



Getting started with PatBase

Logging in

A screenshot of the PatBase login page. The form is titled "PatBase Login" and contains a text input field for an email address with the value "support@minesoft.com" and a blue "Next" button. Below the form, there is a note about corporate access.

PatBase Login

Please enter your email address to begin log in

Email address

support@minesoft.com

Next

For Corporate Access (Single Sign On) please enter your email address in the box above.

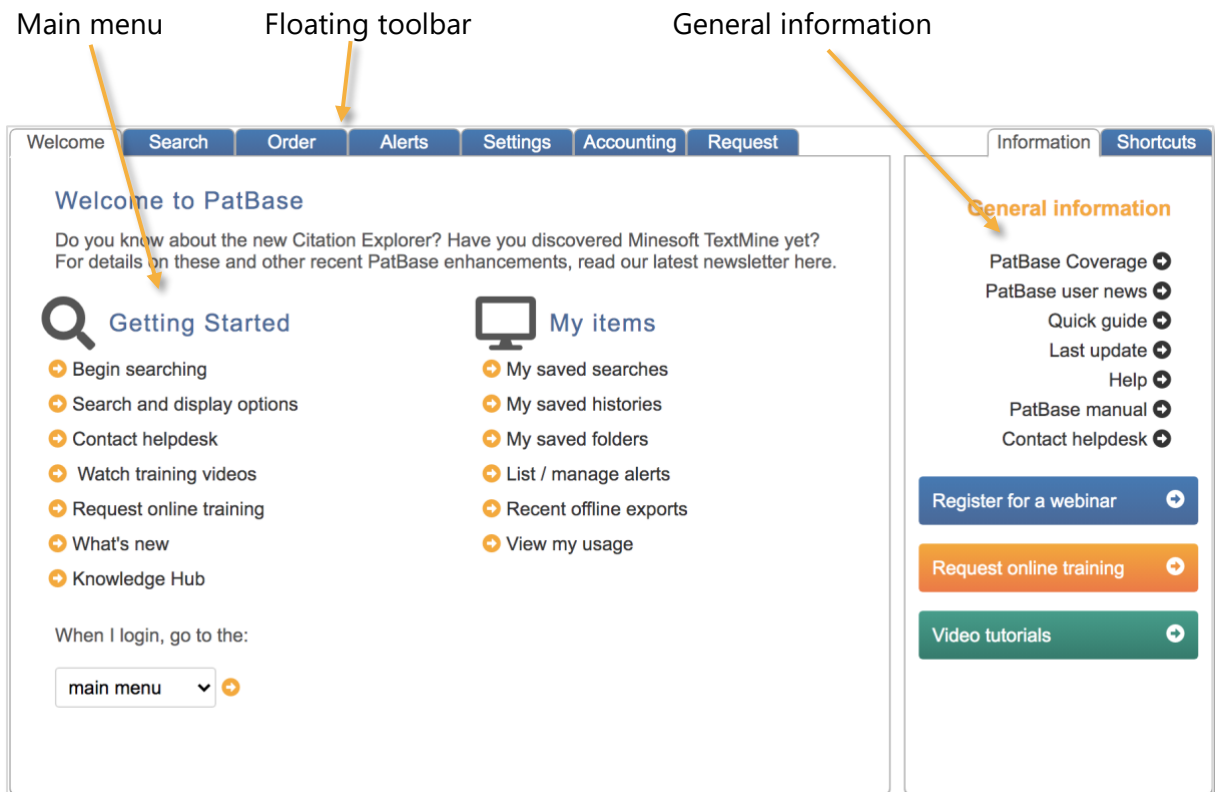
1. Go to the secure PatBase login page <https://www.patbase.com>
2. Enter your User ID (usually your email address)
3. Enter your Password.
4. Enter a Sub account (optional)
Use the sub account option when you want to charge a search to a named account.
For further information on sub accounts refer to the Sub Account section of the PatBase Manual
5. Select *Remember my login information* if you want PatBase to remember your login details
6. Select *Continue last session* if you want to carry on the work from previous sessions

Please note, if one of your colleagues is using the same User ID, this may result in loss of data. We recommend that you do not share User IDs. Please contact us if you need additional User IDs.

Please note, as with all secure sites, avoid the internet browser forward and back buttons. We also recommend clearing temporary internet files regularly and that on the rare occasion of a failure, to log out and close the browser too.

First page / Main menu

When you first log in to PatBase, you are presented with the following display:



General information

Links to PatBase coverage information, PatBase news, PatBase command language, the PatBase Manual, helpdesk contact information and tutorial videos.

[PatBase coverage](#) – Provides details of PatBase coverage including past weeks' data, also hyperlinks to detailed statistics for major countries. Question marks highlight points to note.

[PatBase user news](#) – Provides information with the latest updates and features in PatBase.

[Quick guide](#) – Provides a quick reference to commands and functions available in PatBase, with examples given.

[Help](#) – A link to *Help* where topics are grouped together by subject (listed on the left) so you can easily find what you are looking for.

[PatBase manual](#) – A comprehensive manual provided in PDF form, so it can be saved to your PC for future reference.

[Contact helpdesk](#) – Click to contact the PatBase Helpdesk.

[Register for a webinar](#) – Click to register on one of our monthly running webinars.

[Register for online training](#)– Request an online training with one of our training specialists at a time that suits you.

[Video tutorials](#)– Watch our short tutorial videos to improve your use of PatBase.

Floating toolbar

Visible on almost every page in PatBase, the floating toolbar travels along the page with you. It can be disabled by visiting the Settings tab, then Display & search options. Please refer to the section in this document about PatBase [Settings](#).

Navigating the main toolbar

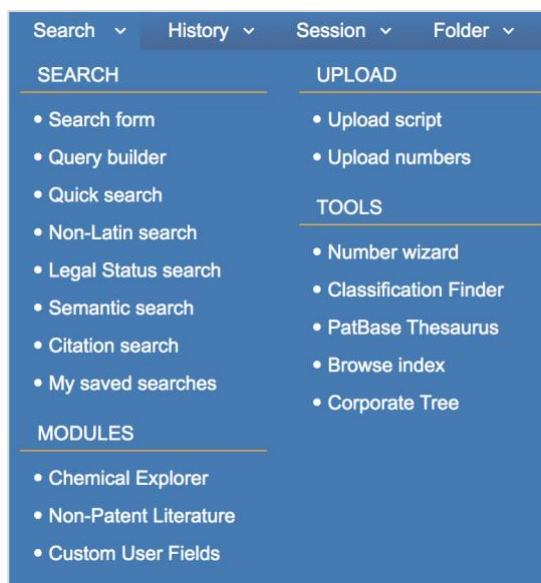


Menu

Click to return to the Main menu, change display options or create an alert.

Search

Mouse over to reveal all search options (with exception of the command line) and search assistance tools.



The command line search field is found at the bottom of the screen:



History

Click to view your searches and to save them.

Session

Click to view, export or clear your session log (what you have achieved since logging on).

Folder

Click to create a new folder or view existing folders.

Order

Click to order PDF's.

Help

Click to view and search help files.

Logoff

Click to log out of PatBase.

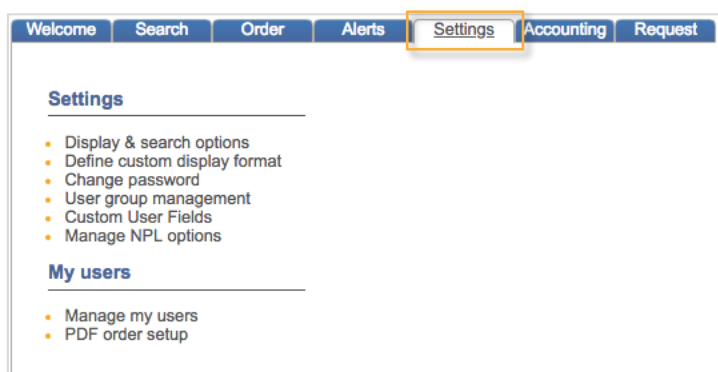
When on the Main menu page, a tab bar is also available below the main toolbar:



Many of these options are repeated elsewhere, but from these tab bars as well as *Search* (view all search options, search tools, search history, session and folders), *Order* (order PDF's) and *Alerts* (create and manage any alerts you have set up) you can also view/edit all *Settings* options and view/edit all *Accounting* options. *Requests* provides options to Minesoft and RWS services outside of your PatBase subscription.

Settings

PatBase offers a variety of display and search options, which are found under the *Settings* tab on the *Main menu*.



From the *Display & search options* you can modify the settings to meet your requirements:

A screenshot of the PatBase Settings page, specifically the 'Display options' section. The page is divided into several sections: 'Display options', 'Search options', and 'Other options'. The 'Display options' section includes: Default keyword search (Claims, title & abstract), Default record display format (Classic), Default sorting order (Publication date desc), Search history display order (Descending), Default number of records to display (10), Define custom display format button, PDF export page size (A4), and several checkboxes: Disable floating toolbar, Disable auto stemming of words when highlighting, Allow multiple popups, View simple families, Do not display inventors names in assignee field, Use larger fonts, Enable keyboard shortcuts for navigation of results, Show non-Latin assignees and inventors, Use long field names in 'Other Formats' exports, and Dead or alive. The 'Search options' section includes: Enable Japanese classification, Expand command line, Enable autosuggest, Enable German classification, Use symbols: + - , as boolean operators, and a Delete autosuggest data button. The 'Other options' section includes: Do not receive marketing material from PatBase. At the bottom, there is a Change interface language button and a Save options button.

For more information about PatBase Settings, please refer to the PatBase Manual.

Using the search form

The main search form in PatBase is fully featured and simple to use. It can be used at any time during a search session and provides a structure to searches if you are unfamiliar with command language and/or field qualifiers.

The screenshot displays the PatBase search form with the following fields and values:

- Title, abstract & Claims**: laser* AND point* (e.g. crane* and motor 206,313 families)
- Assignee (PA)**: samsung (e.g. siemens 407,813 families)
- Inventor (IN)**: (e.g. Depta Robert)
- Publication number (PN)**: (e.g. US4500000)
- Publication date (PD)**: from: 2010 to: equals: (e.g. 19970221 31,353,607 families)
- Priority number (PR)**: (e.g. US19990454001)
- Priority date (PRD)**: from: to: equals: (e.g. 199702)
- Application number (AP)**: (e.g. US20000493582)
- Application date (APD)**: from: to: equals: (e.g. 1997)
- Kind Code (KD)**: (e.g. DEU* or EPB1)
- Publication country (CC)**: US OR EP OR KR OR JP OR CN OR WO (e.g. US or EP 56,558,438 families)
- Designated states (DS)**: (e.g. DE or FR)
- Agent (AG)**: (e.g. GRIFFITH HACK)
- Cited patent (CT)**: (e.g. DE19646559)
- Int. class (All)**: (e.g. C12N5/06 or G01 or A)

Additional options:

- Search within the same publication
- Include machine translations

Buttons: Search, Clear


Result: 534 families

Access the *Search form* from the *Main menu* page or from the toolbar under *Search*.

Enter the criteria you wish to search. Multiple fields can be searched at once – as shown in the above example. Then click *Search*. To empty the form, click *Clear*.

Select "Search within the same publication" to search all fields across the same publication.

The checkbox to "Include machine translations" will run the search across all original and machine translated text.

Click this icon  to access the *Browse index* (or Lookup) for a corresponding field. The Browse index feature allows users to see the contents of the database index before submitting a search. The Browse index enables users to explore variations in spellings for example.

Click on this icon  to access the PatBase help file for the related field.

Please note, when searching classifications, the German and Japanese Classification search options are only available if enabled in the Search & display options found under the Settings tab.

Search history page




The Search history page displays all the searches you have run. An option to *Clear* search history is found under the *History* tab.

3	TAC=(fiber* and fiber*)	1,301,771	View Browse Hits Optimise Export More...
2	1 AND IC=(C11D3 OR A61K8 OR B32B5)	1,695	View Browse Hits Optimise Export More...
1	tac=(fabric and (soften# or condition#)) and PD>201505 and CC=(US or EP or WO or JP)	5,395	View Browse Hits Optimise Export More...

Searches are numbered and can easily be combined in the command line:

The above search combines searches #2 and #3.

Search History				 Save Search History	 Clear Search History	 Export Search History
#	Search query	Results	Options			
5	FN=52661002	1	View Browse Hits Optimise Export More...			
4	2 and 3	511	View Browse Hits Optimise Export More...			
3	TAC=(fiber* and fiber*)	1,301,771	View Browse Hits Optimise Export More...			
2	1 AND IC=(C11D3 OR A61K8 OR B32B5)	1,695	View Browse Hits Optimise Export More...			
1	tac=(fabric and (soften# or condition#)) and PD>201505 and CC=(US or EP or WO or JP)	5,395	View Browse Hits Optimise Export More...			

Please note: Clicking on the red number of a search line, will enter that search query into the command line. This enables users to edit the search criteria in the command line.

Next to your *Results* are options to *View, Browse, Hits, Optimise, Export* data and more...

To view PatBase records of your search results click on *View* or *Browse*.

PatBase results are based in patent families - One family is equal to one invention.

Hits

A hit map which displays the frequency of keywords in a document.

Optimise

Filter results by Companies, Technologies, Publication dates and Countries.

Export

Export data/results in different formats. For more information on exporting, please see "Exporting data from PatBase" user guide.

More...

Lists options to analyse and visualise results through a number of tools including the sophisticated PatBase Analytics; publish, export and save search results; add all these results to a folder, set this search as a filter and assign custom fields.

Viewing a PatBase record

Access to all the advanced options: Similar, Translate, Full Text, Legal Status and Citation Explorer and Insight

1) Family number: 52661002 (US2013000986 AA) Similar • Translate • Full-text • Status • Citations • Insight

Title: [EN] DRILLING MOTORS WITH ELASTICALLY DEFORMABLE LOBES

Abstract: Source: US2013000986 AA [EN] In an aspect, a drilling motor is provided that in one embodiment includes a stator and a rotor configured to be disposed in the stator, wherein the rotor includes a lobe member having an elastically deformable surface configured to provide an interference seal between the stator and the rotor.

+ Add Custom User Fields

Classifications: [Classification Explorer](#)

International (IPC 8-s): B23P15/00 E21B4/00 E21B4/02 H02K1/12 H02K1/22

CPC: E21B4/02 F01C21/08 F03C2/08 F04C2/1071 F04C2230/231

US: 175/107 175/92 175/93 29/888.025

Family: [Family Explorer](#)

Publication number	Publication date	Application number	Application date	Links
US2013000986 AA	20130103	US20110175093	20110701	
US8776916 BB	20140715	US20110175093	20110701	
WO13006450 A2	20130110	WO2012US44975	20120629	
WO13006450 A3	20130502	WO2012US44975	20120629	
WO13006450 A4	20130919	WO2012US44975	20120629	

Priority: [Priority Map](#)

US20110175093 20110701

Probable Assignee: BAKER HUGHES INC

Assignee(s): (std): BAKER HUGHES INC ; DICK AARON J

Inventor(s): (std): DICK AARON J

Agent(s): CANTOR COLBURN LLP

Designated states: AE AG AL AM AO AT AU AZ BA BB BE BF BG BH BJ BR BW BY BZ CA CF CG CH CI CL CM CN CO CR CU CY CZ DE DK DM DO DZ EC EE EG

Within one PatBase record there are many options to gather further information about one particular invention with links to the image viewer to see the mosaic for example; the Family Explorer to reveal details about individual publication, review the legal status in the national register offices or open up the PDF document.

On the family bar you can access to the advanced options:

Similar

Finds similar patents based on the title and abstract, claims, description, images (US only), citations, classifications and for non-patent literature.

Translate

Select your language of choice to translate the full text.

Full Text

A new pop up window will display the full text. In the left-hand column is a list of all the full text documents available for the selected patent family.

Status

A Legal status table will be displayed in a new window, showing legal events and colour coded legal status groups.

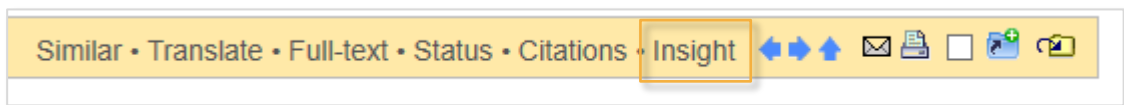
Citations

To view the backward and forward citations from all the members of the family.

If you are viewing multiple families as part of a result set, you will see blue arrows within the ribbon bar for each family as shown below:

Insight

View general information and further insights about the family.



These arrows allow you to jump to the next (right arrow) or previous (left arrow) families in your result set or to return to the first result in your set (Up arrow).

Enable the Keyboard shortcuts in your settings to navigate the records in PatBase.



Analysing the Results

A graphical analysis of a result set is available through the PatBase Analytics. Access to this tool either from the *History* page, by clicking on *more...* next to the results set to be analysed, then select *PatBase Analytics* in the right-hand column. Alternatively select the *Analytics* tab along the top, when viewing records in the *View*, *Browse* or *Hits* mode. Analytics on the last search strategy can also be accessed by typing *A* in the command line.



Create an Alert

You can create an alert to keep up to date with technological developments and monitor competitive intelligence without the need to login to PatBase and run searches manually.

In an alert you can include specific Patent Classification codes (subject) and/or Assignee data (competitors) and keyword searches for example. Results can be delivered to PatBase users and non-PatBase users so that information is easily shared with colleagues.

There are 2 ways to set up an alert:

1. From the *History* page, click on *more...* against the search query to be used to create the alert. This will link through to the Alert set-up screen with the search strategy automatically added to the *Alert query* box. If the alert should consist of a combination of search queries, then click on *more...* against the last search step to be included in the alert.

Menu Search History Session Folder Order Help Logoff

Search History

Save Search History Clear Search History Export Search History

#	Search query	Results	Options
4	2 and 3	511	View Browse Hits Optimise Export More...
3	TAC=(fiber* and fiber*)	1,301,771	View Browse Hits Optimise Export More...
2	1 AND IC=(C11D3 OR A61K8 OR B32B5)	1,695	View Browse Hits Optimise Export More...
1	tac=(fabric and (soften# or condition#)) and PD>201505 and CC=(US or EP or WO or JP)	5,395	View Browse Hits Optimise Export More...

Information Shortcuts

4: More options

- PatBase Analytics
- Class Analysis
- Snapshot
- Explore search
- Export search results
- Publish / Send results
- Add to results folder
- Save search
- Order documents
- Assign Custom
- Save as an alert
- Set as a bookmark
- Create alert**
- Send to IPShare
- Cancel

- From the *Menu* tab in the tool bar or within the *Alerts* tab in the *Main Menu*, click on *Create a new alert*. The alert set-up screen will appear from where the alert can be created.

Add a new alert

Alert name:

Alert query:

```
(laser* W1 point* W1 beam*)
CC=(EP)
CC=(EP) AND TAC=((laser* AND point*) OR (laser* W1 beam*))
ATAC=(laser beam OR 激光束) AND CC=(CN)
ATACCN=(laser* beam*)
ATAC_CN=(激光束)
PRSD=(payment date: 1992)
PRSD=(payment date:1992)
PRSD=(payment date:2010)
PRSD=(payment date:19920527)
```

Email to:

(Separate multiple email addresses with a semi colon)

Do not send email when alert returns zero results.

Text to include in alert email:

Alert frequency: Weekly Monthly

Display format:

Alert options: New families only New families and when new publications are added

Show advanced options

For further help on getting started with PatBase, please visit [PatBasics](#), where you can find introductory videos and other useful guides.