming, searching, and nested meta data available. The clustered tree enables users to click and zoom in on a cluster and zoom in further to nodes (sub-clusters).



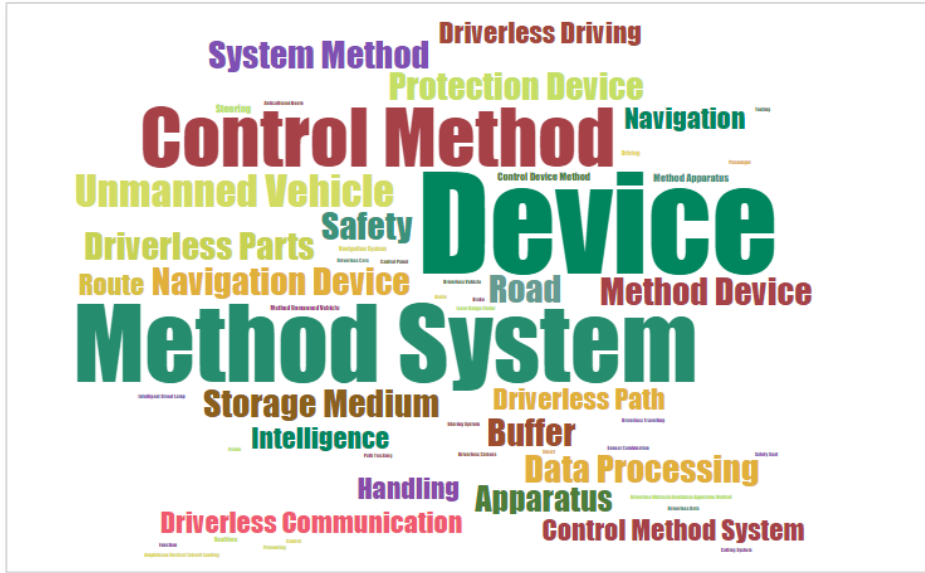
Clustered Circle

The clustered circle is an interactive visualisation of multi-level clustered and grouped family data. The clustered circle enables users to click and zoom in on a cluster (which is shown on the outside) to sub-clusters on the inside. Click on the pink arrows to expand/collapse the number of clusters displayed.



Word Cloud

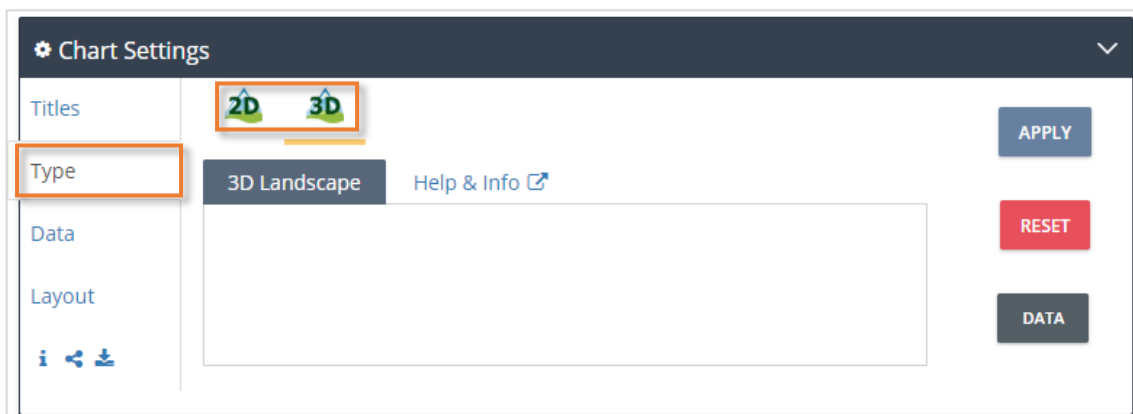
Word Cloud takes clustered keyword data (patent documents that are organised into clearly labelled thematic groups) and presents the keywords (thematic groups) relative to their size. The idea is to provide an attractive easy to understand visual representation of a large dataset in one easy to consume graphic.



Please note: Due to the requirements of the Word Cloud, the layout takes precedent over content, and as such - while the word cloud provides a nice overview into a subject area - conclusions or analysis should only be drawn in conjunction with other analysis.

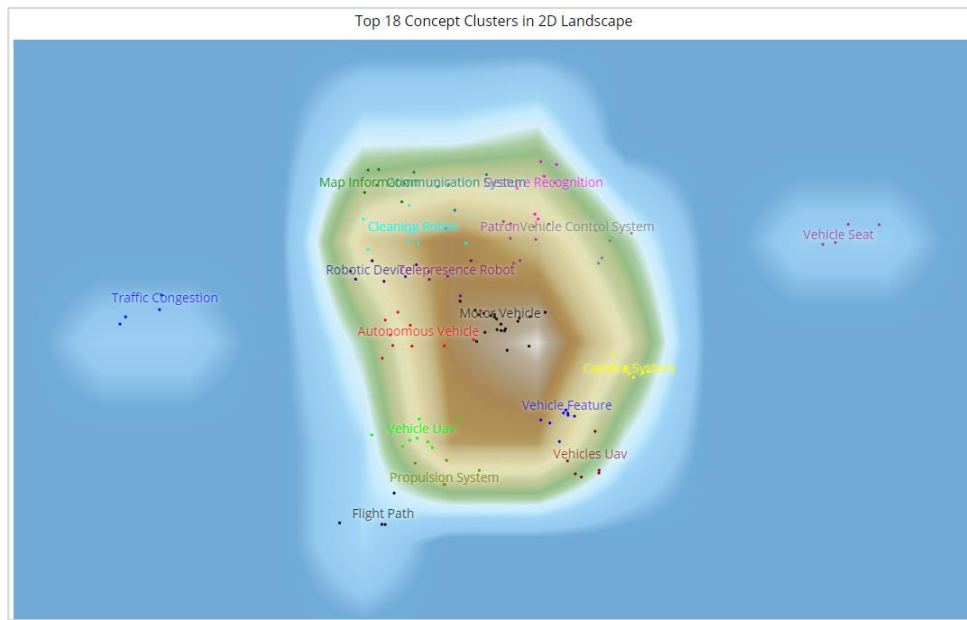
Landscapes

Keywords or concepts are displayed in either a 2D or 3D landscape view, based on the selection made in the chart settings.



2D landscape

The 2D landscape highlights commonly used keywords (or concepts) as clusters, with intensity (occurrences) in line with the implied "height" of the landscape. The blue "sea" represents low-lying (fewer families) and the land (from coast to peak) being "higher" and therefore representing more families. If there is trouble distinguishing clusters, try increasing the available height in the Layout tab.



The layout of the landscape can be modified using the chart settings. Cluster markers can be changed to show markers, keywords, assignees, both (keywords and assignees) or none. Visual features such as font size and colour can also be adapted. Additional chart settings exist for 3D landscapes to alter the altitude between flat, hilly or mountainous, as well as including crosshair or grid lines.

Chart Settings


- Titles
- Type
- Data
- Layout**
- [i](#) [↶](#) [↷](#)

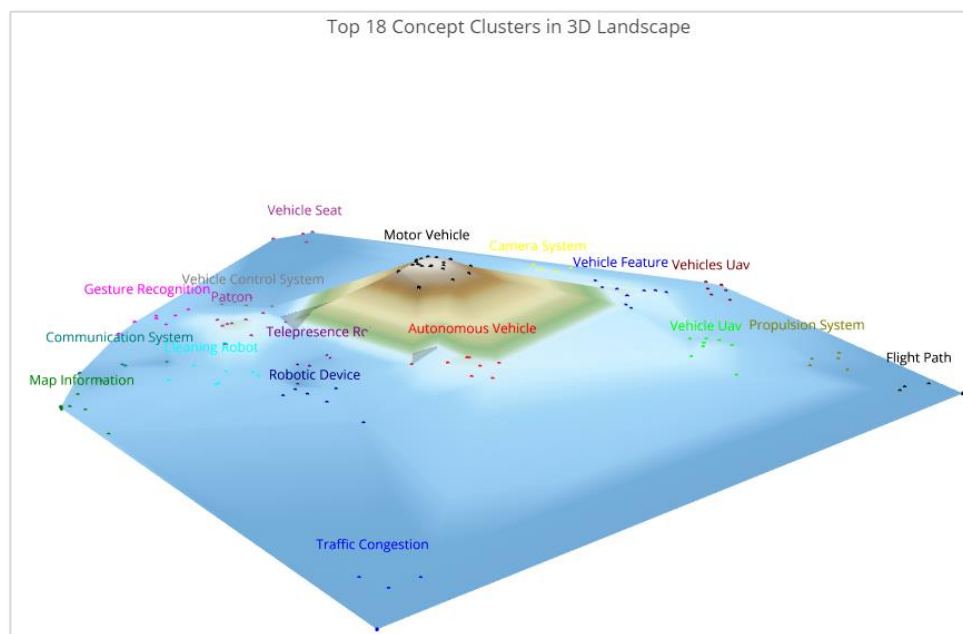
Cluster Markers:	Font Size:	Altitude:
<input type="checkbox"/> Markers	<input checked="" type="checkbox"/> Small	<input type="checkbox"/> Flat
<input checked="" type="checkbox"/> Keywords	<input type="checkbox"/> Medium	<input checked="" type="checkbox"/> Hilly
<input type="checkbox"/> Assignees	<input type="checkbox"/> Large	<input type="checkbox"/> Mountain
<input type="checkbox"/> Both		Crosshair:
<input type="checkbox"/> None		<input type="checkbox"/> On <input checked="" type="checkbox"/> Off
Family Markers:	Font Colouring:	Grid:
<input checked="" type="checkbox"/> Show	<input type="checkbox"/> Black	<input type="checkbox"/> On <input checked="" type="checkbox"/> Off
<input type="checkbox"/> Hide	<input checked="" type="checkbox"/> Coloured	

3D landscape

The 3D (topographical) landscape works as per the 2D landscape, except it renders the third (Z) dimension displaying the "height" instead of just implying height by colouring (as the 2D version does). Therefore, clusters containing more families are shown as relative "height" in the z-plane.

The perspective of the 3D landscape can be modified by holding the left click button on the mouse and dragging across the landscape. Use the mouse wheel to zoom in and/ or out of the landscape.

The exact mode of rotation can be set using the context menu that appears top right when you hover over the landscape –  These include panning, orbital or turntable rotation - there is also a home button to reset the display.



Cluster Rules

When analysing by keyword, there may be some irrelevant keywords that occur frequently in the patent documents. These can be removed across all keyword landscapes and clusters by going to *Cluster Rules* in the *Layout* tab in chart settings.

Enter cluster rules directly into the textbox or access the cluster management tool by selecting the "[Manage](#)" button. The basic cluster rules are shown in the table below:

Rule	Description	Example
Remove	Enter the exact (case sensitive) name	Light bulb, Light Fitting ⁽¹⁾
Wildcard remove	Use an asterisk (*)	Light*
Remove cluster	Use square braces []	[Light bulb]
Rename	User a pointer (>)	Light Bulb > Luminare
Merge ⁽²⁾	User a plus (+) to join clusters and a pointer (>) to give the cluster a name	Light Bulb + Light Bulbs > Luminares

(1) This example includes comma separated multiple rules

(2) Merging is only possible on the Landscape, it is not available in the keyword clustering view

Cluster management

Hide cluster

Tick the relevant checkbox next to a cluster name to hide a cluster.

Rename cluster

Enter a new cluster name in the corresponding textbox.

Merge cluster

To merge 2 clusters, in the first text box enter the exact cluster name (e.g., Vehicle feature) or click the cluster name to be merged with the current cluster (e.g., Camera system). Then, enter a new cluster name (e.g., Car features) for these merged terms.

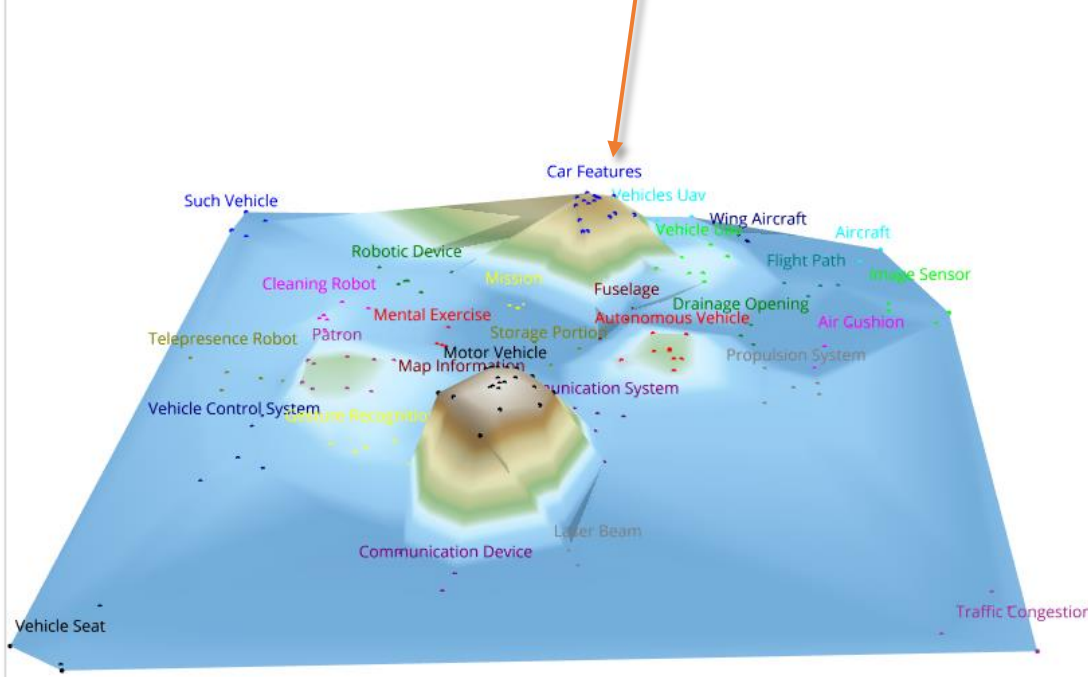
Click “Save and apply” to update the chart or “Clear all and close” to exit the cluster management page.

Create and manage cluster rules

Cluster	Hide	Rename to	Merge (With/ As)	
Whole Landscape	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	>
↳ Motor Vehicle	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	> ✕
↳ Patron	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	> ✕
↳ Vehicle Feature	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	> ✕
↳ Autonomous Vehicle	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	> ✕
↳ Vehicle Uav	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	> ✕
↳ Camera System	<input type="checkbox"/>	<input type="text"/>	Vehicle Feature Car Features	> ✕
↳ Gesture Recognition	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	> ✕
↳ Cleaning Robot	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	> ✕

CLEAR ALL AND CLOSE **SAVE AND APPLY**

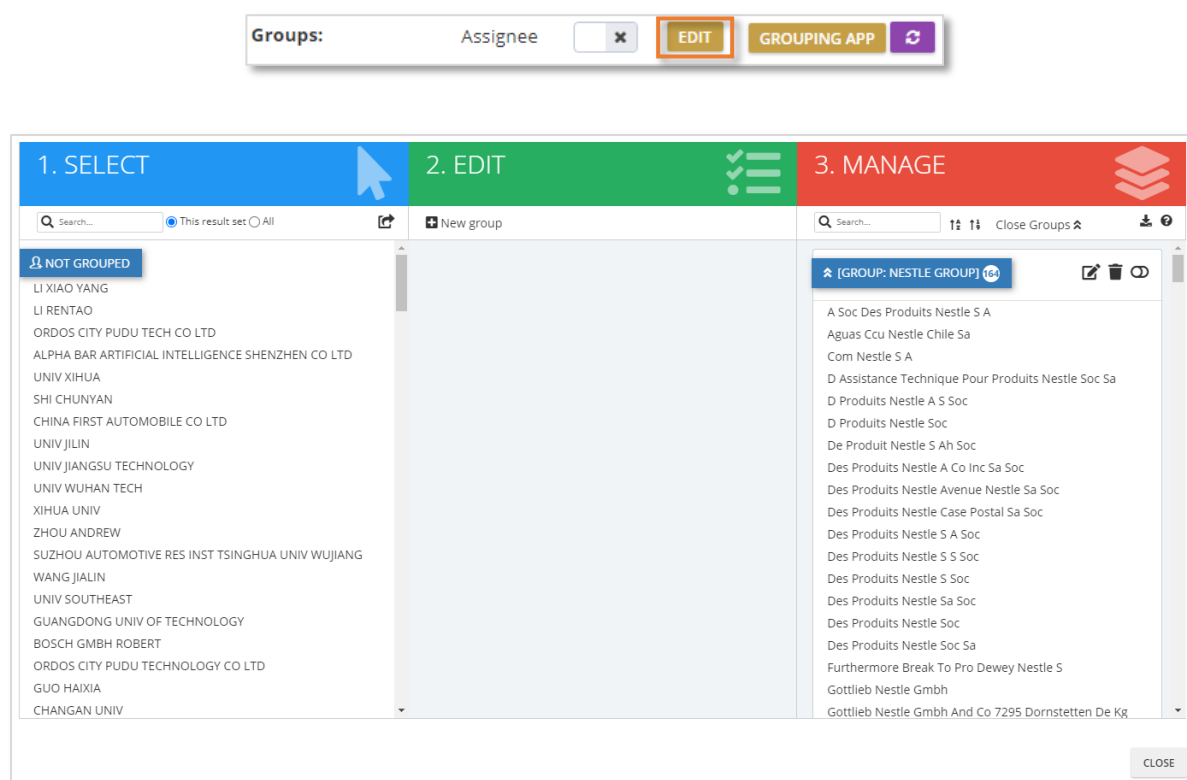
Top 29 Concept Clusters in 3D Landscape



Groups

Five of the analysis options can be grouped: jurisdictions, assignees, classifications, inventors and agents.

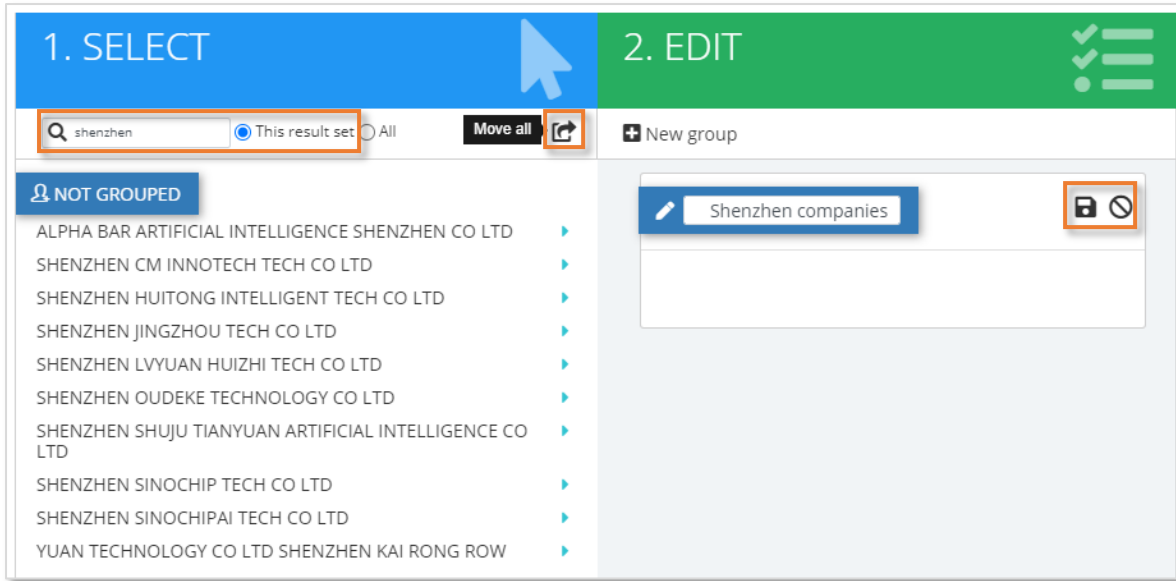
Depending on the currently viewed chart, selecting the groups “Edit” button from the chart settings menu data tab, will open the corresponding analysis group management popup window. Please see assignees group management example below.






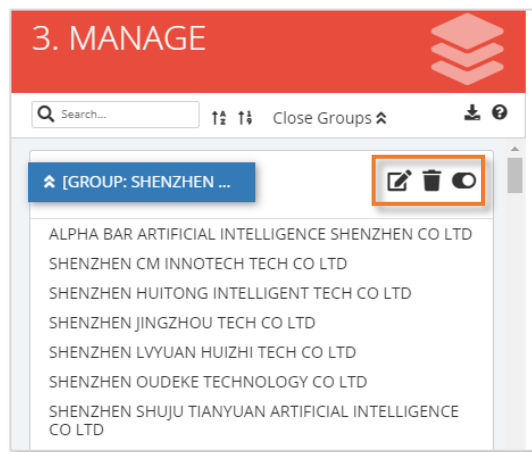
Creating a group

To create a new group, start by clicking “+ New group” under the *Edit* column. Enter a group name in the text box and then select the entities to add to the group from the *Select* column on the left-hand side. The search box can be utilised to search across not grouped entities for the current result set or across all PatBase entities (not only the entities that appear in the current search analysis).

For example, typing in **Shenzhen** will find all assignees that contain the word “Shenzhen”.

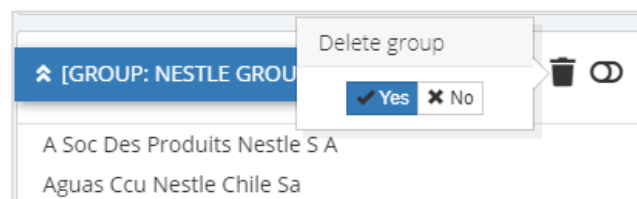


Individually add entities to the group by clicking on the entity name or add all entities using the move all  icon displayed next to the search box. Click on the save  icon when ready or click on the cancel  icon to cancel any changes and start again.

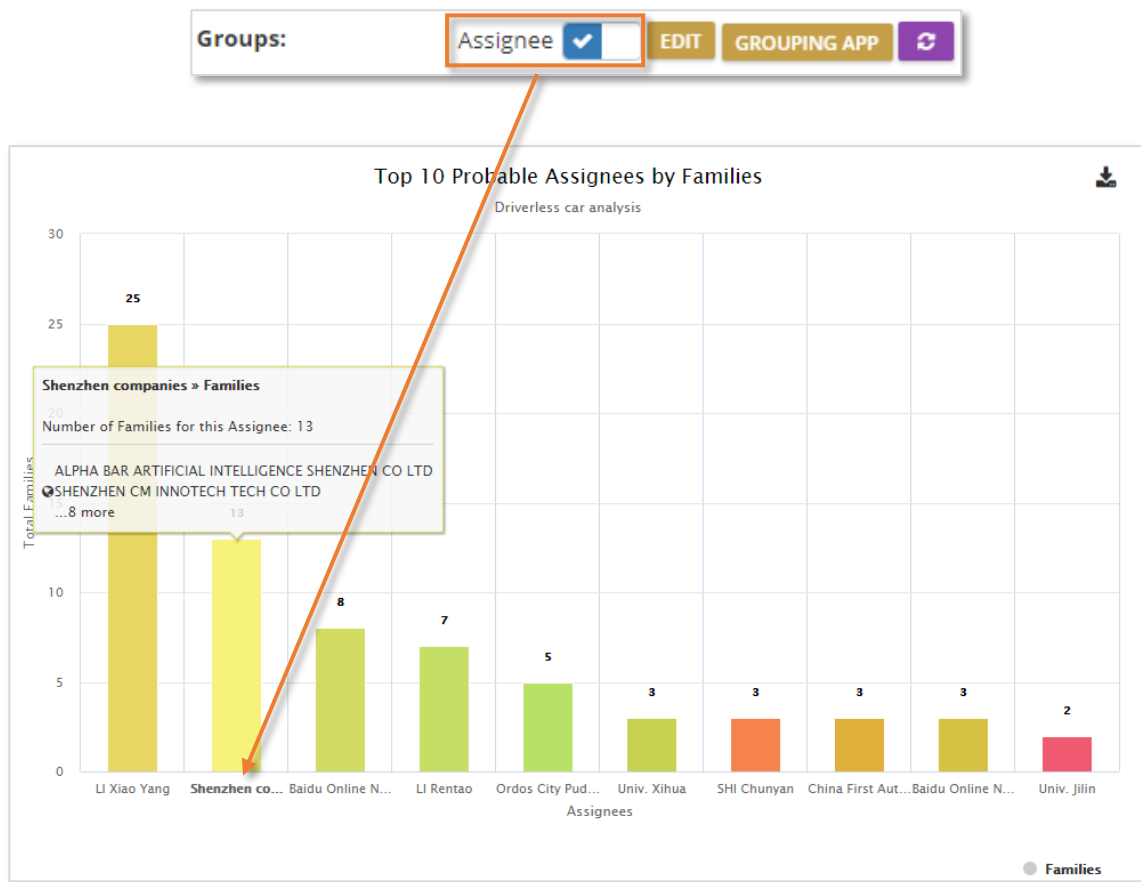


Saved groups will appear under the *Manage* column. There are 3 icons displayed next to the group name:

- Edit – will bring the group back under the edit column.
- Delete – will open a warning message confirming deletion.
- Toggle - switch on to apply group to the analysis charts.



Once ready, click “Close” to return to the chart. This will auto refresh the displayed chart and any applied groups will now be present in the chart. Groups will need to be switched on in chart settings to be applied to the chart.

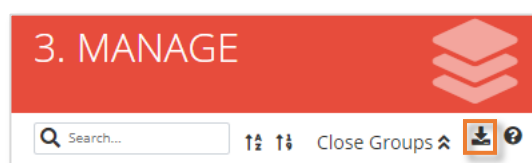


Hiding entities using groups

It is possible to hide entities from being displayed in the chart through groups. Create a group named **Hide** and then add relevant entities to the group and click “Save”. Once applied to the chart, the entities within the group Hide will no longer be displayed in the chart.

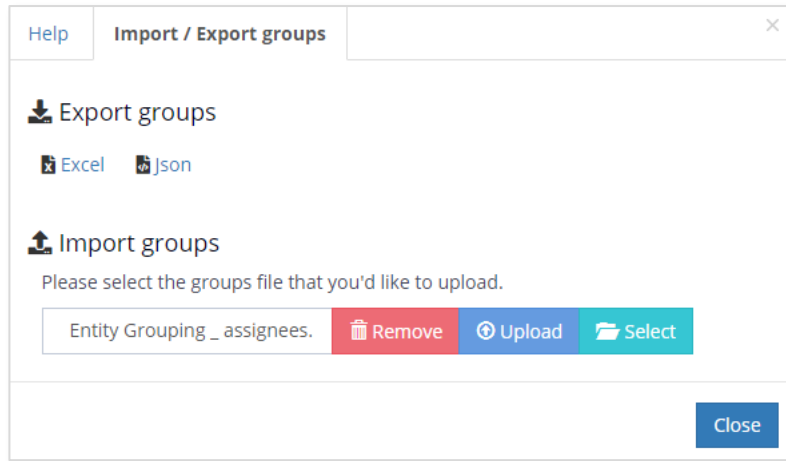
Import/export groups

Select the download icon at the top of the *Manage* column to import and/or export groups.



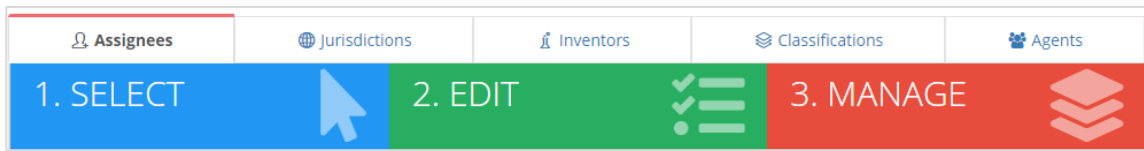
Export groups by selecting the Excel or JSON file format.

Import groups by selecting from your computer the groups file and clicking “upload”.



Grouping app

Easily manage all analysis groups in one place by selecting the “Grouping app” button under the data tab in chart settings. Use the tabs displayed at the top of the page to navigate to the relevant analysis options group management page.



Please note: the grouping app will not auto-refresh the data displayed in the chart, so the purple refresh button will need to be used to reload the chart data.




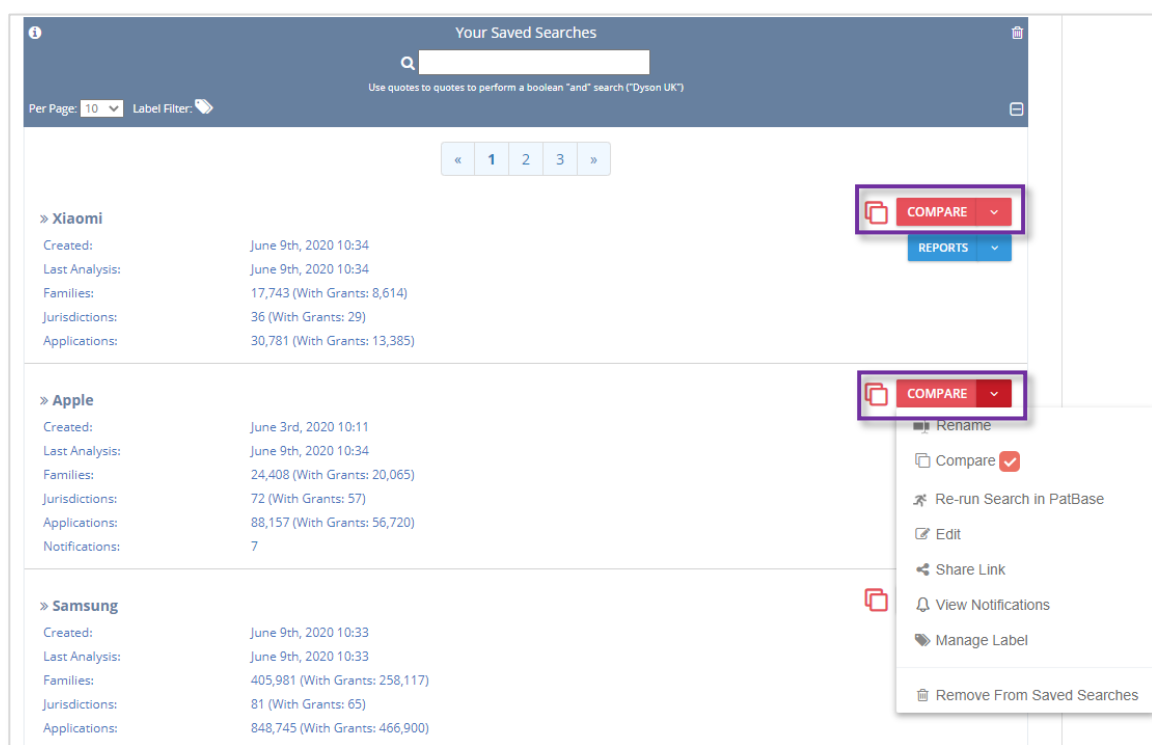
Comparison Analysis

The comparison analysis option directly compares up to 4 result sets side-by-side. This makes it easy to compare patenting trends, whether it is between different competitors, one company at different periods of time or parallel technology areas etc. The following comparison analysis example will compare the recent portfolios of Apple, Samsung, Huawei, and Xiaomi.

Running a comparison analysis from your saved searches

To run a comparison analysis, begin by loading analyses for up to 4 different result sets. Once each analysis has fully loaded it will be automatically added to [Your Searches](#) as well as the Analysis Switcher.


In your Saved Searches, select the dropdown menu against the analyses of interest and tick the “Compare ” checkbox. A two squares icon should appear  next to each analysis indicating which analyses have been selected. Once all analyses have been selected for the comparison, click the red “Compare” button on either of the selected searches. This will direct users to the comparison dashboard page.

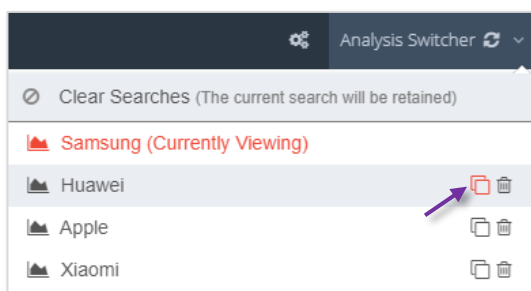


Running a comparison analysis using the Analysis Switcher


The Analysis Switcher makes it easier to re-establish a comparison. This means that you can move from a comparison analysis back to a single analysis, then quickly and easily re-establish the comparison analysis simply by selecting it from the Analysis Switcher.

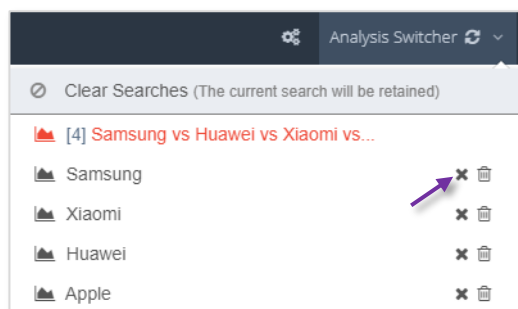
Adding analyses to comparison analysis

Select the  compare icon next to the analysis of interest from the Analysis Switcher in the top toolbar. This will immediately run a comparison analysis with the currently viewed analysis. Repeat this method to compare up to 4 different analyses.



Removing analyses from comparison analysis

To remove an analysis from the comparison analysis, select the  remove icon on the right.



Adding a fifth analysis

If a fifth analysis is added to the comparison from the Analysis Switcher, then the newly added analysis is added onto the end (right) and pushes the first (left) analysis out of the comparison.

Comparison split

An automatic comparison split is available on a single analysis for simple searches, such as:

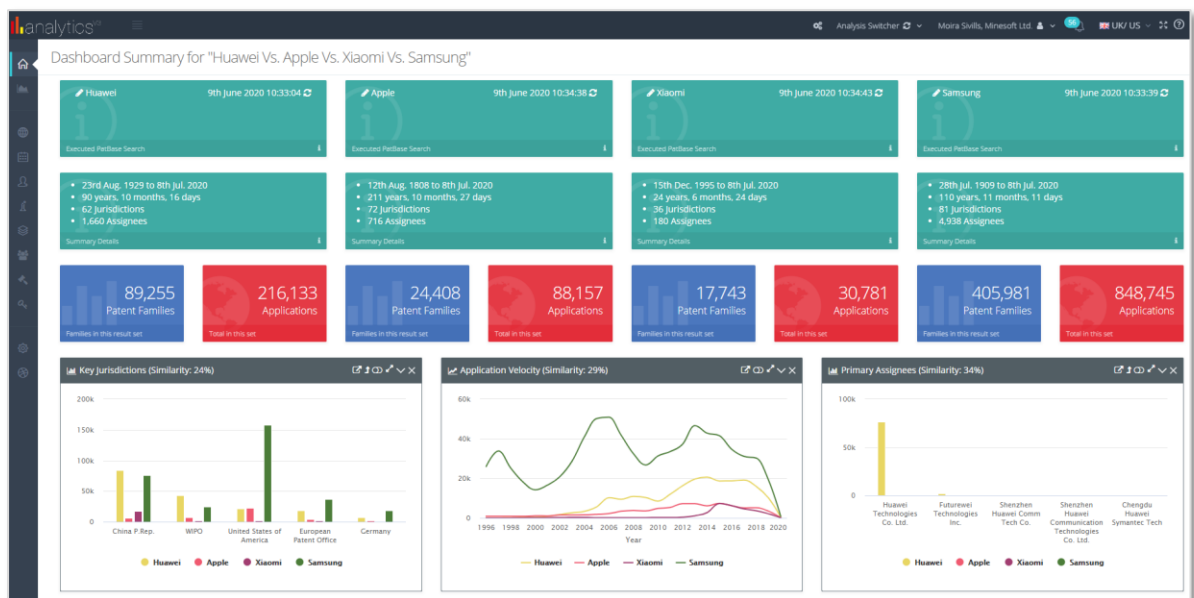
PA=(Apple or Samsung or Huawei or Xiaomi)

If a comparison split is available, the comparison icon will be present in the middle green information box. Hover over the icon to see how the analysis will be split and compared. Click on the icon and the single analysis will be split accordingly and display the comparison analysis dashboard page.



Comparison dashboard page

Navigate the comparison analysis in the same way as a single analysis. Please note, comparison analysis only shows summary charts.



New searches

Select from Numbers, Basic, Advanced and Quick search to run a new analysis in PatBase Analytics V3.

Analysis by Numbers

Directly paste family, application or publication numbers into the input box. The numbers form should automatically recognise the number format and select the corresponding number type from the options below. The number type can also be manually selected. Click “View analysis” to analyse this new dataset and be directed to the new dashboard page or click “Clear” to empty the form.

The screenshot shows the 'Analysis by Numbers' search form. At the top, there are five tabs: 'Analysis by Numbers' (highlighted with a red box), 'Analysis by Form (Basic)', 'Analysis by Free Text (Advanced)', 'Quick Analysis', and 'Your Saved Searches'. Below the tabs, there are two red bullet points: 'You can post numbers here for immediate analysis.' and 'Please select the correct number type from the options below.' The main input area contains a long string of patent numbers: 'US2007218949,US7706828,DE4340771,GB2278937,GB2313190,GB2313191,GB2313213,GB9323741,GB9716988,GB9716989,GB9716990,JP3006986,JP7008428,US5440216,DE4034668,FR2668668,GB2249412,GB9023725,JP3026593,JP4179157,US5157278,USD403341,US5283608,KR100793321,US2008125405,US2009197845,USD512694,CN1100969,CN1116701,DE19512451,IT235494'. Below the input area, it says '31 Publications'. There are three buttons: 'Families' (with an 'x' icon), 'Applications' (with an 'x' icon), and 'Publications' (with a checkmark icon). At the bottom, there are two buttons: 'CLEAR' and 'VIEW ANALYSIS'.

Analysis by Form (Basic)

The basic search form offers a fast and simple way to run a keyword and/or assignee/inventor search within Analytics. The search can be further refined by publication date and jurisdiction. When searching for multiples keywords and/or assignees, use commas to separate the terms. Click “View analysis” to analyse this new dataset and be directed to the new dashboard page or click “Clear” to empty the form.

Saved Searches

Analysis by Numbers **Analysis by Form (Basic)** Analysis by Free Text (Advanced) Quick Analysis Your Saved Searches

Keywords

 Examples: laser disk blue layer
 wingless aircraft
 golf ball dimple
 For multiple terms, comma separate please.

Assignees

 Examples: motorola
 general motors
 alexander bell
 For multiple assignees, comma separate please.

Publication Date
 All 12 Months 5 Years 20 Years

Jurisdiction
 All US Only UK Only WO Only EP Only DE Only JP Only

Analysis by Free Text (Advanced)

The advanced search form enables users to directly enter PatBase command language into the search box. Click “View analysis” to analyse this new dataset and be directed to the new dashboard page or click “Clear” to empty the form.

Saved Searches

Analysis by Numbers Analysis by Form (Basic) **Analysis by Free Text (Advanced)** Quick Analysis Your Saved Searches

PatBase Search Term

Quick Analysis

Analyse an entire jurisdiction by entering a jurisdiction name in the corresponding search box. Click “View analysis” to analyse the entire published output of the jurisdiction(s).

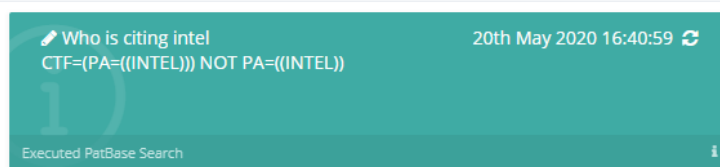
The screenshot shows the 'Quick Analysis' tab selected in a navigation bar. Below it is the 'Entire Jurisdiction Analysis' form. The form has a title 'Entire Jurisdiction Analysis' and a prompt: 'Please enter (or select) a jurisdiction (or jurisdictions) to analyse the entire published output of the jurisdiction...'. There is a search box with the placeholder text 'Select Jurisdiction'. Below the search box, there are examples: 'United Kingdom', 'United States of America, MX', and 'GB, US, MX'. A note says 'For multiple jurisdictions, comma separate please.'. At the bottom left is a 'CLEAR' button and at the bottom right is a 'VIEW ANALYSIS' button.

Analyse an entire assignee by entering an assignee name in the corresponding search box. There is an additional feature below the search box, which enables users to make use of the Corporate Tree tool. Entering an assignee name and clicking the “+corp tree” option will automatically add related company names and subsidiaries into the search box. Click “View analysis” to analyse the entire published output of the assignee(s).

The screenshot shows the 'Entire Assignee Analysis' form. The form has a title 'Entire Assignee Analysis' and a prompt: 'Please enter (or select) a assignee (or assignees) to analyse the entire published output of the assignee...'. The search box contains the text 'Bp Plc, Corning Inc, Hanshin Electric, Toshiba Corp, Samsung Group, Samsung Bp Chemicals Co Ltd, Samsung Corning Advanced Glass Llc, Sam'. Below the search box, there are examples: 'Walmart', 'Sinopec Group', and 'Shell OIL Co., BP Plc.'. A note says 'For multiple assignees, comma separate please.'. To the right of the search box is a yellow button labeled '+CORP TREE' with a purple arrow pointing to it. At the bottom left is a 'CLEAR' button and at the bottom right is a 'VIEW ANALYSIS' button.

Analyse who is citing whom by entering an assignee(s) in the corresponding search box. Click “View analysis” to run an analysis of the citing documents. The analysis will remove self-citations.

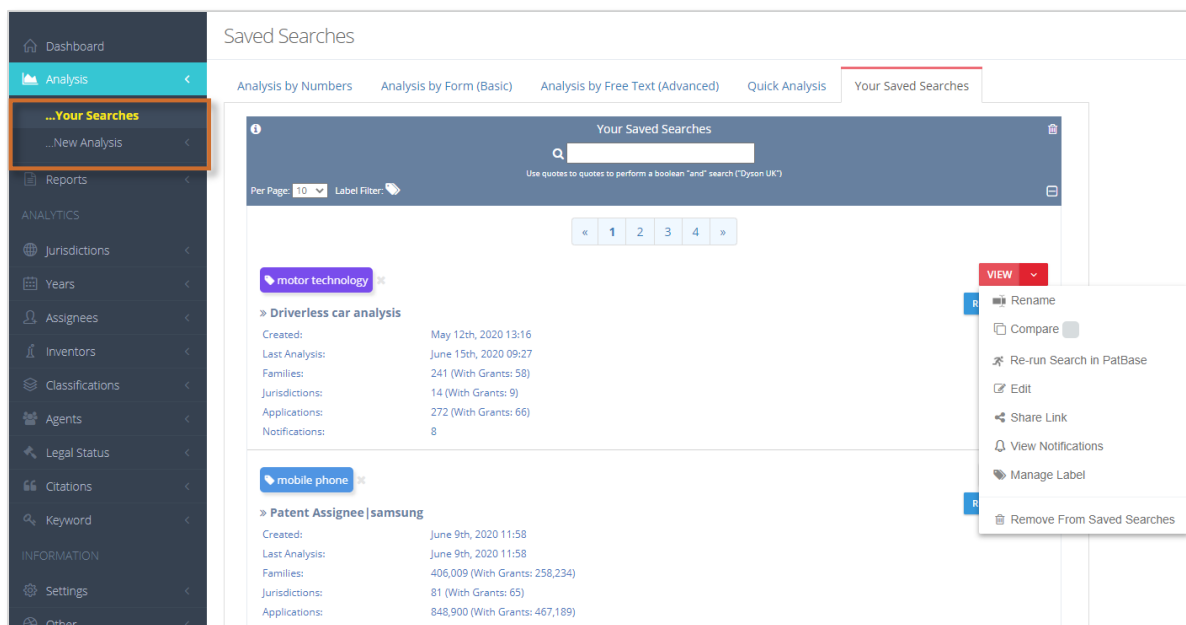
The screenshot shows the 'Who is Citing Whom?' form. The form has a title 'Who is Citing Whom?' and a prompt: 'Please enter an assignee (or a list of assignees) to run an analysis of the citing documents...'. The search box contains the text 'intel'. Below the search box, there are examples: 'Intel', 'Microsoft', and 'Dyson, Hoover, Indesit'. A note says 'For multiple assignees, comma separate please.'. At the bottom left is a 'CLEAR' button and at the bottom right is a 'VIEW ANALYSIS' button.



If searching multiple jurisdictions or assignees, separate terms with a comma. Click “Clear” to empty the form.

Saved searches

Analytics V3 keeps a history of your previous searches under “Your Searches” in the Analytics menu on the left-hand side.



Details of each previous search are displayed including the date created, date last analysed in Analytics, number of families, jurisdictions and applications analysed. Click “View” to open the analysis in the dashboard page.

Saved search options

Next to each saved search there is a red drop-down menu with the following options:

Rename

Enter a memorable unique name for the saved search.

Compare

Select and compare up to 4 different analyses by ticking the checkbox. Please refer to the [comparison analysis](#) section for more information.


Re-run search in PatBase

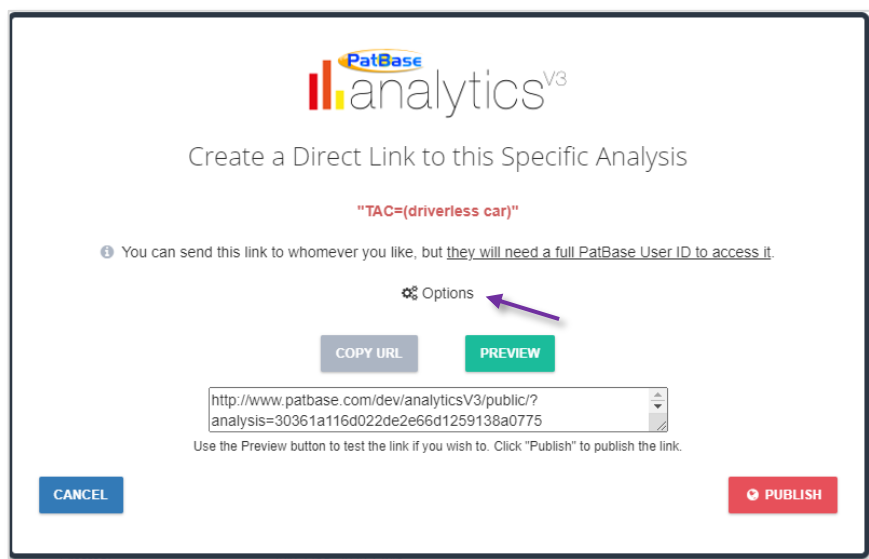
Directs users back to the PatBase window, re-running the search query and displaying the results on the search history page.

Edit

Edit the analysis search query.

Share analysis link

Create a share link for the entire analysis which can be copied and shared with colleagues. Select  Options to add an optional expiry date for the link and to add a note. Use the “Preview” button to test the link or click “Publish” to make the link live.



View notifications

Directs users to the notifications page, displaying new families, grants, citations, etc. since last running the search analysis.

Manage label

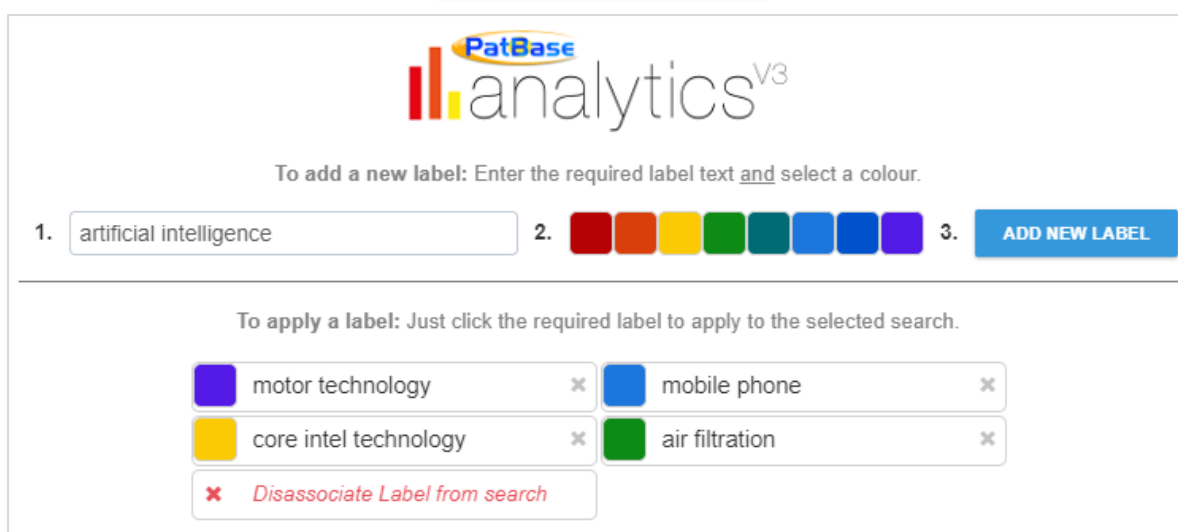
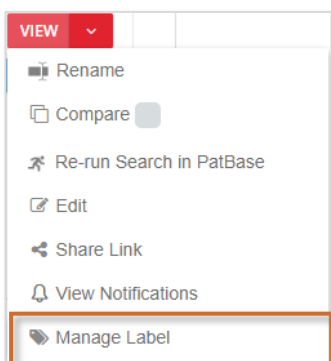
Users can create new labels and delete saved labels, as well as apply and disassociate labels from saved searches. Please see [Label saved searches](#) for more information.

Remove from saved searches

Delete search from saved searches page.

Label saved searches

Organise your saved searches by attaching labels. Select from the red drop-down menu “Manage label” to create, delete, apply, and remove labels from saved searches.



PatBase analytics^{V3}

To add a new label: Enter the required label text and select a colour.

1. 2. 3.

To apply a label: Just click the required label to apply to the selected search.

 motor technology <input type="button" value="x"/>	 mobile phone <input type="button" value="x"/>
 core intel technology <input type="button" value="x"/>	 air filtration <input type="button" value="x"/>
<input type="button" value="x Disassociate Label from search"/>	

Create a new label

Follow the numbered steps to create a new label. Begin by entering a label name, then selecting a colour and lastly clicking on “Add new label”. The new label will appear directly below in the saved labels list.

Delete a saved label

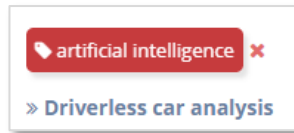
Click on the cross icon to permanently delete a saved label. Labels that are in use (applied to a search) cannot be deleted.

Apply label to search

Click on a saved label to apply to the selected search.

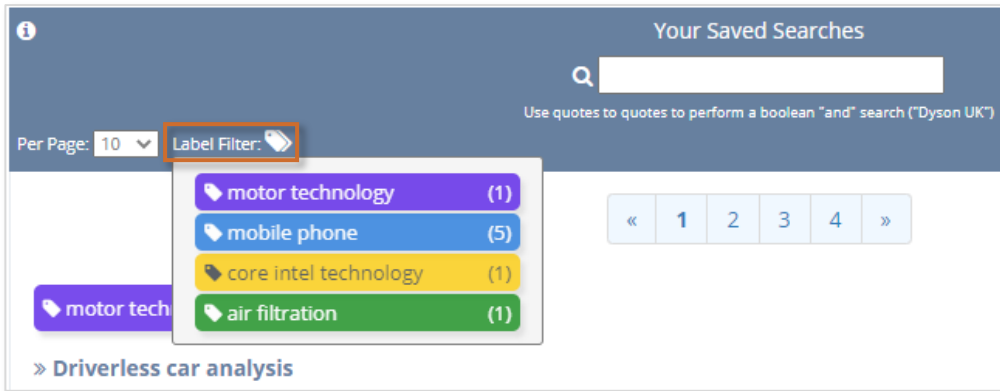
Remove label from search

Select “Disassociate label from search” to remove the applied label for the selected saved search. Alternatively, in the saved searches page, select the cross icon to remove label.




Filter saved searches

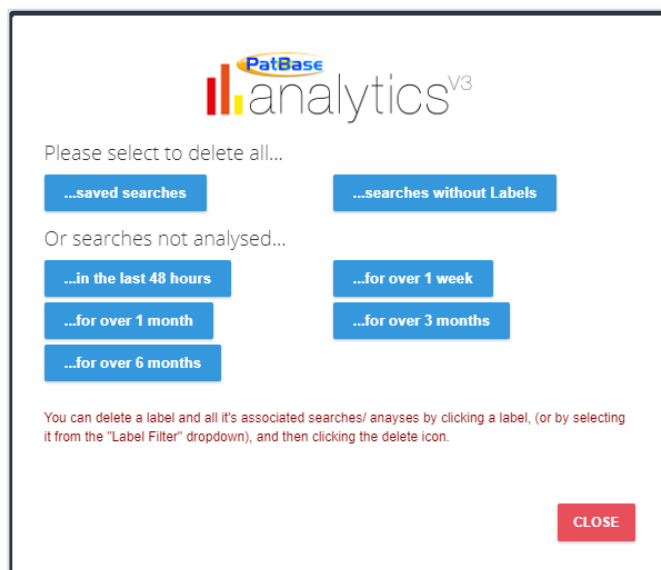
Use the label filter or the search box to navigate through your saved searches more efficiently. The number of saved searches attached to a label is displayed in brackets.




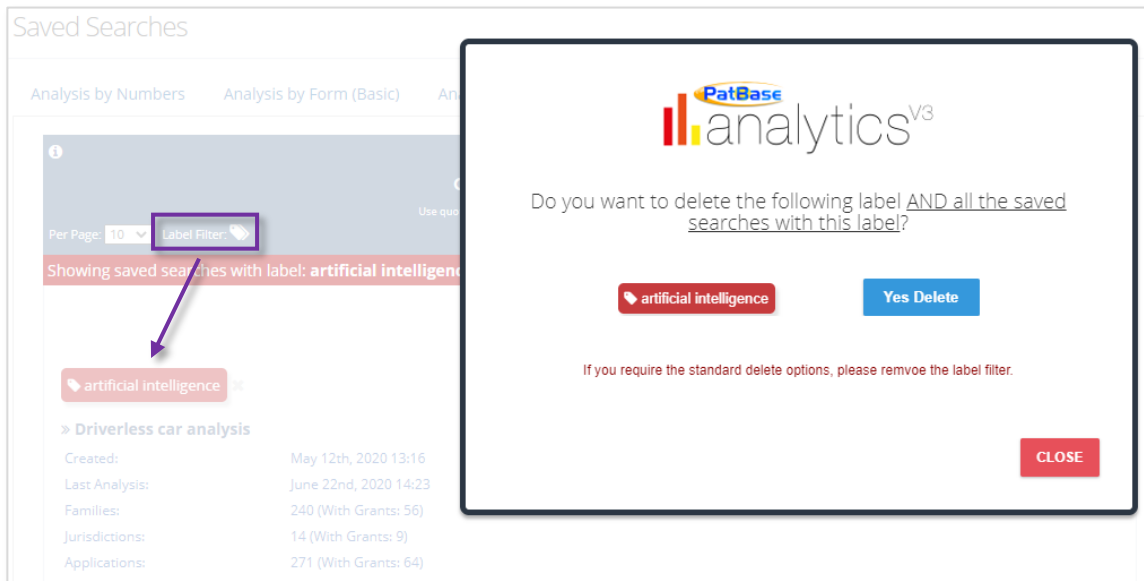
Delete saved searches

Select the bin  icon in the top right-hand corner of the saved searches page to open a pop-up window of available bulk delete options.

Choose to delete all your saved searches or all searches without attached labels. Alternatively, delete searches that have not been analysed within a certain period of time.



If a label filter has been applied, then clicking on the bin  icon will open a different set of delete options in the pop-up window.



Select "Yes delete" to delete the label and the search(es) associated with the label.

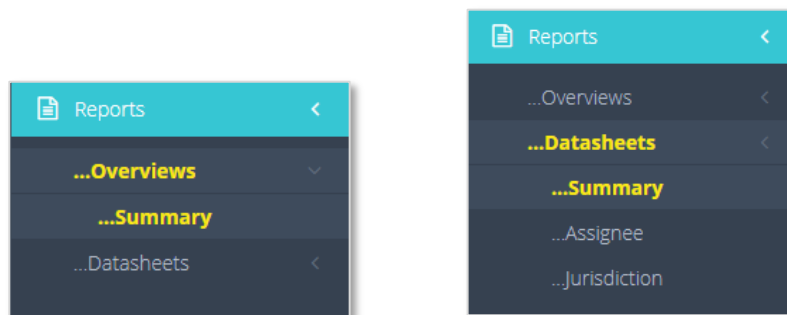
Automated reporting

Analytics V3 automates the generation of reports which can be edited and then shared with colleagues or clients. Currently, reports can be exported as PDF, Word, or PowerPoint file.

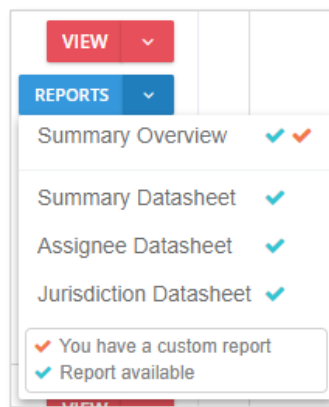
There are 4 types of reports available:

- *Overview summary report* – provides a full overview of an analysis, covering all primary areas at a basic level (available as an 8-10 page / portrait option)
- *Summary datasheet* – provides a brief overview of an analysis, covering only a basic level but for a range of metrics (available as 2 – 3 page / landscape / 1 chart per page option)
- *Assignee datasheet* – provides a brief overview of a selected assignee within an analysis, this report covers the basic data but for a range of metrics
- *Jurisdiction datasheet* – focusses on the jurisdiction data of the current analysis

To generate a report, select “Reports” from the Analytics menu.



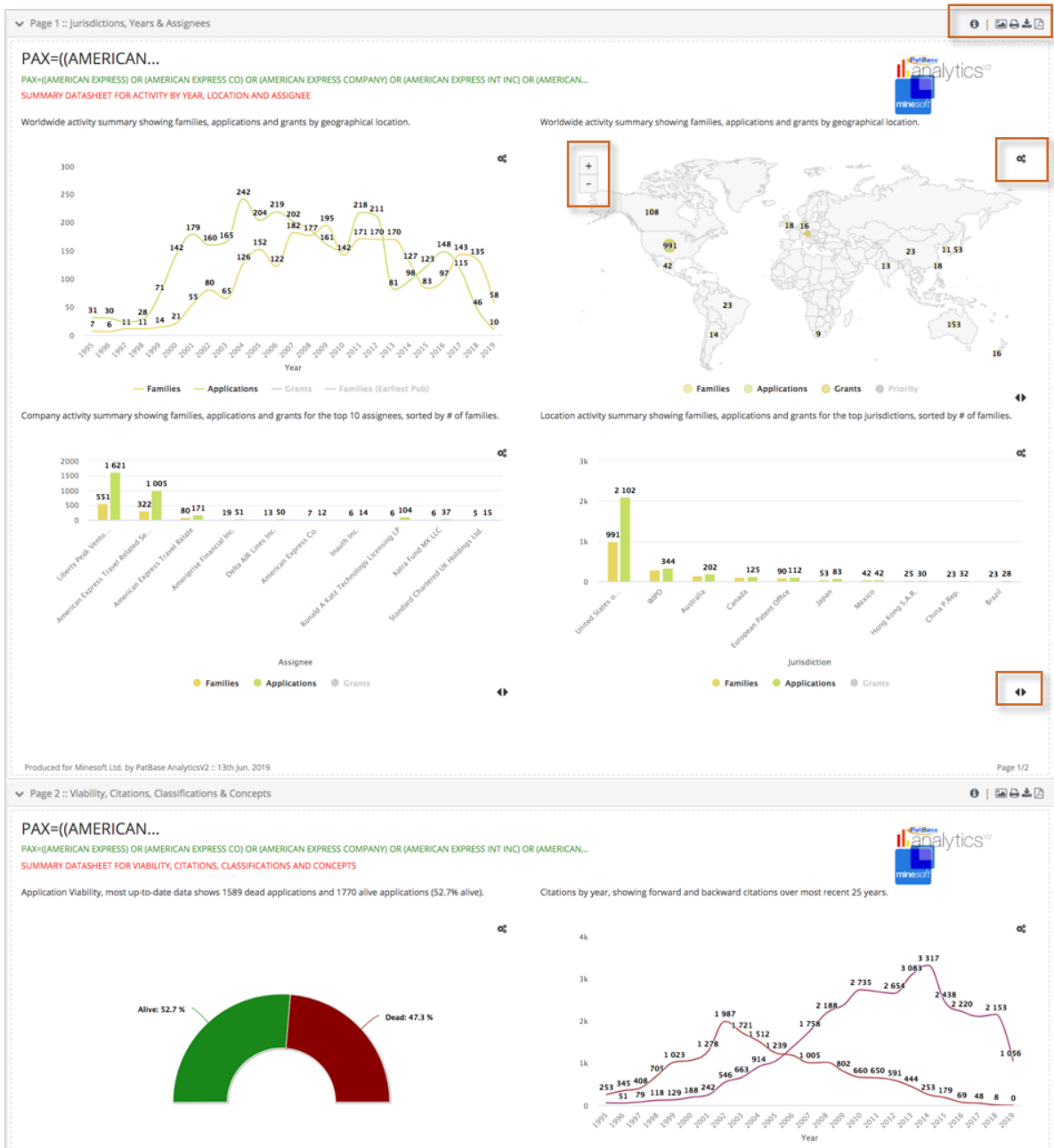
Alternatively, in the saved searches page, select available reports from the blue drop-down menu.



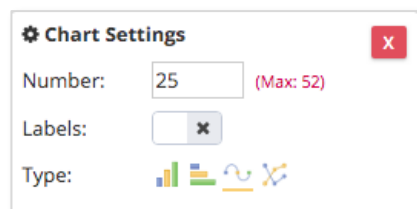
Editing the report template

In the top right-hand corner for each page, there are options to download a specific page as a PDF, PNG or to print the page. There is also an information icon to give more of a breakdown of each of these download options.






Interact further with each graph, for example zooming in and out using the mouse wheel, adjusting the basic chart setting options (look for the settings icon).

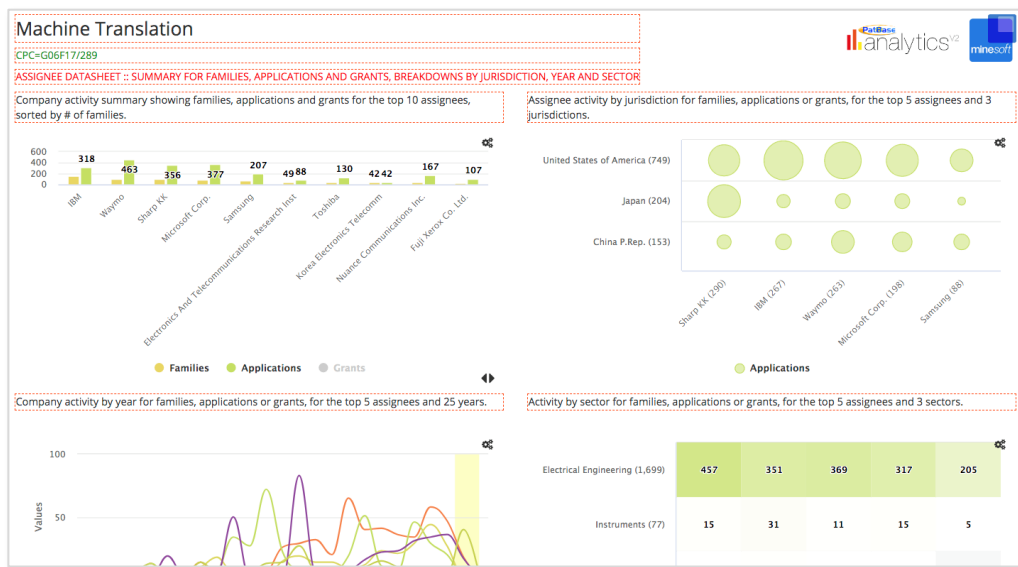


Adjust the number of data points shown, i.e. number of jurisdictions included, number of years, etc. Choose to show data labels and change the type of chart displayed. Depending on the analysis chart, different sets of options will be available.

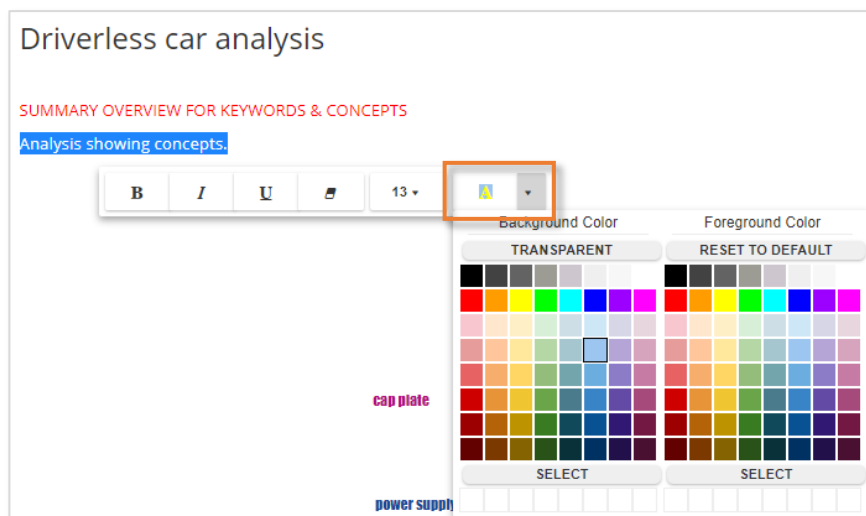
When a graph is showing multiple types of data, for example, families and applications. There will be an arrows icon at the bottom right-hand corner . Clicking this will change the order that the selected metrics are shown in, this works hand-in-hand with the ability to turn on or off the displayed metrics using the legend (simply click “families” or “applications” etc. to turn them on/off or show/hide them). These changes are stored in the default template.

Highlight editable text

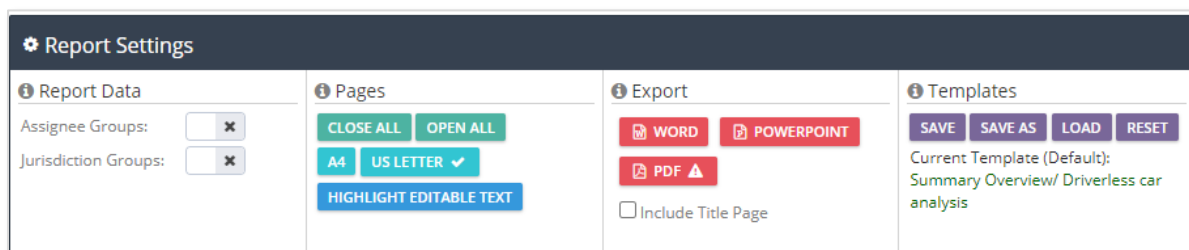
When editing the report, there are some areas of text which can also be changed, to identify these areas, select “Highlight Editable Text” under report settings. Editable areas will be outlined with a red dotted line, like below:



Click on these areas to remove or add content or make formatting changes. All these changes can be saved in a default template by clicking “Save” under report settings.



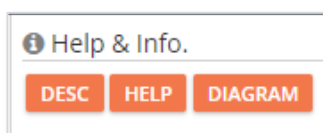
Report settings



- **Report data** – toggle off/on assignee or jurisdiction groups, for information about the highlight assignee option please read next sub-section.
- **Pages** – minimise or maximise all pages/graphs, adjust page size, change to one chart per page, highlight any editable text.
- **Export** – decide whether or not to include a title page, export the report as a Word, PowerPoint or PDF document.

Please note: There is a “warning” triangle next to the PDF export option because the PDF is generated directly from the screen, therefore the picture quality may not be great depending on the user’s screen resolution. To rectify this, choose the Word export option and then “Save As” a PDF from Microsoft Word.

Templates – save the current template, save the current template with a different name for future use, load a saved template, reset a default template or delete a custom template.

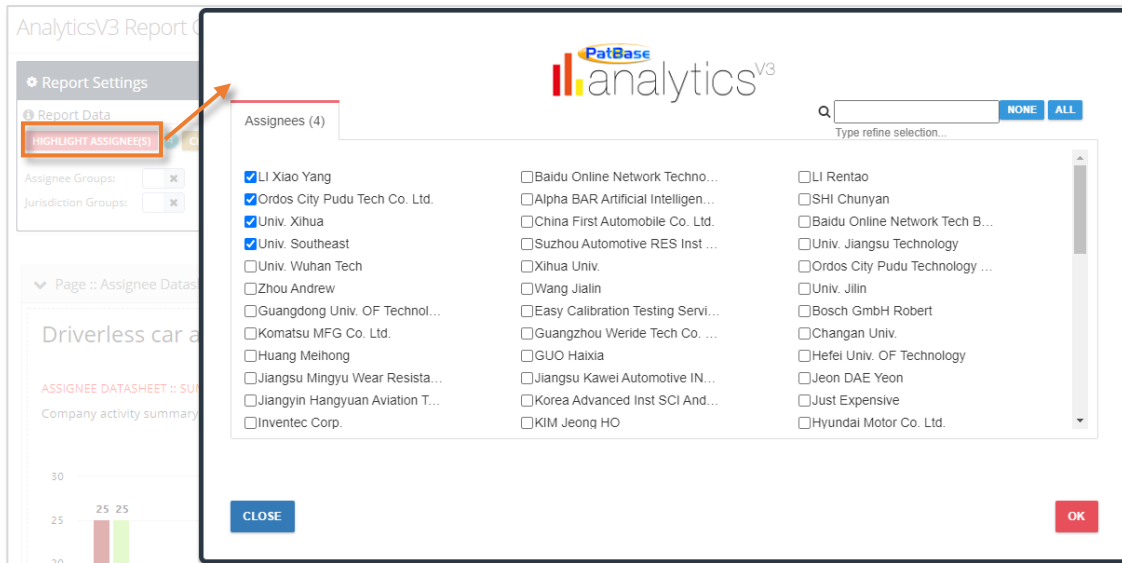


- **Help & Info** – see a description of the type of report you have generated, check if any further data needs to be analysed or view a diagram on using templates.

Highlight assignees/jurisdictions

The highlight assignees/jurisdictions option enables users to select and highlight one or more assignees/jurisdictions of interest. This will highlight them within the report which is useful for comparing their positions within the current result set/report. This option is only available from the assignee and jurisdiction data sheets.

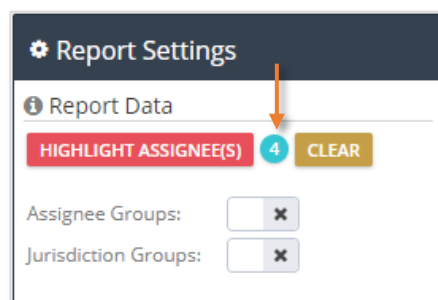
To open the option, click “Highlight Assignee(s)” from “Report Settings” from the assignee data sheet or click “Highlight Jurisdiction(s)” from the jurisdiction datasheet.



A pop-up window will appear. Select assignees/jurisdictions to highlight by ticking the relevant checkbox(es) and click “OK”. The selected assignees/jurisdictions will then be highlighted within the report.




The number of selected assignees/jurisdictions is also indicated next to the “Highlight assignee/Highlight jurisdictions” button. Click “Clear” to cancel highlighting.

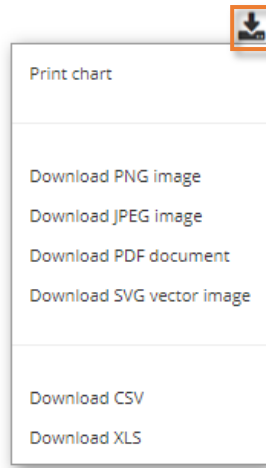


Please note: Turn groups on from “Report Settings” to include assignee or jurisdiction groups.

Download, export, print or share charts

Download or print



Options to print or download an image can be found at the top-right corner of all charts by clicking on the download  icon, or in the *Chart Settings* under the [chart information, share and download](#) tab. Choose to print the chart or download as a PNG, JPEG, PDF or SVG. The data can also be downloaded as a CSV or XLS for further manipulation.



Export

The underlying data can be exported from within the Chart Settings as either an Excel, XML, CSV, HTML and JSON file.

Share

Share individual charts by clicking on the share  icon at the top of the page or use the green share  button in chart settings. Share the entire analysis by generating a share link from your saved searches page. Please refer to [your saved searches](#) for further information.