



## Pat-KM manual: general users

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### Glossary

<b>Term</b>	<b>Description</b>
PatBase	A global full-text patent database covering over 100 patent-issuing authorities, with records grouped into 60+ million patent families.
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 archive alerts and to manage Pat-KM users and create user groups, including granting certain access rights to certain users.
Inspector	Users with rights to perform reviews and inspections of alert results. They can also edit archive fields (that are made visible to them) on records.
User	A general Pat-KM user with no administrative or inspector rights. They can search the archive and view archive fields (that are made visible to them) assigned to records but cannot make any changes to archive fields. They can also sign up to subscriptions to receive weekly alerts based on archive fields of interest.
Inspection	An inspection is the second stage of a two-level inspection, or the only stage of a one-level inspection. During an inspection, the inspector(s) can assign relevant archive fields to records retrieved in alert results.
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.

## Accessing Pat-KM

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



The image shows a login form titled "PatBase Login". Below the title is the instruction "Please enter your PatBase user ID and password to log in". The form contains three input fields: "User ID" with the value "caitlin@patarchive.com", "Password" with masked characters "\*\*\*\*\*", and "Sub account" which is empty. To the right of the "Sub account" field is a yellow "Login" button. Below the input fields are two checkboxes: "Remember my login information" (unchecked) and "Continue last session" (checked). At the bottom, there are two links: "Forgot your password? [click here](#)" and "For corporate access please [click here](#)".

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

Check *Remember my login information* to save your log-in details for the next time you access the platform on the same computer.

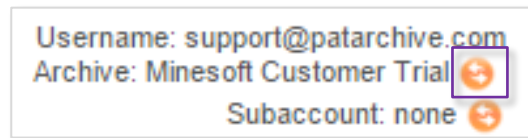
Check *Continue last session*, to continue your previous session, i.e. the searches from the previous session will be listed on the search history page.

If you have forgotten your password, please click on the link on the log-in screen in order to reset it.

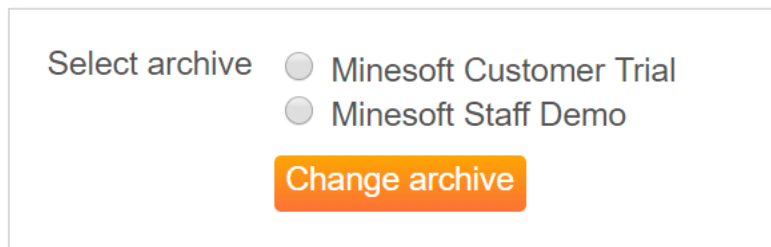
## Switching between archives

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

To switch to a different Archive, click on the orange arrows icon next to the name of the current archive, in the top right-hand corner of the screen.



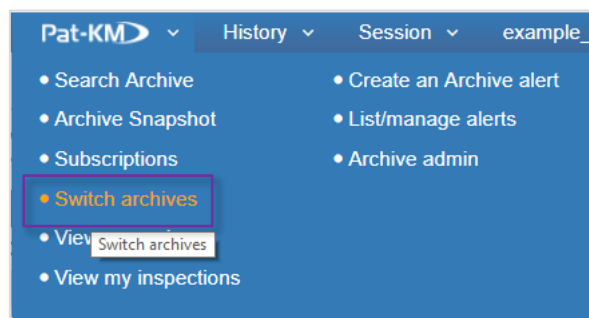
An interim screen will appear, in order to select which Archive to switch to.



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

The new Archive will appear in the top right-hand corner to indicate that you have logged in to a different archive.

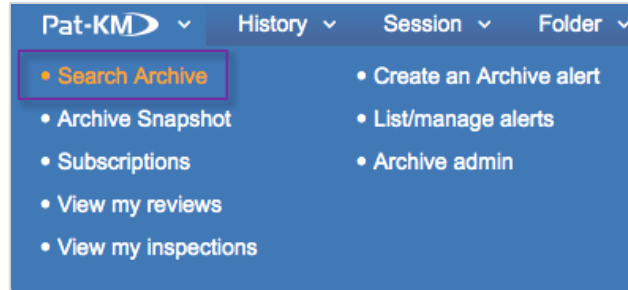
Alternatively, mouse over the *Pat-KM* tab on the toolbar and click on the *Switch archives* option.



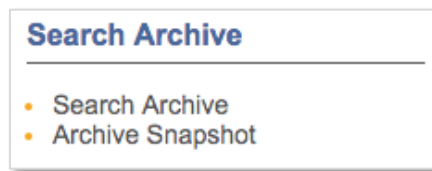
***Please note: if logging out and back into the system, Pat-KM will remember the last active Archive accessed.***

## Searching the Archive

To search the archive using archive search fields, go to the *Pat-KM* tab on the toolbar and select *Search Archive*.



Alternatively, go to the *Pat-KM* tab on the menu page and select *Search Archive* under the *Search Archive* section.



The Archive search form contains the Archive search fields available to search along with the option to search relevant information using the drop-down lists on top of the page. More fields/search criteria can be included by clicking on the + *Add another field* button.

**minesoft**  
**Pat-KM**

Combine your Archive search with a regular PatBase search. Show **i**

Search your Archive using one or more of your pre-defined Archive fields

Classification

- Unicycles
- Bicycles
- Cycles with handlebars
- Freight- or passenger-carrying cycles
- Children's cycles
- Motorcycles, engine-assisted cycles or motor scooters with one or two wheels
- Cycles convertible to, or transformable into, other type of cycle or land vehicle
- Collapsible or foldable cycles
- Cycles not otherwise provided for

Assignee  **i**

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, certain fields may not be visible to all user groups.

Select the required search criteria. 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.

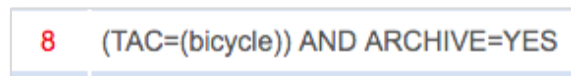
Click on *Search* to submit the search query.

This will limit search results to only those records tagged with the chosen archive fields. On the search history page, the query will be prefaced with [AF]: to indicate that it is an archive search.

**14** [AF]: (Classification=(Bicycles\*))

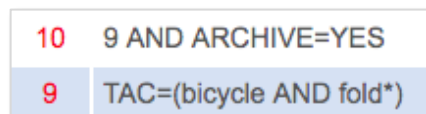
Alternatively, open up the PatBase search form to search against standard fields, but select the option to *Search in Archive only*.

This will limit search results to only those records that have been archived. On the search history page, the Archive=Yes command will form part of the search query displayed.



8 (TAC=(bicycle)) AND ARCHIVE=YES

Alternatively, users can run a search on PatBase, then combine the results with the Archive=Yes command in order to determine which records in that results set are already in the archive.

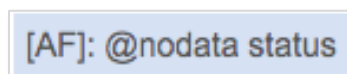


10 9 AND ARCHIVE=YES  
9 TAC=(bicycle AND fold\*)

To search for records that contain no data for any fields in the archive, search [AF]: @nodata in the command line.

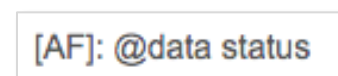
To search for records that do not contain data in a specific field search: [AF]: @nodata \*field name\*

E.g. for the field name 'Status' use the following search:



[AF]: @nodata status

To search for records that do contain data in a specific field search: [AF]: @data \*fieldname\*  
E.g. for the field name "Status" use the following search:



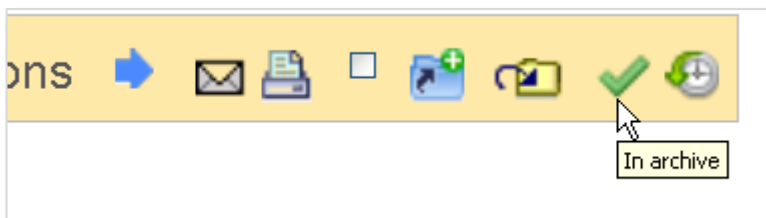
[AF]: @data status

***Please note: the above @data/nodata searches make use of the field name as shown in the search history when a search on the field is run. To ensure you are using the correct field name, run a search containing the field and ensure that your @data/nodata search uses the field name as shown in the history.***

## Archive Record Display

Click on *View* or *Browse* from the *Search History* page to view PatBase or Archive search results.

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.***

**1) Family number: 49804749 (IN197042B)**

**Title:** [EN] AN IMPROVED BRAKING DEVICE FOR TWO WHEELERS

**Abstract:** Source: IN197042B [EN] An improved braking device for two wheel attached to the rear wheel brake shoe, characterised in that the said two brak helical spring (7) provided between the front wheel support and the front open having tensile strength more than 2.5 to 3.5 times than the tensile strength of transmitted to the rear wheel brake shoes and only 30% of the force is trans

**Archive Fields:**

**Classification:** Bicycles

**Classifications:** [Classification Explorer](#)  
**International** (IPC 1-7): F16D65/30

To view the inspection history of a record, click on the clock icon at the top right corner of each record.





All activity associated with the record can be viewed, along with the user who made the change. The history is searchable.

History for family 19800663		
Show 50 entries		
Date/Time	User	Event
2013-07-01 13:28:12	Katy Wood	Fields updated in bulk assignment (Append). • Classification = Unicycles Bicycles > recumbent-type bicycles Bicycles > automatic balancing machines Cycles with handlebars Cycles convertible to, or transformable into, other type of cycle or land vehicle > to a tandem
2013-06-25 16:15:21	Jochen	Fields updated in archive. • Classification = Unicycles Bicycles > recumbent-type bicycles Bicycles > automatic balancing machines Cycles convertible to, or transformable into, other type of cycle or land vehicle > to a tandem

## Subscriptions

Subscriptions allow 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 or sign up to subscriptions based on archive fields relevant to their area of expertise.

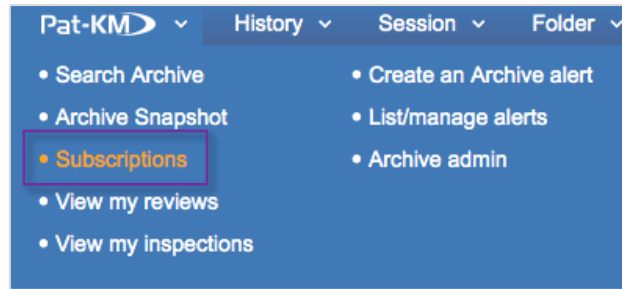
All users can create subscriptions.

In addition, administrators can set up predefined subscription queries that any user can choose to sign up to. Alternatively, administrators can sign up users to subscriptions, to automatically push relevant alert results out to them each week.

## Create subscriptions

*Creating a subscription using the create subscription form*

To create a subscription, any user can click on *Subscriptions* from the *Pat-KM* tab on the toolbar or under the *Subscriptions* section on the main Pat-KM menu.

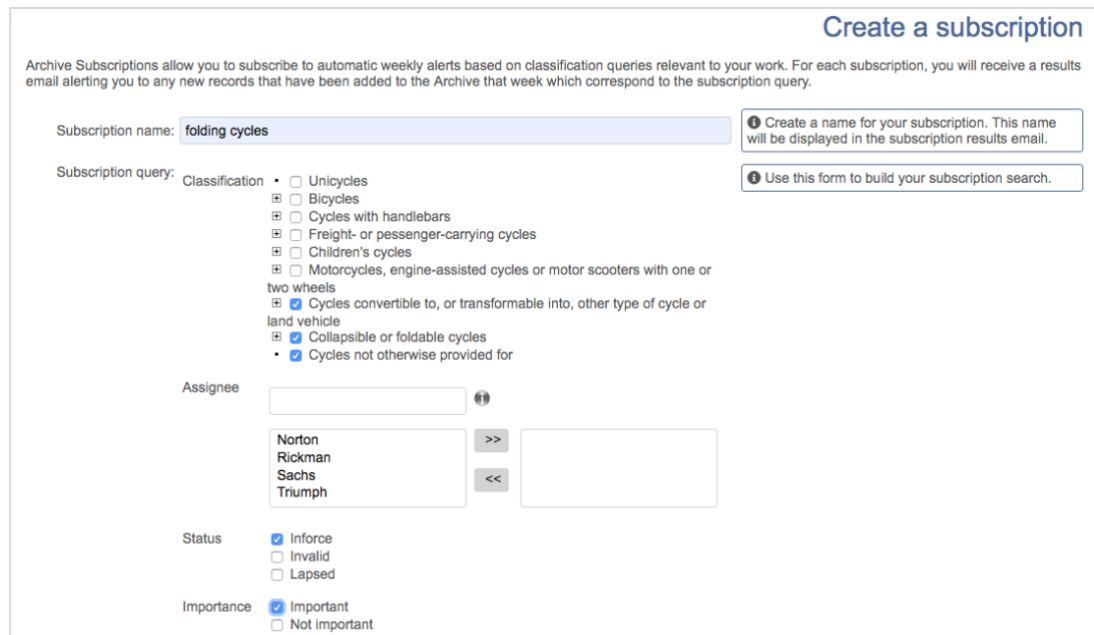


### Subscription name

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

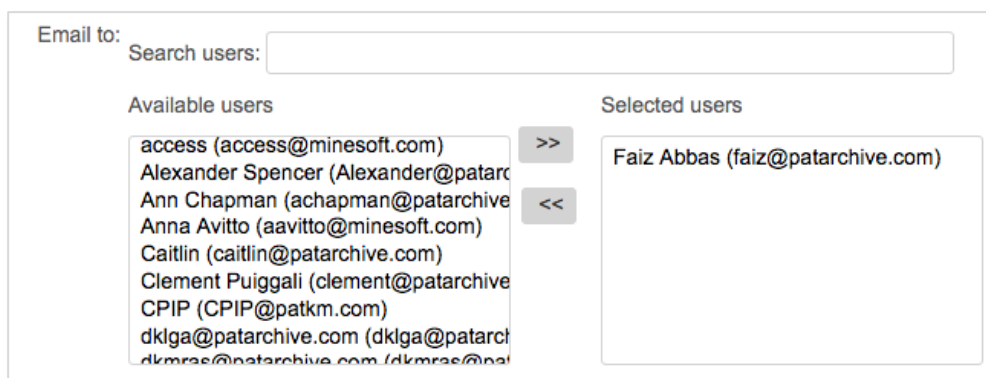
### Subscription query

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.

A screenshot of the 'Create a subscription' form. The form is titled 'Create a subscription' in blue text at the top right. Below the title, there is a paragraph of text: 'Archive Subscriptions allow you to subscribe to automatic weekly alerts based on classification queries relevant to your work. For each subscription, you will receive a results email alerting you to any new records that have been added to the Archive that week which correspond to the subscription query.' The form contains several sections: 1. 'Subscription name: folding cycles' with a text input field and a help icon. 2. 'Subscription query: Classification' with a list of checkboxes: 'Unicycles', 'Bicycles', 'Cycles with handlebars', 'Freight- or passenger-carrying cycles', 'Children's cycles', 'Motorcycles, engine-assisted cycles or motor scooters with one or two wheels', 'Cycles convertible to, or transformable into, other type of cycle or land vehicle', 'Collapsible or foldable cycles', and 'Cycles not otherwise provided for'. 3. 'Assignee' with a text input field and a help icon, and a list of names: 'Norton', 'Rickman', 'Sachs', 'Triumph' with '>>' and '<<' buttons. 4. 'Status' with checkboxes: 'Inforce' (checked), 'Invalid', and 'Lapsed'. 5. 'Importance' with checkboxes: 'Important' (checked) and 'Not important'.

## Email to

Search or select which Pat-KM users will receive the subscription.



The screenshot shows a web form titled "Email to:". At the top, there is a "Search users:" text input field. Below this, the form is divided into two columns: "Available users" on the left and "Selected users" on the right. The "Available users" list includes: access (access@minesoft.com), Alexander Spencer (Alexander@patarch...), Ann Chapman (achapman@patarchive.com), Anna Avitto (aavitto@minesoft.com), Caitlin (caitlin@patarchive.com), Clement Puiggali (clement@patarchive.com), CPIP (CPIP@patkm.com), dklga@patarchive.com (dklga@patarch...), and dkmrae@patarchive.com (dkmrae@patarch...). Between the two columns are two arrow buttons: a right-pointing arrow (>>) and a left-pointing arrow (<<). The "Selected users" list contains one entry: Faiz Abbas (faiz@patarchive.com).

Email recipients who are not registered Pat-KM users can be added manually by entering the email address in the *Add address* box underneath and clicking *Add*.

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

## Notes

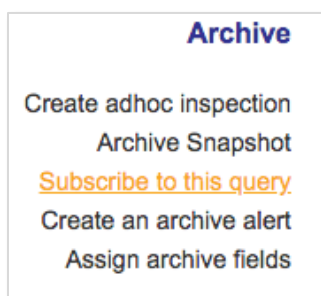
Add any notes to the subscription if required.

Click on *Save* to save the subscription or select *clear* if you have made a mistake and want to restart the process.

## Creating a subscription from search results

Alternatively, any user can create a subscription from archive search results. On the search history page, click on the *more...* options for the search query of interest and choose the *Subscribe to this query* link under the *Archive*.

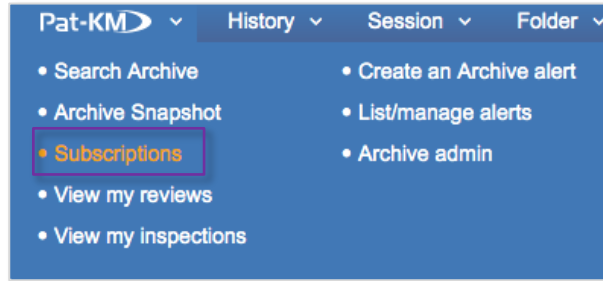
***Please note: this option will only be visible from archive search results, not PatBase search results.***



This opens the form to create a subscription, where the above instructions should be followed.

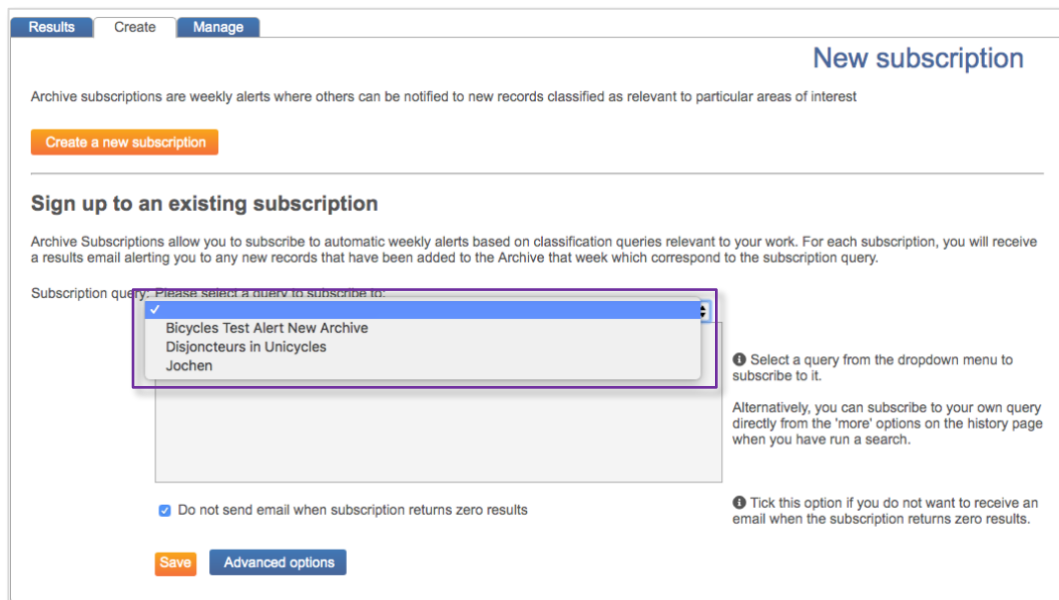
## Sign up to subscriptions (sign up to a predefined subscription)

Mouse-over the Pat-KM tab on the toolbar and select *Subscriptions*.

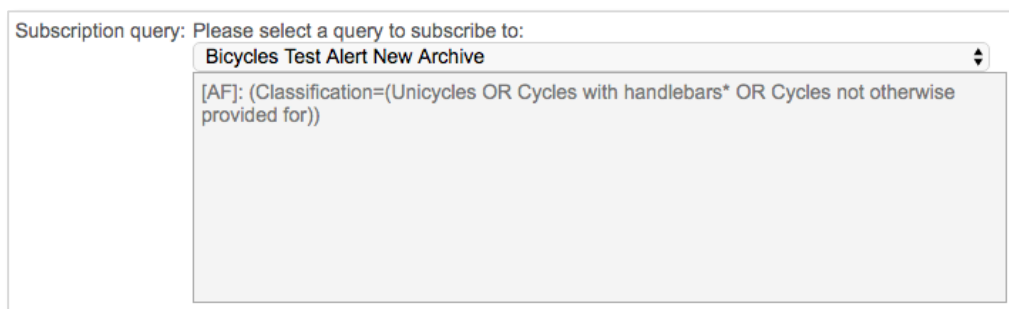


Select the *Create* tab and scroll down to the subscription query drop-down menu

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



Once selected, the subscription query will be displayed in the box below. The query cannot be edited.



### Email to

Use the search box to retrieve certain users or select users from the list of available users to assign the existing subscription to a user or users.

Email recipients who are not registered Pat-KM users can be added manually by entering the email address in the *Add address* box underneath and clicking *Add*.

The screenshot shows a web form titled "Email to". At the top, there is a "Search users:" text input field. Below this, the form is divided into two columns: "Available users" and "Selected users". The "Available users" column contains a list of users with their names and email addresses: access (access@minesoft.com), Alexander Spencer (Alexander@patarchi...), Ann Chapman (achapman@patarchive...), Anna Avitto (aavitto@minesoft.com), Clement Puiggali (clement@patarchive...), CPIP (CPIP@patkm.com), Caitlin (caitlin@patarchive.com), and dklga@patarchive.com (dklga@patarchi...). Between these two columns are two arrow buttons: a right-pointing arrow (>>) and a left-pointing arrow (<<). The "Selected users" column is currently empty. Below the user lists is an "Add address:" text input field followed by an orange "Add" button. Underneath the "Add address" field are three checkboxes: the first is checked and labeled "Do not send email when subscription returns zero results"; the second is unchecked and labeled "Send results as an adhoc inspection"; the third is unchecked and labeled "Include links to PatBase Express only". Below the checkboxes is a "Notes:" text area. At the bottom of the form are two buttons: an orange "Save changes" button and a grey "Clear" button.

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

It is possible to *Send results as an adhoc inspection* by ticking the box above the notes field. This will send the results to the recipient(s) in the form of an ad hoc inspection rather than a set of search results. Only administrators and inspectors can see this option.

### Notes

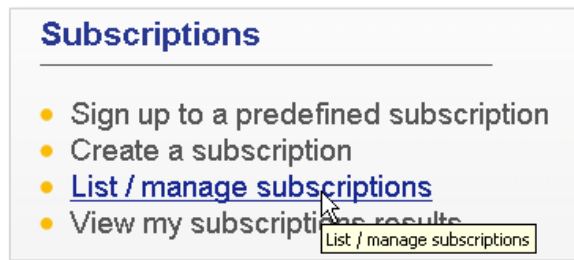
Add any notes if required

Click on *Save* to save the subscription. It will now appear in the subscriptions list, found under *List/manage subscriptions*.

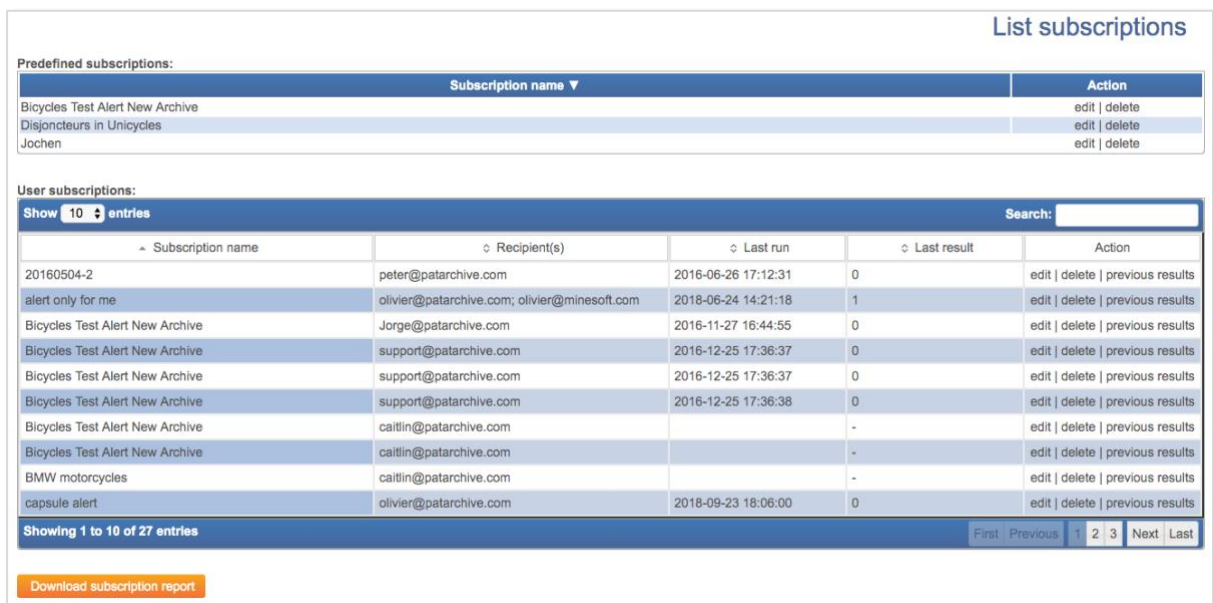
## Manage subscriptions

To manage subscriptions, click on *Menu* in the floating toolbar to go to the main menu page, then select the *Pat-KM* menu tab.

Click on *List/manage subscriptions* listed under the *Subscriptions* section.



The user's own subscriptions are listed in a table. Subscriptions can be edited or deleted from here. Clicking on *previous results* allows the user to see how many results were returned in previous weeks (the user needs to go to *View subscription results* to actually view the results).



The image shows a screenshot of the 'List subscriptions' page. The page is divided into two sections: 'Predefined subscriptions' and 'User subscriptions'.

**Predefined subscriptions:**

Subscription name ▼	Action
Bicycles Test Alert New Archive	edit   delete
Disjoncteurs in Unicycles	edit   delete
Jochen	edit   delete

**User subscriptions:**

Show 10 entries Search:

Subscription name	Recipient(s)	Last run	Last result	Action
20160504-2	peter@patarchive.com	2016-06-26 17:12:31	0	edit   delete   previous results
alert only for me	olivier@patarchive.com; olivier@minesoft.com	2018-06-24 14:21:18	1	edit   delete   previous results
Bicycles Test Alert New Archive	Jorge@patarchive.com	2016-11-27 16:44:55	0	edit   delete   previous results
Bicycles Test Alert New Archive	support@patarchive.com	2016-12-25 17:36:37	0	edit   delete   previous results
Bicycles Test Alert New Archive	support@patarchive.com	2016-12-25 17:36:37	0	edit   delete   previous results
Bicycles Test Alert New Archive	support@patarchive.com	2016-12-25 17:36:38	0	edit   delete   previous results
Bicycles Test Alert New Archive	caitlin@patarchive.com		-	edit   delete   previous results
Bicycles Test Alert New Archive	caitlin@patarchive.com		-	edit   delete   previous results
BMW motorcycles	caitlin@patarchive.com		-	edit   delete   previous results
capsule alert	olivier@patarchive.com	2018-09-23 18:06:00	0	edit   delete   previous results

Showing 1 to 10 of 27 entries

First Previous 1 2 3 Next Last

Download subscription report

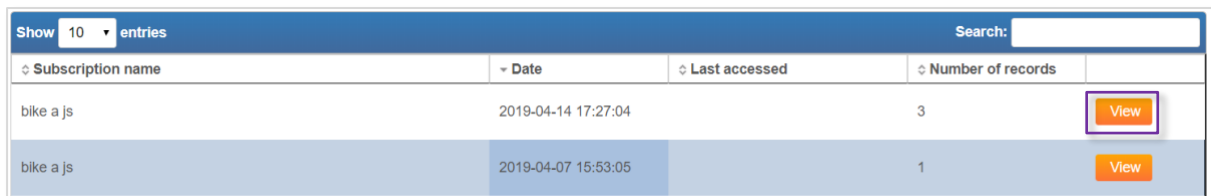
## View subscription results

In order to view previous, personal subscription results, click on *View my subscription results* under the *Subscriptions* section of the *Pat-KM* menu.



Alternatively, go to the *Pat-KM* tab on the toolbar and click on *Subscriptions* then go to the *Results* tab.

This displays a searchable table of previous subscription results. The order can be changed by name, date, last accessed or number of records.



The image shows a table with columns: "Subscription name", "Date", "Last accessed", and "Number of records". There are two rows of data. The first row has "bike a js", "2019-04-14 17:27:04", and "3". The second row has "bike a js", "2019-04-07 15:53:05", and "1". A "View" button is present in the rightmost column of each row. The "View" button in the first row is highlighted with a red box.

Subscription name	Date	Last accessed	Number of records	
bike a js	2019-04-14 17:27:04		3	<a href="#">View</a>
bike a js	2019-04-07 15:53:05		1	<a href="#">View</a>

Click on *View*.

The subscription results will then appear as a search query on the search history page. Click on *View* or *Browse* as normal to review the records.



The image shows a "Search History" table with columns: "#", "Search query", "Results", and "Options". There is one row of data with "# 50", "Subscription results: bike a js", "3", and "View | Browse | Hits | Optimise | more...".

#	Search query	Results	Options
50	Subscription results: bike a js	3	<a href="#">View</a>   <a href="#">Browse</a>   <a href="#">Hits</a>   <a href="#">Optimise</a>   <a href="#">more...</a>

Or, users can access results by clicking on the link in the subscription results email they receive.

## Creating a Manual Inspection

It is possible to create a manual or 'ad hoc' inspection from a set of search results.

From the search history page, click on the *More* link for the search query required, and select *Create adhoc inspection* listed under *Archive* on the menu.

The screenshot shows the 'Search History' page. It features a table with columns for '#', 'Search query', 'Results', and 'Options'. The table lists 13 search queries with their respective result counts and options like 'View', 'Browse', 'Hits', and 'Optimise'. To the right of the table is a sidebar with '3: More options' and 'Archive' sections. The 'Archive' section includes a button labeled 'Create adhoc inspection' which is highlighted with a red box.

#	Search query	Results	Options
13	1 and CC=ES	257	View   Browse   Hits   Optimise   more...
12	[AF]: @data status	1144	View   Browse   Hits   Optimise   more...
11	[AF]: @nodata status	54262	View   Browse   Hits   Optimise   more...
10	9 AND ARCHIVE=YES	911	View   Browse   Hits   Optimise   more...
9	TAC=(bicycle AND fold*)	13284	View   Browse   Hits   Optimise   more...
8	(TAC=(bicycle)) AND ARCHIVE=YES	3455	View   Browse   Hits   Optimise   more...
7	1 and ARCHIVE=YES	911	View   Browse   Hits   Optimise   more...
6	[AF]: (Classification=(Motorcycles, engine-assisted cycles or motor scooters with one or two wheels*)) AND (Assignee=(BMW OR Megelli Motorcycles)) AND (Status=(Inforce))	5	View   Browse   Hits   Optimise   more...
5	Subscription results: Duesseldorf Monitoring Childeren cycles	3	View   Browse   Hits   Optimise   more...
4	[AF]: (Classification=(Motorcycles, engine-assisted cycles or motor scooters with one or two wheels*)) AND (Assignee=(BMW)) AND (Importance=(Important))	9	View   Browse   Hits   Optimise   more...
3	2 and cc=es	27	View   Browse   Hits   Optimise   more...
2	1 and PD=2017	1083	View   Browse   Hits   Optimise   more...
1	TAC=(bicycle and fold*)	13265	View   Browse   Hits   Optimise   more...

**3: More options**

- PatBase Analytics
- Class Analysis
- Snapshot
- Explore search
- Export search results
- Publish / Send results
- Add to results folder
- Save search
- Order documents
- Set as a search filter
- Create alert

**Archive**

- Create adhoc inspection
- Create an archive alert
- Assign archive fields

Cancel

Select an inspector from the drop-down list of available inspectors.

The *Email from* field will correspond to the user ID currently used; this can be changed if necessary.

Enter the subject and message, if applicable, and press *Create inspection*.

An email will be sent to the selected inspector, and will appear as a pending inspection when they are logged in.

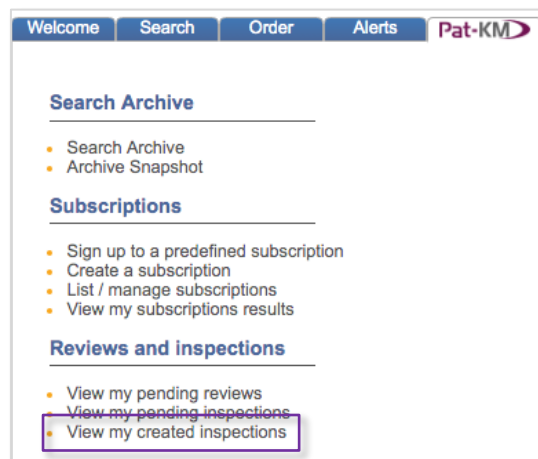
The screenshot shows the 'Create inspection' form. It has four main fields: 'Email to' (a dropdown menu with 'Inspector 1 (inspector1@patarchive.com)' selected), 'Email from' (a text box with 'admin@patarchive.com'), 'Subject' (a text box), and 'Message' (a large text area). At the bottom of the form is a button labeled 'Create inspection'.



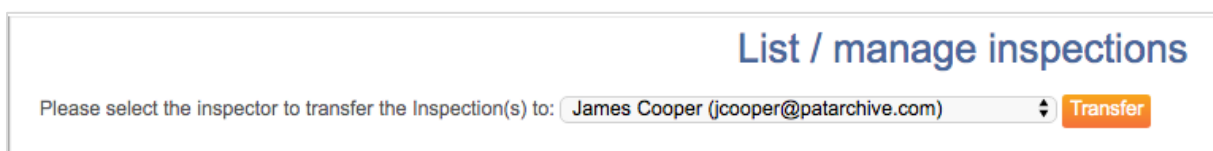
## View created inspections

All Pat-KM users are able to view a list of pending inspections which they have sent to inspectors within their archive.

Go to the *Menu* page and select the *Pat-KM* tab, click *View my created inspections* under the *Reviews and Inspections* section.



Users can send a reminder to the inspector or transfer the inspection to a different inspector using the drop-down menu at the bottom of the list. If Transfer to another inspector is selected, a secondary page will load where you can choose from a list of inspectors to transfer to.



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