Exporting Data from PatBase

Data can be exported from PatBase in a choice of formats for reporting, further analysis and/or to keep a record.

Exporting search results

To export search results in PatBase, click on the "Export" option directly from Search History page.

Alternatively, when reviewing results via View or Hits, click on the Save/export icon along the top of the screen. This will open the Export Wizard, where file formats, display formats, sorting orders and additional data options can be selected.

Along the top of the Export Wizard, there are 4 steps which will track progress through the export module as desired settings are chosen.

Step 1: Format

Select the Export Type:
New export: create a new export
Use last settings: apply the same settings that were used in the last export

Use a template: select from previously saved export templates, skipping directly to Step 4: Summary page.

Please note: The "Use a template" option will only appear if there are saved templates on the user ID.

If creating a new export, select the desired file format from the list of options available.

Then select the number of records to export. By default, PatBase will only export the first 500 records according to the selected sorting order. If more than 500 records need to be exported, this will need to be manually changed in the "From" and "To" boxes. If below 500 records, the number of records to export will be automatically adjusted to the number of records in result set.

Select "Continue" to move to the next step in the Export Wizard.

Exporting Data from PatBase Guide
support@minesoft.com
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Step 2: Fields

Depending on the export format selected, the fields selection page will display different options.

Word, HTML and PDF exports

For Word, HTML or PDF file formats, the fields selection page will display a variety of predefined display formats on the left-hand side.

Custom formats can also be chosen, the fields selected are identical to those selected in the Custom display formats tab accessed from Menu in the toolbar. For more information, please see the Custom user display settings section in the PatBase Manual. Alternatively, select "Custom Export" to select fields to include in the current Export Wizard session.

Display Format	Summary of information displayed
Classic	Full record with abstract and image at the top
Full	Full record with abstract and image at the end
Biblio	Full record without image or abstract
Scan	Title, Abstract, Assignee
Image	Clipped Image and Mosaics
Custom export	Select between a family-level or a publication-level export and any available fields to include in the export file
Custom	Custom format which can be defined (Refer to Menu => "Display & search options")
Custom 1-4	Custom formats which can be defined and named (Refer to Menu => "Display & search options")

Excel, XML, RIS, CSV and Custom exports

For Excel, XML, RIS and CSV file formats, and if the "Custom Export" option is selected for Word, HTML and PDF file formats, the field selection page will display fields of interest from the boxes shown below. The left-hand box includes all available fields which can included in the export, while the right shows the selected fields that will be included.
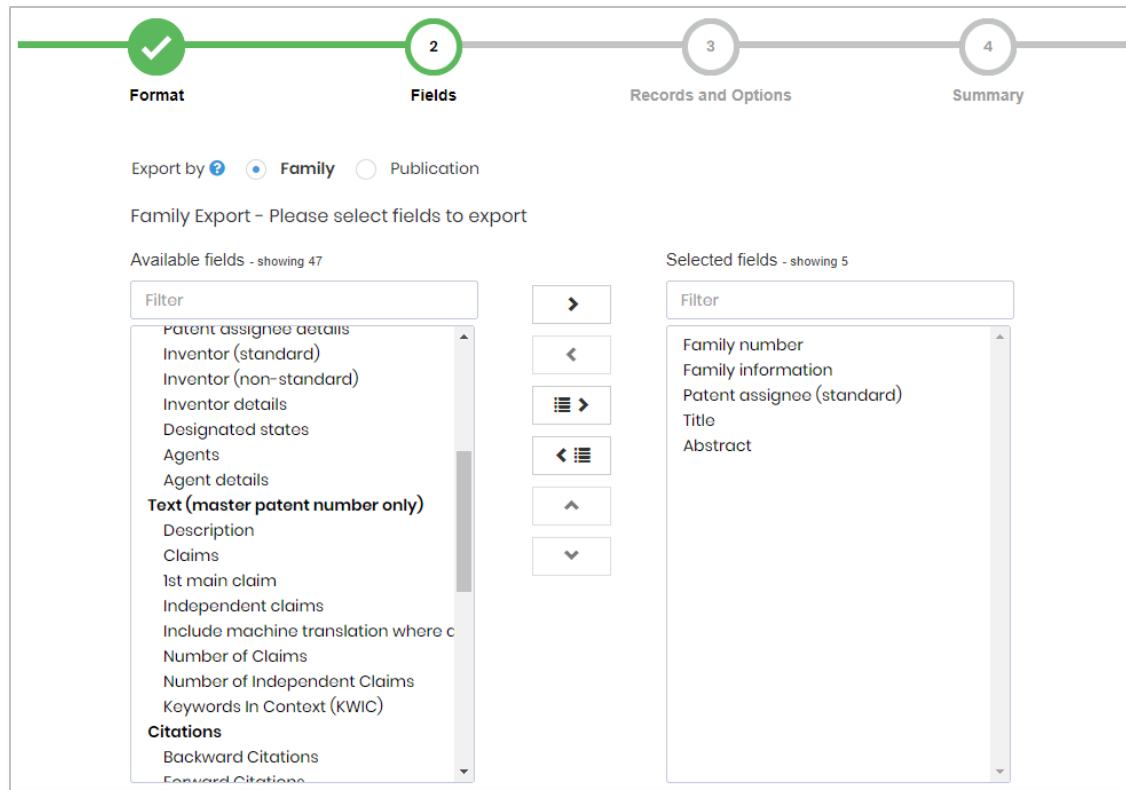
The order of display can be changed by moving the fields up and down the priority list. In the example above, the family number will be shown first, followed by family information and then the patent assignee etc.

There is an option to export by:
- Family: exports data grouped into families, the text fields will be for the master patent number only (representative publication for the family)
- Publication: exports data by individual patent numbers

Exporting on a publication-level will show additional options below the field selection boxes. Select which publications to include and additional filter by options using the drop-down menus provided.

Publications from all countries: this option will export all publications within the family.

Publications from specific jurisdictions only: this option will only export documents issued from the stated jurisdiction(s). For example, in the screenshot below, only US, WO and EP patent documents will be exported from the result set.

One publication per family only: this option will export a single publication from each family in the data set. Country preference can again be specified. For example, a country preference order of US WO EP. Firstly, a US document would be exported if available. If no US documents are present in the family, a WO document will be exported etc. If jurisdiction preference is not available in the family, it will export the master patent number.

Master publication only: this option will export the representative publication for the family. This is the publication number in brackets next to the family number.

Highlighted publications only: this option will export only highlighted members from the family table, e.g., the blue highlighted WO publication in the family table below. Family members are automatically highlighted in the family table to show which publications matched the search query.

After choosing all the relevant fields and filters, select "Continue" at the bottom of the screen.

Please note: Up to 500 images can be displayed per Excel download. If above this amount, the image thumbnail will be replaced by an image URL.
Additionally, Excel specifications and limitations also apply. For example, the total number hyperlinks per worksheet cannot exceed 65,530. So, for large exports, it is likely that links (e.g., Links to the family/publication) will not be included in the export.

Step 3: Records and Options

This next screen controls the additional options for the export. Choose to include search history, page breaks, maintain keyword highlighting and to include the legal status information on exported families where available.

For Excel/CSV exports, tick the "Use long field names in headings" checkbox so the column headings in the export display the full heading name rather than the abbreviated version.

Long field names in headings   Abbreviated field names in headings

For family-level exports, tick the "Group Family information into single field" checkbox so that the family information fields are included within a single cell in the Excel/CSV file.

If only "Family information" has been selected in Step 2 of the Export Wizard, then the publication number, publication date, application number and application date will be grouped together in a single cell. If "Dead or Alive" and "Grant" fields have also been selected in Step 2 of the Export Wizard, then the publication number, publication date, application number, application date, dead or alive and grant will be grouped together in a single cell.

Grouped family information	Including Dead or Alive and Grant
FI	FI
CN103282816 A 20130904 CN201180061453 20111104	CN103282816 A 20130904 CN201180061453 20111104 ALIVE NO
CN103282816 B 20160210 CN201180061453 20111104	CN103282816 B 20160210 CN201180061453 20111104 ALIVE YES
CN103328372 A 20130925 CN201180061504 20111104	CN103328372 A 20130925 CN201180061504 20111104 ALIVE NO
CN103328372 B 20150527 CN201180061504 20111104	CN103328372 B 20150527 CN201180061504 20111104 ALIVE YES
CN103842875 A 20140604 CN201280047680 20120928	CN103842875 A 20140604 CN201280047680 20120928 ALIVE NO

Select the order in which to sort the records to be exported from the Sort By options provided. The default sorting order selected in "Display/Search options" will be applied here. Access the "Display/Search options" from the top toolbar under the Menu tab. Once all selections have been made to satisfaction, press "Continue".

Step 4: Summary

This is the final page before the export is submitted. A summary is provided showing all selected options. Select the "edit" icon against the any section to make any changes.

Enter a template name to save the current export options for future use. Please see Export Template section below for further information.

Once satisfied that the export has been set up correctly, click "Submit". A progress bar will appear on the Export page or along the top of the Search History page - displaying the number of records to be exported and how many have been done.

Current offline export progress:
· 57/383

The progress bar will disappear when the export is complete and display a download link. If the option to "Send this export by email" is selected, then an email with a download link to the export will be sent out as well. Alternatively, all recent offline exports are also available from within PatBase. To retrieve these, navigate to the Menu tab in the top toolbar and select "Recent offline exports".
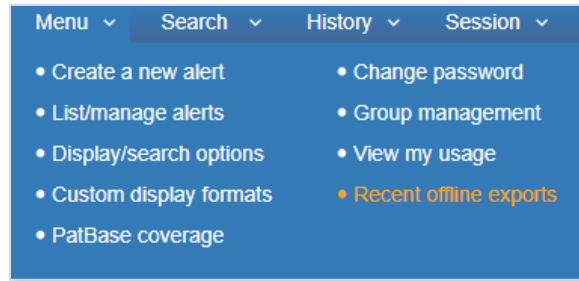
Please note: This email will be sent from info@minesoft.com, please ensure this email address is accepted by your email system so that it does not get lost in junk mail.
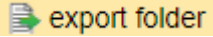
Export Limits

Offline exports will not be accepted if the total number of documents to be exported, including the current request exceeds 250,000 records per month per User ID or 50,000 per day per User ID. The daily quota will be re-set the next day; the monthly quota will be re-set on the 1st of the following month.

Exporting Folders

There are two ways to export a results folder:

1) Open the folder and select "Export folder" listed beneath the name of the open folder in the tool bar.
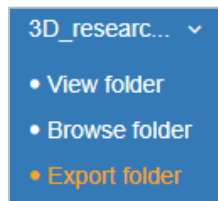
2) When viewing results within a folder, click on the button at the top of the page.

The Export Wizard will appear again. All options will work in the same way as explained for exporting Search Results above. Additional options for exporting a folder will appear in Step 3: Records and Options. Tick the relevant checkbox(es) to include folder description, family notes and family ranking within the export.

For further information on folders in PatBase please refer to the "Working with Folders" User Guide.

Export Template

To save an export template, complete Steps 1, 2 and 3 in the Export Wizard to select desired export format, fields and additional options. Then in Step 4, below the summary box, enter a template name to save export as a template.

To use this template, when in Step 1: Formats, in the Export Type, select "Use a Template". This will display all the previously saved templates. Select a template and the number of records to export and click "Continue".
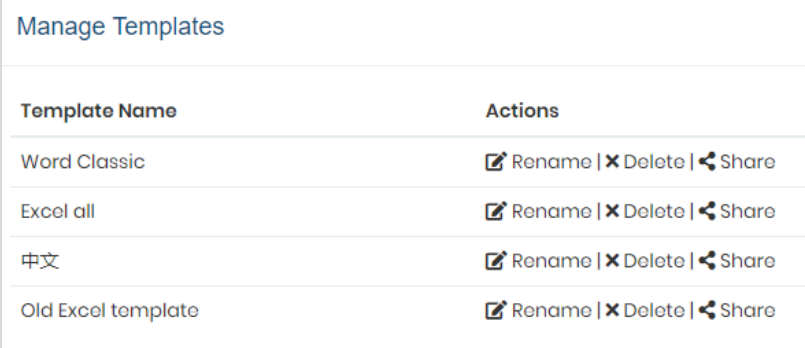

Choosing a previously saved template will direct to the Summary page, ready for exporting.

Manage Templates

At any point during the Export Wizard, in the top-right hand corner, there is a button to "Manage Templates".

In Manage Templates, there are options to "Rename" or "Delete" previously saved templates.

Admin users have the additional option to "Share" a template with other user(s) on the account. Simply select user(s) in the list using the checkbox(es) and select the "Share Template" button. The selected user will then be able to see this shared template when they select "Use a template".