Pat-KM manual: Express users

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Accessing the Express Pat-KM interface

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

The user should enter their unique Pat-KM User ID and password.
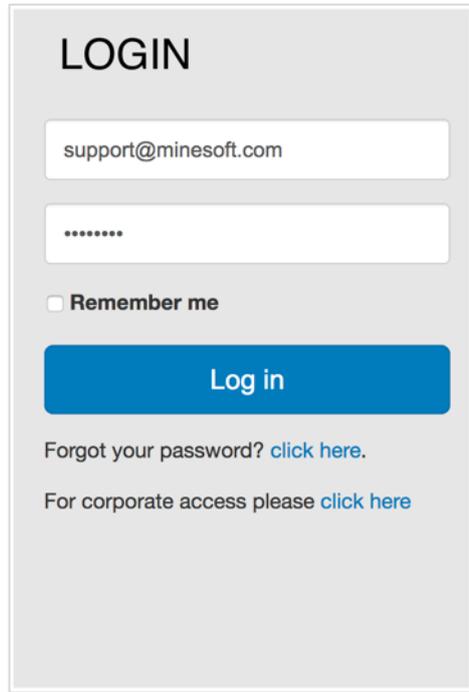
If the user is accessing via IP verification, it may be that no password is required (or is only required the very first time the user accesses the platform from that IP address).

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.

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An interim screen will appear, in order to select which archive to switch to.
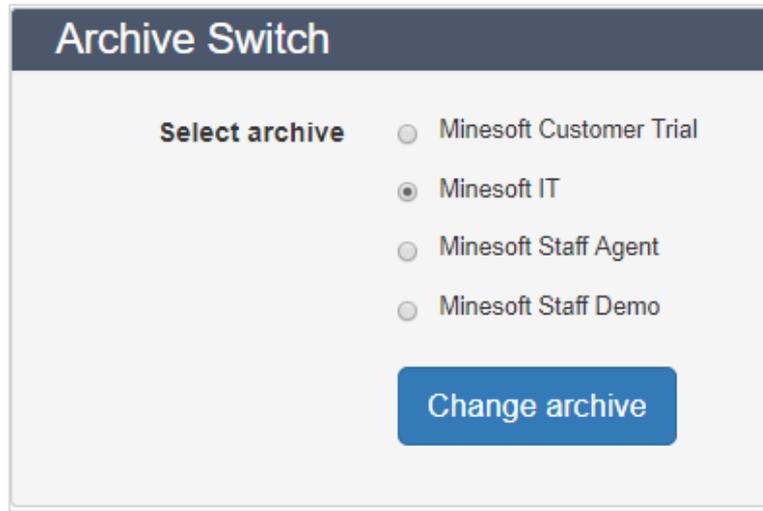
Select the archive to switch to and click on *Change archive.*

The user will immediately be switched to the newly selected archive (there is no need to log-in 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.

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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*.

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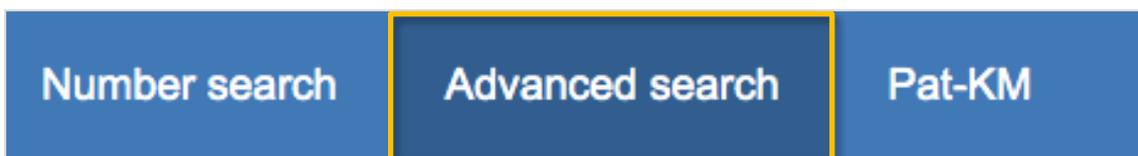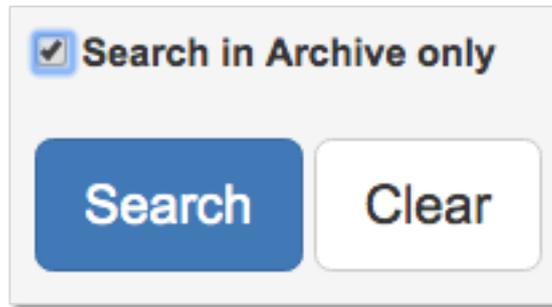
This will limit search results to only those records that have been archived.

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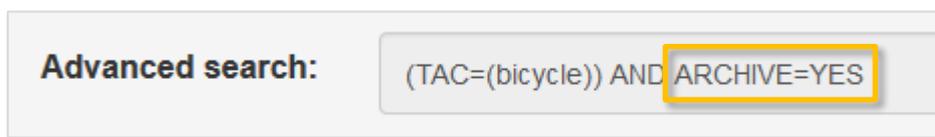
Archive Record Display

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.

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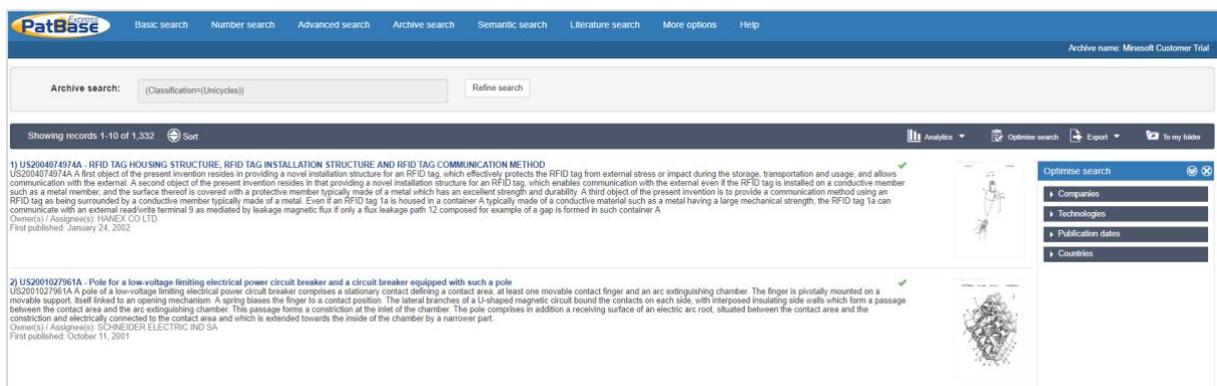
To open a record to view in more detail, click on the title.

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

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.

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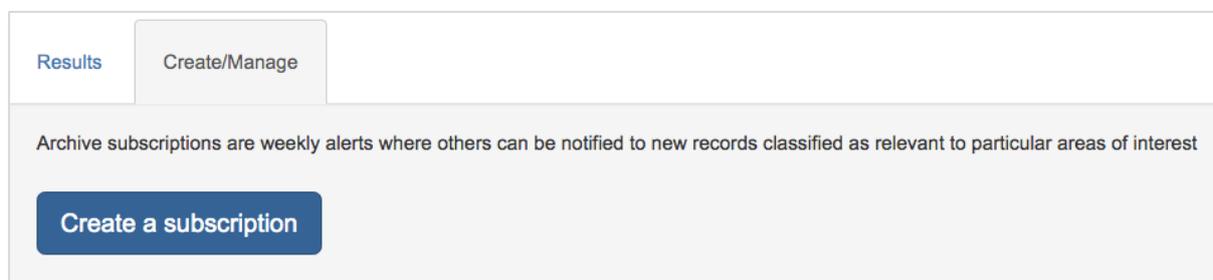
Subscription name
Enter a name for the subscription. This name will be displayed in the subscription results email.

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.

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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.

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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.

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

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

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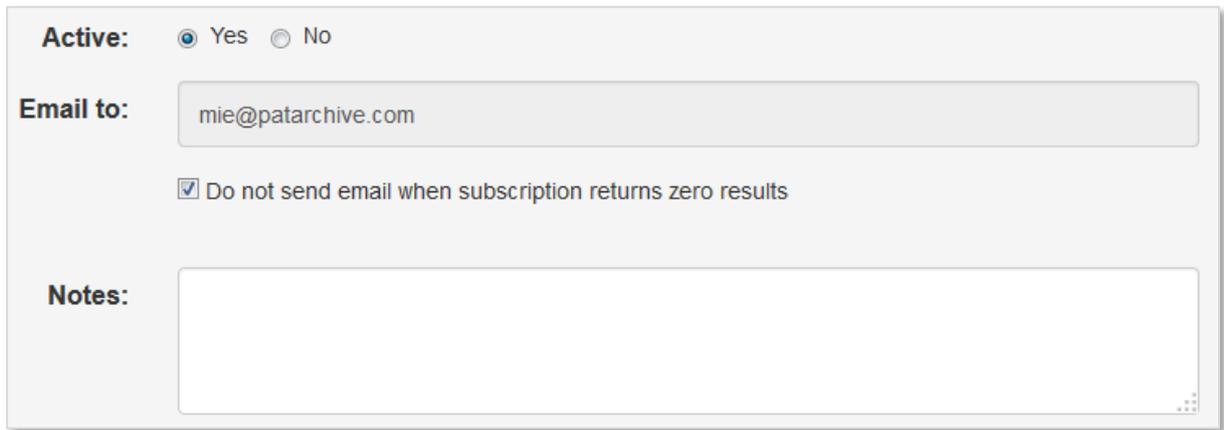
There is also the option to not receive an email when the subscription returns zero results.

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

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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.

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.

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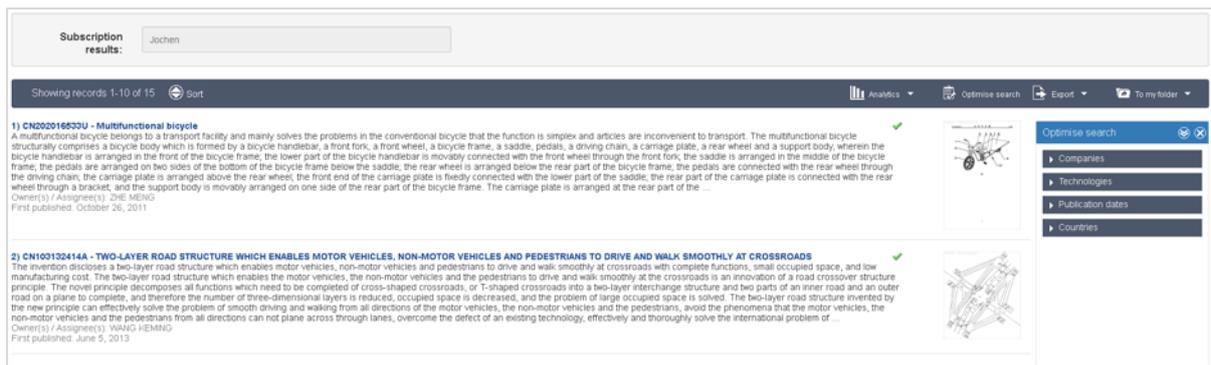
Users can browse through the results as normal.

Alternatively, subscription results can be accessed from the link in the subscription email the user receives.
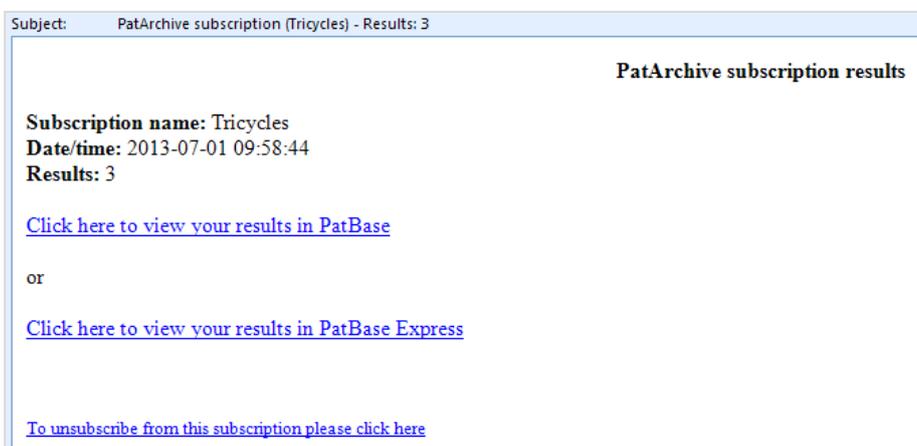
Users should click on the PatBase Express link to log-in to PatBase Express and view the results.

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Pat-KM Snapshot Dashboard
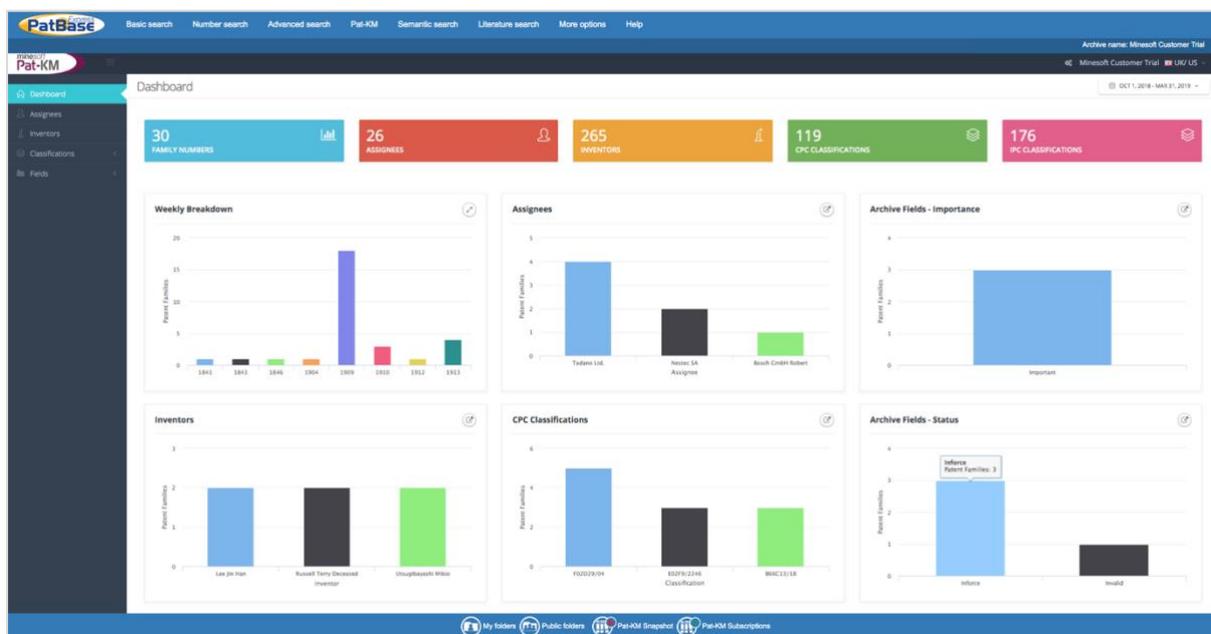
Contact us

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

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

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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.

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