Pat-KM Manual: Administrators

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Accessing Pat-KM

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

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.
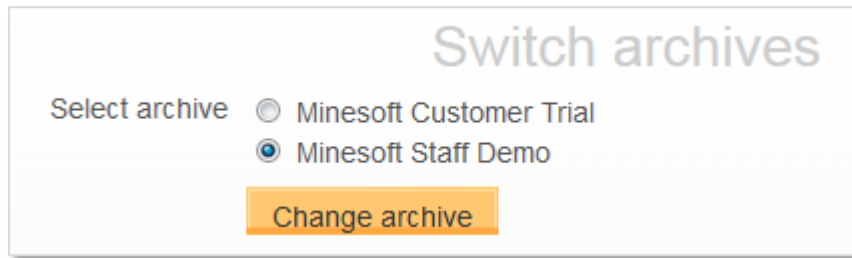

Switching between archives

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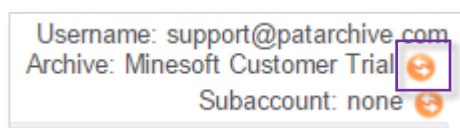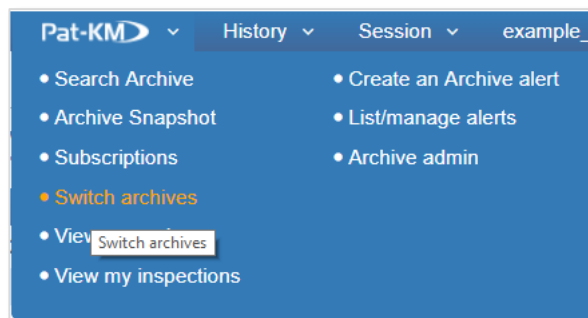
An interim screen will appear, in order to select which archive to switch to:

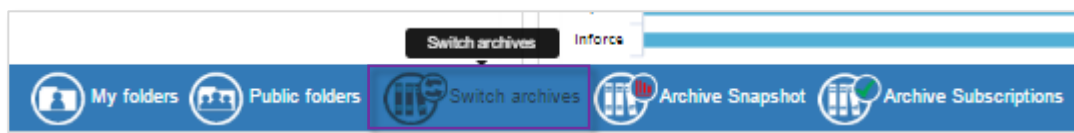Select the archive to switch to and click on *Change archive*.

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.
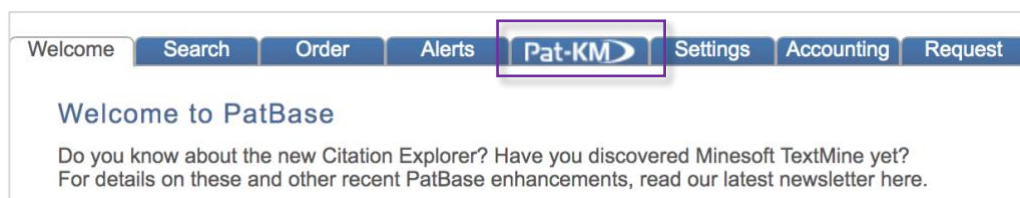

You will then be taken to the interim screen shown in figure 3 where you can select the archive to switch to.
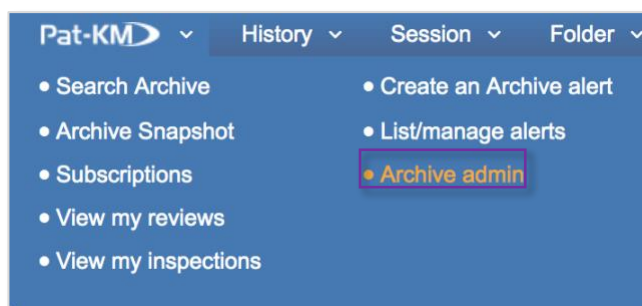
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User Management

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.
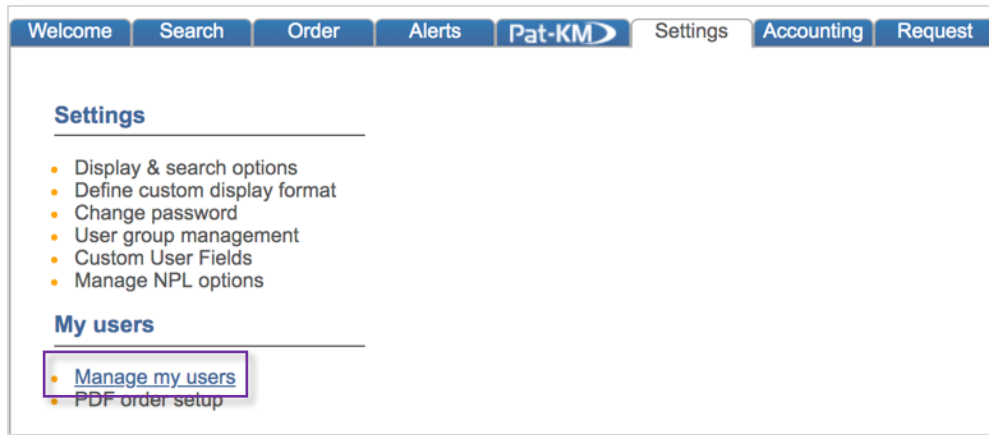

Administrator-only functions are displayed on the right-hand side. Options available to all users are displayed on the left-hand side. User management options are listed under the *Archive users* section.
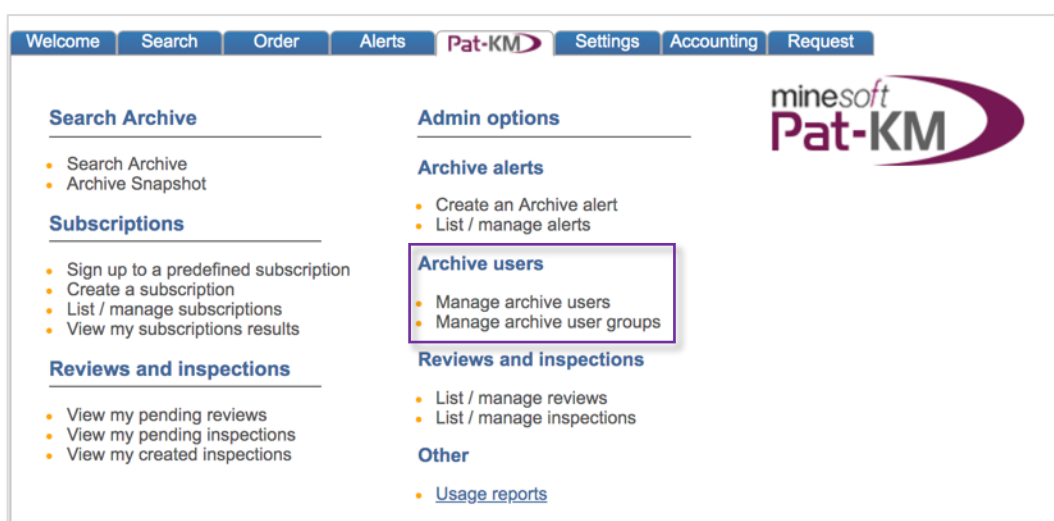
Adding users

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.


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.
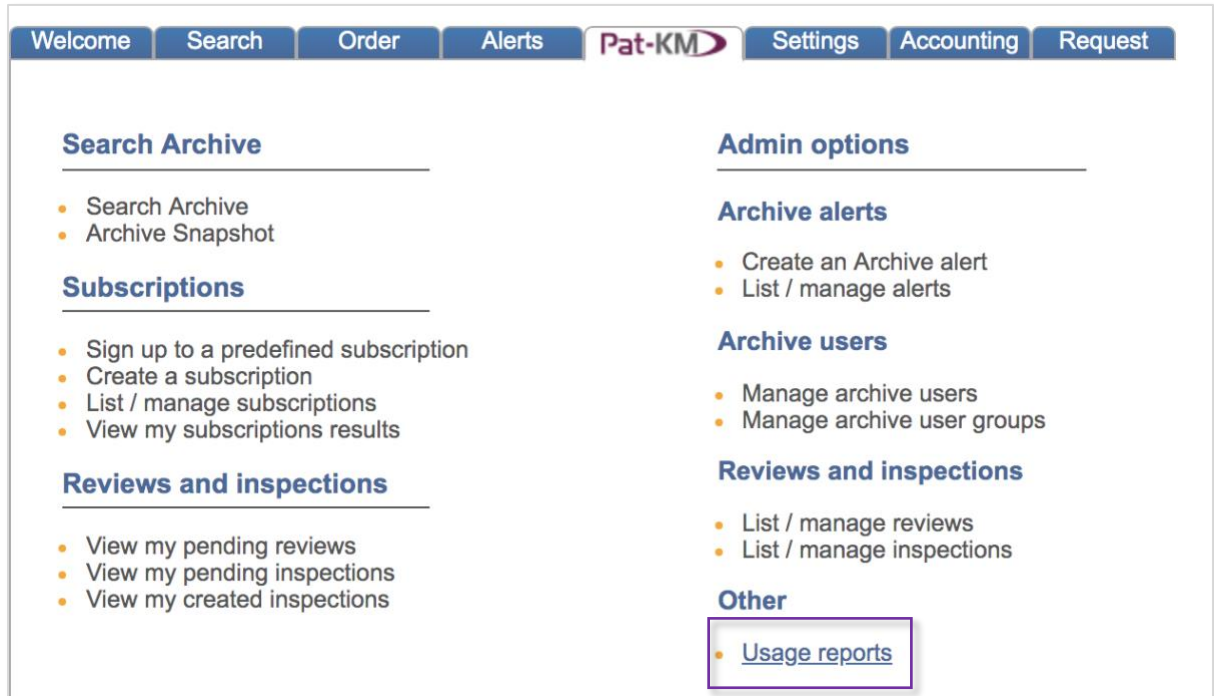
Archive activity reports

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 ad 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*.

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Click on *Add a new group.*

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

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.

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

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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.

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*.

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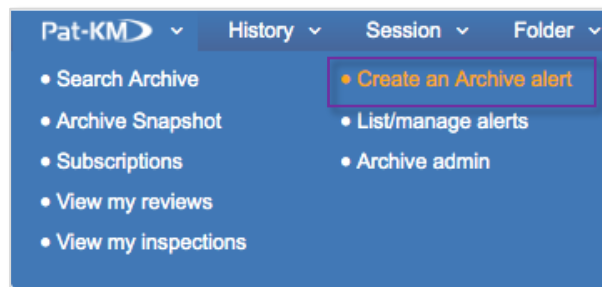
Alternatively go to the Pat-KM tab on the menu page and select *Create an Archive alert*.

Fill in the following fields in order to set up the alert profile:
Alert Name:
Enter the name of the alert.
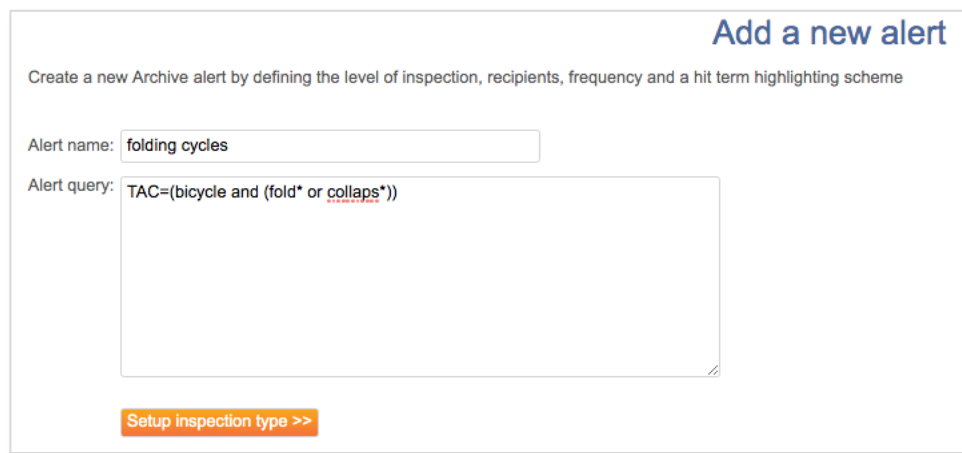
Alert query

The alert query is a script based on a PatBase search query (it must <u>not</u> 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.
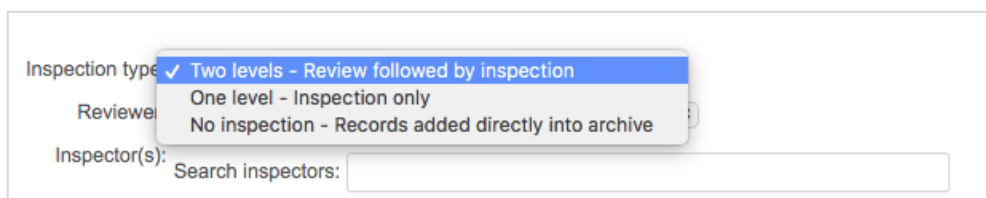
Inspection Type

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

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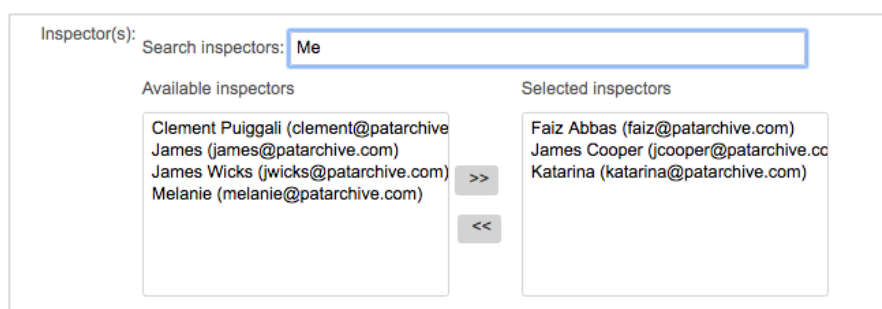
It is also possible to select user groups rather than individual inspectors. Groups that contain inspectors can then be selected during the review in order to quickly assign a record in the review to multiple inspectors at once.

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.

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

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
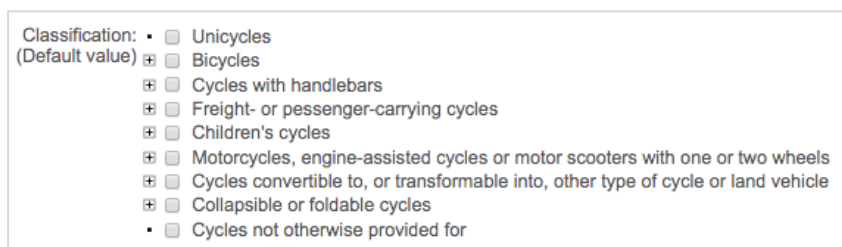
There are also the following advanced options that can be selected:
- When first IPC is added to a family
- When first assignee is added to a family
- When first English abstract is added to a family
- When first assignee or IPC or abstract is added to a family
  (all of the above)
- When legal status 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).
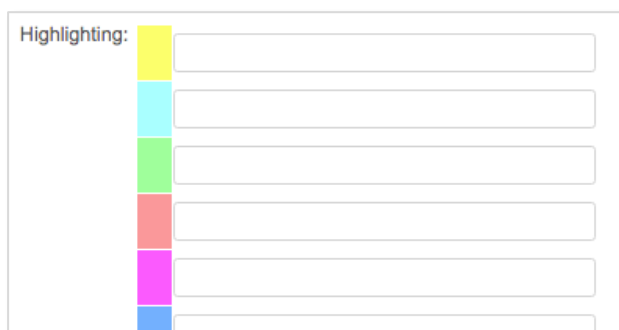
Highlighting (optional)

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).

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.
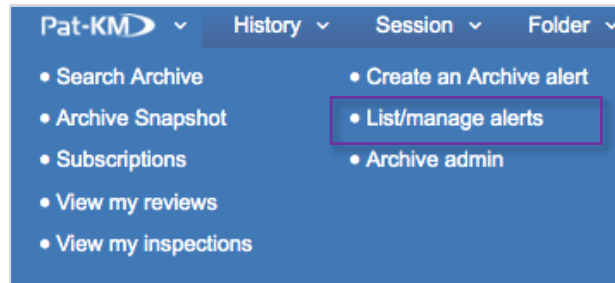
Alternatively, go to the *Pat-KM* section from the main menu page and select *List/manage alerts* under *Archive alerts* under *Admin options*.
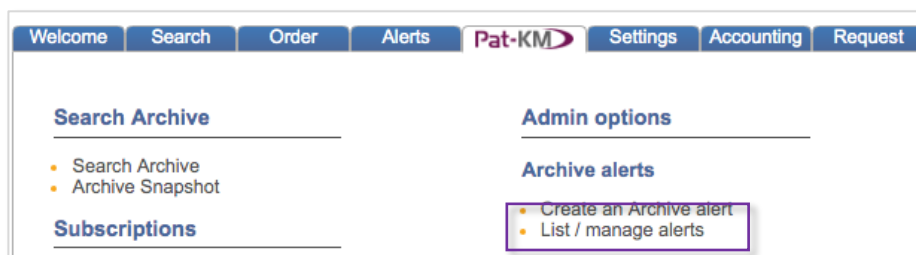
All alerts are listed in a table and can be sorted by alert name. The update week in which the alert last ran is displayed, along with how many results were received in this last run.

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).' This can be clicked on to access the reviews.

Alternatively, mouse-over the *Pat-KM* tab on the toolbar and select *View my reviews*.
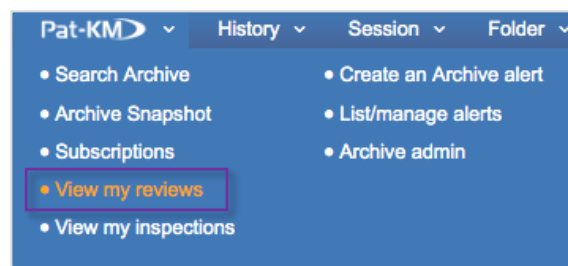
The list of reviews will appear with the Alert name, the update week, the date last accessed, and the number of records displayed in the table. The table can be searched by keywords.

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

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.

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.

If the record is already in the archive, a green tick is displayed in the top right-hand corner of the record.
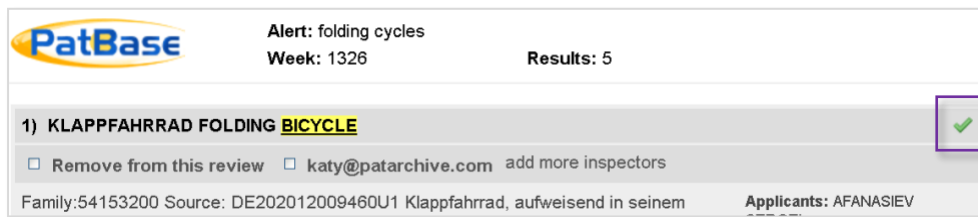
For each result, the reviewer has two options:

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)

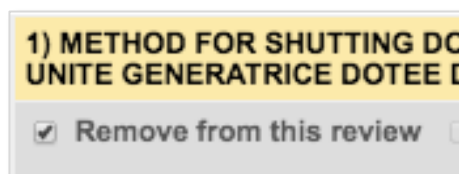Alternatively, the reviewer can choose to send the record to an inspector or inspectors. Any inspector(s) who was designated to inspect the results for this alert when it was created will automatically be displayed at the top of the record. If a group was selected when setting up the alert, the group 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.
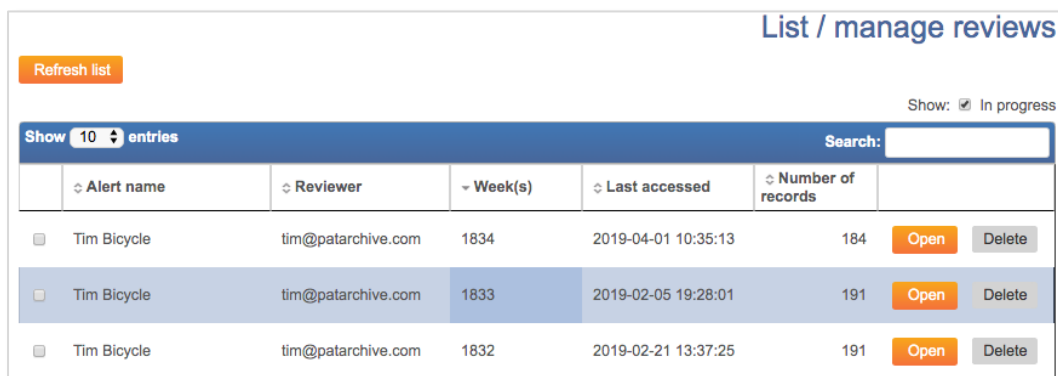
List/manage reviews

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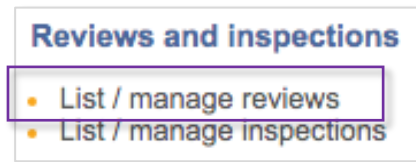
The searchable table displays all pending reviews. The table can be re-ordered by clicking on the appropriate column header.

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

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.
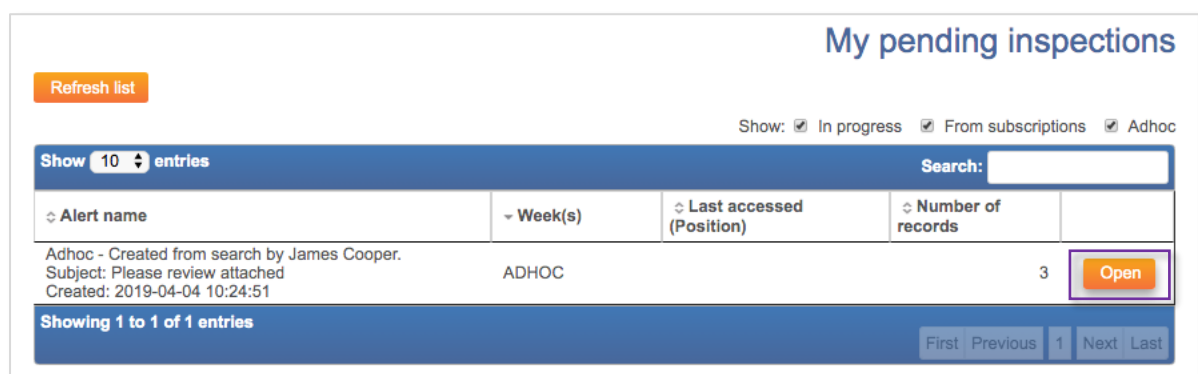
Alternatively, when an inspection is pending a box will appear on top of the screen when the inspector is logged in. This can be clicked on to access the inspections.
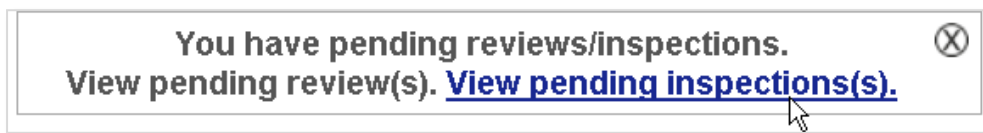
Alternatively, inspectors can mouse over the Pat-KM tab in the floating tool bar and select *View my inspections*.
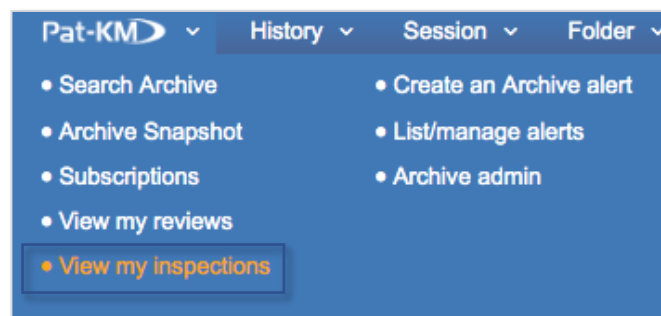
A list of pending inspections will appear. The table is searchable and can be re-ordered by clicking on the appropriate column heading. Click on *Open* to start the inspection.

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.

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.

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.
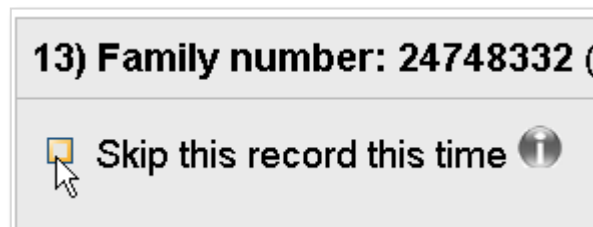
Remove record

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.
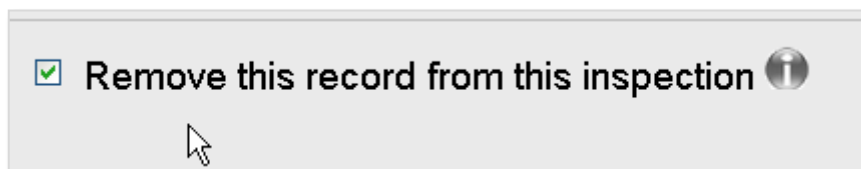
Assigning archive fields

In order to assign fields to the record, click on the *Show fields* button at the top right to display the archive fields.
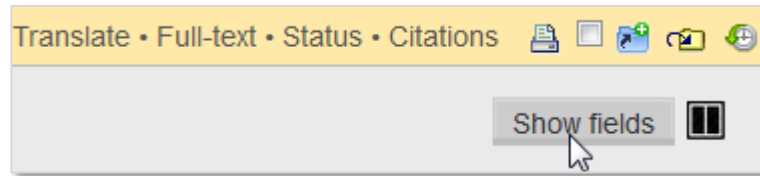
Inspectors can see if any internal classifications were pre-assigned to the record, they will be pre-ticked on the classification tree, and modify accordingly.
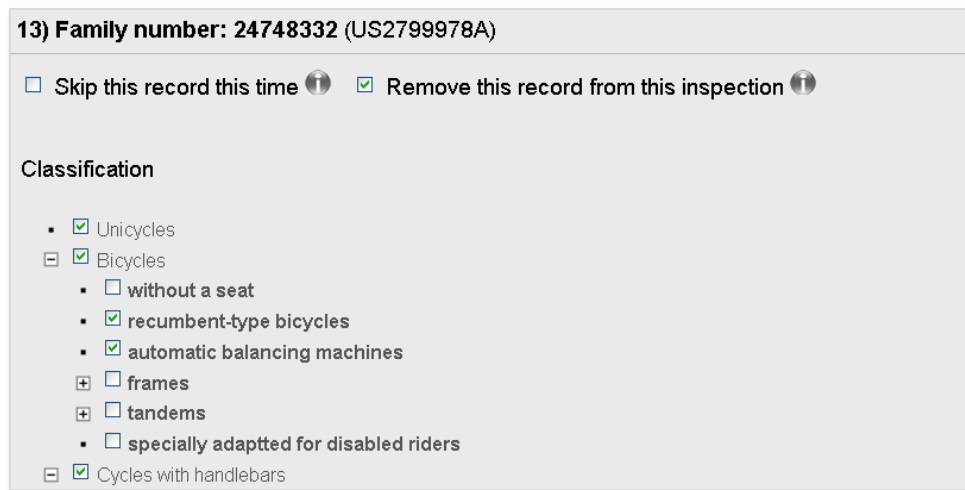
Switch to a side-by-side view by clicking on the side by side icon in the top right-hand corner of the record.
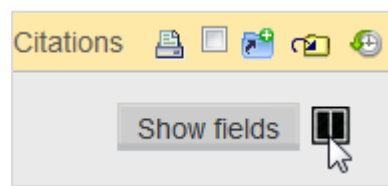
Click on the icon once more to switch back to original layout.

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.

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*.

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.

This will display all previous actions associated with the record.

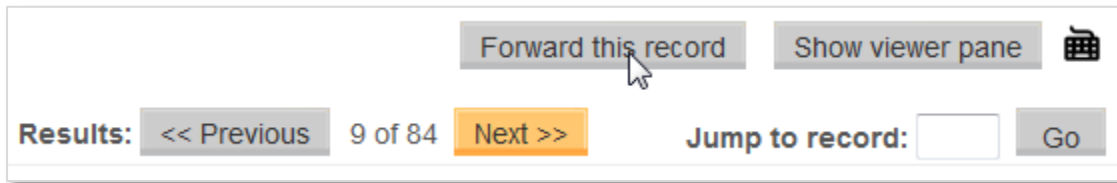(To close the history pane, click on the clock icon again or on *Hide viewer pane* in the top right-hand corner).

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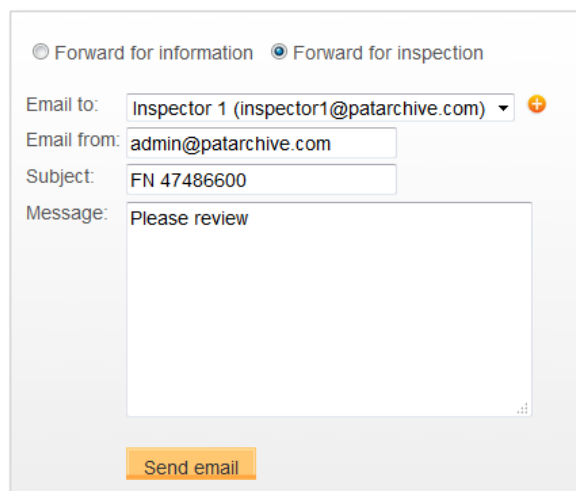
Keyboard shortcuts can be used to navigate through the inspection results, a list of all the shortcuts is available by clicking on the keyboard icon on top of the page.

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	Prinnt 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.

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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.

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.

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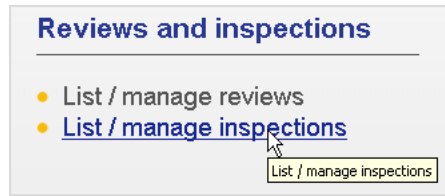
A table of pending inspections is displayed that is searchable and can be re-ordered by clicking on the appropriate column header. The administrator can open an inspection, or they can delete the inspection from the list of pending inspections.
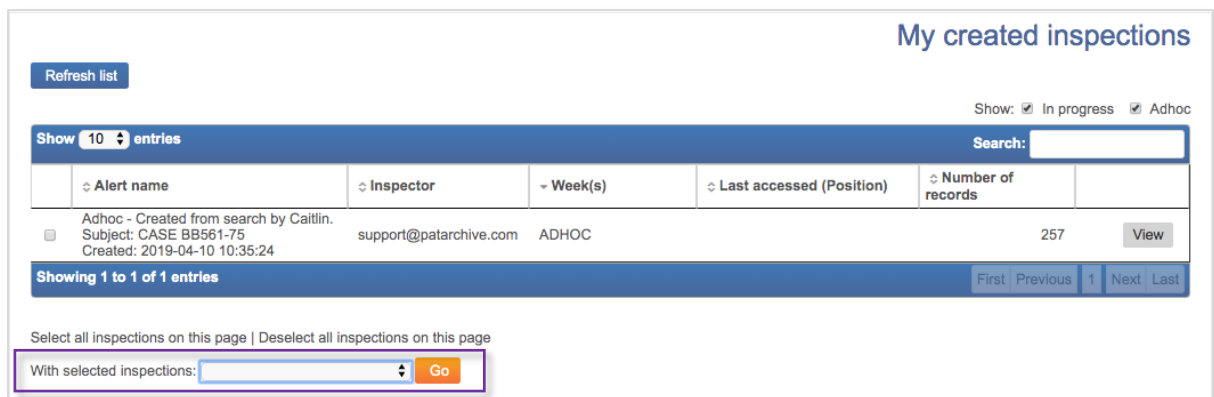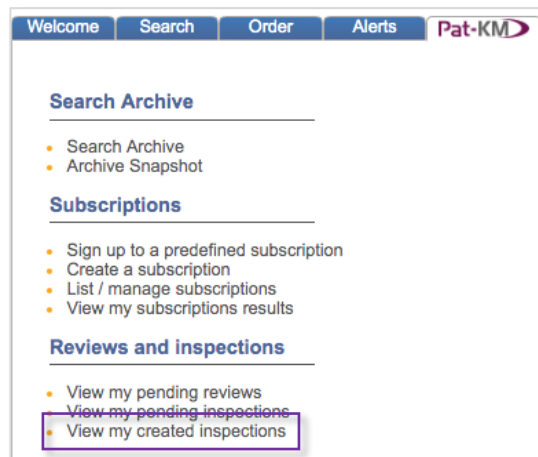
View created inspections

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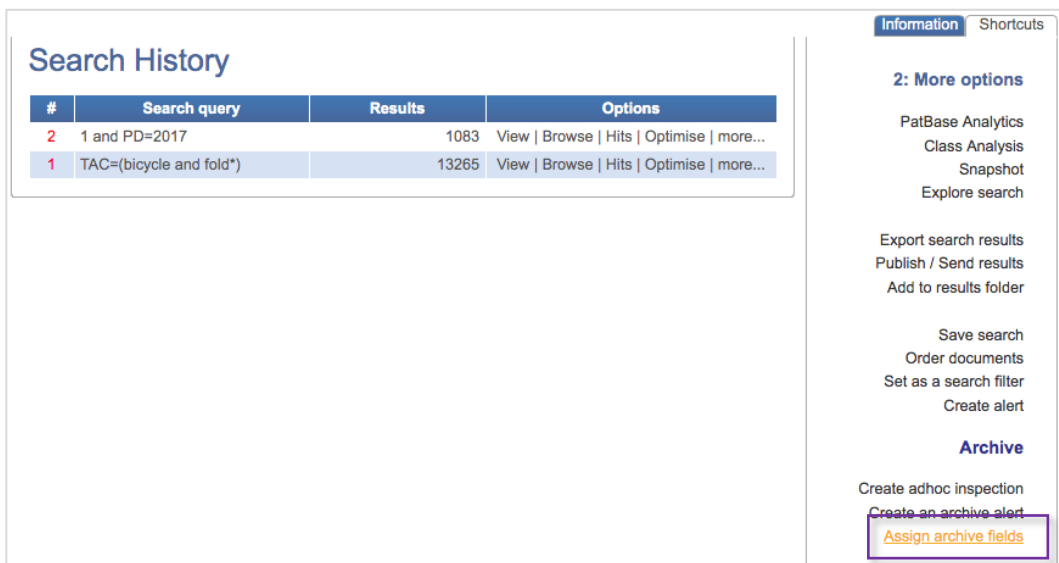
Users can send a reminder to the inspector or transfer the inspection to a different inspector using the drop-down menu at the bottom of the list. If Transfer to another inspector is selected, a secondary page will load where you can choose from a list of inspectors to transfer to.
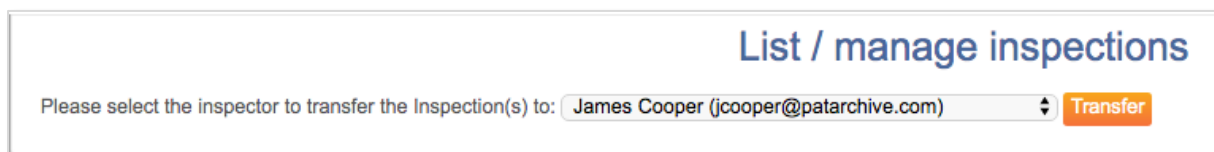
Assign archive fields in bulk

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.

On the next page select from the following update types:

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.

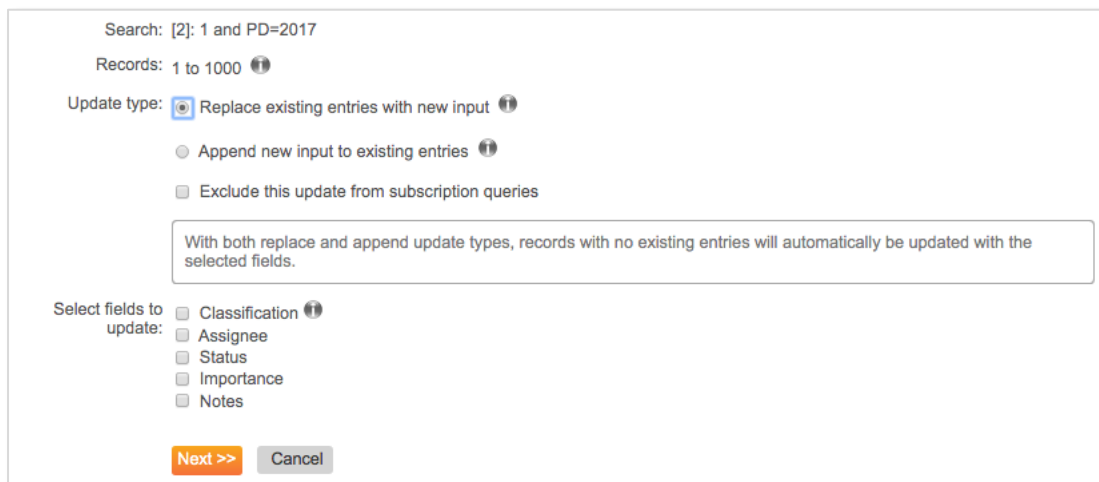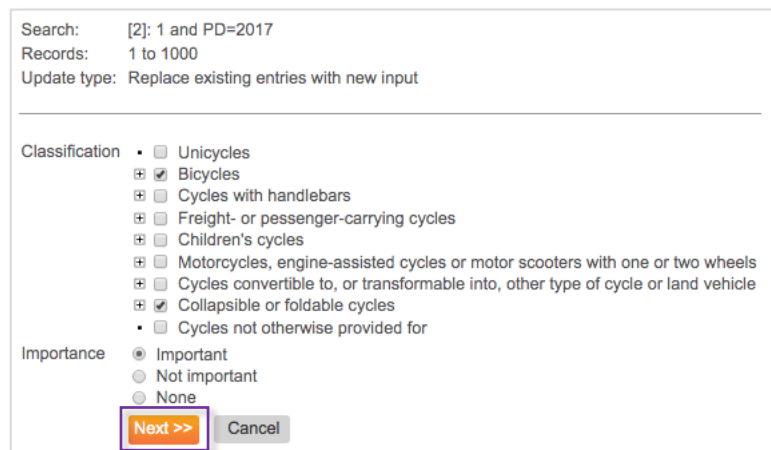*Append new input to existing entries:* all new selected fields will be added to records. Where a family already contains archive fields, the new entries will be appended (added) to the existing entries.

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):

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.

Archive Field values saved.

Search: [3]: 2 and cc=es
Records: 1 to 27
Update type: Replace existing entries with new input
Field(s) updated: Classification
                 Importance

Return to history

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

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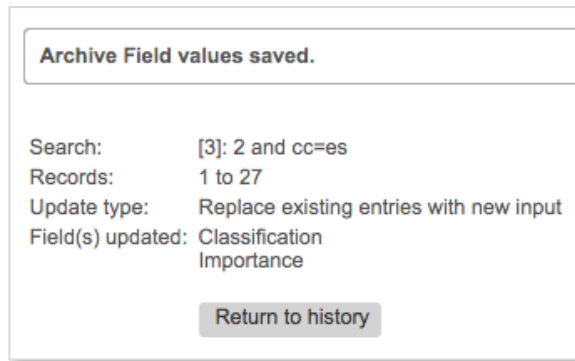
Administrators can manually remove records from the archive in bulk. Up to 1000 records can be removed at one time.

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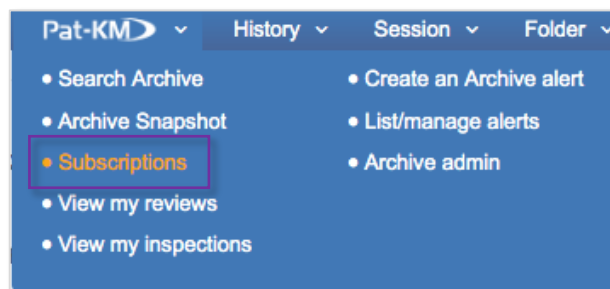
Both options will take you to the *Subscription Builder*, which includes help bubbles to guide you through the process.

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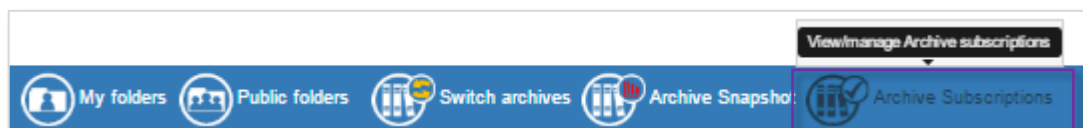
Subscription name

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.

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.

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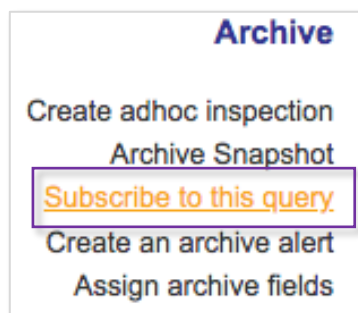
This opens the form to create a subscription, where the above instructions should be followed.

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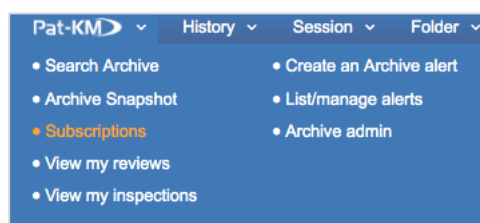
You will be taken to the subscription page. Select the *Create* tab and select the desired subscription from the drop-down menu.

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.

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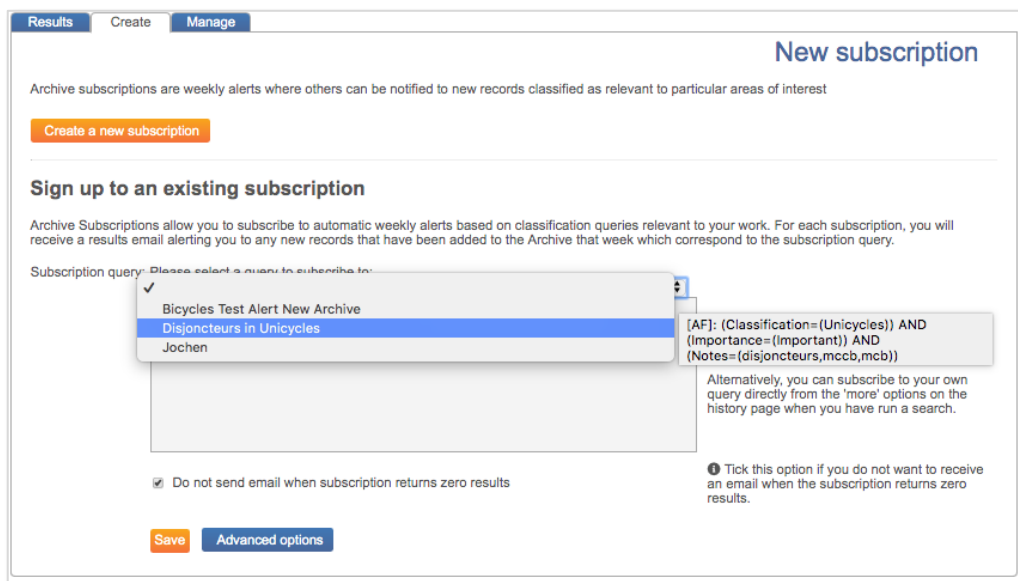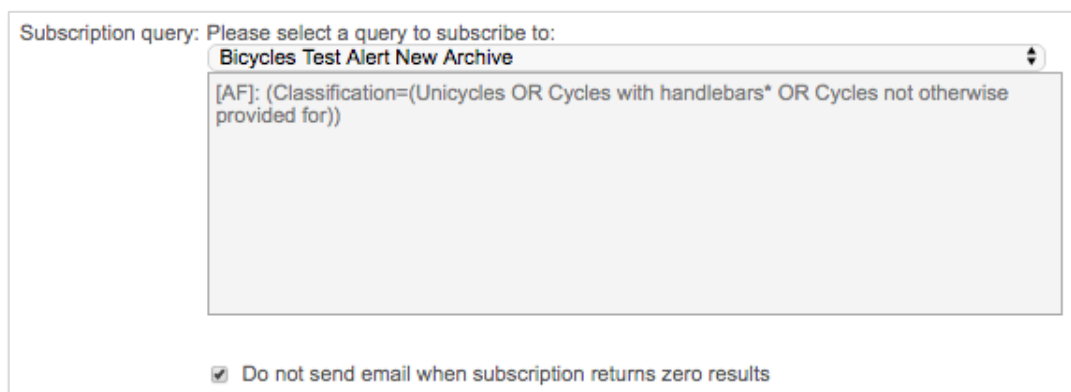

Select a subscription query from the predefined queries in the drop-down list.

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*.

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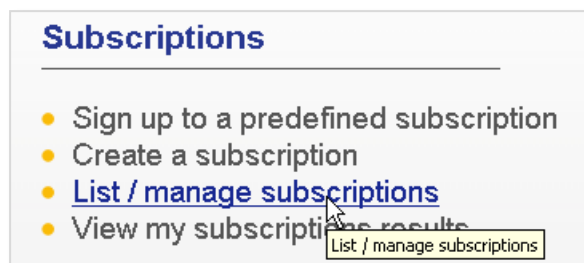
Alternatively, click on Pat-KM from the floating toolbar and click on *Subscriptions*, then select the *Manage* tab from the resulting screen.

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.

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 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

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View subscription results
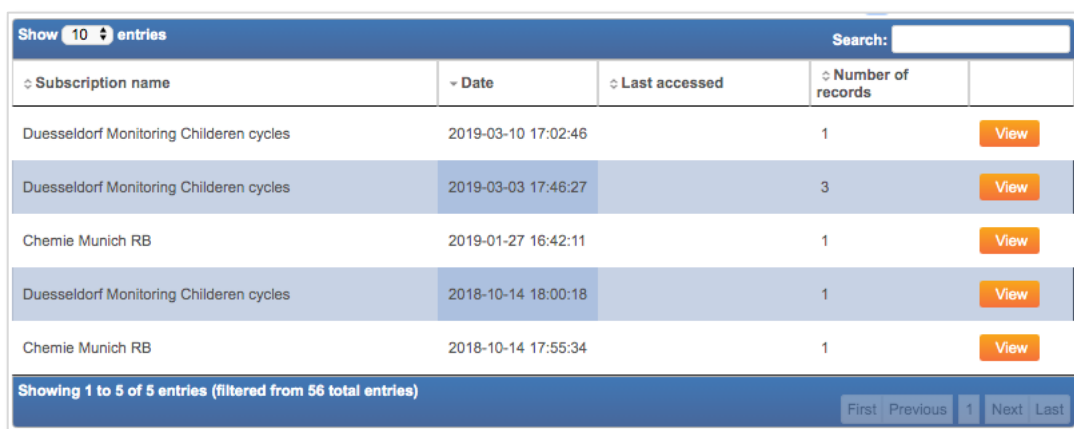
In order to view previous, personal subscription results, click on *View my subscription results* under the *Subscriptions* section of the *Pat-KM* menu.
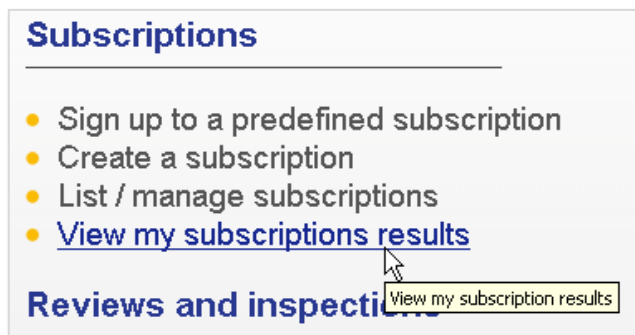
Alternatively, go to the *Pat-KM* tab on the toolbar and click on *Subscriptions* and open the *Results* tab.
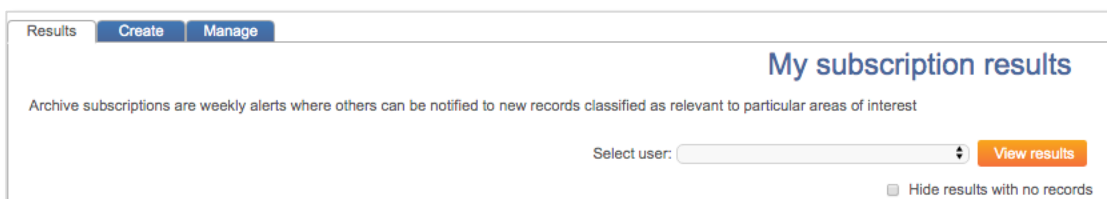
This displays a searchable table of previous subscription results. The order can be changed by switching the name, date, last accessed or number of records column headings.

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*.
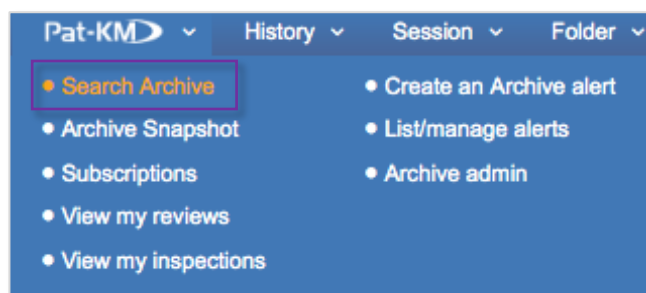
Alternatively, go to the *Pat-KM* tab on the menu page and select *Search Archive*.
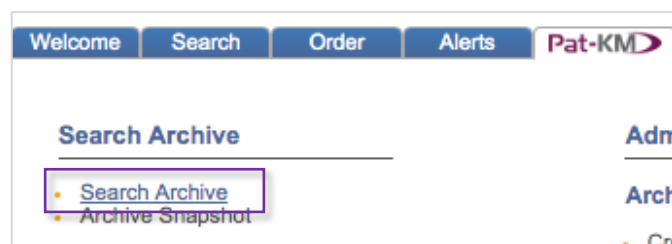
The Archive Search form contains the Archive search fields available to search along with the option to search relevant information using the drop-down lists on top of the page. More fields/search criteria can be included by clicking on the + *Add another field button*.

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.

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.

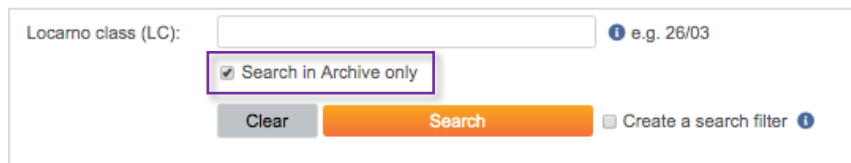This will limit search results to only those records tagged with the chosen archive fields. On the search history page, the query will be prefaced with '[AF]:' to indicate that it is an archive field search.

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Alternatively, open up the PatBase search form to search against standard PatBase 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.

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.
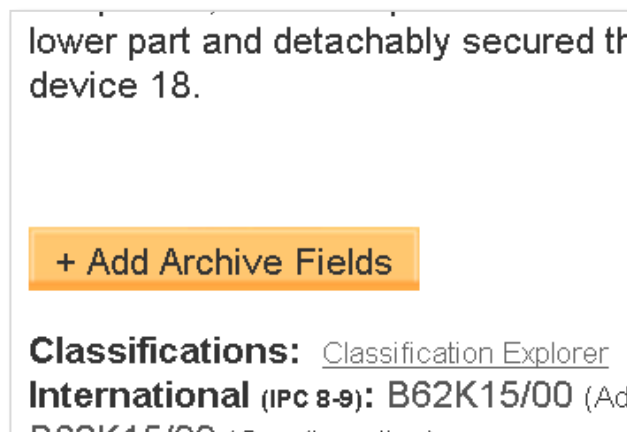
Archive Record Display

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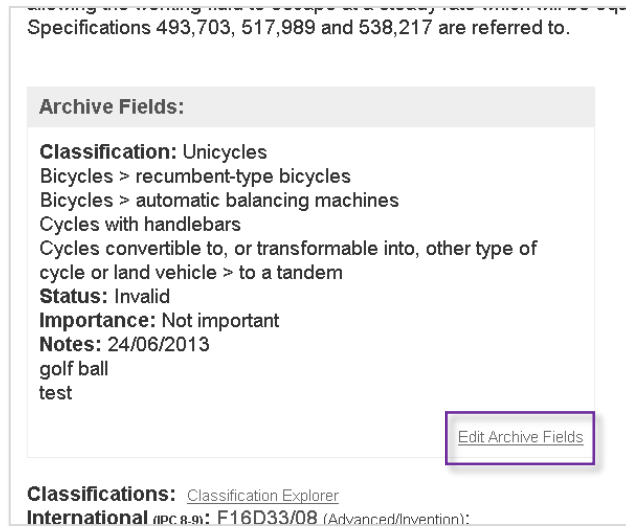
Administrators and inspectors can edit the archive fields on the records by clicking on *Edit Archive Fields* within the record view or *Edit* in the family bar.

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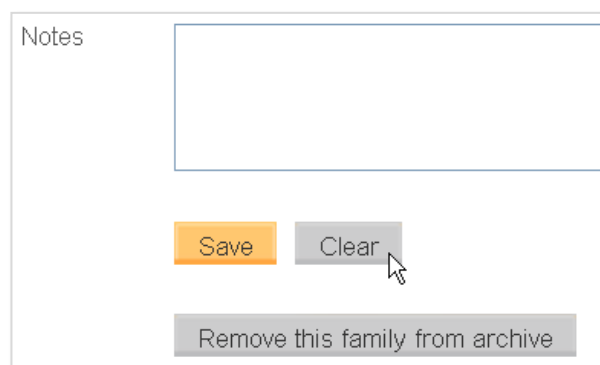
To view the inspection history of a record, click on the clock icon at the top right corner of each record.
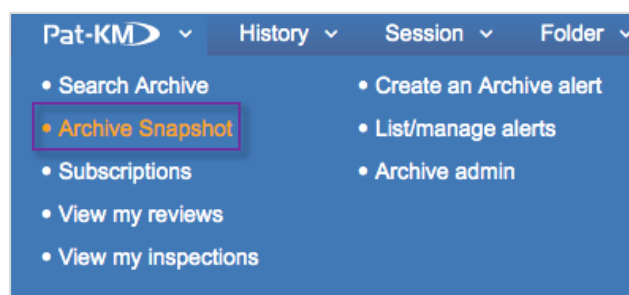

All activity associated with the record can be viewed, along with the user who made the change. The history is searchable.
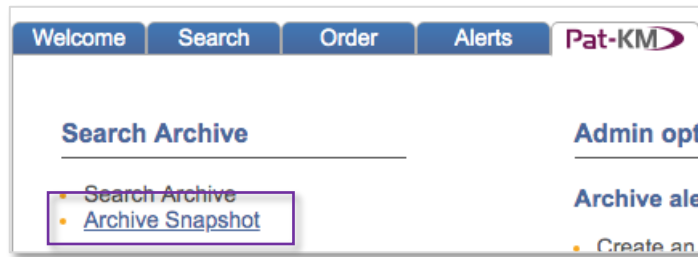

Archive Snapshot

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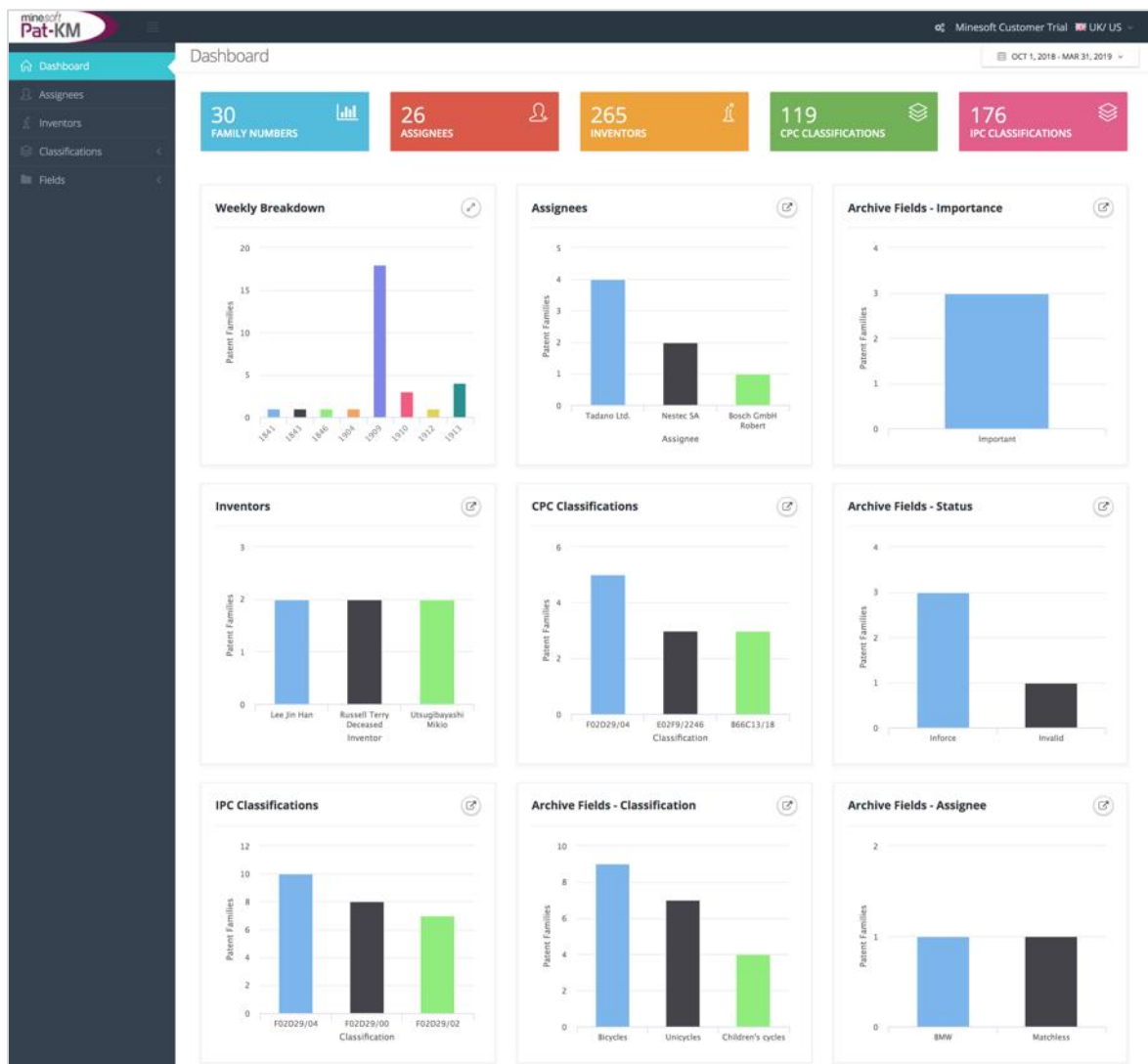
To adjust the time period shown, open the calendar in the top right-hand corner of the page.
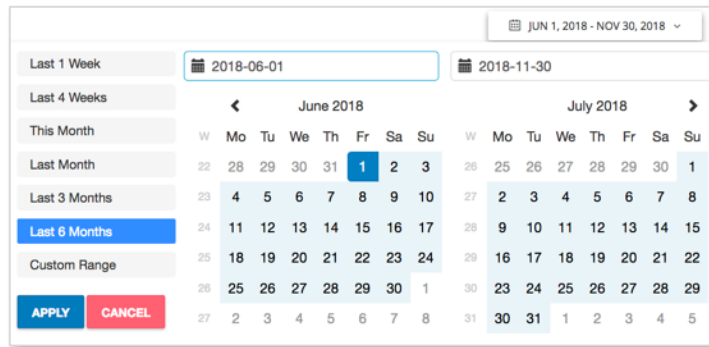

From here you can choose a custom range, or show the last week, last 4 weeks etc.

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).

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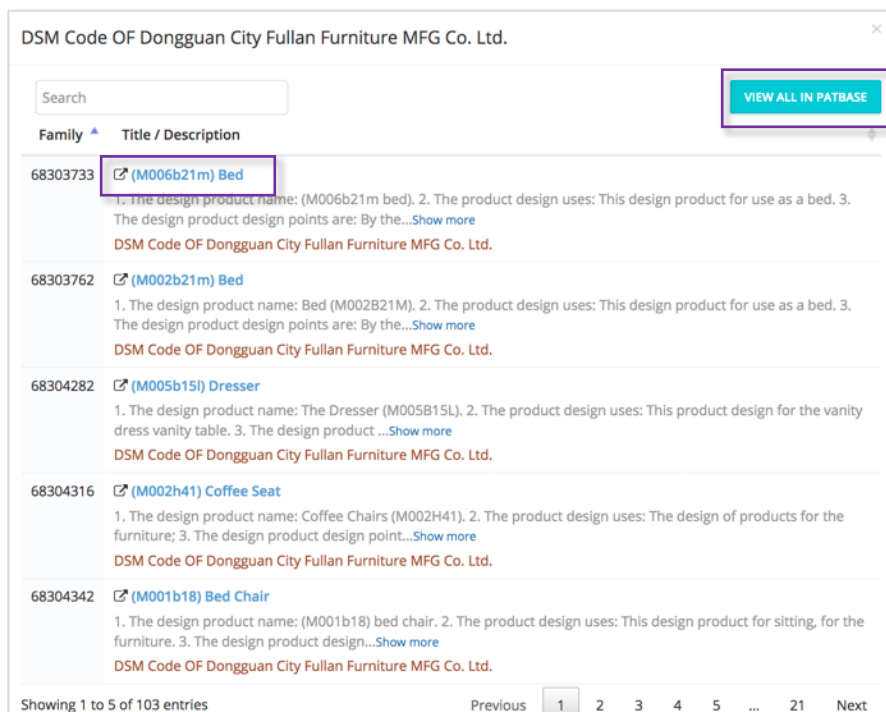
To view a chart in more detail and adjust the settings, select a category from the sidebar on the right-hand side.
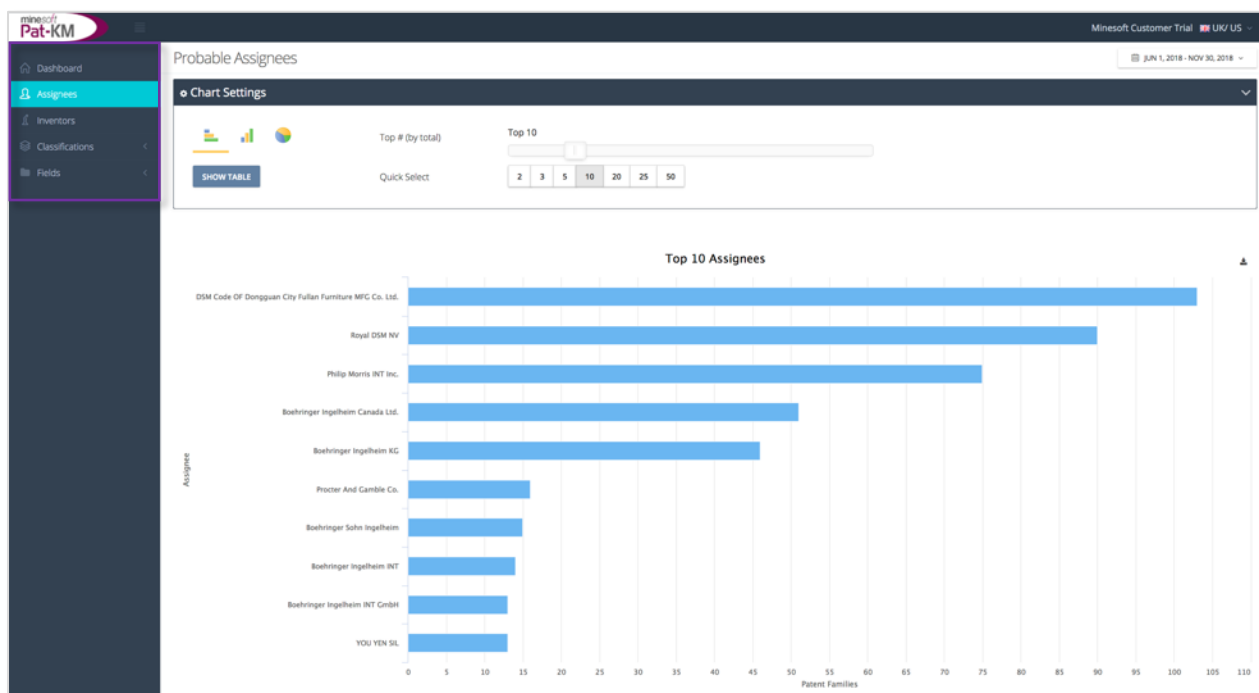
Every archive snapshot will feature the *Assignees*, *Inventors* and *Classifications* (IPC& CPC) breakdown. The fourth category, *Fields*, will change depending on what fields are included in your archive. Whichever category you are looking at, the chart settings/display is the same.

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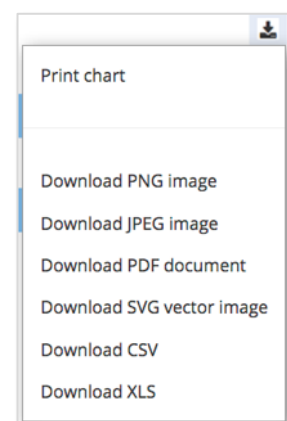
To examine the data that lies behind the chart, click *SHOW TABLE*.

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.

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Contact us

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

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Email: support@minesoft.com