

# Pat-KM manual: Express users

# **Table of Contents**

TABLE OF CONTENTS	1
ACCESSING THE EXPRESS PAT-KM INTERFACE	2
SWITCHING BETWEEN ARCHIVES	2
SEARCHING THE ARCHIVE	3
ARCHIVE RECORD DISPLAY	5
SUBSCRIPTIONS	7
CREATE SUBSCRIPTIONS	7
SIGN UP TO A PREDEFINED SUBSCRIPTION	9
MANAGE SUBSCRIPTIONS	10
VIEW SUBSCRIPTION RESULTS	11
PAT-KM SNAPSHOT DASHBOARD	13
CONTACT US	13
GLOSSARY	14

Page 1 of 14 Pat-KM manual: Express users support@minesoft.com

# Accessing the Express Pat-KM interface

To access Pat-KM, please go to: <u>https://www.patbase.com/express</u>

The user should enter their unique Pat-KM User ID and password.

LOGIN
support@minesoft.com
••••••
Remember me
Log in
Log III
Forgot your password? click here.
Forgot your password? click here. For corporate access please click here
Forgot your password? click here. For corporate access please click here

If the user is accessing via IP verification, it may be that no password is required (or is only required the very first time the user accesses the platform from that IP address).

#### Switching between archives

If your organisation has multiple archives, you can easily switch between them once logged in.

To switch to a different archive from the one currently logged in to, click on the icon at the bottom of the screen.



Page 2 of 14 Pat-KM manual: Express users support@minesoft.com An interim screen will appear, in order to select which archive to switch to.

Archive Switch	
Select archive	<ul> <li>Minesoft Customer Trial</li> </ul>
	<ul> <li>Minesoft IT</li> </ul>
	<ul> <li>Minesoft Staff Agent</li> </ul>
	Minesoft Staff Demo
	Change archive

Select the archive to switch to and click on *Change archive*.

The user will immediately be switched to the newly selected archive (there is no need to login again).

### Searching the archive

To search the archive using archive search fields, click on the *Pat-KM* tab on the menu along the top.



The Archive Search form contains the archive search fields available to search.

Archive Search					
Combine your Arch	Combine your Archive search with a regular PatBase search. Show ⊗				
Search your Archive	e using one or more of your pre-defined Archive fields				
Classification	<ul> <li>Unicycles</li> <li>Bicycles</li> <li>Cycles with handlebars</li> <li>Freight- or pessenger-carrying cycles</li> <li>Children's cycles</li> <li>Motorcycles, engine-assisted cycles or motor scooters with one or two wheels</li> <li>Cycles convertible to, or transformable into, other type of cycle or land vehicle</li> <li>Collapsible or foldable cycles</li> <li>Cycles not otherwise provided for</li> </ul>				
Assignee	BMW Horex Matchless Megelli Motorcycles				
Status	Inforce Invalid Lapsed				
Importance	Important Not important				
Notes					
	Search Clear				

Depending on the access rights set up by administrators on the account, certain fields may not be visible to all users.

Select the required search criteria on the form. If multiple classifications are selected in the Classification Tree, they will be combined with OR. Multiple fields (e.g. Assignee and Status) will be combined with the AND operator.

Click on *Search* to submit the search query.

Alternatively, open up the PatBase Advanced search form to search against standard PatBase fields, but select the option to *Search in Archive only*.



Page 4 of 14 Pat-KM manual: Express users support@minesoft.com



This will limit search results to only those records that have been archived.

When the search query is displayed at the top of the results page, the 'ARCHIVE=YES' command indicates that archived records are being searched.

Advanced search:	(TAC=(bicycle)) AND ARCHIVE=YES

# **Archive Record Display**

Results are displayed in a list (10 per page) that can be navigated using the *Next* link at the top.

Records are displayed in scan format, which includes the title, the first part of the abstract, the assignee, and an image on the right-hand side.

Paterse Basic search Number search Advanced search Archive search Semantic search Literature search More options Help		Arch	ive name: Minesoft Customer Trial
Archive search: (Classification-(Unicyclan)) Refine search			
Showing records 1-10 of 1,332 🛞 Sort	🚹 Analytics 🔹	🗊 Optimise search 🔒	Export 👻 🔯 To my folder
111US200470747.4. RFID TUG LOUSING STRUCTING, BHD 104. NETLUZION STRUCTURE AND RFID TUG COMMUNACTION METHOD 1020001071074.4. dot of the sector humber isolation in topic in your isolation to the in PCD tog is used in statute of a power isolation with the sector and used or the sector isolation with the sector of the sector investment of the sector of the sector of the sector investment of the sector o	a	Optimises     Publica     Countri	xearch 😸 🐼 nlies ogies lion dates es
2) US20102761A. Pole for a low-voltage limiting electrical power circuit breaker and a circuit breaker equipped with such a pole US200102761A pole for a low-voltage limiting electrical power circuit breaker equipped with such a pole US200102761A pole for a low-voltage limiting electrical power circuit breaker equipped with such a pole US200102761A pole for a low-voltage limiting electrical power circuit breaker equipped with such a pole US200102761A pole for a low-voltage limiting electrical power circuit breaker equipped with such a pole US200102761A pole for a low-voltage limiting electrical power circuit breaker equipped with such a pole US200102761A pole for a low-voltage limiting electrical power circuit breaker equipped with such a pole breaker blow contact can a more even equipped with such a such as pole control contact for an electrical power circuit breaker equipped with such a pole control contact and may contage limiting electrical power circuit breaker equipped with such as and which is extended break which form a parago control contact and may contage limiting electrical power breaker equipped with such as and which is extended break the inde of the chamber by a narrower part. First published: Ocober 11, 2001			

Page 5 of 14 Pat-KM manual: Express users support@minesoft.com To open a record to view in more detail, click on the title.



A green tick at the right-hand side of a record indicates that it has been archived.

	<u>_</u> 1		•	■ In my	list 🕡	
Biblio	Claims & Descriptions	Status	Citations	Similar	next >>	~

Archive fields that have been assigned to the record will be displayed in a box on the record.

Please note: depending on the access rights set up by administrators, certain fields may not be visible to all user groups.

	Archive Fields:	
	<b>Classification:</b> Bicycles Motorcycles, engine-assisted cycles or motor scooters with one or two wheels <b>Notes:</b> denne skal vi holde øje med	
Owner(s) / Assignee(s):	ESTEBAN GARCIA SIMON ; GARCIA SIMON ; GARCIA SIMON ES GARCIA SIMON ; SIMON ESTEBAN GARCIA ; SIMON RAMON GA	TEBAN RCIA

Page 6 of 14 Pat-KM manual: Express users support@minesoft.com

### **Subscriptions**

Subscriptions allow Express users to be alerted to new records of interest that enter the archive each week. The subscription query is based on archive fields. Users create subscriptions or sign up to predefined subscriptions based on archive fields relevant to their area of expertise.

Administrators can set up predefined subscription queries that users can choose to subscribe to.

### **Create subscriptions**

To create a subscription, click on the Pat-KM Subscriptions link in the bottom.



There are two ways to set up a subscription – either create a subscription or sign up to a predefined subscription (a subscription that an administrator has already created).

To create a subscription, click the *Create a subscription* button.

Results	Create/Manage	
Archive sub	oscriptions are weekly a	alerts where others can be notified to new records classified as relevant to particular areas of interest
Create	a subscription	

#### Subscription name

Enter a name for the subscription. This name will be displayed in the subscription results email.

#### Subscription query

Select the required archive fields to build the subscription query. Any records in the archive each week which have been assigned these fields will appear in the subscription results.

Page 7 of 14 Pat-KM manual: Express users support@minesoft.com

Classificatio	n 🛛 Unicycles			
	⊞ Bicycles			
	Cycles with handlebars			
	E      Freight- or pessenger-carrying cycles			
	E Children's cycles			
	T Motorcycles, engine-assisted cycles or motor scooters with one or two			
	wheels			
	T Cycles convertible to or transformable into other type of cycle or land			
	vehicle			
	Collapsible or foldable cycles			
	<ul> <li>Cycles not otherwise provided for</li> </ul>			
Assignee				
-	BMW			
	Horex			
	Matchless			
	Megelli Motorcycles <<			
Otatus	M7 *			
Status				
	Invalid			
	Lapsed			
Importance	Important			
	Not important			
Notes				

Alternatively, create a subscription after an archive search has been completed by clicking on the Subscribe icon in the top right-hand corner of the results page.

#### Email to

The user's email address (user ID) will be displayed here. If the user is accessing the archive by IP verification, at this point the system will ask them to enter their valid email address in order to receive the alert results.

Email to:	mie@patarchive.com			
	Do not send email when subscription returns zero results			

There is also the option to not receive an email when the subscription returns zero results.

#### Notes

Add any notes to the subscription if required.

Click on *Create subscription* to create and save the subscription.

# Sign up to a predefined subscription

The subscription sign-up page is displayed below.

Select a predefined subscription query name from the drop-down list.

Subscription name		Last run	Last	result
Bicycles Test Alert New Archive	8		-	Edit   Delete
Sign up to an existing s	ubscription			
Subscription query:	Please select a query to subscribe to:			
	Bicycles Test Alert New Archive		*	<ol> <li>Select a query from the dropdown menu to subscribe to it.</li> </ol>
	Bicycles Test Alert New Archive Disjoncteurs in Unicycles			by clicking on the 'Subscribe' button at the top right hand of the results page.
	Jochen			
	Do not send email when subscription returns zero results			Tick this option if you do not want to receive an email when the subscription
				returns zero results.
	Save			

Once a name is selected, the subscription query will be displayed in the box below for reference. The query cannot be edited.

P	Please select a query to subscribe to: Hydrogel	•
[(	[AF]: (Classification=(Bicycles*)) AND (Assignee=(Triumph)) AND (Status=(Inforce)) AND (Importance=(Important))	

#### Active

The active functionality allows users to stop or pause the predefined subscriptions. Simply select Yes/No to make the changes.

Page 9 of 14 Pat-KM manual: Express users support@minesoft.com

#### Email to

The user ID for the account will be displayed here and can be edited if necessary, for example, if the user ID is not a valid email address. If the user is accessing the archive by IP verification, at this point the system will ask them to enter a valid email address in order to receive the alert results.

Active:	Yes      No	
Email to:	mie@patarchive.com	
	Do not send email when subscription returns zero results	
Notes:		

There is also the option to not receive an email when the subscription returns zero results.

*Notes* Add any notes if required

Click on Create subscription.

# Manage subscriptions

To manage subscriptions, click on *Pat-KM Subscriptions* at the bottom of the screen.



Subscriptions are listed in the top table displaying the subscription name, when the subscription alert last ran, and how many results were returned in the last run. The user has the option to edit or delete the subscription query as required

Page 10 of 14 Pat-KM manual: Express users support@minesoft.com

Result       CreateManage         Archive subscriptions are weekly alerts where others can be notified to new records classified as relevant to particular areas of interest         Create a subscription         Subscription name       Last run         Explore Test Alert New Archive         Bicycles Test Alert New Archive         Disjoncteurs in Unicycles       2018-08-12 14.49:57         Jochen       2018-08-12 14.49:07         Subscription       Edit Delete Edit Delete Edit Delete         Subscription       Please select a query to subscribe to query:         Please select a query to subscribe to in a search by clicking on the dropdown menu to subscribe to it.         Alernatively, you can create a new subscription query when you have or the results page.					
Archive subscriptions are weekly alerts where others can be notified to new records classified as relevant to particular areas of interest.          Create a subscription         Subscription name taket New Archive         Bicycles Test Alert New Archive         Disjoncteurs in Unicycles         2018-08-12 14:49:57         Disjoncteurs in Unicycles         2018-08-12 14:50:08         Sign up to an existing subscription query:         Please select a query to subscribe to:         Image: Comparison of the subscription query when you have not a search by clicking on the "Subscription query when you have not a search by clicking on the "Subscription query when you have of the results page.	Results Create/Mana	ge			
Create a subscription         Subscription name       Last run       Last result         Bicycles Test Alert New Archive       -       -       Edit Delete         Disjoncteurs in Unicycles       2018-08-12 14:49:57       0       Edit Delete         Disjoncteurs in Unicycles       2018-08-12 14:50.08       1       Edit Delete         Sign up to an existing subscription       Please select a query to subscribe to:       •       •         Query:       Please select a query to subscribe to:       •       •       •         Query:       •       •       •       •       •         Of Select a query from the dropdown menu to subscribe to it.       •       •       •       •         Of Select a query from the dropdown menu to subscribe to it.       •       •       •       •       •         Of the results page.       •       •       •       •       •       •       •	Archive subscriptions are w	eekly alerts where others can be notified to new reco	ords classified as relevant	to particular areas of ir	nterest
Subscription name       Last run       Last result         Bicycles Test Alert New Archive       -       -         Disjoncteurs in Unicycles       2018-08-12 14:49:57       0         Disjoncteurs in Unicycles       2018-08-12 14:50:08       1         Sign up to an existing subscription       -       -         Subscription query:       Please select a query to subscribe to:       -          -       -       -         Query:       Please select a query to subscribe to:       -       -          -       -       -       -          -       -       -       -          -       -       -       -       -          -       -       -       -       -          -       -       -       -       -       -          -					
Subscription name       Last run       Last result         Bicycles Test Alert New Archive       -       -       Edit   Delete         Disjoncteurs in Unicycles       2018-08-12 14:49:57       0       Edit   Delete       Edit   Delete         Sign up to an existing subscription query:       Please select a query to subscribe to:       •       •       •         O       Select a query for subscribe to:       •       •       •       •         •       •       •       •       •       •       •	Create a subscription	n			
Subscription name     Last run     Last result       Bicycles Test Alert New Archive     -     -       Disjoncteurs in Unicycles     2018-08-12 14:49:57     0       Jochen     2018-08-12 14:50:08     1   Sign up to an existing subscription  Please select a query to subscribe to:     Please select a query to subscribe to:      () Select a query from the dropdown menu to subscribe to it.  Alernatively, you can create a new subscription query when you have run a search by clicking on the 'Subscribe' button at the top right hand of the results page.					
Bicycles Test Alert New Archive	Subscription name		Last run	Last result	
Bicycles Test Alert New Archive 0 Disjoncteurs in Unicycles 2018-08-12 14:49:57 0 Jachen 2018-08-12 14:50:08 1 Sign up to an existing subscription query: Please select a query to subscribe to: Query: O Select a query from the dropdown menu to subscribe to it. Alernatively, you can create a new subscription query when you have run a search by clicking on the 'Subscribe' button at the top right hand of the results page.	Bicycles Test Alert New Arci	iive		-	Edit   Delete
Disjoncteurs in Unicycles 2018-08-12 14:49:57 0 Jochen 2018-08-12 14:50.08 1 Edit [ Delete Edit ] Delete Edit [ Delete Edit ] Delete Edit [ Delete Edit ] Delete Edit ] Delete Comparison of the results are subscription Of the results are subscription of the "Subscription of the "Subscription" o	Bicycles Test Alert New Arc	nive		-	Edit Delete
Jocen     2018-08-12 14:50:08     1     Edit Delete       Sign up to an existing subscription query to subscribe to:     Please select a query to subscribe to:     •       Query:	Disjoncteurs in Unicycles		2018-08-12 14:49:57	0	Edit Delete
Sign up to an existing subscription         Subscription query:         Please select a query to subscribe to:         • O Select a query from the dropdown menu to subscribe to it.         Alematively, you can create a new subscription query when you have run a search by clicking on the "Subscribe" button at the top right hand of the results page.	Jochen		2018-08-12 14:50:08	1	Edit Delete
Sign up to an existing subscription Please select a query to subscribe to: Please select a query to subscribe to: O Select a query from the dropdown menu to subscribe to it. Alematively, you can create a new subscription query when you have run a search by clicking on the "Subscribe" button at the top right hand of the results page.					
Please select a query to subscribe to:         Please select a query to subscribe to:         Image: Control of the subscribe to: <td>Sign up to an existing</td> <td>subscription</td> <td></td> <td></td> <td></td>	Sign up to an existing	subscription			
Query: <ul> <li>Select a query from the dropdown menu to subscribe to it.             </li> <li>Alematively, you can create a new subscription query when you have run a search by clicking on the "Subscribe" button at the top right hand of the results page.</li> </ul>	Subscription	Please select a query to subscribe to:			
O Select a query from the dropdown menu to subscribe to it.      Alernatively, you can create a new subscription query when you have     run a search by clicking on the "Subscribe" button at the top right hand     of the results page.	Subscription				
Alematively, you can create a new subscription query when you have run a search by clicking on the 'Subscribe' button at the top right hand of the results page.	query.				Select a query from the dropdown menu to subscribe to it.
Alematively, you can create a new subscription query when you have run a search by clicking on the "Subscribe" button at the top right hand of the results page.					Ψ,
run a search by cilcking on the 'Subscribe' button at the top right hand of the results page.					Alematively, you can create a new subscription query when you have
of the results page.					run a search by clicking on the 'Subscribe' button at the top right hand
					of the results page.

### **View subscription results**

Subscription results are listed in a table below the list of subscriptions. The results can be re-ordered by clicking on the appropriate column header.

Results Create/Manage					
My subscription results					
			🗐 Hide re	sults with no records	
Show 10 • entries			Search:		
Subscription name	Date	Last accessed	Number of records		
Jochen	2018-08-12 14:50:08		1	View	
Disjoncteurs in Unicycles	2018-08-12 14:49:58		0		
Jochen	2018-08-05 14:39:28		15	View	
Disjoncteurs in Unicycles	2018-08-05 14:39:16		0		
Disjoncteurs in Unicycles	2018-07-29 14:32:12		0		
Showing 1 to 5 of 5 entries					

Click on View to view subscription results.

They will appear as search results, with *Subscription results* and the subscription query name appearing at the top of the page.

Page 11 of 14 Pat-KM manual: Express users support@minesoft.com

Subscription results:	Jochen				
Showing records 1-10 of	15 🕞 Sort	🛄 Analytics 👻	🕞 Optimise search	🔒 Export 💌	🔄 To my folder 💌
<ol> <li>CN202016530U - Multifuncti A multifunctional bicycle belongs structurally comprises a bicycle b bicycle handlebar is arranged in timer, the pedia's are arranged of the driving chark, the carriage pl wheel through a bracket, and the Owner(5) / Assignee(3) 2HE MEB First published. October 26, 2011</li> </ol>	enal bicycle To a transport tenned by a too many, solves the problems in the conventional bicycle that the function is simplex and anticles are inconvenient to transport. The multituration To a transport tenned by a too;be therefore a front where is a boycle that the function is simplex and anticles are inconvenient to transport. The multituration the ford of the too;be multituration of the bicycle names is a boycle that are an anticle are a simplex and anticles are inconvenient to transport. The multituration the ford of the too;be multituration of the bicycle names are multituration of the simple name and the sim	val bicycle ody, wherein the die of the bicycle rear wheel through ected with the rear	- AR	Optimise sear Companies Technologie Publication Countries	rch 🛞 🔗 es dates
<ol> <li>CN100132414A - TWO-LAYE! The invention discloses a be-lay principle. The novel principle des- road on a plane to complete, and the new principle can effectively of non-motor vehicles and the effectively of Owner(5) / Assignme(5) WANO 6 First published. June 5, 2013</li> </ol>	ROAD STRUCTURE WHICH ENABLES MOTOR VEHICLES, NON-MOTOR VEHICLES AND PEDESTRUMS TO DRIVE AND WALK SMOOTHLY AT CROSSROADS are road structure which enables motor vehicles, non-nation vehicles and patientians to sha and walk smoothly at construction which constructions, small accupate road structure which enables motor vehicles, non-nation vehicles and patientians to sha and walk smoothly at constructions which constructions, small accupate road structure which enables devices in reduced, occupied space to decreased, and the problem of large occupied space to share for the occupient structure, and the problem of large occupied space to share for the occupient space to share the share threads structure and the optication of the motor vehicles, the non-native rules and the problem of large occupied space to share motor and the reduction of the motor vehicles, the non-native rules and the problem of large occupied space to an one share motor and the robust days and the problem of large occupied space to share motor and the share roads structure and the optications, and the problem at large to the distribution of the motor vehicles, the non-native rules and the problem structure, and the problem at large to the distribution of the motor vehicles, and the problem of large occupied space to share share the number of three-distructure and the optication of the motor vehicles, the non-native rules and the problem share. The local rules are the motor of the motor vehicles, and the problem share the large transition of the motor vehicles and the problem share and the problem share the share roads structure and the problem share the share roads structure and the problem share the share roads structure and the problem share the non-native share the share roads structure and the problem share the sh	space, and low crossover structure r road and an outer ructure invented by tor vehicles, the of			

Users can browse through the results as normal.

Alternatively, subscription results can be accessed from the link in the subscription email the user receives.

Subject:	PatArchive subscription (Tricycles) - Results: 3	
		PatArchive subscription results
Subscr Date/t Result	ription name: Tricycles ime: 2013-07-01 09:58:44 is: 3	
Click h	nere to view your results in PatBase	
or		
Click h	iere to view your results in PatBase Express	
<u>To unsu</u>	ubscribe from this subscription please click here	

Users should click on the PatBase Express link to log-in to PatBase Express and view the results.

Page 12 of 14 Pat-KM manual: Express users support@minesoft.com

# Pat-KM Snapshot Dashboard

PatBase **	sic search Number search Advanced search Pat-KM Se	mantic search Liter	ature search More options Help			
mpacell						Archive name: Minesoft Customer Trial
Pat-KM						4 Minesoft Customer Trial DK/ US -
🛆 Destboard	Dashboard					OCT 1, 2018 - MAR 31, 2018 -
3 Assigners						
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Classifications	PAMILY NUMBERS ASSIGNEES		INVENTORS	CPC CLASS	FICATIONS	IPC CLASSIFICATIONS
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	Lee Jin Hun Russell Terry Deceased Utsu inventor	pibeyesh: Mikur	402029/04	E02P9/2246 B66C13/18 Classification	0. Inforce	maid
		(R) My	folders 🦳 Public folders 💮 Pat-KM Si	repetrot		

# **Contact us**

For assistance with Minesoft Pat-KM, please contact the Minesoft helpdesk on:

Telephone: +44 (0)20 8404 0651 Email: support@minesoft.com

> Page 13 of 14 Pat-KM manual: Express users support@minesoft.com

# Glossary

Term	Description
PatBase	A global full-text patent database covering over 106 patent- issuing authorities, with records grouped into 60+ million patent families.
PatBase Express	End-user interface for PatBase.
Archive	A subset of PatBase records that have been assigned archive fields by designated users manually or during an inspection process.
Archive fields	Company-specific, internal fields that are applied to PatBase records by selected users, to create a searchable archive of value- added, intelligently 'tagged' patent data.
Administrator	Users with administrative rights on the Pat-KM account. They have the highest level of access which grants them the ability to create alerts, manage users and create user groups, including granting access rights to users.
Subscription	Users can create or sign up to pre-defined subscriptions to receive weekly alerts based on archive fields of interest. Administrators have the ability to sign up users to subscriptions.

Page 14 of 14 Pat-KM manual: Express users support@minesoft.com