



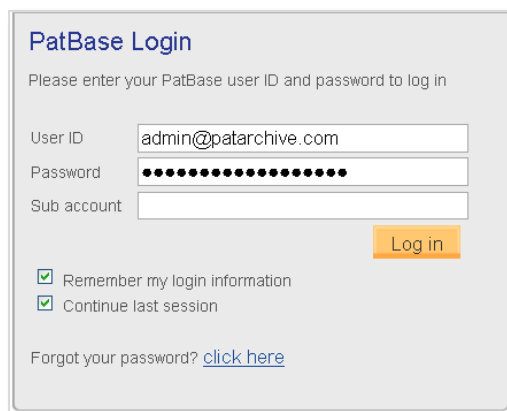
Pat-KM Manual: Administrators

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Accessing Pat-KM

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



The image shows a login form titled "PatBase Login". It contains the following fields and elements:

- Title: PatBase Login
- Instruction: Please enter your PatBase user ID and password to log in
- User ID field: Contains "admin@patarchive.com"
- Password field: Contains masked characters (dots)
- Sub account field: Empty
- Log in button: Orange button with "Log in" text
- Remember my login information: Remember my login information
- Continue last session: Continue last session
- Forgot your password? [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.

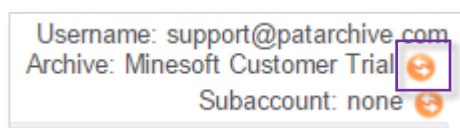
Check *Continue last session*, to continue your previous session, i.e. the searches from the previous session will be listed on the search history page.

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

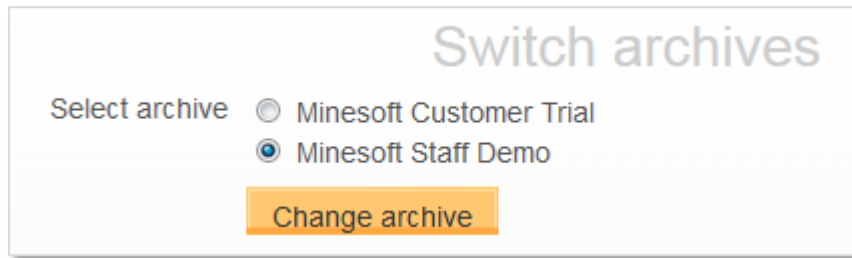
Switching between archives

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.



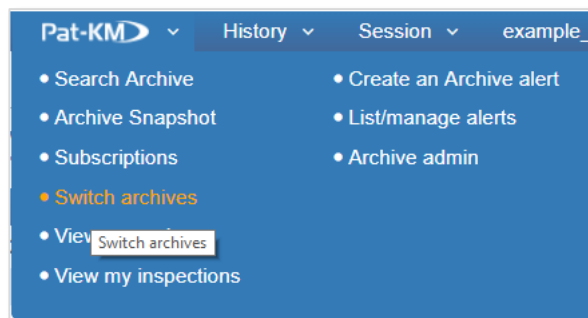
An interim screen will appear, in order to select which archive to switch to:



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

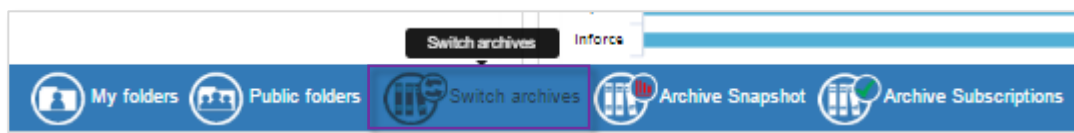
This new archive will appear in the top right-hand corner to indicate that you have logged in to a different archive.

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.

To switch archives in PatBase Express select the *Switch archives* option from the toolbar at the bottom of the screen as below.

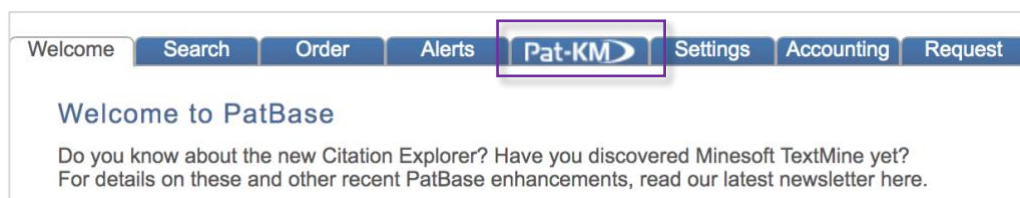


You will then be taken to the interim screen shown in figure 3 where you can select the archive to switch to.

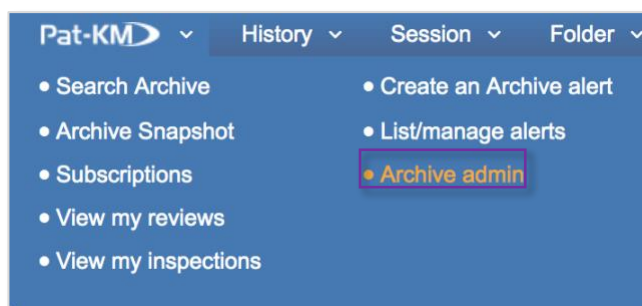
User Management

To access the user management area, click on the *Menu* tab on the toolbar to display the main menu screen.

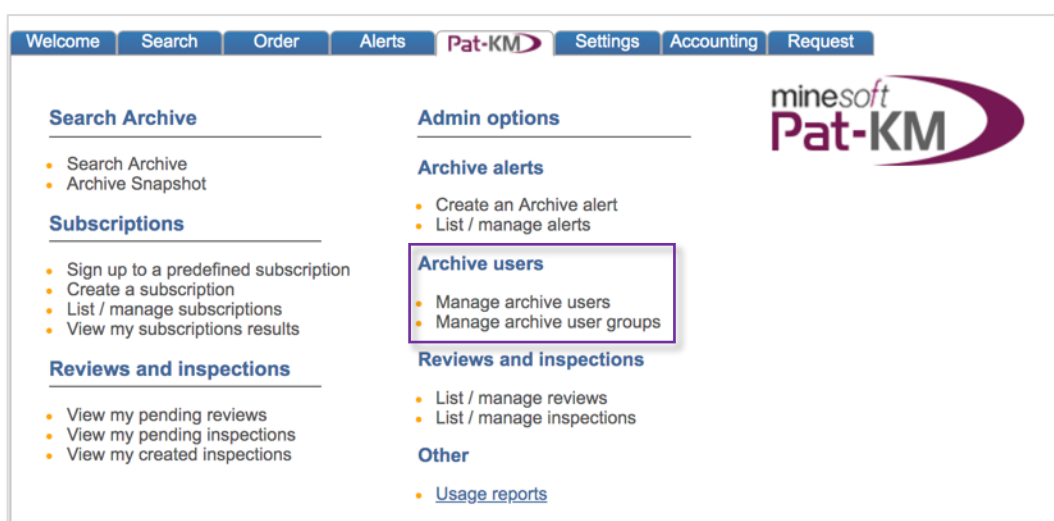
Click on the *Pat-KM* tab along the top for access to all the Pat-KM features.



Alternatively, mouse over the Pat-KM option on the main toolbar and select *Archive admin* from the drop-down menu.

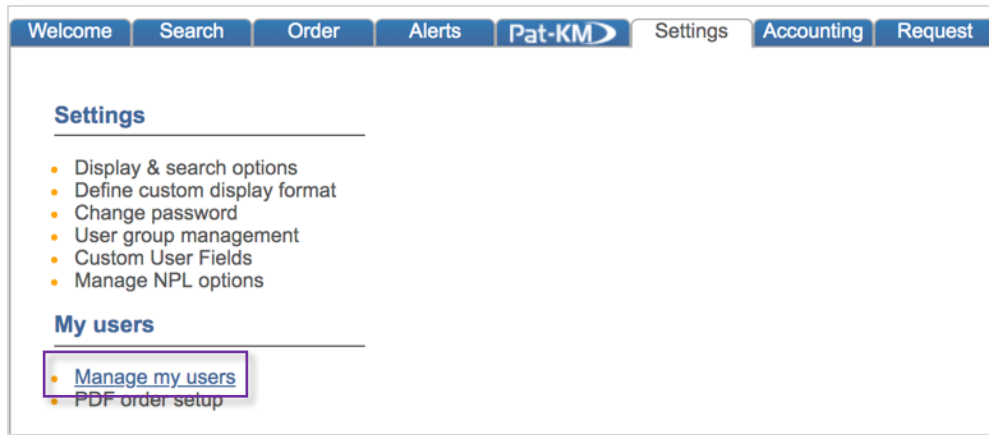


Administrator-only functions are displayed on the right-hand side. Options available to all users are displayed on the left-hand side. User management options are listed under the *Archive users* section.



Adding users

If the user is not already a PatBase user, go to *Settings* on the *Main menu* > *My users* > *Manage my users*.



Click on *Add a new user* and fill in the required details in order to create the new user.

Please note: administrators must also be set up as administrators on the PatBase account in order to add new users.

If the user is already a PatBase user, select *Manage archive users* in the *Archive users* section under the *Admin options* on the *Pat-KM* menu page:



In order to set PatBase users up as archive users, tick the *Allow archive access* option and save.

In addition, users can be set up as administrators and inspectors, as appropriate, by checking the options. Administrators have the highest level of access which grants them the ability to create alerts and to manage users and create user groups, including granting certain access rights to certain users.

Inspectors are 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.

Minesoft Staff Demo - Manage archive users

Show: Administrators Inspectors End Users Users in groups Users not in Archive

Show 10 entries Search:

#	UserID	User Name	Archive options
1	aavitto@minesoft.com	Anna Avitto	<input type="checkbox"/> Allow archive access
2	access@minesoft.com	access	<input checked="" type="checkbox"/> Allow archive access <input type="checkbox"/> Archive administrator <input type="checkbox"/> Archive inspector Manage groups (0)
3	achapman@patarchive.com	Ann Chapman	<input checked="" type="checkbox"/> Allow archive access <input type="checkbox"/> Archive administrator <input checked="" type="checkbox"/> Archive inspector Manage groups (1)
4	administrator@patarchive.com	Phil W	<input type="checkbox"/> Allow archive access
5	agentclient@patarchive.com	agent Client	<input type="checkbox"/> Allow archive access
6	Alexander@patarchive.com	Alexander Spencer	<input type="checkbox"/> Allow archive access
7	clement@patarchive.com	Clement Puiggali	<input checked="" type="checkbox"/> Allow archive access <input type="checkbox"/> Archive administrator <input checked="" type="checkbox"/> Archive inspector Manage groups (2)
8	CPIP@patkm.com	CPIP	<input type="checkbox"/> Allow archive access
9	devesh@patarchive.com	Devesh	<input checked="" type="checkbox"/> Allow archive access <input checked="" type="checkbox"/> Archive administrator <input checked="" type="checkbox"/> Archive inspector Manage groups (0)
10	dklga@patarchive.com	dklga@patarchive.com	<input type="checkbox"/> Allow archive access

Showing 1 to 10 of 57 entries First Previous 1 2 3 4 5 Next Last

[Download users report](#)

Editing archive users

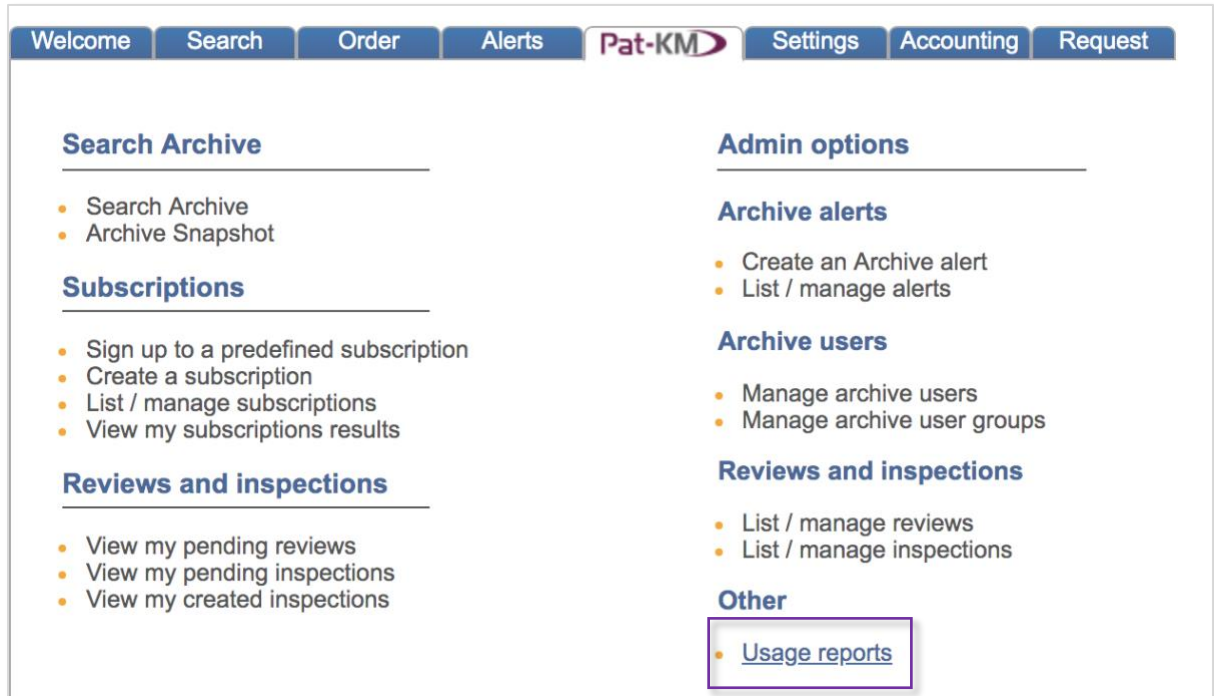
To edit archive users (to remove archive access or to grant inspector rights for example) go to the Pat-KM tab on the main menu and select *Manage archive users*. Make the appropriate changes by ticking or un-ticking the options, and press *save*.

Deleting users

To delete a user from the archive and from PatBase, go to the *Settings* tab on the main menu page, select *Manage my users* and press *Delete* next to the user in question. The User ID and all associated data will be permanently deleted from the PatBase and Pat-KM account.

Usage Reports

To run usage reports, go to the PatBase menu, select the Pat-KM tab then 'Usage reports'.



Archive activity reports

The archive activity report provides an overview of changes in the archive during the specified time period, including review and inspection activity for each alert. A summary of how many records added, updated and removed from the archive is provided.

Inspector activity report

The inspector activity report provides details of the actions performed by each inspector in the archive during the specified time period. The report includes the number of reviews and inspections completed as well as records updated.

Field assignment report

The field assignment report shows the number of families assigned to the chosen field(s) during the specified time period.

To run the field assignment report, select the archive field(s) of interest, select an optional breakdown field to display a breakdown of how many records have been assigned to the selected field(s).

Report period:	2015-07-01 to 2015-07-31					
	Status	Inforce	Invalid	Lapsed	[NONE]	Total
Assignee	BMW	1	0	0	0	1
Assignee	Horex	3	0	0	0	3
Assignee	Matchless	0	0	1	0	1
Assignee	Megelli Motorcycles	0	0	1	0	1
Assignee	MZ	0	0	0	0	0
Assignee	Norton	0	0	0	0	0
Assignee	Rickman	0	0	0	0	0
Assignee	Sachs	0	0	0	0	0
Assignee	Triumph	0	0	0	0	0

Managing Users Groups

User groups can be set up to control access to the archive for various users. Each user group can be assigned a different set of access rights depending on functional requirements, for example certain fields can be hidden from certain user groups at different stages of the workflow.

Adding a new user group

To add a new user group, go to the Pat-KM tab on the menu page and select *Manage archive user groups*.



Click on *Add a new group*.

Enter a group name and select the access rights from the table below.

Field name	Show in inspection <small>Select all</small>	Show in search <small>Select all</small>	Show in display <small>Select all</small>	Show in express search <small>Select all</small>	Show in express display <small>Select all</small>
Classification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assignee	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Importance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Choose which internal fields will be displayed for this user group at the following stages:

- Show in inspection (the field will be visible during inspection)
- Show in search (the field will be searchable to those users; this means it will be available when they create a subscription too)
- Show in display (the field will be displayed on the record)
- Show in express search (the field will be searchable in PatBase Express)
- Show in express display (the field will be viewable on records in PatBase Express)

These viewing rights apply to both inspectors and general users within groups. This means that even if a user is an inspector, and therefore has rights to assign and edit archive fields, administrators can hide certain fields from him/her by not selecting them in the table above.

Field name	Show in inspection <small>Select all</small>
Classification	<input checked="" type="checkbox"/>
Assignee	<input type="checkbox"/>
Status	<input type="checkbox"/>

Press *Save group* to create the user group and save the choices.

Once the new group has been saved, users can be assigned to the group below. Select users from the drop-down list of available users by using the arrows, or search for specific users using the search box.

Assign users: Search users:

Available users

- Phil O (phillip@patarchive.com)
- Rahman (rh@patarchive.com)
- Support (support@patarchive.com)
- Tanguy (thefnaoui@patarchive.com)
- Tim Campbell (tim@patarchive.com)
- access (access@minesoft.com)
- germany@patarchive.com (germany@)
- kevin S (kevin2@minesoft.com)

Selected users

- Devesh (devesh@patarchive.com)
- Ida (ida@patarchive.com)
- Stegemann Jorge (Jorge@patarchive.com)

Save users

Click on *Save users* to save those users to that user group.

Editing existing user groups

To edit existing user groups, go to the Pat-KM tab on the menu page and select *Manage archive user groups*.

Select the group to be edited from the dropdown menu and click *Manage group*.

Minesoft Staff Demo - Manage archive user groups

Add a new group or Select group: Manage group

- 2nd level inspector
- department b
- department d
- Distribution Bicycle
- Distribution Cars
- Duesseldorf User
- Express user

It is possible to change the name of the group, change the access rights and amend the users in the group.

Once the required changes have been made, click on 'Save group' and/or 'Save users' accordingly.

Deleting user groups

To delete a user group, go to the Pat-KM tab on the menu page and select *Manage archive user groups*.

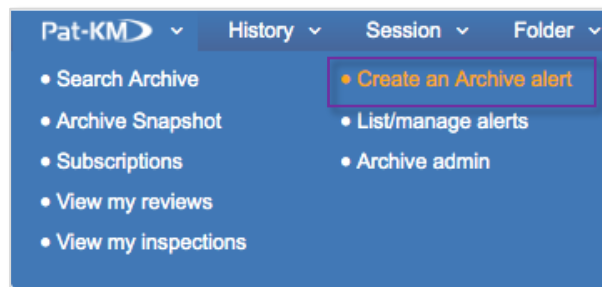
Select the user group to be edited from the dropdown menu and click *Manage group*. Select the *Delete group* button found below the access rights table.

Alerts

Setting up alerts

Pat-KM administrators are able to create alerts for inspection.

To create a new alert, mouse over *Pat-KM* in the floating toolbar and select *Create an Archive alert*.



Alternatively go to the Pat-KM tab on the menu page and select *Create an Archive alert*.



Fill in the following fields in order to set up the alert profile:

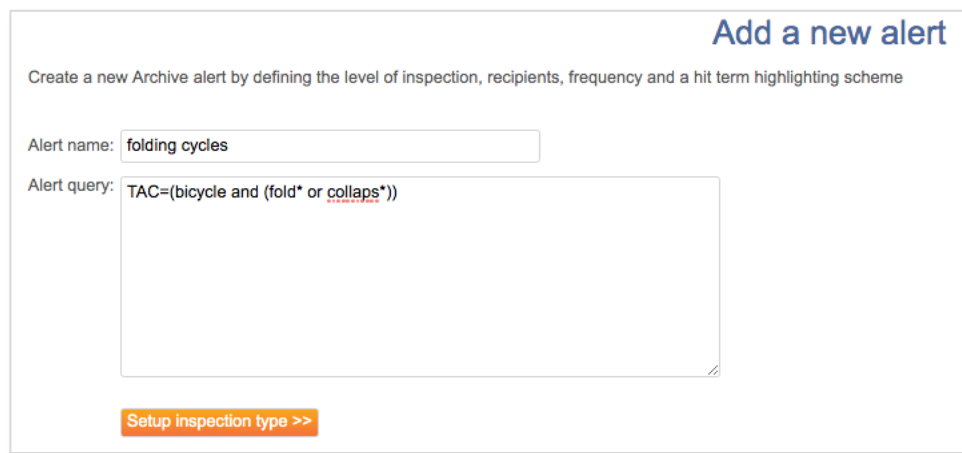
Alert Name:

Enter the name of the alert.

Alert query

The alert query is a script based on a PatBase search query (it must not include any archive fields). The query can be created here, copied and pasted here, or created directly from search results.

To create a Pat-KM alert from search results, go to *More options* on the search history page for the search query in question and select *Create an archive alert* under the *Archive* options. The search query will automatically be pasted in this alert query box.



Add a new alert

Create a new Archive alert by defining the level of inspection, recipients, frequency and a hit term highlighting scheme

Alert name:

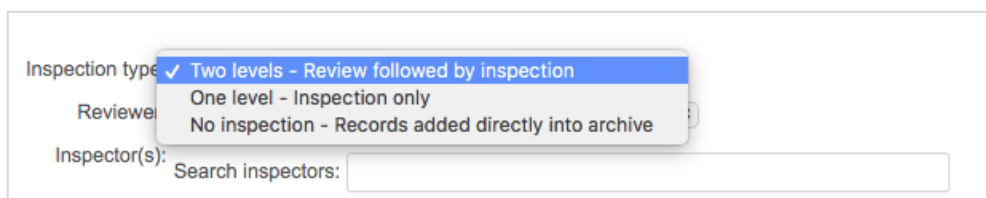
Alert query:

[Setup inspection type >>](#)

Inspection Type

Choose the type of inspection for this alert from the following three options:

- **Two levels** – Review followed by inspection
- **One level** – Inspection only
- **No inspection** – Records added directly to archive



Inspection type: Two levels - Review followed by inspection
 One level - Inspection only
 No inspection - Records added directly into archive

Inspector(s):

A review is the first stage of a two-level inspection. A review is designed to determine whether a record that has been retrieved in alert results should be sent for inspection to an inspector(s) or not.

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.

Reviewer

This option will only appear if *Two levels* has been selected in the Inspection type. The reviewer can either discard the record or send it to the relevant inspector(s).

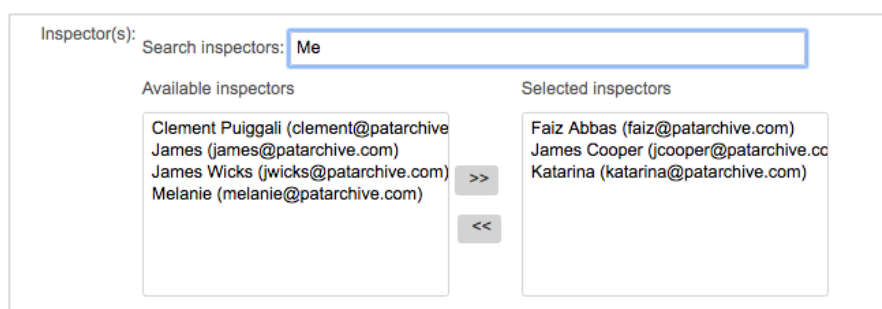
Select the reviewer from the drop-down list of available users.



Inspector

Select the inspector(s) by clicking on them in the *Available inspectors* box and click on the arrows to move them to the 'Selected inspectors' box.

There is also a lookup box to search for specific inspectors by name.



It is also possible to select user groups rather than individual inspectors. Groups that contain inspectors can then be selected during the review in order to quickly assign a record in the review to multiple inspectors at once.

Please note: all user groups will be displayed here, but inspections will only be created for the members of the group(s) who are inspectors.

Groups(s) ⓘ: Search groups:

Available groups		Selected groups
2nd level inspector	<input type="button" value=">>"/> <input type="button" value="<<"/>	Destruction Bicycle
Destruction Cars		
Duesseldorf User		
Express user		
IP Attorney		
Ken Test		
Minesoft Duesseldorf		
New group name here		

No emails if zero results

Tick the box *Do not send email when alert returns zero results* to ensure emails are not sent if that alert has not generated any results that week/month.

Notes (optional)

Enter any notes relevant to the alert.

Alert Frequency

Alerts can run weekly or monthly. An alert can be disabled, if required, so it will not run automatically.

Alert options

Alert options:

- New families only
- New families and when new publications are added
- Show advanced options** 🗲
- When first IPC is added to the family
- When first assignee is added to the family
- When first English abstract is added to the family
- When first assignee or IPC or abstract is added to the family
- (all of the above)
- When INPADOC legal status changes

There are two main types of alert to choose from:

- **New families only:** Retrieves new families (new records) added to PatBase that match the alert criteria
- **New families and when new publications are added:** Retrieves new families (new records) and existing families to which new publications have been added

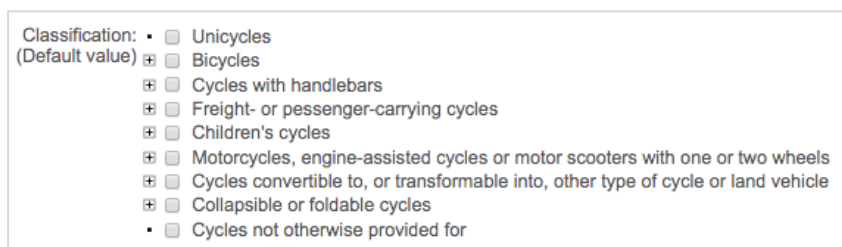
There are also the following advanced options that can be selected:

- When first IPC is added to a family
- When first assignee is added to a family
- When first English abstract is added to a family
- When first assignee or IPC or abstract is added to a family (all of the above)
- When legal status changes occur

Default Technology (optional)

It is possible to pre-tag records retrieved in alert results i.e. to pre-assign archive fields to indicate default technologies.

To do this, select the required archive fields from the form. The selected values will be pre-assigned to the alert results. However, the values can be changed during the inspection or once the records are published in the archive (by users with the required edit rights).

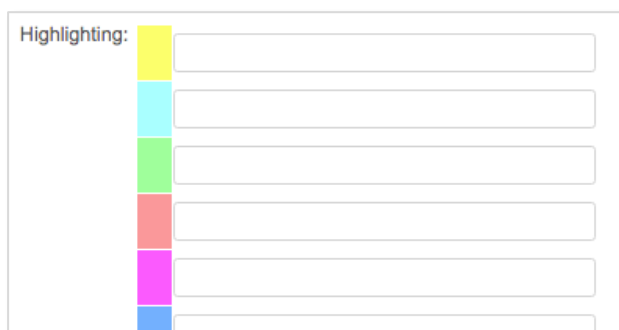


The image shows a form titled "Classification: (Default value)". It contains a list of categories with checkboxes and expand/collapse icons. The categories are: Unicycles, Bicycles, Cycles with handlebars, Freight- or passenger-carrying cycles, Children's cycles, Motorcycles, engine-assisted cycles or 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.

Highlighting (optional)

It is possible to set a highlighting scheme that is applied to keywords in the alert results.

Enter keywords into the colour boxes (10 different colours available).

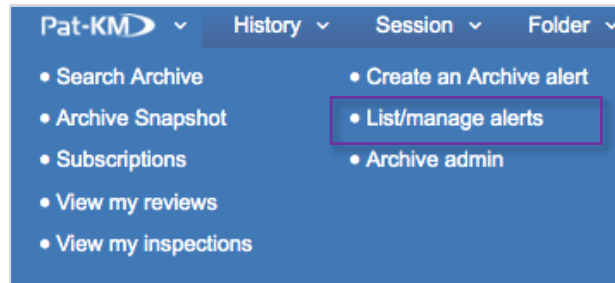


The image shows a form titled "Highlighting:". It features a vertical column of ten colored boxes (yellow, cyan, green, red, magenta, blue) on the left. To the right of each colored box is a corresponding empty text input field for entering a keyword.

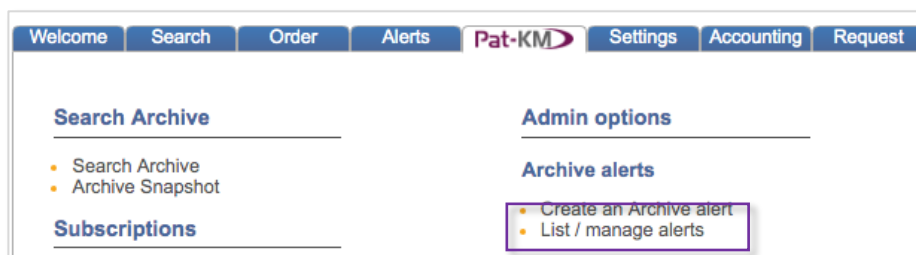
Once all selections have been made press *Create alert* to activate it.

List/Manage Alerts

Administrators can view a list and manager their alerts by clicking on *List/manage alerts* under the *Pat-KM* tab on the toolbar.



Alternatively, go to the *Pat-KM* section from the main menu page and select *List/manage alerts* under *Archive alerts* under *Admin options*.



All alerts are listed in a table and can be sorted by alert name. The update week in which the alert last ran is displayed, along with how many results were received in this last run.

List alerts

Show **10** entries Search:

Alert name	Reviewer	Inspector(s)	Last run	Last result	Action
Alert on Childrens Bicycles Inspection Only	-	pallan@patarchive.com	1704	9	edit delete previous results
Alert on Childrens Bicycles Review and Inspection	pallan@patarchive.com	greg@patarchive.com matvei@patarchive.com mie@patarchive.com pallan@patarchive.com florent@patarchive.com	1716	16	edit delete previous results
Tim Bicycle	tim@patarchive.com	clement@patarchive.com jason@patarchive.com ken@patarchive.com kevin2@minesoft.com	1834	189	edit delete previous results

Showing 1 to 3 of 3 entries (filtered from 18 total entries) First Previous 1 Next Last

[Download alerts report](#)

Administrators can edit or delete the alert; or view the number of results received in previous update weeks.

Reviews

Reviewing alerts

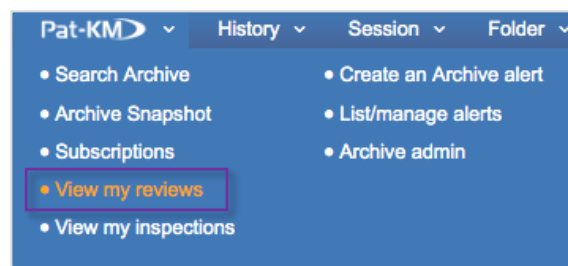
Users who have been set up as reviewers will receive a link to the alert results by email to review.

On opening the link, reviewers will log in to the archive to begin the review process.

Alternatively, if the reviewer is already logged in to the archive and a review is pending, a box will appear at the top of the screen with the message 'You have pending reviews/inspections. View pending review(s). View pending inspections(s).' This can be clicked on to access the reviews.



Alternatively, mouse-over the *Pat-KM* tab on the toolbar and select *View my reviews*.



The list of reviews will appear with the Alert name, the update week, the date last accessed, and the number of records displayed in the table. The table can be searched by keywords.

To open a review, click the *Open* button for the relevant alert.

My pending reviews

Refresh list

Show: In progress

Show 10 entries Search:

Alert name	Week(s)	Last accessed	Number of records
case 567d bio	1914		10

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

The alert review will open in a new tab.


The alert results are displayed in scan format, with the title, excerpt of the abstract and the family table displayed, alongside a clipped image. The PatBase family number and representative member number are displayed above the abstract. The publication numbers in the family table link out to relevant patent office sites.

9) COLLAPSIBLE VEHICLE

Remove from this review admin@patarchive.com add more inspectors

Family 4825030 Source: US2012161772A A vehicle with a collapsible body. With this construction a one-person's vehicle can be folded together to a very compact size with the dimensions of an average suitcase. The body comprises two halves: a front and back part. Each of these parts contains a lower and upper hollow section. Each upper hollow section can slide telescopically in and out the lower hollow ...

Applicants: ANDEREGG HOLDING BV
ANDEREGGHOLDING BV



Publication Number	Publication Date	Application Number	Application Date	
CN102574557 A	20120711	CN201080043911	20100804	View text
EP2462019 A2	20120613	EP20100763047	20100804	View text
IN195002012 A	20150724	IN2012D01930	20120302	View text
NL2003332 C	20110208	NL20092003332	20090805	View text
US2019181772 A1	20120719	US2019038699	20100804	View text
WO11016722 A2	20110210	WO2010NL50494	20100804	View text
WO11016722 A3	20110421	WO2010NL50494	20100804	View text

Forward this record >> View record in PatBase >>

Clicking on View text in the family table opens up a reading pane on the right-hand side where all available text for the publication is displayed for review. Click on *Hide full text viewer* in the top right-hand corner of the screen to close this reading pane.

PatBase Alert: case 567d bio Week: 1914 Results: 10

Hide full text viewer

1) METHOD FOR SHUTTING DOWN A GENERATOR UNIT HAVING A FUEL CELL DEVICE PROCEDE POUR ETENDRE UNE UNITE GENERATRICE DOTEE D'UN DISPOSITIF A PILE A COMBUSTIBLE

Remove from this review caillin@patarchive.com add more inspectors

Family 88505591 Source: WO18024776A1 The present invention relates to a method for shutting down a generator unit (1) comprising a fuel cell device (100) having the steps (a) shutdown of a current generation via a control unit (510); (b) detection of at least one anode temperature of an anode (122) of the fuel cell device (100); in particular during a cool-down process; (c) blocking of an escape of carbon monoxide from an anode chamber (120) in which the anode (122) is arranged at least partially, in particular, at least for the most part, completely, if the anode temperature is higher than the first limit temperature T1; (d) at least partial removal of carbon monoxide from an anode chamber (120) in which the anode (122) is arranged at least in part, in particular, at least for the most part, completely, if the anode temperature falls below a first limit temperature T1. The present invention further relates to a generator unit (1), a vehicle having this generator unit (1) and a use of this generator unit (1). La presente invention concerne un procede pour etendre une unite de generateur (1) comprenant un dispositif de pile a combustible (100) ayant les etapes (a) etendre une generation de courant par l'intermediaire d'une unite de commande (510); (b) detection d'au moins une temperature d'anode d'une anode (122) du dispositif de pile a combustible (100), en particulier pendant un processus de refroidissement; (c) blocage d'une fuite de monoxyde de carbone d'une chambre d'anode (120) dans laquelle l'anode (122) est disposee au moins en partie, en particulier, au moins pour la partie la plus importante, completement, si la temperature de l'anode est superieure a la premiere temperature limite T1; (d) elimination au moins partielle du monoxyde de carbone d'une chambre d'anode (120) dans laquelle l'anode (122) est disposee au moins en partie, en particulier, au moins pour la majeure partie, completement, si la temperature de l'anode tombe en-dessous d'une premiere temperature limite T1 La presente invention concerne en outre une unite de generateur (1), un vehicule ayant cette unite de generateur (1) et une utilisation de cette unite de generateur (1).

Publication Number	Publication Date	Application Number	Application Date	
AT18056 A1	20180215	AT20180050794	20180802	View text
CN19665982 A	20190402	CN201780047825	20170802	View text
WO18024776 A1	20180208	WO2017EP09541	20170802	View text

Forward this record >> View record in PatBase >>

2) GENERATOR UNIT HAVING A FUEL CELL DEVICE; VEHICLE HAVING A GENERATOR UNIT OF THIS TYPE AND TAIL PIPE DEVICE FOR A GENERATOR UNIT UNITE GENERATEUR AYANT UN DISPOSITIF PILE A COMBUSTIBLE; VEHICULE AYANT UNE UNITE GENERATEUR DE CE TYPE ET DISPOSITIF TUYAU D'ECHAPPEMENT ARRIERE POUR UNE UNITE GENERATEUR

Remove from this review caillin@patarchive.com add more inspectors

Family 88505588 Source: WO18024775A1 The present invention relates to a generator unit (1) comprising a housing (100) having at least one opening (112), a fuel cell device, which is arranged in the housing (100), a tail pipe device (200) having at least one exhaust pipe (210), which is connected to the fuel cell device in a gas-carrying manner and extends through the opening (112) of the housing (100), and an insulator (220), which extends at least in an area between an outer wall of the exhaust pipe (210) and an edge of the opening (112) and, in particular, reduces, in particular, at least for the most part, prevents, heat transfer from the exhaust pipe (210) to the housing (100). Furthermore, the present invention relates to a tail pipe device (200) for use in a generator unit (1) of the type described here. La presente invention concerne une unite generateur (1) comprenant un boitier (100) ayant au moins une ouverture (112), un dispositif pile a combustible, qui est loge dans le boitier (100), un dispositif tuyau d'echapement arriere (200) ayant au moins un tuyau d'echapement (210), qui est relie au dispositif pile a combustible d'une maniere transportant du gaz et qui s'etend a travers l'ouverture (112) du boitier (100), et un organe isolant (220), qui s'etend au moins dans une zone situee entre une paroi exterieure du tuyau d'echapement (210) et un bord de l'ouverture (112) et, en particulier, reduit, au moins pour la majeure partie, le transfert de chaleur du tuyau d'echapement (210) vers le boitier (100).

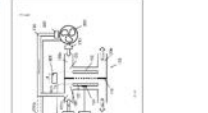
PatBase

Bibliographic Data Abstract Claims Description Citations Images

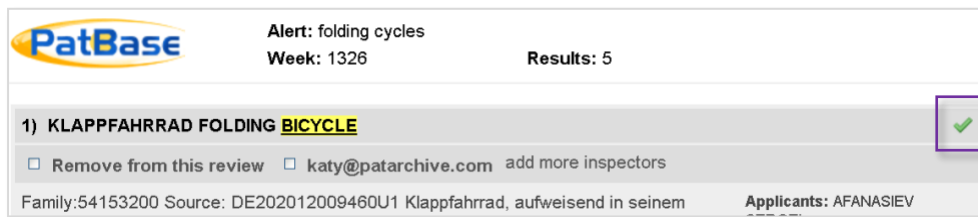
AT518956 (A1) - VERFAHREN ZUM HERUNTERFAHREN EINER GENERATOREINHEIT MIT EINER BRENNSTOFFZELLENVORRICHTUNG

Family Number: 68502591 Patbase Update Week: 1808

Bibliographic Data

Publication Number	AT518956	View record in PatBase
Type		
Country	AUSTRIA	
Kind Code A1		
Date	20180215	
Application Number	AT20180050794 20180802	
Classification IPC	H01M8/4223; H01M8/4228	
CPC	H01M8/4203; H01M8/4209; H01M8/4201; H01M8/4228; H01M8/4231; H01M8/4232; H01M8/4243; H01M8/4245; H01M8/0816; H01M8/0081293; H01M8/25020; Y02E60/325; Y02E70/32; H01M8/4231; H01M8/4228	
Priority	AT20180050794 20180802	
Inventor(s)	DAKI TANAKA[JAT]; DIPL.-ING. JOERG MATHE[JAT]; DIPL.-ING. JOERG MATHE	
Assignee(s)	AVL LIST GMBH[JAT]; NISSAN MOTOR[JAT]; NISSAN MOTOR CO	
Titles	[DE] VERFAHREN ZUM HERUNTERFAHREN EINER GENERATOREINHEIT MIT EINER BRENNSTOFFZELLENVORRICHTUNG	
First Image		

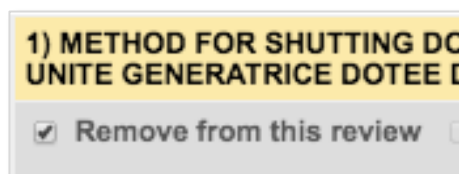
If the record is already in the archive, a green tick is displayed in the top right-hand corner of the record.



For each result, the reviewer has two options:

1. Remove from this review

The reviewer can choose to remove from the review, so the record will not get sent for inspection.



2. Send to inspector(s)

Alternatively, the reviewer can choose to send the record to an inspector or inspectors. Any inspector(s) who was designated to inspect the results for this alert when it was created will automatically be displayed at the top of the record. If a group was selected when setting up the alert, the group will be displayed. The reviewer can select the displayed inspector(s) or group(s), or they can choose to add more inspectors by clicking on the *add more inspectors* link and select additional inspectors by searching by name or from the drop-down list of available inspectors.

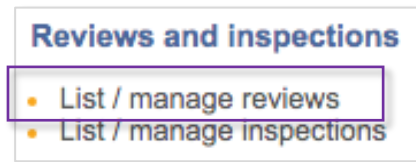


A record can also be forwarded as information by clicking on the *Forward this record* link below the family table.

Once all records have been reviewed, the review is complete, and the reviewer should click the *Create inspection(s)* button at the bottom of the screen to send the results to the selected inspector(s) for inspection.

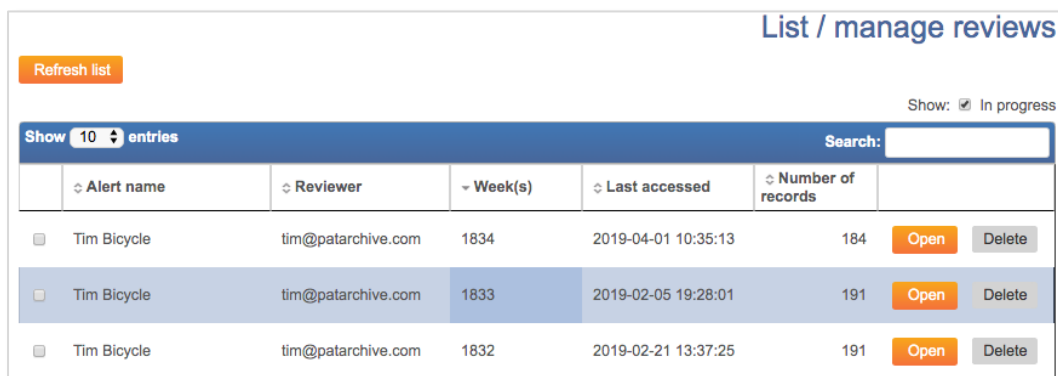
List/manage reviews

Administrators can view and manage users' pending reviews by going to the Pat-KM tab on the main menu and clicking on *List/manage reviews* found under the *Reviews and inspections* section.



The searchable table displays all pending reviews. The table can be re-ordered by clicking on the appropriate column header.

Administrators can open pending reviews, and they can delete reviews from the list.



The screenshot shows the "List / manage reviews" interface. At the top left is a "Refresh list" button. On the right, it says "Show: In progress". Below this is a "Show 10 entries" dropdown and a "Search:" input field. The main part of the interface is a table with the following columns: Alert name, Reviewer, Week(s), Last accessed, and Number of records. Each row has an "Open" button and a "Delete" button.

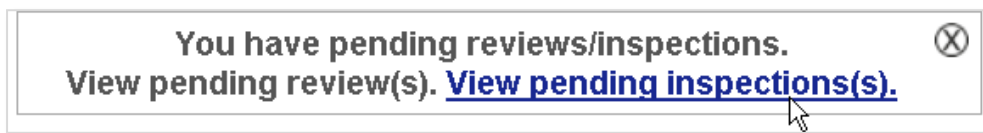
	Alert name	Reviewer	Week(s)	Last accessed	Number of records	
<input type="checkbox"/>	Tim Bicycle	tim@patarchive.com	1834	2019-04-01 10:35:13	184	<input type="button" value="Open"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	Tim Bicycle	tim@patarchive.com	1833	2019-02-05 19:28:01	191	<input type="button" value="Open"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	Tim Bicycle	tim@patarchive.com	1832	2019-02-21 13:37:25	191	<input type="button" value="Open"/> <input type="button" value="Delete"/>

Inspections

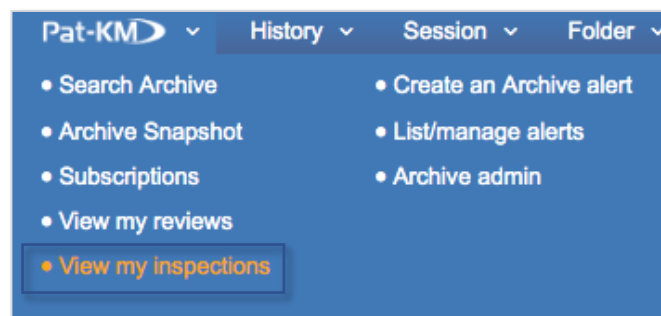
View inspections

Inspectors can carry out an inspection from the alert results email sent to them. Click on the link in the email to login in and begin the inspection.

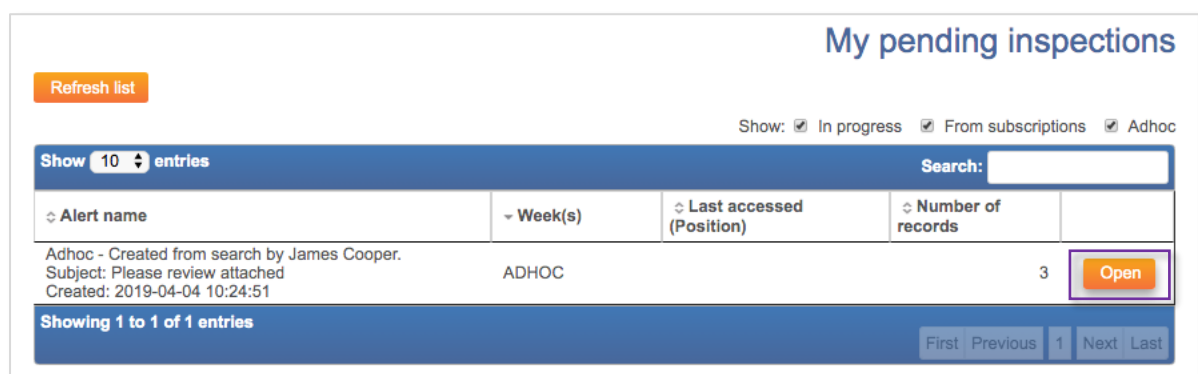
Alternatively, when an inspection is pending a box will appear on top of the screen when the inspector is logged in. This can be clicked on to access the inspections.



Alternatively, inspectors can mouse over the Pat-KM tab in the floating tool bar and select *View my inspections*.



A list of pending inspections will appear. The table is searchable and can be re-ordered by clicking on the appropriate column heading. Click on *Open* to start the inspection.



The screenshot shows the "My pending inspections" page. At the top right, there is a "Refresh list" button. Below it, there are checkboxes for "Show: In progress", "From subscriptions", and "Adhoc". A search bar is present with the text "Search:". The main content is a table with the following columns: "Alert name", "Week(s)", "Last accessed (Position)", and "Number of records". The table contains one entry:

Alert name	Week(s)	Last accessed (Position)	Number of records
Adhoc - Created from search by James Cooper. Subject: Please review attached Created: 2019-04-04 10:24:51	ADHOC		3

Below the table, there is a blue bar with the text "Showing 1 to 1 of 1 entries" and navigation buttons: "First", "Previous", "1", "Next", "Last". An "Open" button is located to the right of the table entry.

If the user is returning to an inspection that has already been started (where records were skipped), the system will have marked what progress the user made, and they will be able to continue from that point.

The inspection record

Each record in the inspection will display a snapshot of information that includes a title, abstract, clipped image and family table, as well as bibliographic details, including classifications (IPC, CPC, USC, EC) and assignees/inventors.

The screenshot shows the PatBase interface for a record titled "MARS EXPLORATION ROVER ATHENA". The record details include:

- Title:** MARS EXPLORATION ROVER ATHENA
- Abstract:** 1. The ornamental design for Mars exploration rover Athena, as shown and described.
- US class:** D12/1
Classification: Explorer
- Family:**


Publication number	Publication date	Application number	Application date
USD488093 S1	20040406	US20020164833F	20020731
- Priority:** US20020164833F 20020731
- Cited documents:** USD437255, USD413551, US6488306, US6333631, US6267196, US6112843, US6026135, US5372211, US5323867, US5174405, US3809004, US3653455, US2751027.
- Forward Citations:** USD838320, USD679646, USD673482, USD545721, US8159357.
- Assignee(s):** (ast): CALIFORNIA INST OF TECHN
- Assignee(s):** CALIFORNIA INST OF TECHNOLOGY ; CALIFORNIA INSTITUT ; CALIFORNIA INSTITUTE OF TECHNOLOGY ; NA HEADQUARTERS SA ; NASA HEADQUARTERS ; CALIFORNIA INST
- Inventor(s):** (ast): BOYKINS KOBIE ; BURKE KEVIN ; HARRINGTON BRIAN ; KARLMANN PAUL ; KRISHNAN SATISH ; LEE LAWRENCE ; LINDEMANN RANDEL ; MELKO JOSEPH P ; NASIF ANNETTE K ; RAINEN RICHARD A ; SHIRAIISHI LORI ; STONE JAMES ; SUCHMAN JASON ; THELEN MICHAEL P ; VACCHIONE JOSEPH ; VOORHEES CHRISTOPHER

The technical drawing (FIG. 1) shows a side view of the Mars exploration rover Athena, highlighting its ornamental design features.

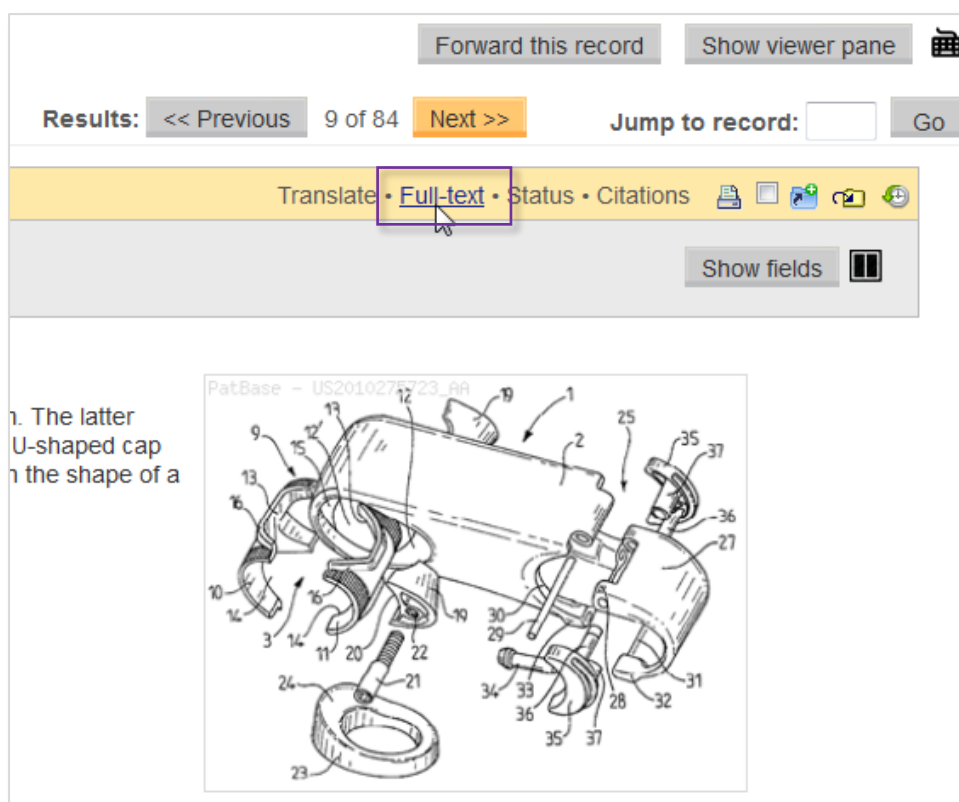
Along the top the PatBase family number and representative member will appear.

The publication numbers in the family table link out to relevant patent office sites, whilst the R icons link out to relevant national registers.

Clicking on the PDF next to a publication of interest will open up a PDF version of the original patent document.

Publication number	Publication date	Application number	Application date	
USD679646 S1	20130409	US20090342598F	20090827	

Clicking on *Full-text* in the top right-hand corner of the record will open up a new window containing all text available for easy review.



The screenshot shows a patent record interface. At the top, there are buttons for "Forward this record" and "Show viewer pane". Below that, a "Results:" section shows "9 of 84" records, with "Previous" and "Next" navigation buttons. A "Jump to record:" field is also present. A yellow navigation bar contains links for "Translate", "Full-text" (highlighted with a red box), "Status", and "Citations". There are also icons for printing, saving, and other actions. A "Show fields" button is located below the navigation bar. The main content area displays a technical drawing of a mechanical assembly with various numbered parts (1-37). To the left of the drawing, there is a partial text description: "1. The latter U-shaped cap in the shape of a".

There is also an option to translate the record and to check the legal status information. In addition, there is a Citations link to view citations for the family in various formats including a tree graph.

The record can be printed and the PatBase folder shortcuts are active.

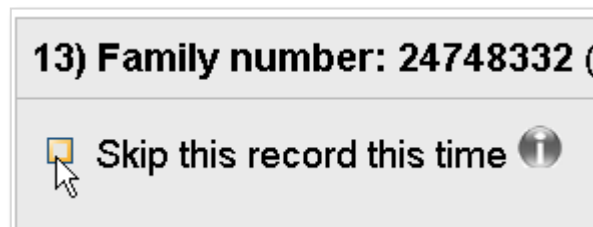
The inspection

Inspectors have several inspection options for each record.

Skip record

It is possible to select *Skip this record this time*. This will keep the record in the inspection to be returned to at a later date. The inspection cannot be closed if there are outstanding skipped records in the inspection.

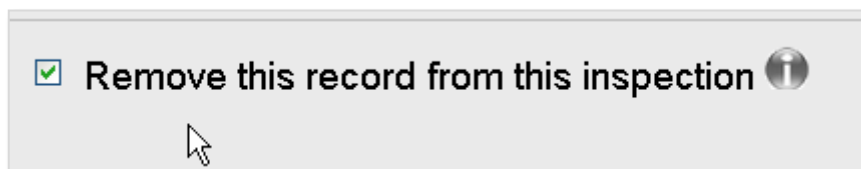
However, any other records that were successfully inspected during the inspection will be added to the archive immediately.



Remove record

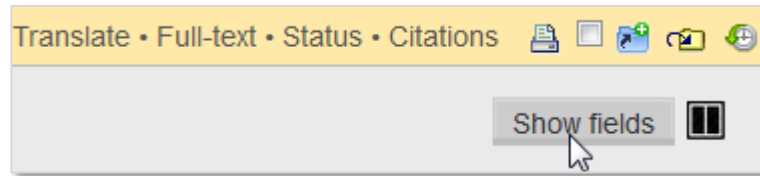
It is possible to *Remove this record from this inspection* which means that the inspector will not assign fields to the record and it will be permanently removed from that inspection.

Please note: the record remains in the archive - a green tick will be visible on the record when viewed in search results. This is the case even if the record already had archive fields assigned to it and the inspector un-ticks them all during this inspection and then removes the record.

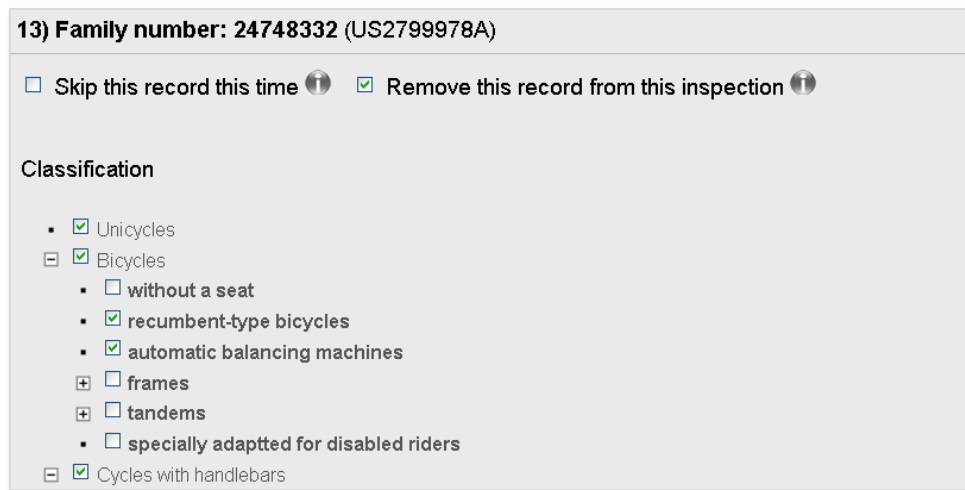


Assigning archive fields

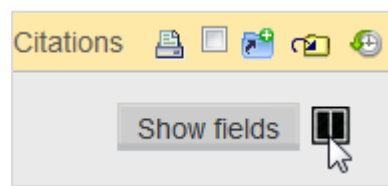
In order to assign fields to the record, click on the *Show fields* button at the top right to display the archive fields.



Inspectors can see if any internal classifications were pre-assigned to the record, they will be pre-ticked on the classification tree, and modify accordingly.



Switch to a side-by-side view by clicking on the side by side icon in the top right-hand corner of the record.



Click on the icon once more to switch back to original layout.

They can also tag the record with additional, new fields. Depending on the access rights set up by administrators, certain fields may not be visible to all inspectors.

Assignee:

Horex
 MZ
 Matchless
 Megelli Motorcycles
 ...

Status: Inforce Invalid Lapsed

Importance: Important Not important None

Notes:

Click on *Next* at the top of the screen to save and apply the fields and move to the next record. To return to the previous record (with the inspection fields saved for the current record), click on *Previous* at the top of the screen. To move to a specific record in the inspection, enter the result number in the box next to Jump to record then click Go.

Jump to record:

To view the history of a record, click on the clock icon in the top right to open up the history in a reading pane on the right-hand side.

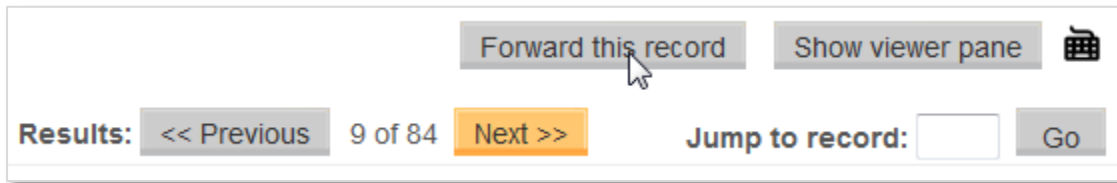
Translate • Full-text • Status • Citations

This will display all previous actions associated with the record.

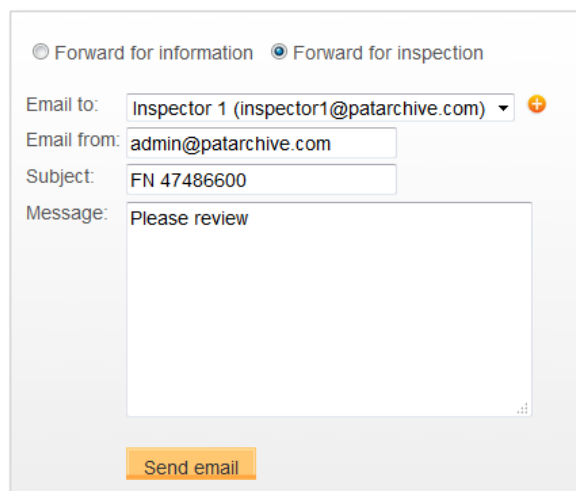
(To close the history pane, click on the clock icon again or on *Hide viewer pane* in the top right-hand corner).

History for family 24748332		
Date/Time	User	Event
2013-07-01 13:30:22	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
2013-03-19 16:18:58	Katy Wood	Fields updated in bulk assignment. • 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

Records can also be forwarded for inspection or for information by clicking on *Forward this record* at the top right of the screen.



Forward for information allows a link to the record to be emailed to multiple recipients to view. *Forward for inspection* will create an inspection email that can be sent to an inspector selected from the drop-down list of available inspectors.



Keyboard shortcuts can be used to navigate through the inspection results, a list of all the shortcuts is available by clicking on the keyboard icon on top of the page.

Key	Description
N	Next - Move to the next Family.
P	Previous - Move to the previous Family.
F	Full text – Displays the Full text for the currently selected Family in a new window.
C	Citations – Displays the Citations for the currently selected Family in a new window.
L	Legal status – Displays the legal status of the currently selected Family in a new window.
D	Drawings (mosaic) – Displays the Drawings of the currently selected Family in a new window.
T	Top – Scrolls to the top of the screen. This does NOT change the selected Family/Families; just that part of the page you are viewing.
R	Print current Record – Prints the current record.
INS	Add/Remove family from folder - if there is no folder open, this will open the folder screen in a new window.
DEL	Remove - Remove the currently selected Family from this inspection.
[SPACE]	Skip - Skip the currently selected Family from this inspection this time.

Once all alert results have been inspected, a *Finish inspections* button will appear along the top. Click this to complete the inspection. If there were no skipped records, the inspection will now be removed the list of pending inspections.

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* options.

The screenshot shows the 'Search History' page with a table of search results and a sidebar of options. The table has columns for '#', 'Search query', 'Results', and 'Options'. The sidebar includes sections for 'More options' and 'Archive'. The 'Create adhoc inspection' option is highlighted in the 'Archive' section.

#	Search query	Results	Options
2	1 and PD=2017	1083	View Browse Hits Optimise more...
1	TAC=(bicycle and fold*)	13265	View Browse Hits Optimise more...

Information Shortcuts

2: 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

Select an inspector from the dropdown list of available inspectors. The 'Email from' field will correspond to the user ID currently used; this can be changed if necessary.

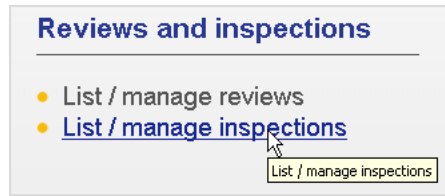
Enter the subject and message if applicable and press 'Create inspection'. An email will be sent to the selected inspector, and will appear as a pending inspection when they are logged in.

The screenshot shows the 'Create inspection' form with the following fields:

- Email to: James Cooper (jcooper@patarchive.com)
- Email from: caitlin@patarchive.com
- Subject: (empty)
- Message: (empty text area)
- Create Inspection button

List/manage inspections

Administrators can view and manage the current list of all pending inspections under the account by going to the Pat-KM tab on the main menu and selecting *List/manage inspections* from the *Reviews and inspections* section of the Admin options.



A table of pending inspections is displayed that is searchable and can be re-ordered by clicking on the appropriate column header. The administrator can open an inspection, or they can delete the inspection from the list of pending inspections.

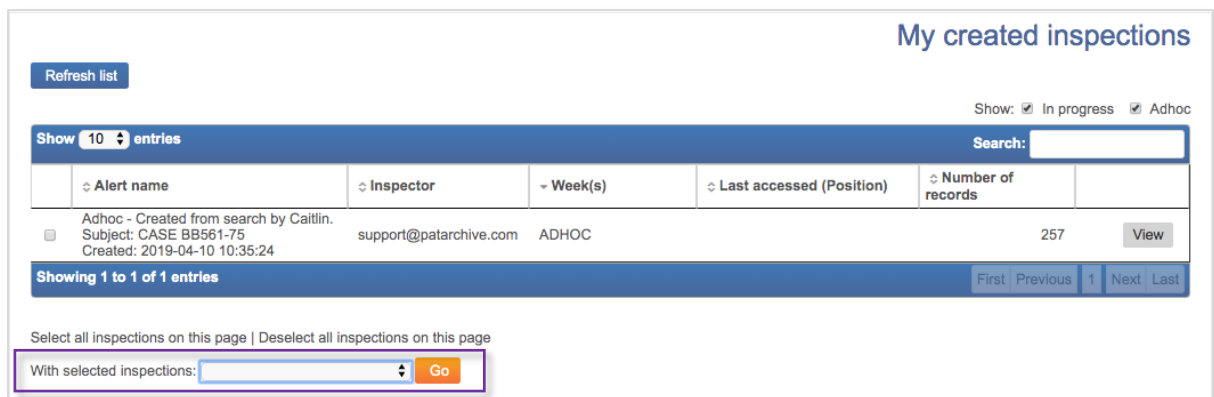
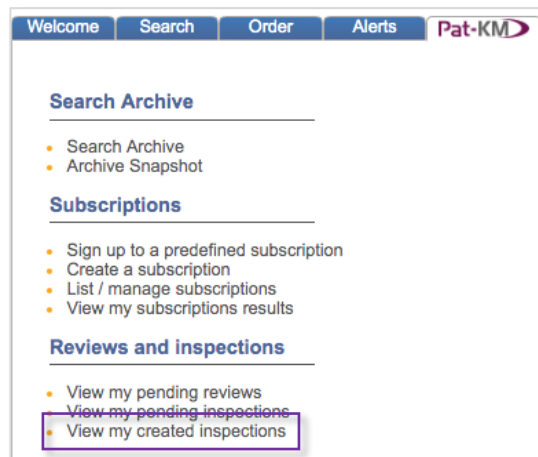
The screenshot shows the "List / manage inspections" interface. At the top right, it says "List / manage inspections". Below that, there's a "Refresh list" button and a "Show:" filter with options for "In progress", "From subscriptions", and "Adhoc". The main table has columns for "Alert name", "Inspector", "Week(s)", "Last accessed (Position)", and "Number of records". Each row represents an inspection with details like creation date, subject, inspector, and a number of records. There are "Open" and "Delete" buttons for each inspection. At the bottom, there's a "Showing 1 to 10 of 61 entries" indicator and a "Download inspections report" button.

Alert name	Inspector	Week(s)	Last accessed (Position)	Number of records
Adhoc - Created from search by Peter Niermann. Subject: Competitor Created: 2016-09-22 12:22:52	peter@patarchive.com	ADHOC	2016-10-23 12:41:56 (6)	166
Adhoc - Created from search by EUAD@minesoft.com. Subject: Portfolio EI Created: 2017-05-23 10:39:09	peter@patarchive.com	ADHOC	2018-09-06 11:40:56 (3)	65
Adhoc - Created from search by James Cooper. Subject: Created: 2018-04-20 13:18:13	jcooper@patarchive.com	ADHOC	2019-02-27 10:12:42 (2)	24
Adhoc - Created from search by Peter Niermann. Subject: Created: 2018-06-26 12:50:09	katarina@patarchive.com	ADHOC		72
Adhoc - Created from search by Peter Niermann. Subject: Created: 2018-07-25 13:12:06	peter@patarchive.com	ADHOC	2018-07-25 13:55:12 (1)	68
Adhoc - Created from search by James Cooper. Subject: Created: 2018-07-26 09:23:07	jcooper@patarchive.com	ADHOC	2018-07-26 09:25:26 (1)	387
Adhoc - Created from search by Olivier Huc. Subject: Created: 2018-07-27 14:56:29	olivier@patarchive.com	ADHOC	2018-07-27 14:59:54 (6)	163
Adhoc - Created from search by JT12. Subject: Created: 2018-07-30 08:29:16	jt2@minesoft.com	ADHOC	2018-09-12 14:44:08 (3)	147
Adhoc - Created from search by JT12. Subject: Created: 2018-08-03 13:38:40	jt2@minesoft.com	ADHOC	2018-08-03 13:38:52 (1)	3
Adhoc - Created from search by Melanie. Subject: test Created: 2018-08-15 09:07:14	melanie@patarchive.com	ADHOC	2019-03-26 14:23:42 (2)	353

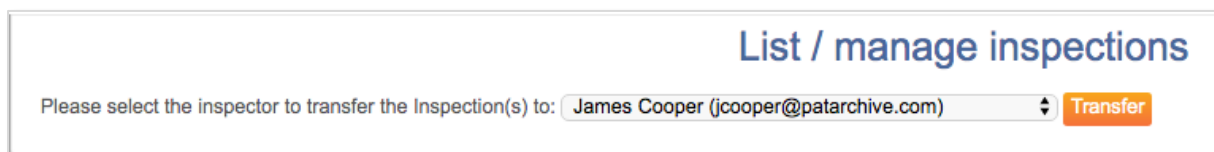
View created inspections

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.



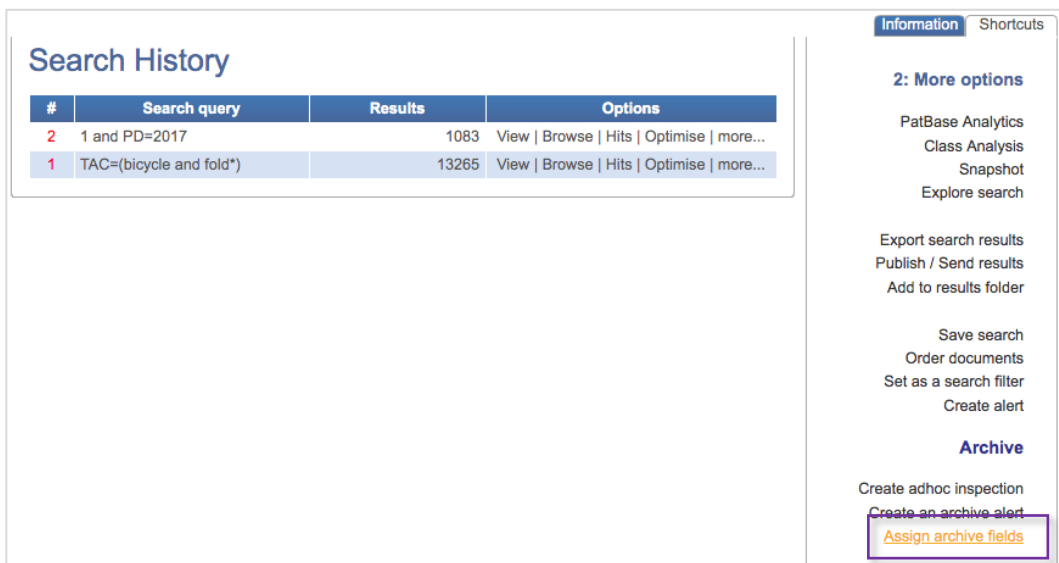
Users can send a reminder to the inspector or transfer the inspection to a different inspector using the drop-down menu at the bottom of the list. If Transfer to another inspector is selected, a secondary page will load where you can choose from a list of inspectors to transfer to.



Assign archive fields in bulk

Administrators can manually assign archive fields in bulk to a set of search results. The fields will be applied to the first 1000 records in the results set (according to the user's default sorting order).

Click *more...* next to the query on the *Search History* page (this can be both from a query run on the archive or a query run in PatBase) and click on *Assign archive fields* from the *Archive* options on the menu on the right-hand side.



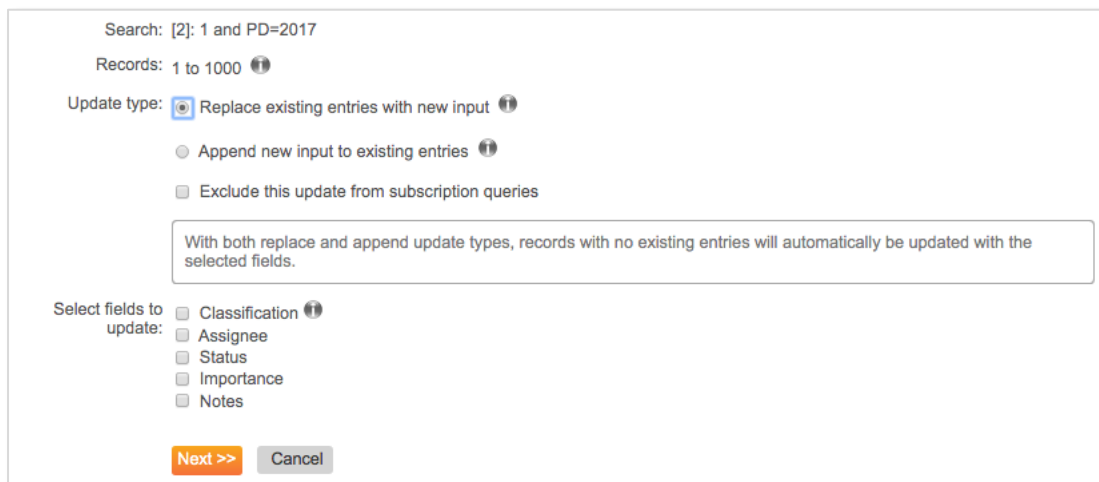
The screenshot shows the 'Search History' page. It features a table with the following data:

#	Search query	Results	Options
2	1 and PD=2017	1083	View Browse Hits Optimise more...
1	TAC=(bicycle and fold*)	13265	View Browse Hits Optimise more...

On the right-hand side, there is a sidebar with the following options:

- Information Shortcuts
- 2: 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**

On the next page select from the following update types:



The dialog box shows the following configuration:

- Search: [2]: 1 and PD=2017
- Records: 1 to 1000
- Update type: Replace existing entries with new input
- Append new input to existing entries
- Exclude this update from subscription queries
- With both replace and append update types, records with no existing entries will automatically be updated with the selected fields.
- Select fields to update:
 - Classification
 - Assignee
 - Status
 - Importance
 - Notes
- Next >> Cancel

Replace existing entries with new input: if there are any existing archive fields on any of the families in the results set, the existing field entries will be replaced by the new selection(s). The old entries will disappear from the record display and will not be searchable.

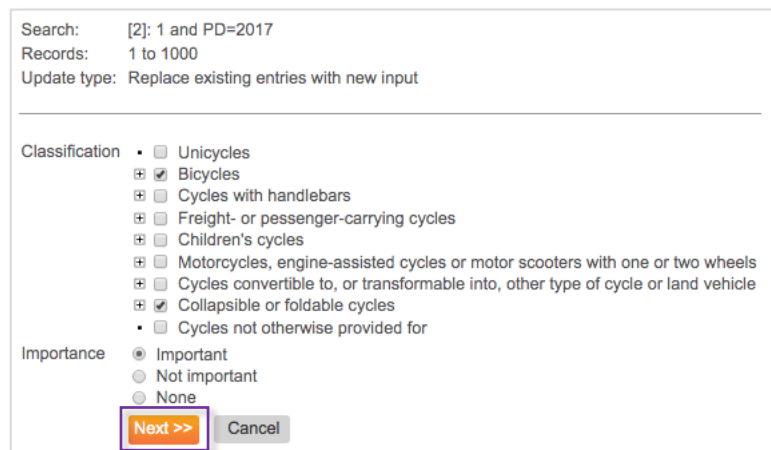
Append new input to existing entries: all new selected fields will be added to records. Where a family already contains archive fields, the new entries will be appended (added) to the existing entries.

For both update types, records with no existing archive fields will automatically be updated with the selected fields.

Tick the box next to *Exclude this update from subscription queries* if the newly assigned fields should not be included in subscription results. Please see the *Subscriptions* section for further information.

Once the fields(s) to update have been selected, click on *Next*.

On the next page select the archive fields to be added to the record(s):



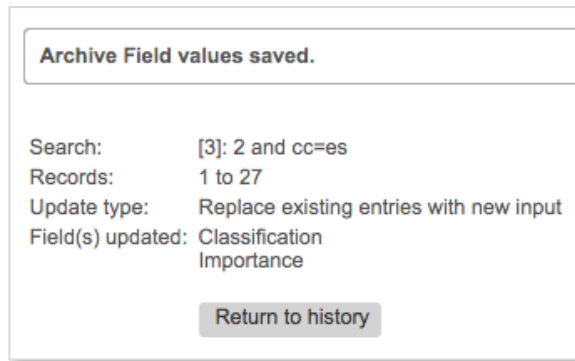
The screenshot shows a software interface with the following details:

- Search: [2]: 1 and PD=2017
- Records: 1 to 1000
- Update type: Replace existing entries with new input
- Classification section with a tree structure:
 - Unicycles (checkbox)
 - Bicycles (checkbox, checked)
 - Cycles with handlebars (checkbox)
 - Freight- or passenger-carrying cycles (checkbox)
 - Children's cycles (checkbox)
 - Motorcycles, engine-assisted cycles or motor scooters with one or two wheels (checkbox)
 - Cycles convertible to, or transformable into, other type of cycle or land vehicle (checkbox)
 - Collapsible or foldable cycles (checkbox, checked)
 - Cycles not otherwise provided for (checkbox)
- Importance section with radio buttons:
 - Important (selected)
 - Not important
 - None
- Buttons: "Next >>" (highlighted with a red box) and "Cancel"

Click *Next*.

A message will appear requiring the user to confirm they wish to continue with the bulk update. Once confirmed, the selected fields will then be applied to the records.

Once the fields have been updated, a summary page displays which options have been selected.



Click on *Return to search history* to go back to the history page.

Remove records from the archive in bulk

Administrators can manually remove records from the archive in bulk. Up to 1000 records can be removed at one time.

To permanently remove records, click *More...* next to the query on the search history page (this can be both from a query run on the archive or a query run in PatBase), and click on *Assign archive fields* from the *Archive* options on the menu on the right-hand side.



Click on *Remove records from archive* at the bottom of the page.

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.

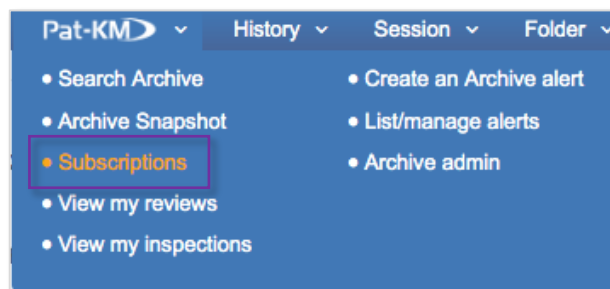
All users can create subscriptions.

In addition, administrators can set up predefined subscription queries that users 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

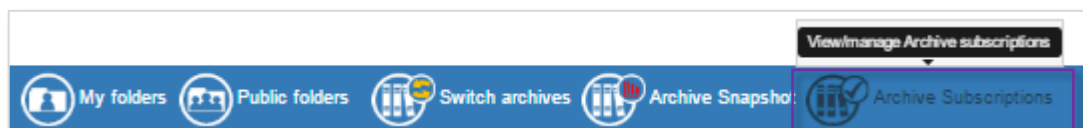
Creating a subscription using the create subscription form

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.



Both options will take you to the *Subscription Builder*, which includes help bubbles to guide you through the process.

In PatBase Express, the *Subscription* link can be found at the bottom of the page marked *Archive Subscriptions*



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.

The screenshot shows a web form for configuring a subscription. It includes the following fields and options:

- Subscription name:** A text input field.
- Subscription query:** A section for selecting classification fields with checkboxes:
 - 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:** A text input field with an information icon, a dropdown menu (showing BMW, Horex, Matchless, Megelli Motorcycles), and left/right arrow buttons.
- Status:** Radio buttons for Inforce, Invalid, and Lapsed.
- Importance:** Radio buttons for Important and Not important.
- Notes:** A text input field.
- Predefined subscription:** Radio buttons for Yes and No (No is selected).

Informational callouts in the form include:

- "Create a name for your subscription. This name will be displayed in the subscription results email."
- "Use this form to build your subscription search."
- "Creating a predefined subscription query allows end-users to select the query from a dropdown list to subscribe to it."

Predefined subscription (Administrator-only option)

The query can be set up as a predefined subscription by ticking the Yes option. This means that it will be available for end users to sign up to. They will not need to create a query themselves.

If Yes is selected, the email options below disappear, and a notes field appears to add a comment.

If administrators wish to sign up themselves or other users to a predefined subscription, they need to go to *Sign up to subscription*.

If it is not a predefined subscription and *No* is selected, email options will appear below to choose who should receive the subscription results emails.

Email to

Administrators can choose to sign up themselves or other users to the subscription. Use the search box to retrieve certain users or select users from the list of available users.

The screenshot shows a web interface for configuring a subscription. At the top, there is an 'Active' section with radio buttons for 'Yes' (selected) and 'No'. Below this is an 'Email to:' section with a search box. The main area is divided into 'Available users' and 'Selected users'. The 'Available users' list includes: access (access@minesoft.com), Alexander Spencer (Alexander@patarch), Ann Chapman (achapman@patarch), Anna Avitto (aavitto@minesoft.com), Caitlin (caitlin@patarch.com), Clement Puiggali (clement@patarch), CPIP (CPIP@patkm.com), and dklga@patarch.com (dklga@patarch). There are '>>' and '<<' buttons between the lists. Below the lists is an 'Add address:' field with an 'Add' button. There are three checkboxes: 'Do not send email when subscription returns zero results' (checked), 'Send results as an adhoc inspection' (unchecked), and 'Include links to PatBase Express only' (unchecked). A 'Notes:' text area is at the bottom left. On the right side, there are four informational boxes: 'Subscription results will be emailed to all selected users each week.', 'Add an email address to send results to a recipient who is not a registered user of the archive.', 'Tick this option if you do not want to receive an email when the subscription returns zero results.', 'Tick this option if you want to receive results as an adhoc inspection rather than a search set.', 'Tick this option if you want to receive links to PatBase Express only.', and 'Add any comments associated with the subscription here.' At the bottom left, there are 'Save' and 'Clear' buttons.

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.

If the results should be sent in the form of an ad hoc inspection rather than as a set of search results, tick the *Send results as an adhoc inspection* box above the notes field.

Notes

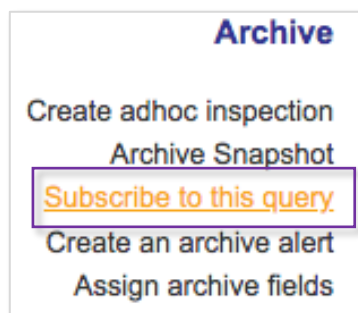
Add any notes to the subscription if required.

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' options section.

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

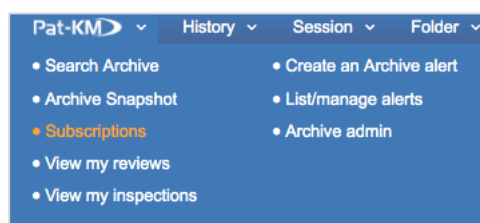


This opens the form to create a subscription, where the above instructions should be followed.

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

All users can sign up to predefined subscriptions (created by administrators) in two ways:

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



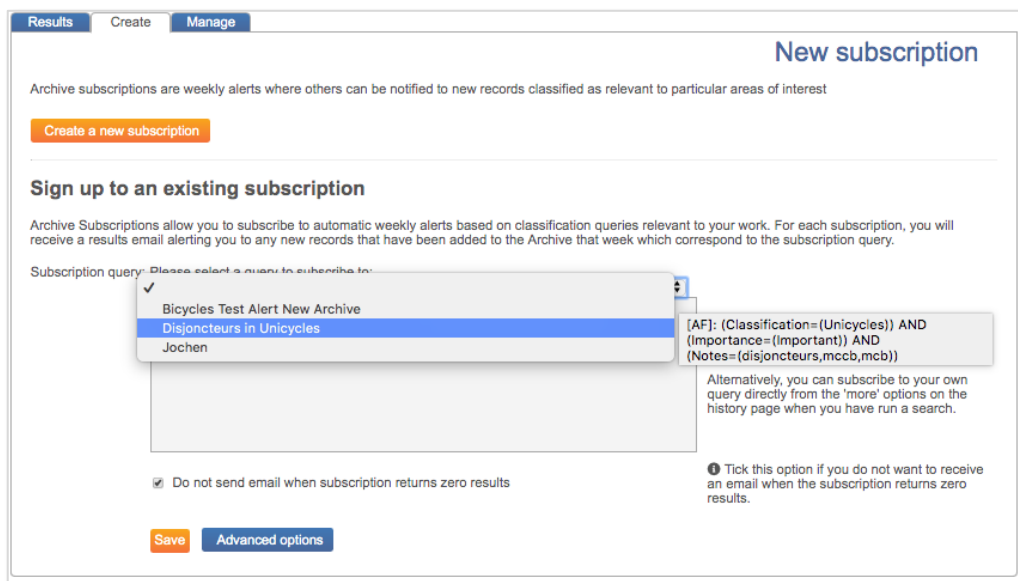
You will be taken to the subscription page. Select the *Create* tab and select the desired subscription from the drop-down menu.

Please note: in PatBase express, the subscriptions tab will take you to the subscription screen which is split into the results tab and the create/manage tab.

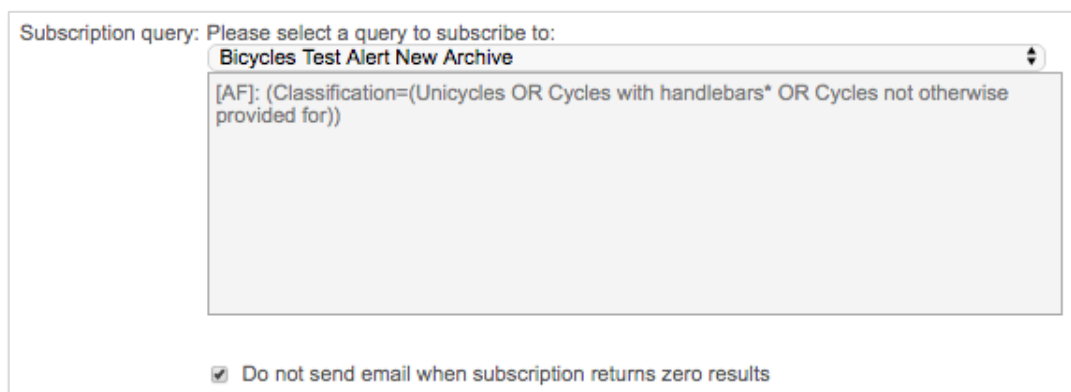
- Go to the archive section of the main menu and select *Sign up to a predefined subscription* listed under the *Subscriptions* options.



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



Once saved, the subscription query will be displayed in the box below. The query cannot be edited (only administrators will be able to edit it from the *Manage subscriptions* section).



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(s).

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*.

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.

Subscription name:

Subscription query:

Active: Yes No

Email to: Search users:

Available users:

- access (access@minesoft.com)
- Alexander Spencer (Alexander@patarchive.com)
- Ann Chapman (achapman@patarchive.com)
- Anna Avitto (aavitto@minesoft.com)
- Clement Puiggali (clement@patarchive.com)
- CPIP (CPIP@patkm.com)
- dklga@patarchive.com (dklga@patarchive.com)
- dkmras@patarchive.com (dkmras@patarchive.com)

Selected users:

- Caitlin (caitlin@patarchive.com)

Add address:

Do not send email when subscription returns zero results

Send results as an adhoc inspection

Include links to PatBase Express only

Notes:

Informational boxes on the right:

- Create a name for your subscription. This name will be displayed in the subscription results email.
- You have chosen to subscribe to receive weekly results from the search query displayed here. If you need to modify the query, rerun the search with the required modifications and choose again the option to 'Subscribe to this query' from the 'more' options on the History page.
- Subscription results will be emailed to all selected users each week.
- Add an email address to send results to a recipient who is not a registered user of the archive.
- Tick this option if you do not want to receive an email when the subscription returns zero results.
- Tick this option if you want to receive results as an adhoc inspection rather than a search set.
- Tick this option if you want to receive links to PatBase Express only.
- Add any comments associated with the subscription here.

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.

If links to PatBase Express only is required, tick the box next to *Include links to PatBase Express only*.

Notes

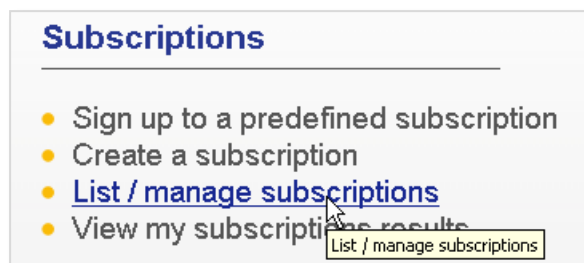
Add any notes if required.

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.



Alternatively, click on *Pat-KM* from the floating toolbar and click on *Subscriptions*, then select the *Manage* tab from the resulting screen.

The screenshot shows the "List subscriptions" page. It has tabs for "Results", "Create", and "Manage". 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
capsule alert	olivier@patarchive.com	2018-09-23 18:06:00	0	edit delete previous results
Chemie Munich RB	ciemens.keilholz@ohmann-koester.com; FRH1@patarchive.com; FRH2@patarchive.com; jl@patarchive.com; bio1@patarchive.com	2019-04-07 16:12:34	0	edit delete previous results

Showing 1 to 10 of 26 entries First Previous 1 2 3 Next Last

Download subscription report

Administrators are able to see any predefined subscriptions that have been set up under the account. These are displayed in the top table. These can be edited or deleted as necessary by administrators.

Predefined subscriptions:

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

Click *edit* to bring up options to alter the subscription name or notes, you can also edit the subscription query from this page by selecting *Edit query* to the right-hand side.

Edit subscription (Bicycles Test Alert New Archive)

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.

Subscription name:

Subscription query:

Notes:

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

Edit query

You have chosen to subscribe to receive weekly results from the search query displayed here.

If you need to modify the query, rerun the search with the required modifications and choose again the option to 'Subscribe to this query' from the 'more' options on the History page.

Add any comments associated with the subscription here.

Then click on *Save changes* at the bottom of the page to save the amends.

Back on the *List/manage subscriptions* page, below the table of predefined subscriptions, all user subscriptions that have been created by any users under the account are displayed. This table is searchable by subscription or recipient name. For each subscription, there is the option to edit it, to delete it, or to view the number of results returned in previous weeks.

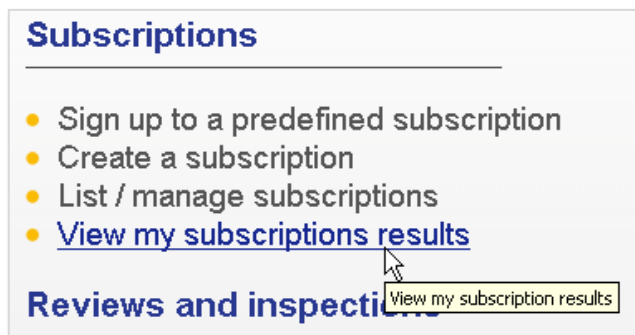
User subscriptions:

Show entries Search:

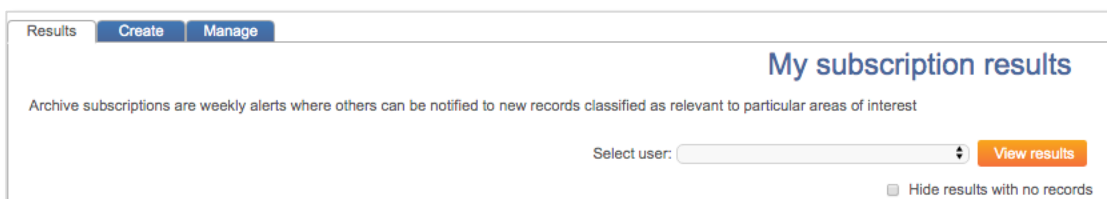
Subscription name	Recipient(s)	Last run	Last result	Action
20160504-2	peter@patarchive.com	2016-06-26 17:12:31	0	edit delete previous results
alert only for me	olivier@patarchive.com; olivier@minesoft.com	2018-06-24 14:21:18	1	edit delete previous results
Bicycles Test Alert New Archive	Jorge@patarchive.com	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

View subscription results

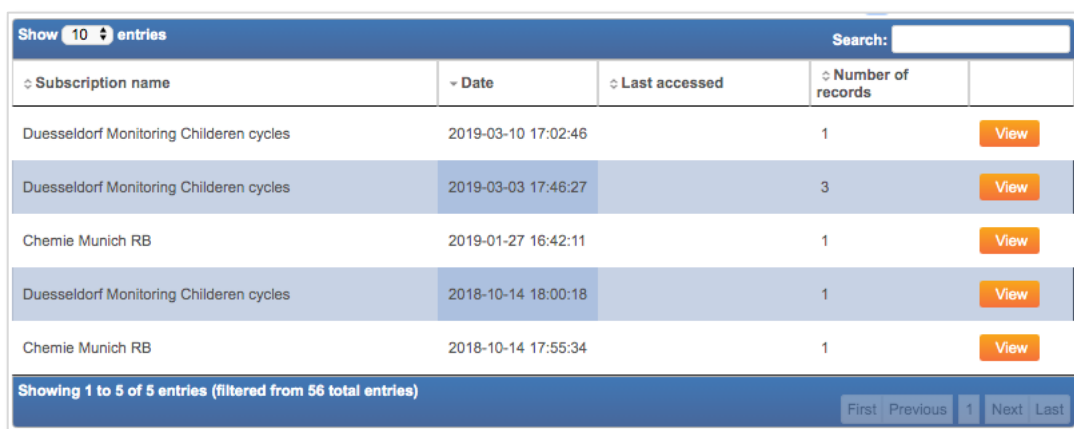
In order to view previous, personal subscription results, click on *View my subscription results* under the *Subscriptions* section of the *Pat-KM* menu.



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



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



The image shows a table with 5 columns: Subscription name, Date, Last accessed, Number of records, and an action column. The table contains 5 rows of data. The first row is highlighted. The table is filtered to show 1 to 5 of 56 total entries. The bottom of the table has navigation buttons: First, Previous, 1, Next, Last.

Subscription name	Date	Last accessed	Number of records	
Duesseldorf Monitoring Childeren cycles	2019-03-10 17:02:46		1	View
Duesseldorf Monitoring Childeren cycles	2019-03-03 17:46:27		3	View
Chemie Munich RB	2019-01-27 16:42:11		1	View
Duesseldorf Monitoring Childeren cycles	2018-10-14 18:00:18		1	View
Chemie Munich RB	2018-10-14 17:55:34		1	View

Showing 1 to 5 of 56 entries (filtered from 56 total entries)

First Previous 1 Next Last

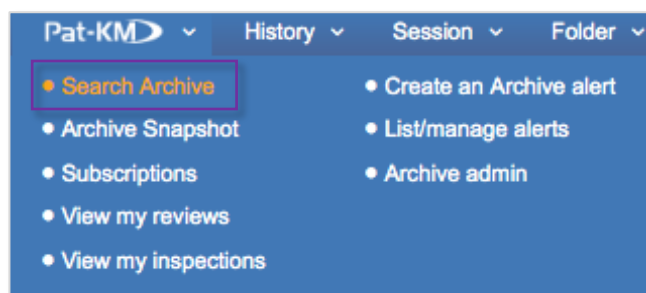
Administrators can also switch to view other users' subscriptions from here by selecting a different user from the drop-down at the top right.

Click on *View* next to the subscription result set of interest and it will be loaded as a search query on the *Search History* page.

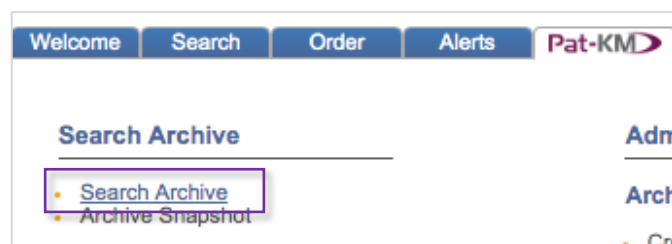
Alternatively, users can access results by clicking on the link in the subscription results email they receive.

Searching the Archive

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

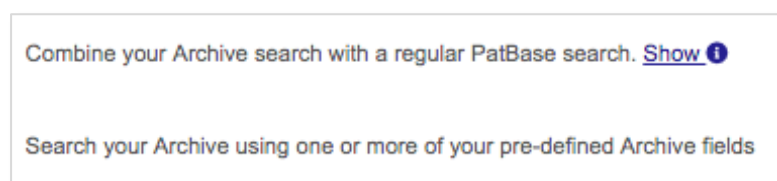


Alternatively, go to the *Pat-KM* tab on the menu page and select *Search Archive*.



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*.

Please note: initially the PatBase search options will be minimised, in order to combine your archive field search with a regular PatBase search click the orange 'Show' button at the top of the page.



minesoft
Pat-KM

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

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

Status

- Inforce
- Invalid
- Lapsed

Importance

- Important
- Not important

Notes

ⓘ Use of wildcards and truncation in Archive search:
 * - Zero or more characters
 ? - Exactly one character

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.

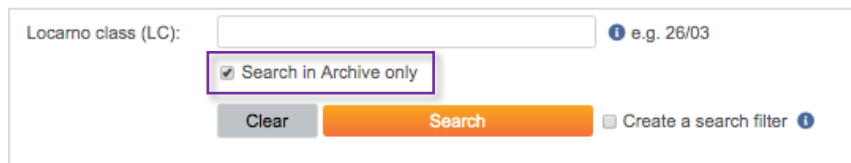
Multiple archive fields (e.g. assignee and status) will be combined with the AND operator.

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 field search.

```
6 [AF]: (Classification=(Motorcycles, engine-assisted cycles or motor scooters with one or two wheels*)) AND (Assignee=(BMW OR Megelli Motorcycles)) AND (Status=(Inforce))
```

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



Locarno class (LC): e.g. 26/03

Search in Archive only

Create a search filter ?

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.

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:

#	Search query	Results
11	[AF]: @nodata status	54262

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:

#	Search query	Results
12	[AF]: @data status	1144

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

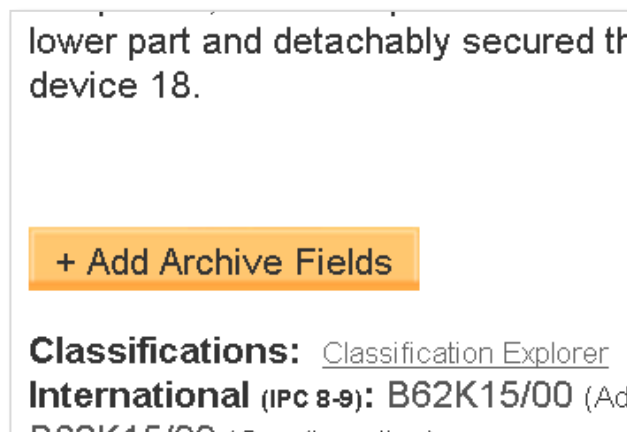
Click on *View* or *Browse* from the search history page to view PatBase or Pat-KM search results.

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



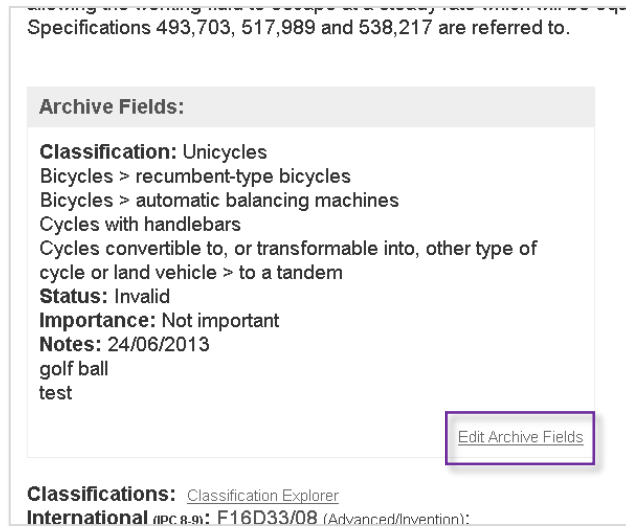
Manually add archive fields to individual records

If the administrator or inspector wishes to assign archive fields to a record that currently has no assigned fields, they should click on the *Add Archive Fields* button on the record.



Records that are archived and have had archive fields assigned to them will display the assigned archive fields 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.



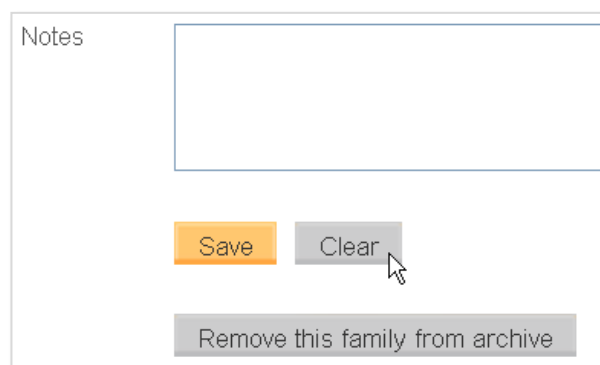
Administrators and inspectors can edit the archive fields on the records by clicking on *Edit Archive Fields* within the record view or *Edit* in the family bar.

The updated archive fields will be applied to the record once the user has pressed *Save*. (At least one field must be selected in order to save)

To clear all ticked fields, press *Clear* and make your new field selections.

To remove the family record from the archive, click *Remove this family from archive*. A warning message will pop up asking if you are sure you want to remove the record from the archive. All archive field data will be deleted from the record.

Only administrators can see the remove option.



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

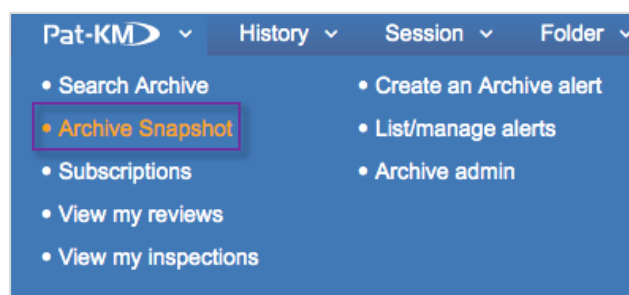


All activity associated with the record can be viewed, along with the user who made the change. The history is searchable.

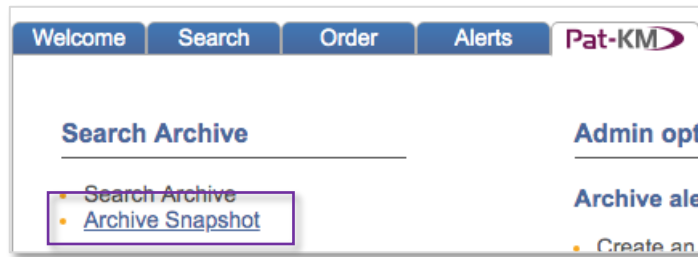
History for family 19800663		
Show 50 entries		
Date/Time	User	Event
2013-07-01 13:28:12	User1	Fields updated in bulk assignment (Append). • Classification = Unicycles Bicycles > recumbent-type bicycles Bicycles > automatic balancing machines Cycles with handlebars Cycles convertible to, or transformable into, other type of cycle or land vehicle > to a tandem
2013-06-25 16:15:21	Admin	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

Archive Snapshot

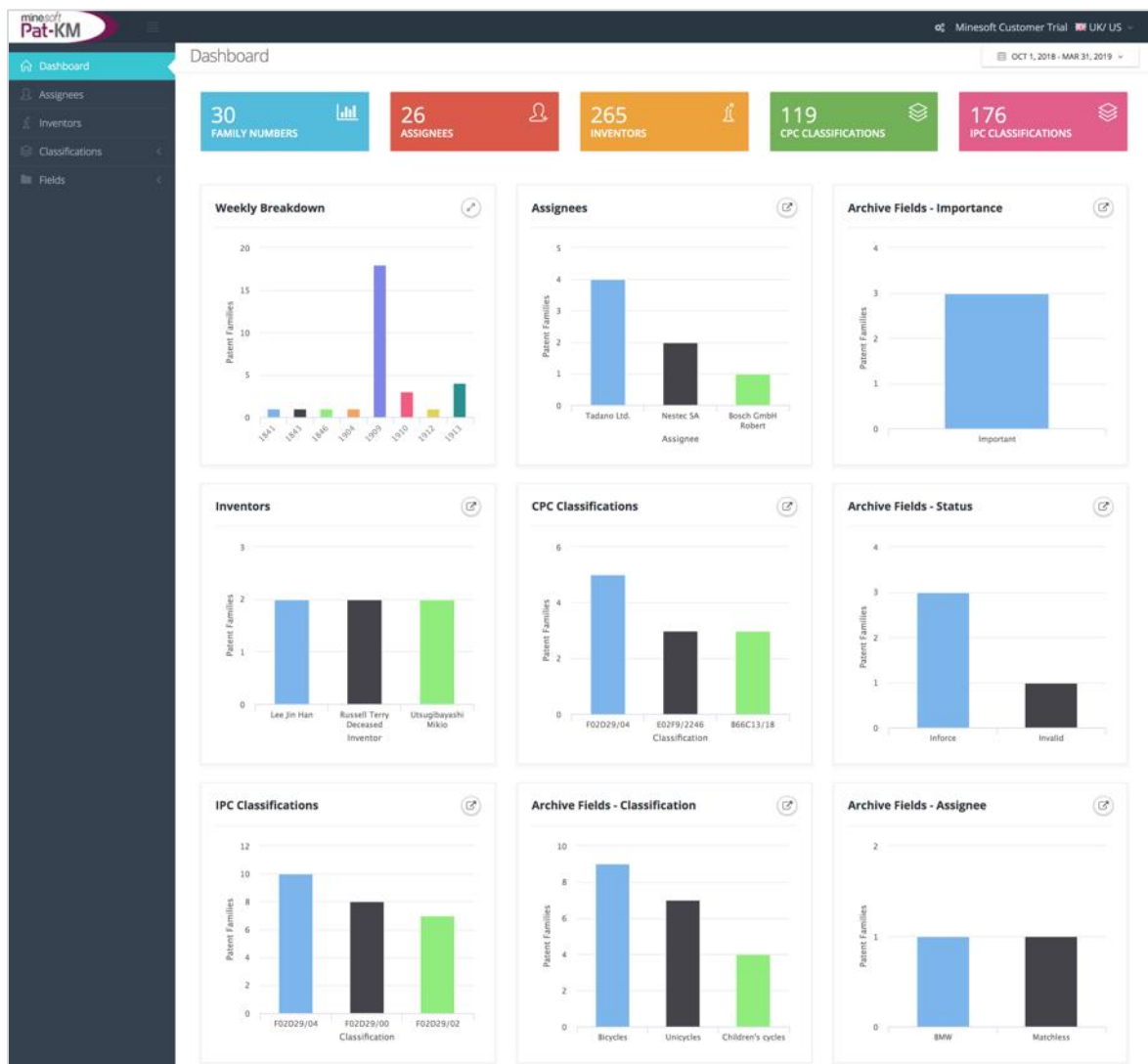
Access the *Archive Snapshot* from the *Pat-KM* tab on the floating toolbar.



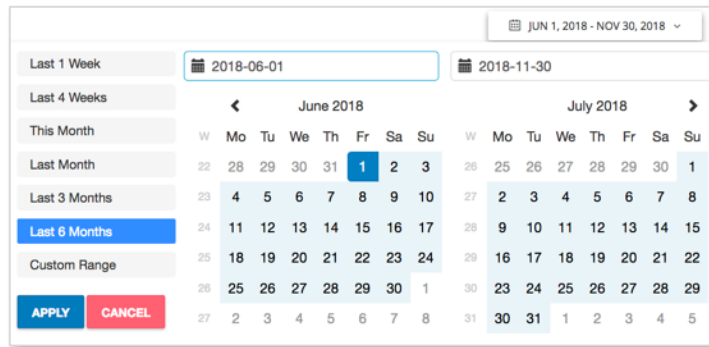
Alternatively go to the *Menu* page, select the *Pat-KM* tab and click on *Archive Snapshot* under the *Search Archive* section.




The *Archive Snapshot* shows data related to both PatBase fields such as CPC classifications, assignees, etc. and archive field information set up by administrators. The Snapshot allows users to quickly identify trends within the information held in the archive.



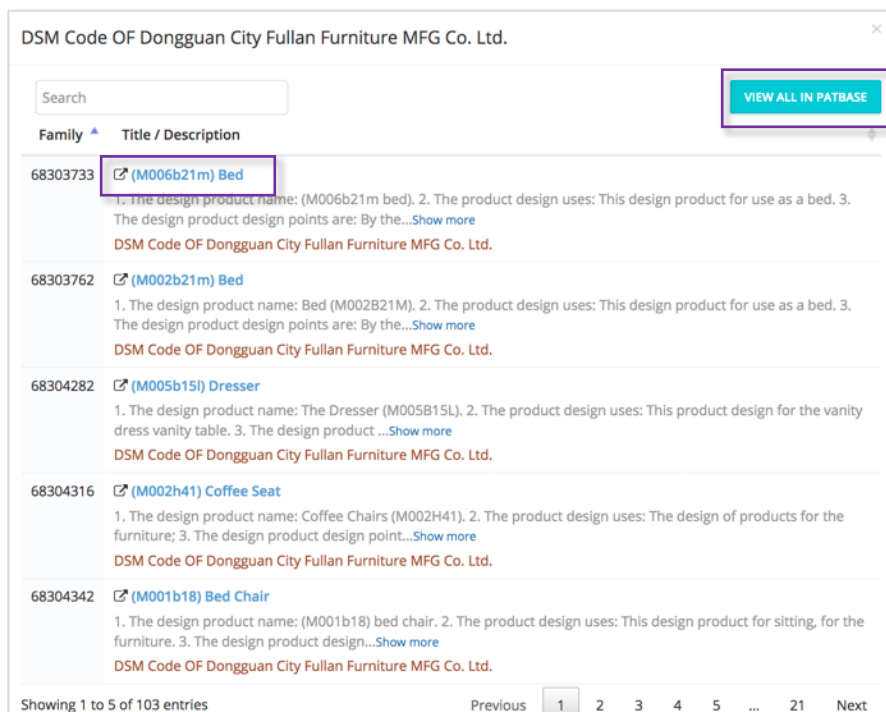
To adjust the time period shown, open the calendar in the top right-hand corner of the page.



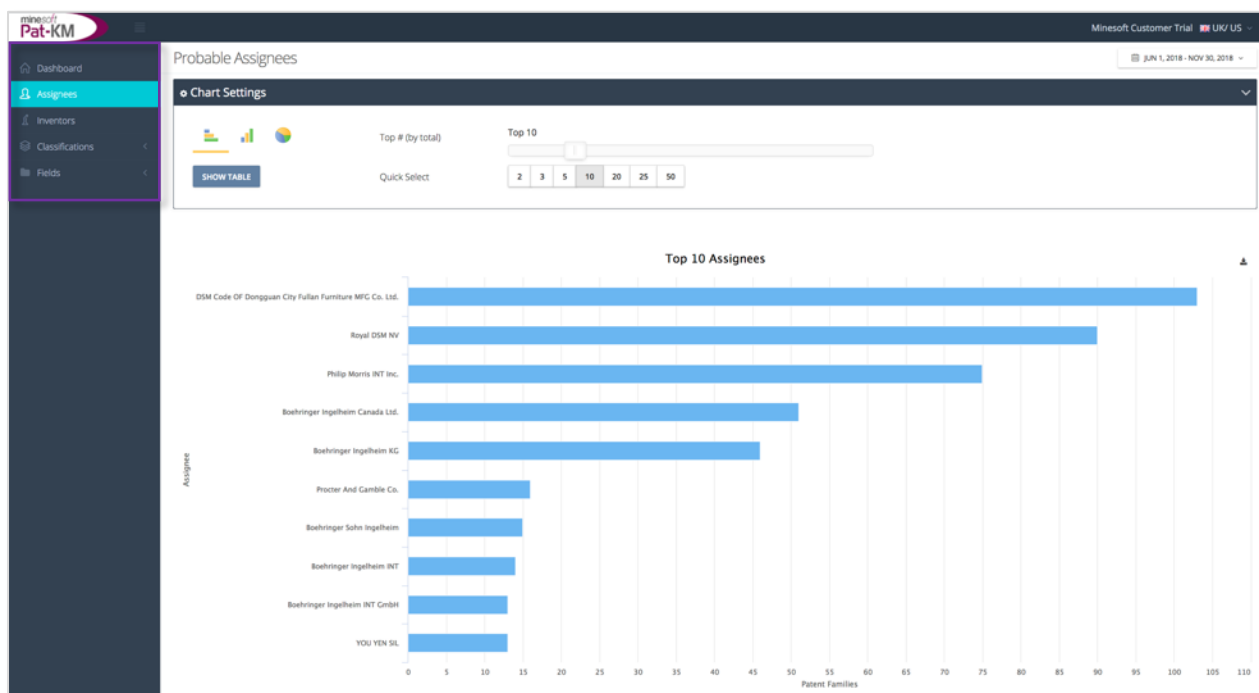
From here you can choose a custom range, or show the last week, last 4 weeks etc.

Each widget can be expanded by clicking the  icon, in the top right-hand corner of the widget.

Data can be brought back into PatBase by clicking on a bar in any of the charts on the dashboard. This will open a pop-up window where you can view all the represented families in PatBase (by clicking on *VIEW ALL IN PATBASE*) or click through to a specific document (by clicking on the title).



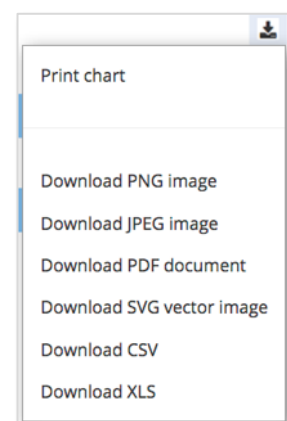
To view a chart in more detail and adjust the settings, select a category from the sidebar on the right-hand side.



Every archive snapshot will feature the *Assignees*, *Inventors* and *Classifications* (IPC& CPC) breakdown. The fourth category, *Fields*, will change depending on what fields are included in your archive. Whichever category you are looking at, the chart settings/display is the same.

Clicking on the download icon above the chart will open a drop-down menu with the different formats the chart can be downloaded in and an option to print.

In the chart settings, you can choose the number of assignees/inventors etc. to show in the chart by the slide along bar and quick select options. In addition, you can choose your preferred chart type, either horizontal bar chart, vertical bar chart or pie chart.



To examine the data that lies behind the chart, click *SHOW TABLE*.

There are several export options available for the data table. In addition, you can drill down further by clicking on a row of interest. This will open the same pop-up as on the dashboard page, where you can choose to *VIEW ALL IN PATBASE*, select a specific family or read further information where available.

Symbol	Text
A	HUMAN NECESSITIES
A21	FOODSTUFFS; TOBACCO
A23	FOODS OR FOODSTUFFS; THEIR TREATMENT, NOT COVERED BY OTHER CLASSES
A23V	INDEXING SCHEME RELATING TO FOODS, FOODSTUFFS OR NON-ALCOHOLIC BEVERAGES
A23V2002/00	Food compositions, function of food ingredients or processes for food or foodstuffs

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Family	Title / Description
1914308	Comprehensive Dietary Supplements Supplements Alimentaires Complets A comprehensive dietary supplement of bioavailable minerals, vitamins, phytonutrients, herbs, antioxidants, and enzymes for ameliorating the effects of stres... Show more Today Inc. 4
1914501	Comprehensive Dietary Supplement A comprehensive dietary supplement of bioavailable minerals, vitamins, phytonutrients, herbs, antioxidants, and enzymes for ameliorating the effects of stress a... Show more Zlzs LLC
11127765	Odourless Garlic Supplement Comprising an Enteric Coating and a Deodorising Layer There is provided a garlic supplement comprising: (a) one or more cores comprising garlic; (b) an enteric coating encasing the core(s) which is insoluble at pH ... Show more Kannar David
11488323	Nutritionally Active Composition for Hardening Fingernails Composition Nutritivement Active Pour Durcir Les Ongles The invention relates to compositions having nutritionally beneficial substituents for hardening fingernails. These nutritionally beneficial substituents may... Show more Adams Food Ltd.
11596910	Herbal Extract Composition Containing Gynostemma Pentaphyllum, Crataegus Pinnatifida and Camellia Sinensis Provided is an herbal extract-based composition comprising an extract of Gynostemma pentaphyllum, an extract of Crataegus pinnatifida (hawthorn leaves or berrie... Show more Sante INT Inc.

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