Questel

Covering Intellectual Property Needs Across The Innovation Lifecycle

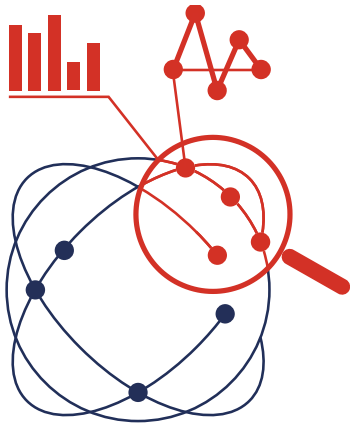
AGH University of Science &Technology
Kraków, Poland

Obtain insight into your data

Software

Consulting

eLearning



Search & Analyze

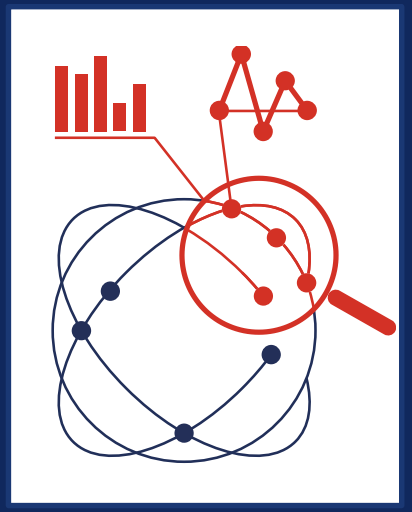
Intellectual Property
Business Intelligence

WHAT

Live analysis

Saved analysis

Analysis Module



Orbit Intelligence Analysis charts can help you:

- ✓ acquire market knowledge,
- ✓ understand your company's market position,
- ✓ understand your company's areas of expertise

The **Gold** level allows analysis of up to

- ✓ 300 000 records live
- ✓ 20 000 records in the saved analysis

FamPat & Fullpat preparation of the database - Normalization:
Assignee names
Technical concepts
Legal status

Analysis Module

Live analysis

- Analyze in real time large sets of patents
- Highlight segments and drill down the selection.
- Filter graphs and interact with the results.
- Customize analysis axis.
- Create and navigate through customized chart templates
- Share customized presentations containing selected charts and comments

Saved analysis

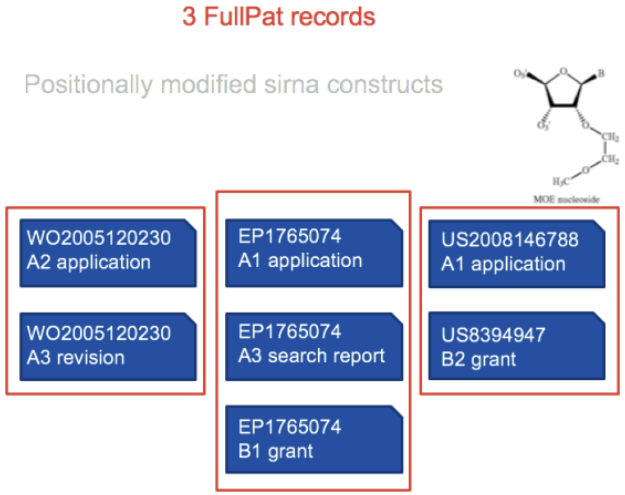
- Create and save data rules (group assignees, concepts).
- Apply all or selected data rules in just a click.
- Customize and add any patent field to the graphs.
- Categorize and analyze datasets.
- Interact between graphs the search page to fine-tune your dataset.
- Create and navigate through customized chart templates
- Share customized presentations containing selected charts and comments

Choosing Database for Analysis

- FullPat
1 record per patent application

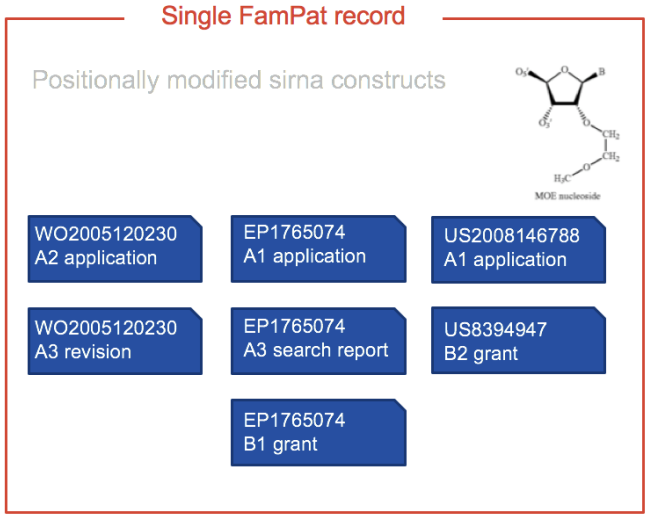
Or

- FamPat
1 record per patent family



Analysis done per patent

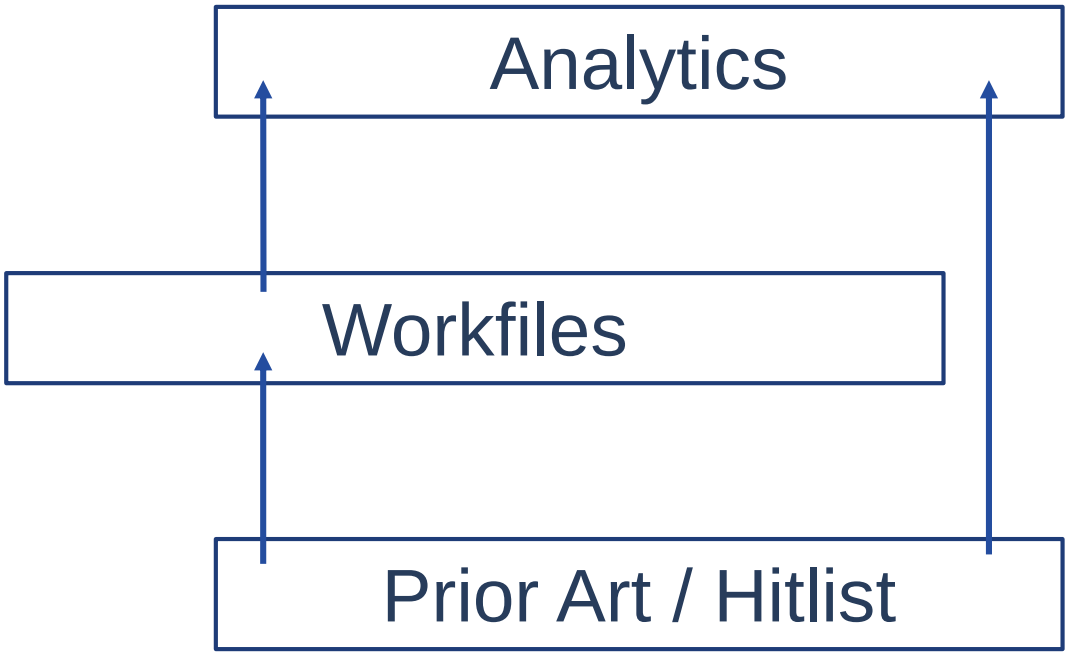
Great for specific country analysis



Analysis done per family

Great for global view per invention

Running your analysis



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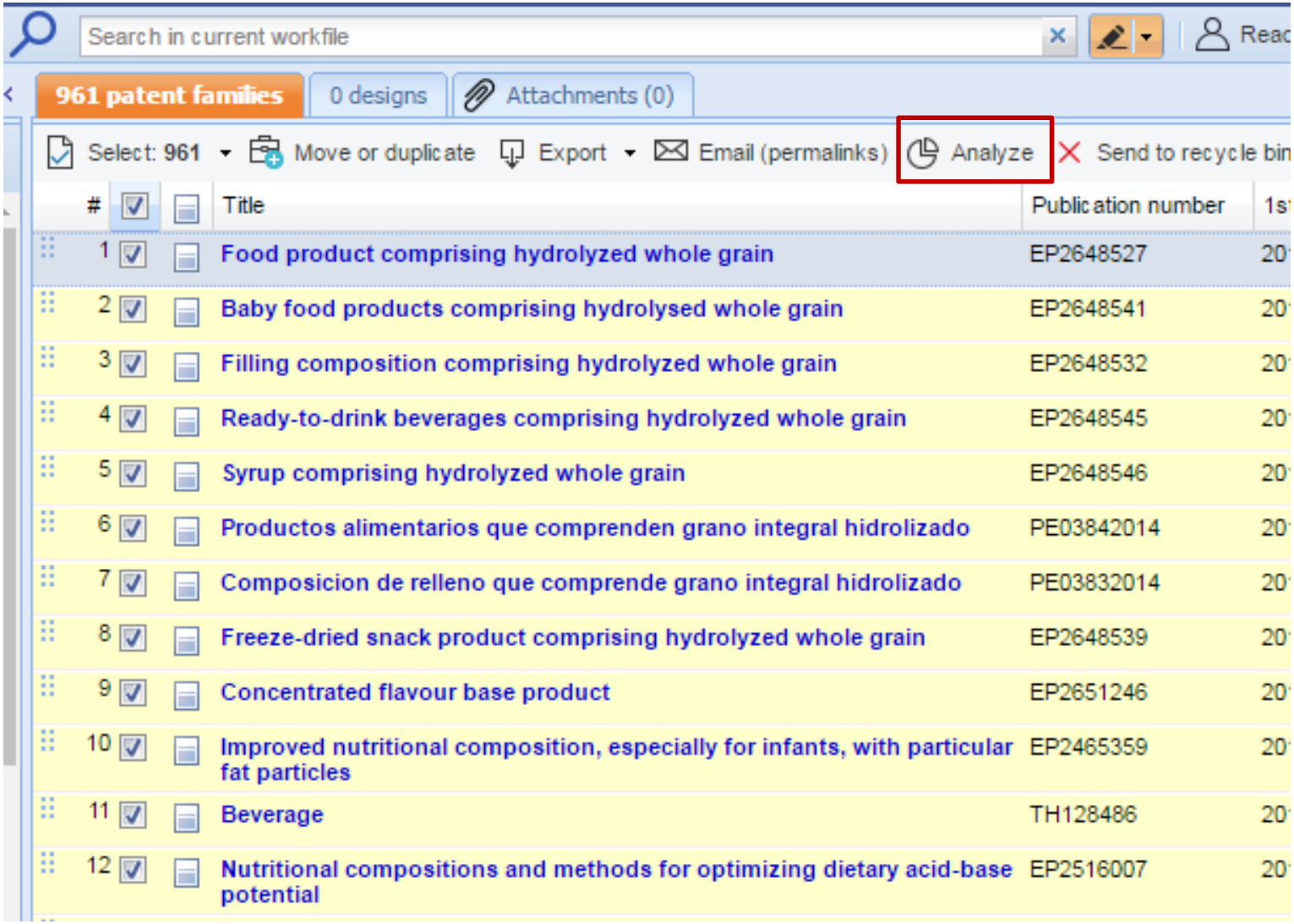
Search in current workfile
961 patent families
0 designs
Attachments (0)
Select: 961
Move or duplicate
Export
Email (permalinks)
Analyze
Send to recycle bin
Title Publication number 1s
1 Food product comprising hydrolyzed whole grain EP2648527 20
2 Baby food products comprising hydrolysed whole grain EP2648541 20
3 Filling composition comprising hydrolyzed whole grain EP2648532 20
4 Ready-to-drink beverages comprising hydrolyzed whole grain EP2648545 20
5 Syrup comprising hydrolyzed whole grain EP2648546 20
6 Productos alimentarios que comprenden grano integral hidrolizado PE03842014 20
7 Composicion de relleno que comprende grano integral hidrolizado PE03832014 20
8 Freeze-dried snack product comprising hydrolyzed whole grain EP2648539 20
9 Concentrated flavour base product EP2651246 20
10 Improved nutritional composition, especially for infants, with particular fat particles EP2465359 20
11 Beverage TH128486 20
12 Nutritional compositions and methods for optimizing dietary acid-base potential EP2516007 20

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My Charts

Default Templates

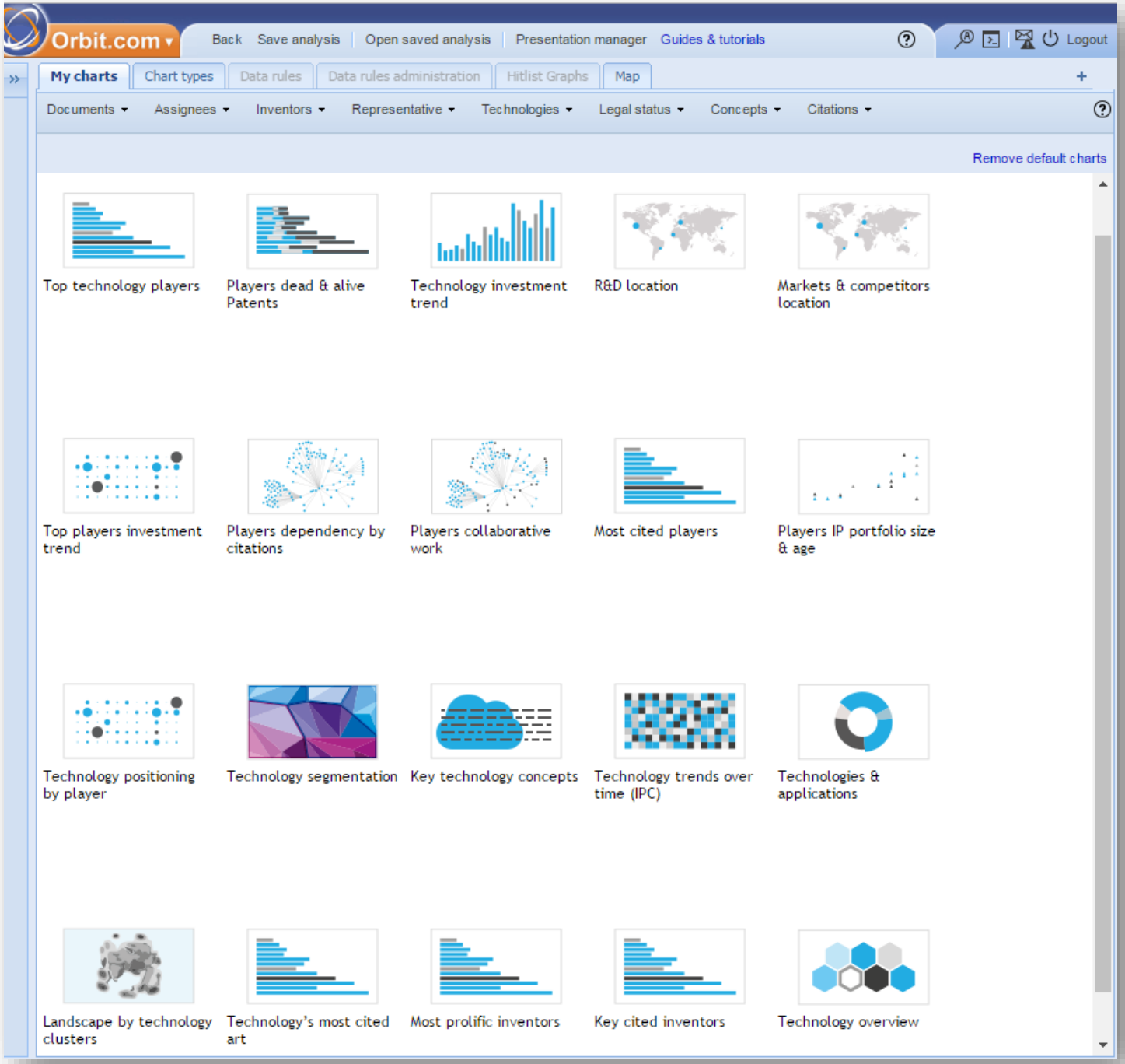


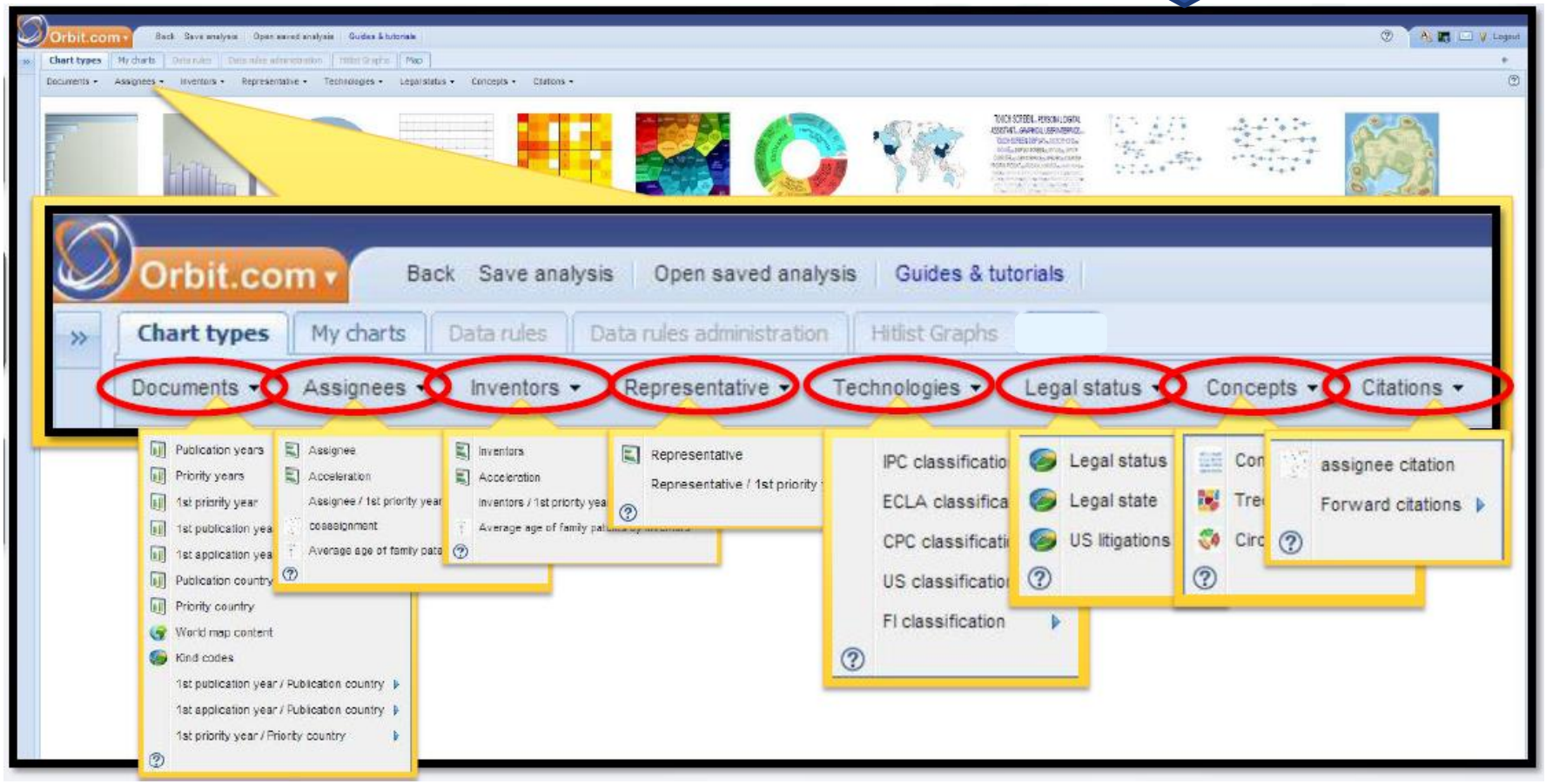
Chart types

- Horizontal bar chart
- Vertical bar chart
- Pie chart
- Bubble chart, Heat map
- Tag cloud
- Concepts or IPC Treemap
- Concepts or IPC Concept wheel
- Geographical map
- Technology domain chart
- Citations, co-assignee, and co-inventor node charts

Define area of interest

Create an environment

Analyse the outcome



There are over forty predefined charts that can be accessed by category

DOCUMENTS ANALYSIS

Graphs show publication and priority dates as well as the distribution of the technology in the market using the geography charts

- Publication & Priority Years
- Earliest Priority & Publication dates
- Application dates
- Publication & Priority countries
- Geographical coverage
- Crossing of Earliest dates & Countries

TOP ASSIGNEES/ INVENTORS

Graphs show the distribution of patent filings across the top assignees/ inventors in the field as well as provide an insight into the portfolios of the assignees

- Review distribution of patents by Patent assignee
- Acceleration
- Assignee/ 1st priority year
- Portfolio size/ age (Saved analysis only)
- Co-assignees

TOP ASSIGNEES/ INVENTORS

Assignee
Acceleration
Assignee / 1st priority year
Co-assignees
Average age of patent families by assignee

- 5 options to analyse assignees,
- Modify date intervals, give a colour to data, change the data to be analysed, etc. ... with the settings
- The fields analysed which are referenced in the following sections are the default ones: They can be modified using settings.
- The selection of families made in the chart is visible by hitting the tab Selection
- The tab In-deep analysis allows you to complete your analysis by displaying other charts.
- Use the tab Annex to display business information about the assignees that you have selected.
- Assignees who are also inventors of one and the same patent are excluded from the assignees analyses and are not shown either in the list of assignees under "Make a rule".

Customising an Analysis

- Create variations by using the settings option
- Edit your graph to get more than offered in the menu
- Predefined axis fields

TOP REPRESENTATION

- Change Graph types to tag for top 100
- Representative/1st Priority year in Bubble graph or Heat map

TECHNOLOGY DOMAIN

- **TECHNOLOGIES: histogram or pie chart:**

  IPC , CPC, US, FI & ECLA

- **TECHNOLOGIES (codes, group, subclass)/EARLIEST PRIORITY: bubble chart or heat map**

LEGAL STATE

- Legal status
- Legal state
- US Litigations
- Licensing event

- ✓ Change title
- ✓ Resize
- ✓ Selection of families
- ✓ Drill down on one state by displaying other charts.

LEGAL STATE

- 2 possible states: Dead or Alive

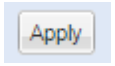
Fampat

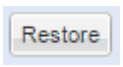
- Family is considered as being in force/alive when it has at least one member in force (Legal Status: pending, restored, and unpublished)
- Family is considered not in force/dead when all its members are dead (Legal Status: expired, lapsed, and revoked)

Fullpat

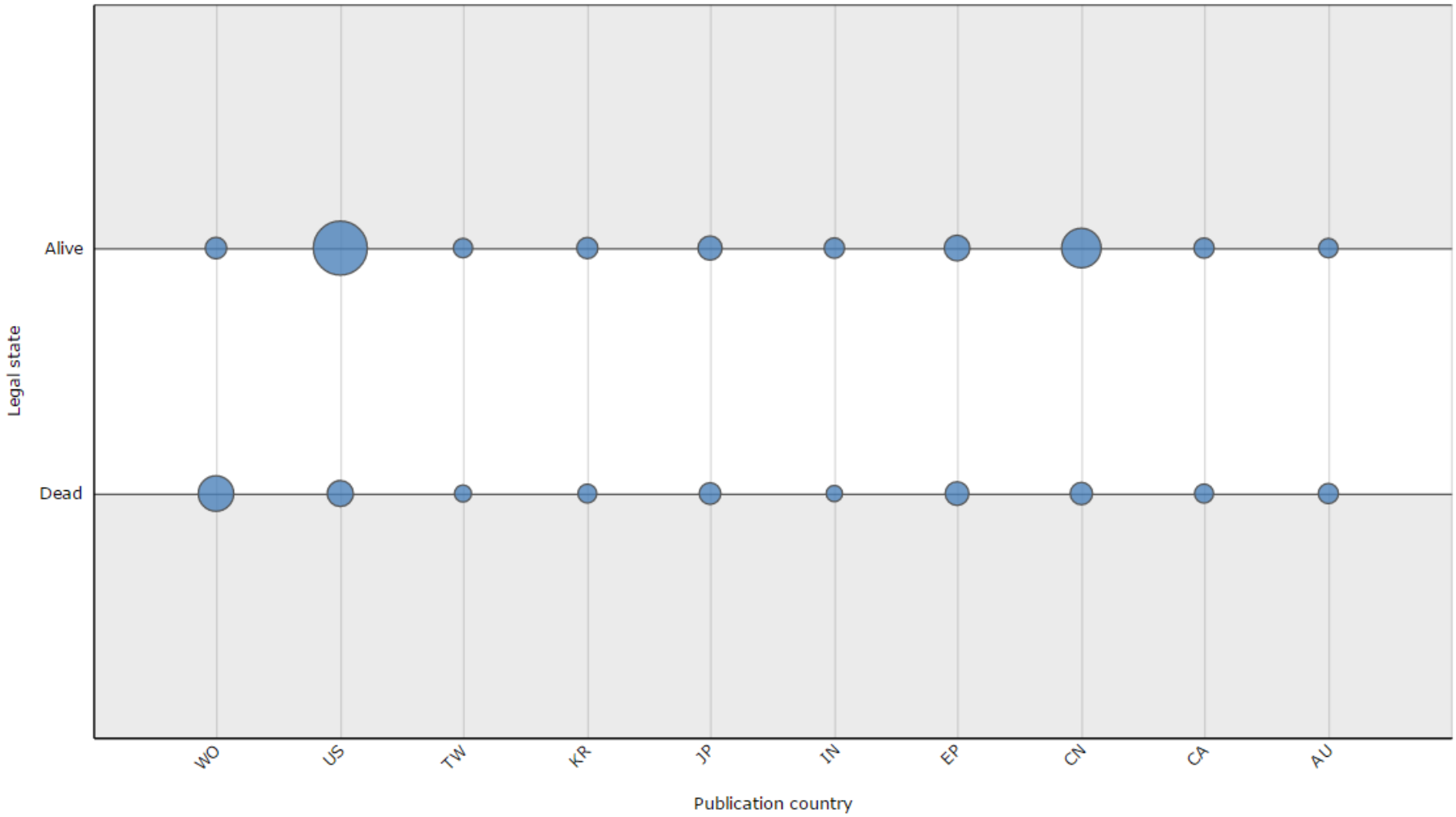
- Legal state at a patent level
- If a patent is alive/dead

Settings

- Displayed at the top
- Option to customize chart to your wishes:
  - ✓ Chart title (determined by the default values)
  - ✓ Chart size
  - ✓ The 

 button validates the changes
  - ✓ 

 button will undo the changes that have not been saved.
  - ✓ The values of the tab are the last ones determined and validated
  - ✓ Once validated restore button will **not** allow you to display once again the default chart.


Alive
Dead
Legal state
WO
US
TW
KR
JP
IN
EP
CN
CA
AU
Publication country

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LEGAL STATUS

The **status of the family** is based on an algorithm that takes into account the status of each of the individual members.

A family will appear only in *one* of the five kinds of Status, according to the following rules:

- **Granted**: when the family has at least one member that is Granted, associated with Alive
- **Pending**: when the family has at least one member that is pending, associated with Alive, and there is no member that is granted yet
- **Revoked**: when the family has at least one member that is revoked, associated with Dead, and there are no members that are pending nor granted
- **Expired**: when the family has at least one member that is expired (reached end of term of protection), associated with Dead, and there are no members that are revoked, pending nor granted.
- **Lapsed**: when the family has at least one member that is lapsed (did not reach end of term of protection), associated with Dead, and there are no members that are expired, revoked, pending nor granted

- A family may not be present in more than one of these Status segments

Explanatory examples:

–a family with a member granted, a member expired and a member lapsed will appear only in the **Granted** status segment

–when a family contains a **pending** divisional patent application, the status of the original patent application is also indicated. If this original patent application is granted, then the family with this divisional application will appear in the Granted segment, even though the family may not contain a granted member

US Litigations

- Pie chart shows US publications that have been the object of a lawsuit within the US
- The two situations **Yes** or **Absent**
- Bubble will pop up over the selection showing whether lawsuits have been found and the percentage of families that are or were facing lawsuits.
- A family is shown in the part Yes if one of its US members has been facing a lawsuit.
- This analysis is done on the field CID.

Licensing event

- Pie chart indicates whether there are any licensing events
- The two situations **Yes** or **Absent**.
- A family is indicated in the Present area if a license was awarded to at least one of its members.
- The analysis is based on the presence of the LID field.

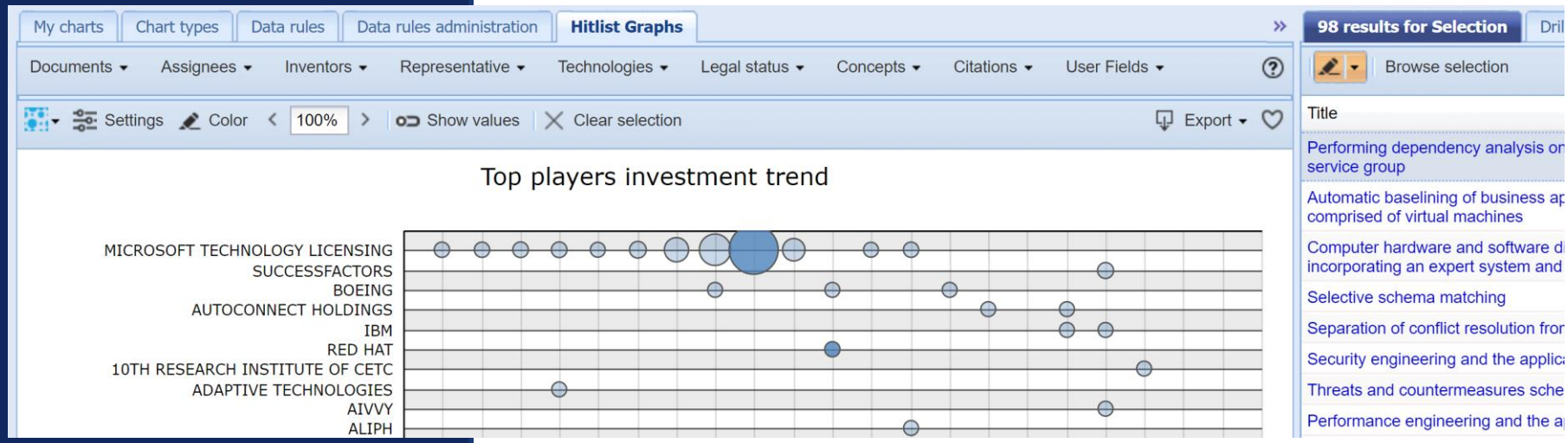
CITATIONS

- ASSIGNEE CITATION (node chart)
- CITING PATENTS (with saved analysis only)
  - TOP CITED Patent Families
  - TOP CITED Assignees
  - TOP CITED Inventors
  - TOP CITED Codes

Selection

- Simple
- Multiple

- When a point is selected, results are shown in the preview window.
- Display a hit-list as in search module with connection to the search module by using browse selection



Drill-down

- Perform a mini-analysis based on selection
- After selection subset do 2nd level analysis on:
  - Classsification
  - Assignee, inventor, agent
  - Concept
  - State or status
  - US litigation

✓*Use browse selection to export the selected results to the Patent Search module and combine with new search criteria for further analysis*

Colouring

- Charts coloration by multiple values
- Multiple value selections from all charts, including colored sub-sections of stacked charts
- Add an additional dimension of information through colour overlays
- Colouring template can be saved
- Colour by Lists or Workfiles

GEOGRAPHICAL COVERAGE

- Geographical distribution of the patent set in the field
- Where are most patents filed and indicates which countries have invested in R&D in the field in these countries.
- High market growth rate and high number of patent filings in a region can be attributed to the location of top players

Concepts

- Concepts dropdown menu offers you three options: Concept clouds, Rectangular Tree map or Circular Tree map

- For every option you can individually modify the date intervals, give a colour to data, change the data to be analysed
- The concepts are taken from the full official text in English of the EP applications (without euro-PCT) from 1988 onwards, the PCT applications from middle of 2001, the issued US patents from 1971 to 2000 and the US applications from 15 March 2001, and the UK applications from 1979 onwards, unextended FR applications, CN utility models and CN applications. PCTs (besides those published in Korean) machine-translated into English are also used to extract concepts. It is possible to find even older documents, back to 1980 for EP and 2000 for WO.
- Before everything else, nominal phrases are identified inside the whole of the text, then they are brought to standard according to syntax and semantic rules.
- Finally, every concept is weighted according to the field in which it has been identified, and the places where it occurs.
- The concepts are a result of the semantic content of the patent.

Concept cloud & Tree map

Concept clouds

The main concepts are shown in a cloud format.

The number between brackets indicates the number of families with concept.

The size of the fonts of the concept is linked to the importance of that concept within the batch of analysed families.

As a family contains several concepts, you can find that family several times within the cloud.

This analysis is done on the field KEYW.

Tree map

The main concepts are shown in a rectangular/ circular tree map format.

They are organised in clusters and can be visualised as shades of colours of varying intensity.

An algorithm determines the shortest distance between the concepts and arranges them into clusters.

The concepts in a given cluster share the same class codes.

For **Rectangular** If you mouse over a square associated with a concept, the title of the cluster and the name of the concept are shown at the bottom of the tree.

Double-click on a concept square, this will change its appearance: the square breaks up in as many boxes as there are assignees who have families containing that concept.

The size of the box depends on the number of families that share the same assignee and the same concept.

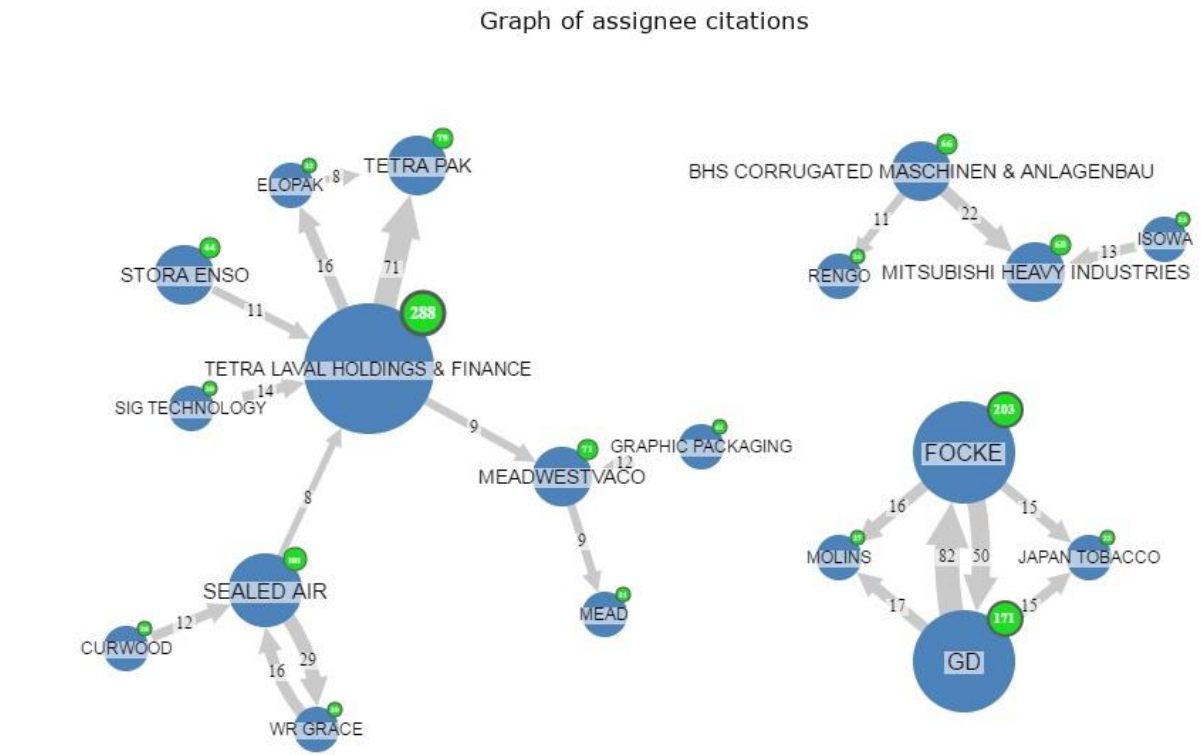
For **Circular** on the first "wheel" you make the names of the clusters visible : On the second "wheel" the concepts contained in every cluster are displayed.

Double-click the name of a cluster, the first and the second wheel change in appearance and will display the cluster and the concepts.

Double-click on the name of the cluster and display the initial chart once again.

Double-click on the name of a concept and a third wheel will appear, showing the names of the assignees who have families that contain this concept.

Citation node chart



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Presentations

Create & Manage

- This page includes all of the presentations that you have created.
- Edit name, date of expiration
- Sort presentations by **Name**, **Modified,** and **Expiry**
- Clicking on the **View** button opens the presentation in a new browser window. Each page displays a chart with its title and comment. You can browse from page to page with the black arrows at the bottom of the presentation.

Templates

- On top of the default offered templates, charts can be saved with named axis, title and values as templates
- Coloring can be saved as templates too

Help and Documents

Help in Context

Symbolised by in Orbit interface

Assistance

Region	Hours	Contact
Europe	9h00 - 18h00 (GMT + 1)	+8000 QUESTEL (+8000 783-7835) help@questel.com
USA	9h00 - 21h00 (GMT -5)	+1 800-456-7248 help@questel.com
Asia	9h00 - 18h00 (GMT + 8)	+86 21 5115 7212 help.cn@questel.com
France	9h00 - 18h00 (GMT + 1)	+33 (0)1 55 04 51 00 clients@questel.com

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