

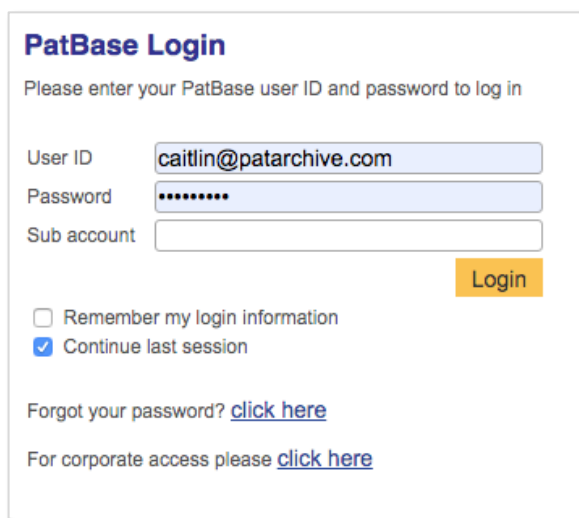


Table of Contents

ACCESSING PAT-KM	2
SWITCHING BETWEEN ARCHIVES	2
REVIEWS.....	4
REVIEWING ALERTS.....	4
INSPECTIONS.....	8
VIEW INSPECTIONS.....	8
THE INSPECTION RECORD.....	9
THE INSPECTION.....	11
CREATING A MANUAL INSPECTION.....	15
VIEW CREATED INSPECTIONS	16
SUBSCRIPTIONS	17
CREATE SUBSCRIPTIONS	17
SIGN UP TO SUBSCRIPTIONS (SIGN UP TO A PREDEFINED SUBSCRIPTION)	19
MANAGE SUBSCRIPTIONS	22
VIEW SUBSCRIPTION RESULTS	23
SEARCHING THE ARCHIVE	24
ARCHIVE RECORD DISPLAY.....	27
CONTACT US.....	29
GLOSSARY	29

Accessing Pat-KM

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



The image shows a login form titled "PatBase Login". It includes a prompt to enter user ID and password. The User ID field contains "caitlin@patarchive.com", the Password field is masked with dots, and the Sub account field is empty. There is a "Login" button, a "Remember my login information" checkbox (unchecked), and a "Continue last session" checkbox (checked). Links for "Forgot your password?" and "For corporate access" are provided.

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.

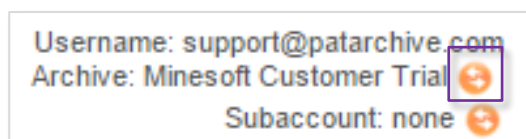
Check *Continue last session*, to continue your previous session, i.e. the searches from the previous session will be listed on the search history page.

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

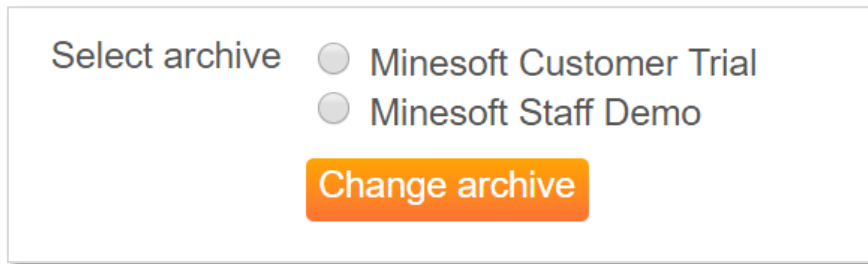
Switching between archives

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:



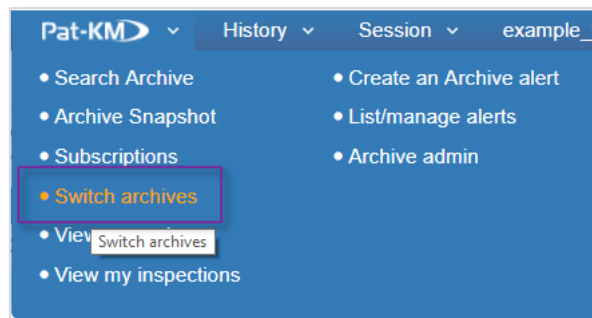
Select archive Minesoft Customer Trial
 Minesoft Staff Demo

[Change archive](#)

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.

Reviews

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.

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.

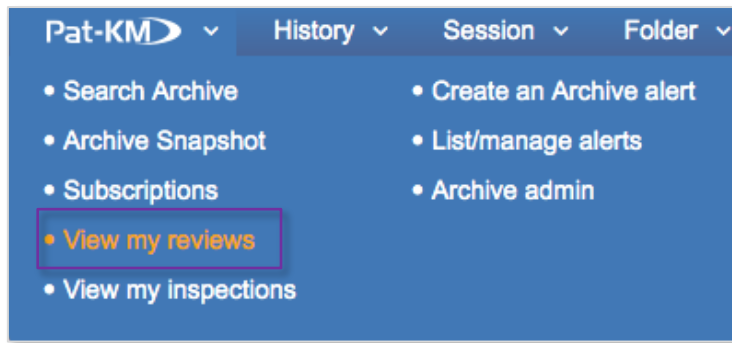


Alternatively, if the reviewer is already logged in to the archive and a review is pending, a box will appear at the top of the screen with the message: "You have pending reviews/inspections. View pending review(s)."

This can be clicked on to access the reviews.

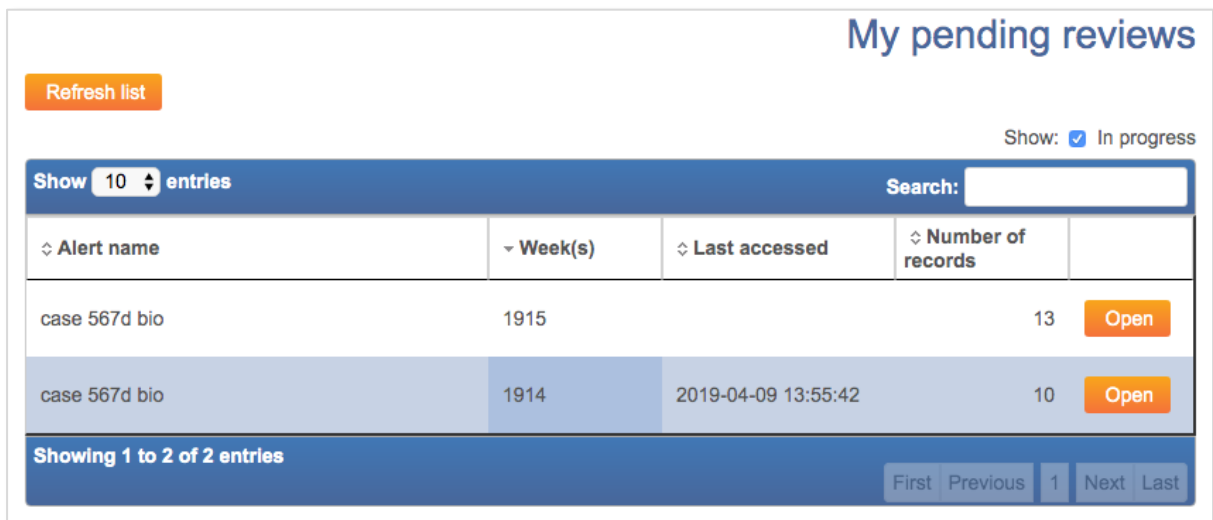


Otherwise, mouse-over the Pat-KM tab on the toolbar and select *View my reviews*.



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.



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

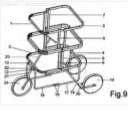
Remove from this review admin@patarchive.com [add more inspectors](#)

Family:48260830 Source: US2012181772A 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
ANDEREGG HOLDING BV

Publication Number	Publication Date	Application Number	Application Date	
CH10574557 A	20120711	CH20108043811	20100804	
EP2462019 A2	20120613	EP20109753047	20100804	
IN1930DN0912 A	20150724	IN2012DN01930	20120302	
NL2003332 C	20110208	NL20092003332	20090805	
US2012181772 AA	20120719	US20100388699	20100804	
WO11016722 A2	20110210	WO2010NL50494	20100804	
WO11016722 A3	20110421	WO2010NL50494	20100804	

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.

Alert: case 567d bio
Week: 1915 Results: 13

1) OIL-SOLUBLE MOLYBDENUM DERIVATIVES DERIVED FROM HYDROXYETHYL-SUBSTITUTED MANNICH BASES

Remove from this review callin@patarchive.com [add more inspectors](#)

Family:32843822 Source: US2006084584A The present disclosure relates to organic molybdenum complexes prepared by reacting a Mannich base with a source of molybdenum. The complexes may be useful in lubricating oil compositions as at least one of an antioxidant, a deposit control additive, and a friction modifier. The organic molybdenum complexes may show a reduced tendency to color finished oils.

Applicants: AFTON CHEMICAL CORP
BOARD OF TRUSTEES OF LELAND STANFORD JUNIOR UNIV
CHRISTOPHER FLAHERTY, J...

Publication Number	Publication Date	Application Number	Application Date	
AT383412 E	20080115	AT20050256496T	20051020	
AT547056 E	20120315	AT20070170338T	20071106	
AT548995 E	20120415	AT20070861721T	20071106	
AU2005211630 AA	20060504	AU20050211530	20050921	
AU2005211630 BB	20071025	AU20050211630	20050921	
AU2005295212 AA	20060427	AU20050295212	20051020	
AU2005295212 BB	20120517	AU20050295212	20051020	
AU2006329867 AA	20070705	AU20060329867	20061213	
AU2006329867 BB	20130919	AU20060329867	20061213	
AU2007313216 AA	20080424	AU20070313216	20071017	
AU2007317886 AA	20080515	AU20070317886	20071106	
AU2007317886 BB	20140306	AU20070317886	20071106	
AU2008241447 AA	20081030	AU20080241447	20080416	
AU2008241447 BB	20140327	AU20080241447	20080416	
AU2008275708 AA	20090115	AU20080275708	20080708	

[Hide full text viewer](#)

AU2008241447 (AA) - INTERSPINOUS SPACER
Family Number: 32843822 Patbase Update Week: 0948

Bibliographic Data

Publication Number AU2008241447 [View original document](#)

Type DPI DOCUMENT

Country AUSTRALIA

Kind Code AA

Date 20081030

Application Number AU20080241447 20080416

Classification IPC A61F2/44; A61B1/56

CPC A61B1/77065; A61B1/77067; A61B2017/00004; A61B2017/00557; A61F2/0077

Priority Number(s) US20070923841P 20070416; US20070923871P 20070417; WO2008/US04901 20080416

Inventor(s) ALTARAC MOTI; KIM DANIEL H; MOTI ALTARAC; SHAWN TEBBE; TEBBE SHAWN


Assignee(s) VERTIFLEX INC[US]

Agent SHELSTON IP-SHELSTON IP PTY LTD

Titles [EN] INTERSPINOUS SPACER

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

Alert: folding cycles
Week: 1326 Results: 5

1) KLAPPAHRRAD FOLDING BICYCLE 

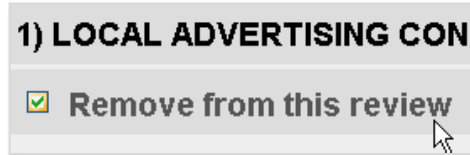
Remove from this review katy@patarchive.com [add more inspectors](#)

Family:54153200 Source: DE202012009460U1 Klappfahrrad, aufweisend in seinem **Applicants: AFANASIEV**

For each result, the reviewer has two options:

1. *Remove from this review*

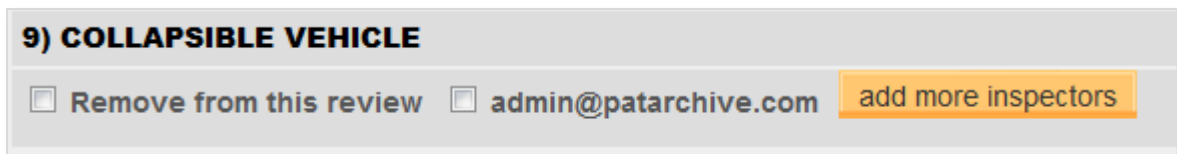
The reviewer can choose to remove the record from the review, so the record will not get sent for inspection.



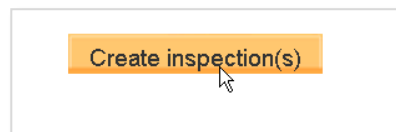
2. *Send to inspector(s)*

On the other hand, the reviewer can to send the record to an inspector(s). 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.



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.

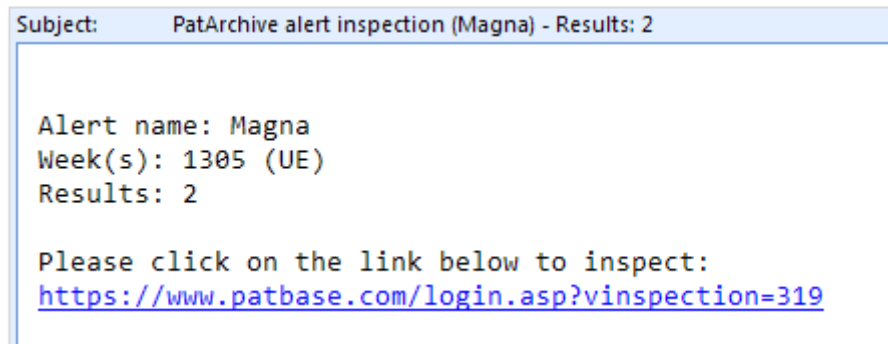


A record can also be forwarded as information by clicking on the *Forward this record* link below the family table.

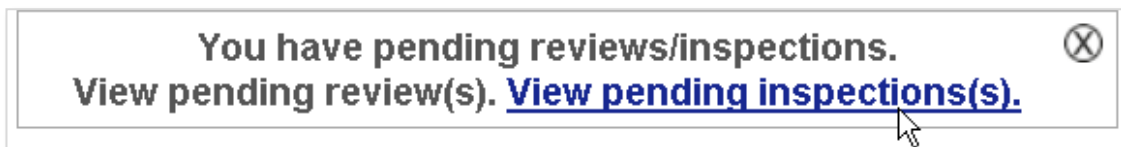
Inspections

View inspections

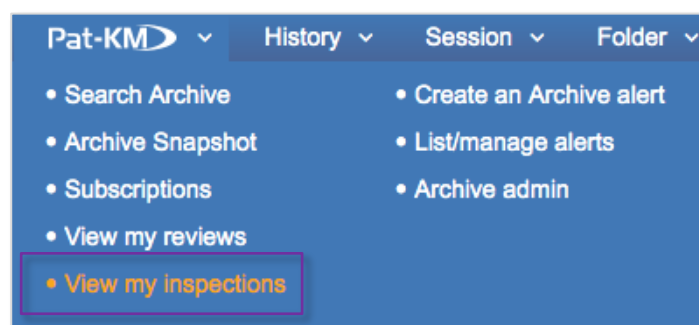
Inspectors can carry out an inspection from the alert results email sent to them. Click on the link in the email to login in and begin the inspection.



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.

My pending inspections

[Refresh list](#)

Show: In progress From subscriptions Adhoc

Show **10** entries Search:

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	2019-04-04 10:45:10 (3)	3 Open

Showing 1 to 1 of 1 entries

[First](#) [Previous](#) [1](#) [Next](#) [Last](#)

If the inspector 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.

PatBase Alert: Adhoc
Week: ADHOC

Results: << Previous 3 of 3 [Finish inspection](#) Jump to record: Go

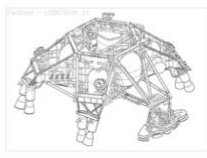
3) Family number: 53443542 (USD679646S) [Translate](#) [Full-text](#) [Status](#) [Citations](#) [Show fields](#)

Skip this record this time Remove this record from this inspection

Title: DESCENT STAGE FOR MARS ROVER

Abstract:
(Claim 1) The ornamental design for descent stage for Mars rover, as shown and described.

US class: D12/320
Locarno class: 12/07
Classification Explorer



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

Priority: US20090342598F 20090827

Cited documents: USD505105 S1, USD493411 S1, USD488093 S1, USD487715 S1, USD437255 S1, USD430530 S1, USD413551 S1, USD408780 S1, USD394040 S1, USD332249 S1, USD202456 S1, US4667907 A, US4296892 A, US3175739 A.

Assignee(s): (ast): EISEN HOWARD J ; LEE STEVEN W ; MANNING ROBERT M ; RIVELLINI TOMMASO P ; JANDURA LOUISE ; SAN MARTIN ALEJANDRO M ; STELTZNER ADAM D ; SABAH DARA ; VOORHEES CHRISTOPHER J ; THOMA BENJAMIN L ; UMLAND JEFFREY W ; WAYDO JAIME M ; CALIFORNIA INST OF TECHN

Assignee(s): CALIFORNIA INST OF TECHNOLOGY ; CALIFORNIA INSTITUTE OF TECHNOLOGY ; NASA



Inventor(s): (ast): EISEN HOWARD J ; JANDURA LOUISE ; LEE STEVEN W ; MANNING ROBERT M ; RIVELLINI TOMMASO P ; SABAH DARA ; SAN MARTIN ALEJANDRO M ; STELTZNER ADAM D ; THOMA BENJAMIN L ; UMLAND JEFFREY W ; VOORHEES CHRISTOPHER J ; WAYDO JAIME M

Agent(s): CHRISTIE PARKER AND HALE LLP

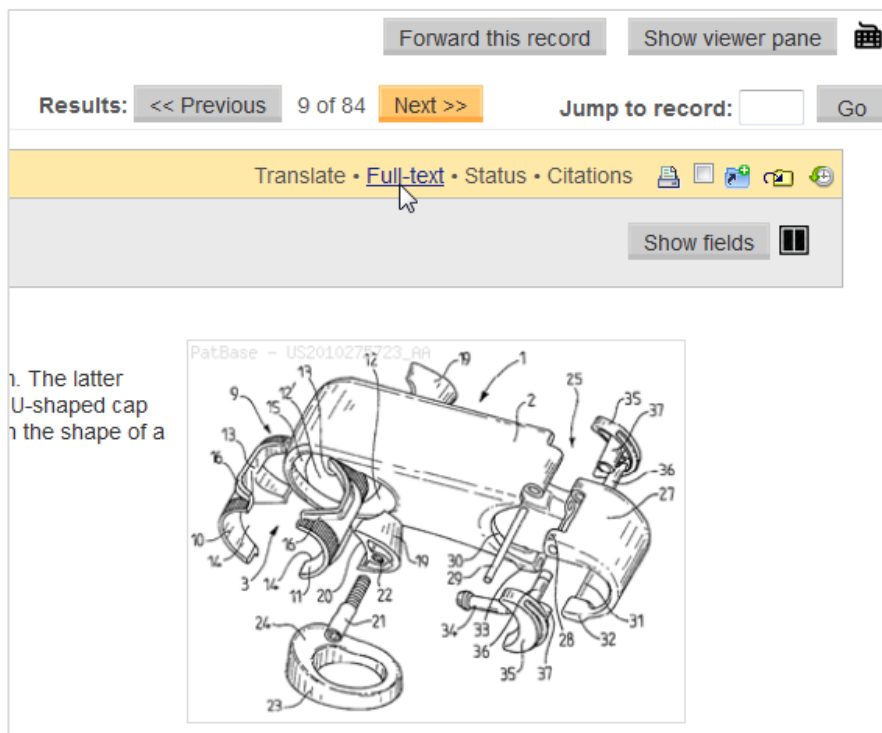
Along the top the PatBase family number and representative member will appear.

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	
USD487715 S1	20040323	US20020164877F	20020731	 

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.



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.

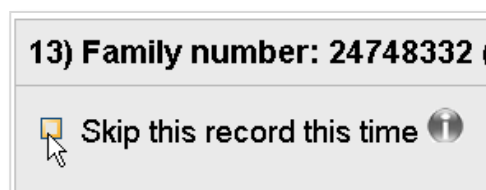
The inspection

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.

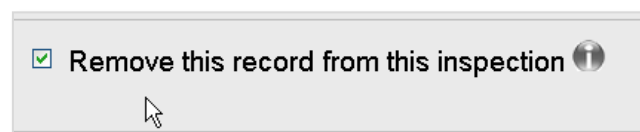
However, any other records that were successfully inspected during the inspection will be added to the archive immediately.



Remove record

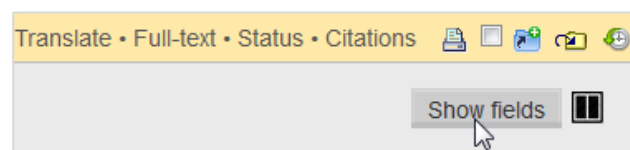
It is possible to *Remove this record from this inspection* which means that the inspector will not assign fields to the record and it will be permanently removed from that inspection.

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.

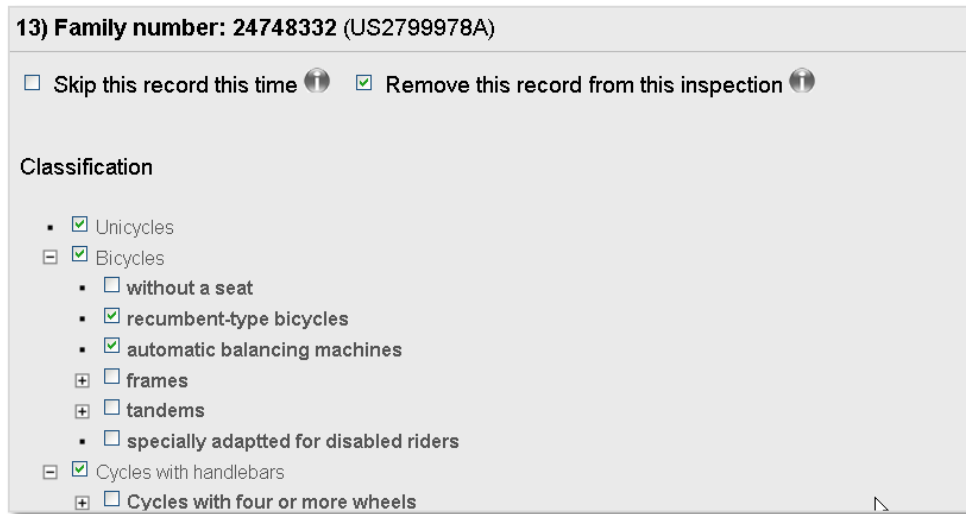


Assigning archive fields

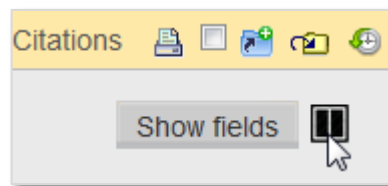
In order to assign fields to the record, click on the *Show fields* button at the top right to display the archive fields.



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.

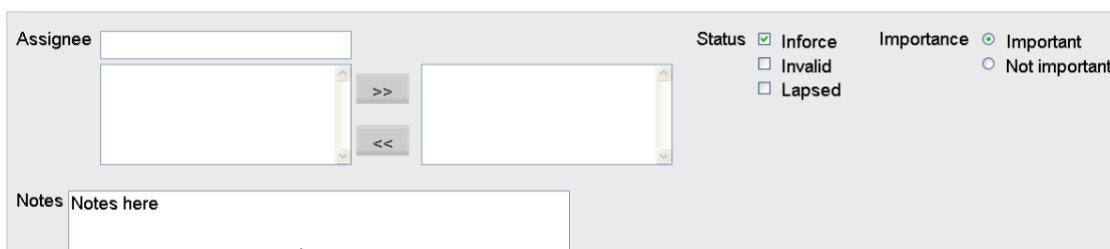


Switch to a side-by-side view by clicking on the icon in the top right-hand corner of the record.



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.



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*.

Results: << Previous 13 of 272 Next >> Jump to record: 25 Go

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  Show fields 

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

Show 50 entries Search:

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
2013-03-19 15:39:40	Katy Wood	Added to archive.

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

Forward this record Show viewer pane 

Results: << Previous 9 of 84 Next >> Jump to record: Go

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.

Keyboard Shortcuts	
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 from 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* on the menu.

#	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.

Email to: Inspector 1 (inspector1@patarchive.com) +

Email from: admin@patarchive.com

Subject:

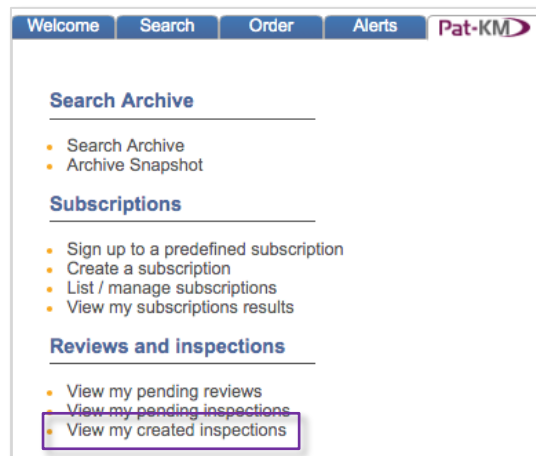
Message:

Create inspection

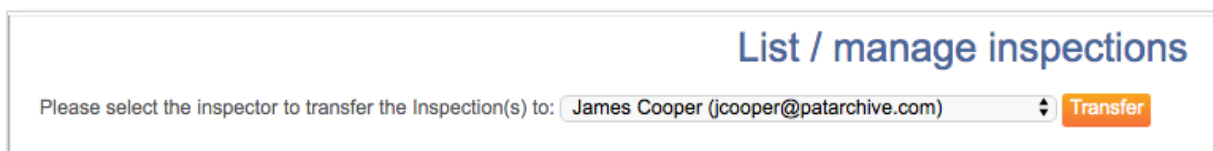
View created inspections

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.



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.

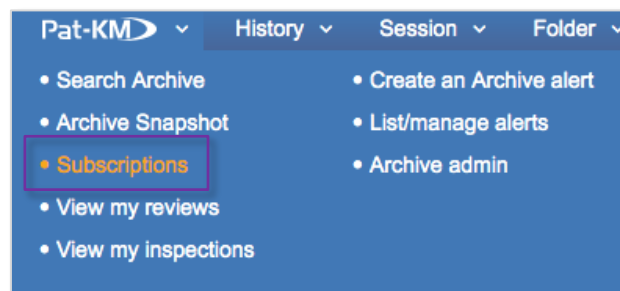
All users can create subscriptions.

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.



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.

Create a subscription

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

Subscription query: 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

Email to

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

Email to: Search users:

Available users		Selected users
access (access@minesoft.com)	<input type="button" value=">>"/>	Faiz Abbas (faiz@patarchive.com)
Alexander Spencer (Alexander@patarc		
Ann Chapman (achapman@patarchive	<input type="button" value="<<"/>	
Anna Avitto (aavitto@minesoft.com)		
Caitlin (caitlin@patarchive.com)		
Clement Puiggali (clement@patarchive		
CPIP (CPIP@patkm.com)		
dklga@patarchive.com (dklga@patarc		
dkmas@patarchive.com (dkmas@pat		

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

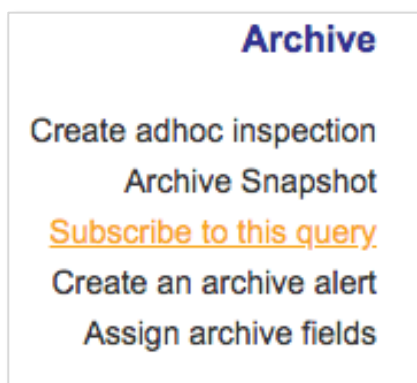
Add any notes to the subscription if required.

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*.

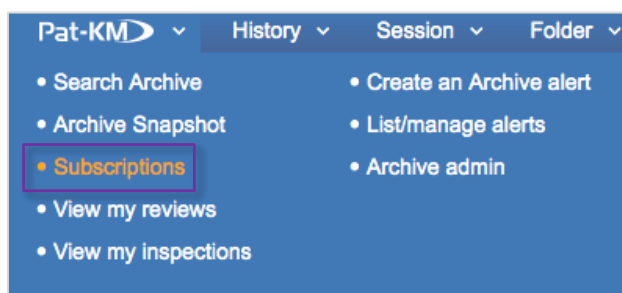
Please note: this option will only be visible from archive search results, not PatBase search results.



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.

Results Create Manage

New subscription

Archive subscriptions are weekly alerts where others can be notified to new records classified as relevant to particular areas of interest

[Create a new subscription](#)

Sign up to an existing subscription

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 query: Please select a query to subscribe to:

- Bicycles Test Alert New Archive
- Disjoncteurs in Unicycles
- Jochen

Do not send email when subscription returns zero results

Tick this option if you do not want to receive an email when the subscription returns zero results.

Alternatively, you can subscribe to your own query directly from the 'more' options on the history page when you have run a search.

[Save](#) [Advanced options](#)

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

Subscription query: Please select a query to subscribe to:

Bicycles Test Alert New Archive

[AF]: (Classification=(Unicycles OR Cycles with handlebars* OR Cycles not otherwise provided for))

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@patarc), 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@patarc). There are right-pointing (>>) and left-pointing (<<) arrow buttons between the two columns. Below the user lists is an "Add address:" text input field with an orange "Add" button to its right. 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". At the bottom of the form is a "Notes:" text area. At the very bottom 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

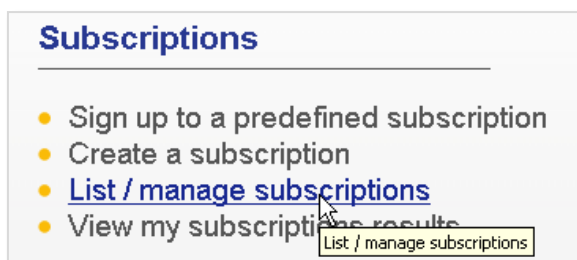
Add any notes if required

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).

List 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

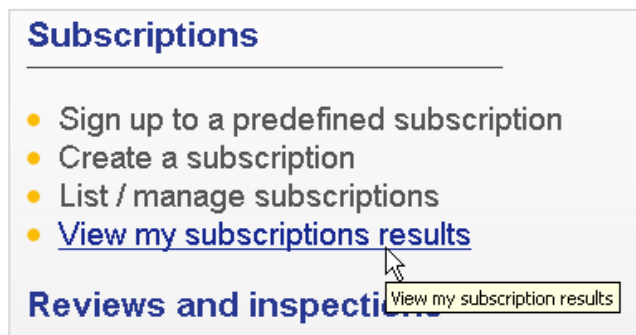
Showing 1 to 10 of 27 entries

First Previous 1 2 3 Next Last

Download subscription report

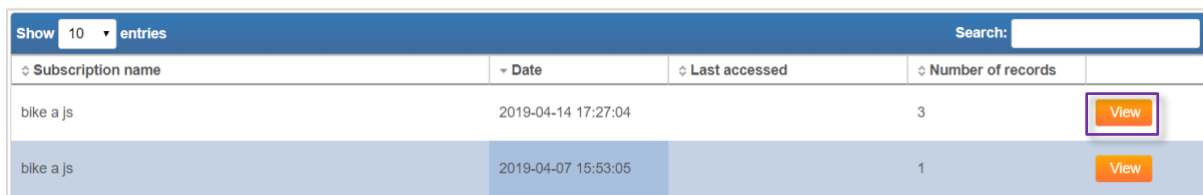
View subscription results

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.



Subscription name	Date	Last accessed	Number of records	
bike a js	2019-04-14 17:27:04		3	View
bike a js	2019-04-07 15:53:05		1	View

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.

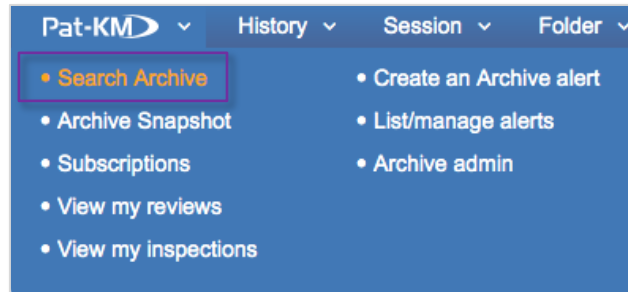


#	Search query	Results	Options
50	Subscription results: bike a js	3	View Browse Hits Optimise more...

Or, 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* 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 ⓘ

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

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.

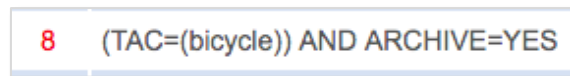
Click on *Search* to submit the search query.

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*))

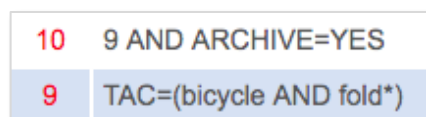
Alternatively, open up the PatBase search form to search against standard fields, but select the option to *Search in Archive only*.

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.

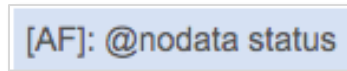


10 9 AND ARCHIVE=YES
9 TAC=(bicycle AND fold*)

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*

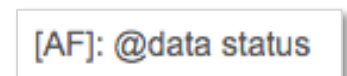
E.g. for the field name 'Status' use the following search:



[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:



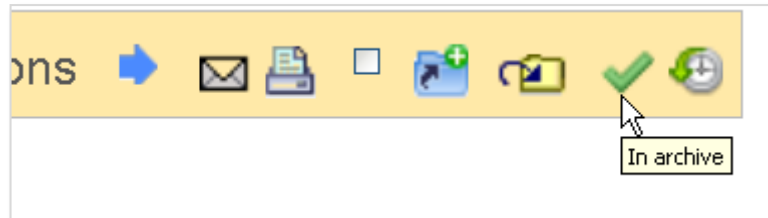
[AF]: @data status

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

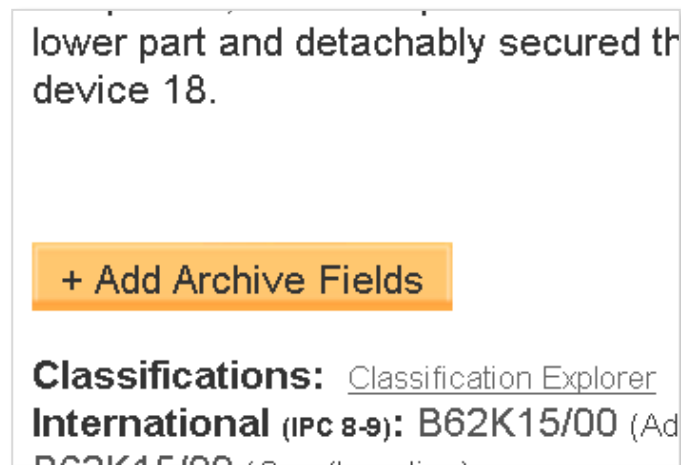
Click on *View* or *Browse* from the *Search History* to view PatBase or Archive search results.

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



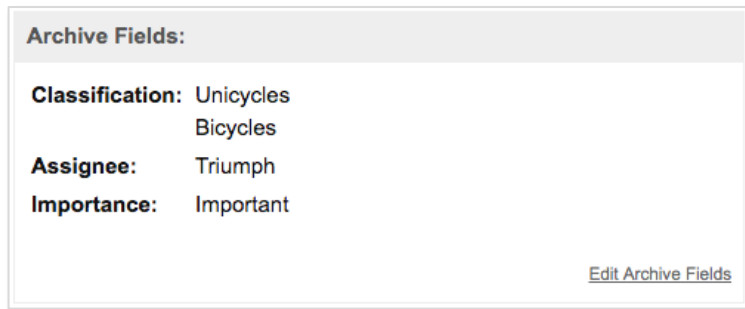
Manually add archive fields to individual records

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.



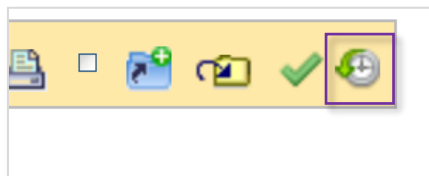
Administrators and inspectors can edit the archive fields on the records by clicking on *Edit Archive Fields* within the record view or *Edit* in the family bar. (Other users can only view the fields)

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 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

Contact us

For assistance with Minesoft PatentArchive, please contact the Minesoft helpdesk on:

Telephone: +44 (0)20 8404 0651

Email: support@minesoft.com

Glossary

Term	Description
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.
Reviewer	Inspectors who perform initial reviews of alert results (during a two-level type of inspection)
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. Users can sign up to subscriptions to receive weekly alerts based on fields of interest.
Alert	A PatBase search query that is run automatically each week or month, with the results sent by email to the designated Reviewers and/or inspectors for review and/or inspection in order to be assigned archive fields
Review	The Review is the first stage of a two-level inspection, designed to determine whether a record that has been retrieved in alert results should be sent for inspection to an Inspector(s) or not.
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.