



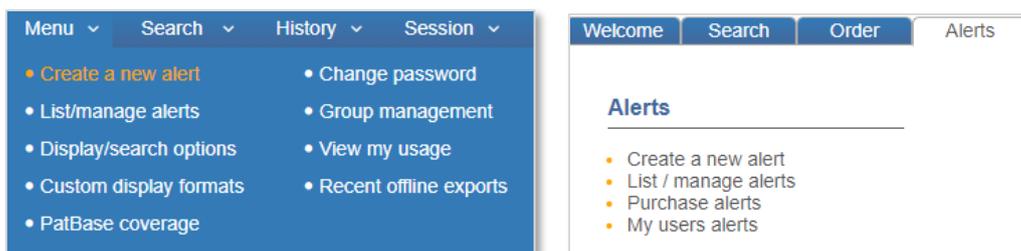
Setting up Automatic Alerts

Alerts can be created to allow users to automatically run searches every week/month and have the results sent to their email without having to log on to PatBase. Alerts can also be sent to non-PatBase users.

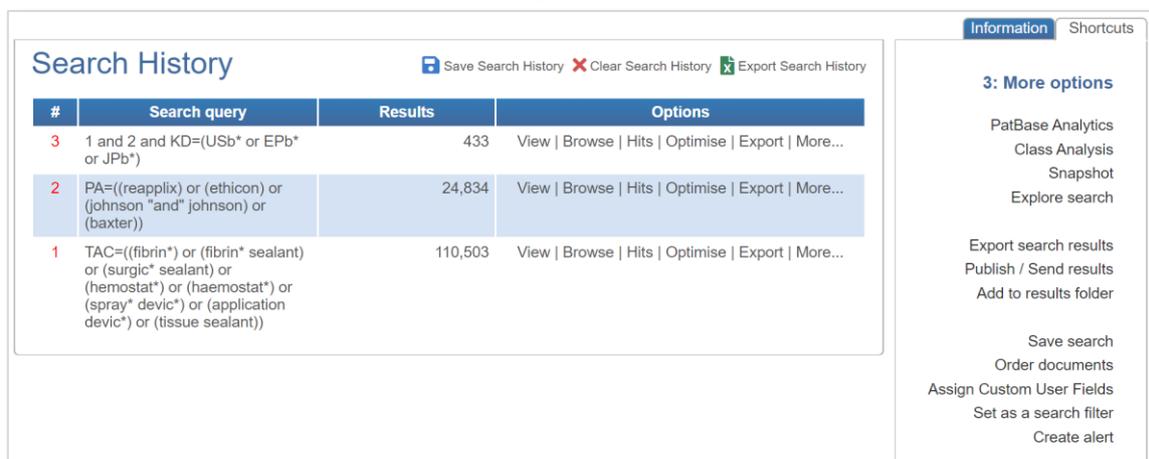
Create a New Alert

There are two options to create an Alert in PatBase:

1. Navigate to the *Menu* tab in the tool bar or go to *Alert* in the main menu screen and select *Create a new alert*. Enter an alert name and alert query using command language.



2. Using the *Search Form*, *Command Line* or a combination of both, create a search or combination of searches. From the *Search History* page, click on *More...* next to the last search step to be included in the alert, then select *Create alert* from the *More options* menu on the right-hand side of the screen.



When in the *Add a New Alert* page, enter the name of the alert and if necessary, edit the search strategy in the alert query box.

Whichever option used to create an alert; the following alert options will be the same.

Specify the Alert name.

Enter a search strategy for the alert in the Alert query field. Multiple queries must be entered in separate lines.

Enter an email address (separate multiple addresses with a semi colon ";") and tick *Do not send email when alert returns zero results* if no email notifications are required from alert runs retrieving zero results. There is also an option to include some text in the alert email.

Select an Alert Frequency from weekly or monthly. Generally, weekly alerts will run every Sunday and monthly alerts will run the first Sunday of a month, for the previous month.

Select a Display Format from the drop-down list of options: Classic, Full, Biblio, Scan, Family + PN list, PN + KD list or PN list. Lastly, specify what kind of results the alerts should return from the Alert options.

Alert name:

Alert query:

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 ?

Alert Options:

New families only – New records added to PatBase (UP).

New families and when new publications are added - New publications added to existing families (UE).

Advanced Alert Options: access these by clicking *Show advanced options*

When first IPC is added to the family (UIC).

When first assignee is added to the family (UPA).

When first English abstract is added to the family (UAB).

When first assignee or IPC or abstract is added to the family - All of the above.

When legal status changes (ULG).

Select *Create Alert* to save the alert. A confirmation message will appear at the top of the screen. The Alert will start running from the following week/month from when the alert was created.

Please Note: The benefit of creating the alert via the Search History page is to make sure the various alert steps run correctly in PatBase and it is easier to eliminate spelling and syntax errors.

Limiting Results to Particular Countries

Combine your final search query with a country code search command.

For example: to limit to new EP, WO and US publications, enter **AND CC=(US or EP or WO)**. You will then only be notified of new publication matching the country code(s) in that particular update week(s).

Limiting Results to Particular Publication Codes (e.g. grants)

Combine your final search query with a kind code search string.

For example: To limit to new US and EP grants, enter **AND KD=(USB* or EPB*)** This will limit the results to families that contain new publications added for those countries and publication types in that particular update week.

Using Citation Commands

If creating an alert strategy using citations commands, it functions just like any other search command in finding new families. So a UE alert on a CTF search does not necessarily mean there is a new citation, it means a new publication in a family that cited the alert query.

List Alerts

Users can manage their alerts either by going to the PatBase main menu page, then selecting the *Alerts* tab and clicking on *List / manage alerts* or navigating to the *Menu* tab in the floating tool bar and clicking on *List/manage alerts*. This will bring up list of alerts set up under your ID. There are options to create an RSS feed (this will not be available until after the alert has run once), view the alert results for the last 6 months, edit the alert and delete the alert.

RSS Feeds

Clicking on RSS will return an RSS Feed link that can be added to your RSS reader; Alerts will then be updated in your RSS reader on weekly or monthly basis.

View

Alert results are delivered by email to the recipient(s). The email contains links to your alert results which remain active for 180 days. Recipients can choose from the following links in the email:

- *View in PatBase*: This link gives 3 options listed below to view the results.
 - PatBase Express, will display the alert results as a search performed in PatBase Express
 - PatBase, will display the results as a searched performed in PatBase
 - PatBase Folder Viewer displays results online in a condensed form together with links to the full text. Recipients do not require a PatBase ID to view the results.
- *View in Folder*: This link will direct you back to the PatBase login screen and prompt you to enter a folder name; results are then displayed in the named folder and saved on your ID. This is useful to be able to remove non-relevant results, or search within your results on PatBase. It is the easy to generate a report of the edited result list to send to third parties.
- *Download results in HTML*: Display results in a static HTML page
- *Download results in PDF*: Displays results in a PDF document
- *RSS feed*: Will create a link which can be added to your RSS reader and results are updated weekly/monthly
- *Download results in Excel*: Display results in an XLS file

Contact us

If you have any questions regarding setting up and managing alerts in PatBase then contact support@minesoft.com or call us on +44 (0)20 8404 0651.