



Covering Intellectual Property Needs Across The Innovation Lifecycle

AGH University of Science & Technology
Kraków, Poland

Training Schedule

- ✓ Patent Searching
- ✓ Workfiles
- ✓ Orbit Express
- ✓ Analysis

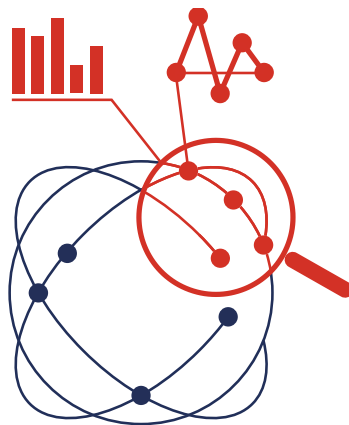




- A patent database covering more than 100 authorities including 23 in Fulltext
- A temporal coverage dating back to the 19th century for some offices
- Records grouped in families with bibliography, full text and legal status
- An advanced search tool
- Analytics capacity and productivity tool
- A sharing platform (Workfile Module)

Coverage details are available on our website [Questel.com](https://www.questel.com)





Patent Search

Intellectual Property
Business Intelligence



Software



Consulting



eLearning

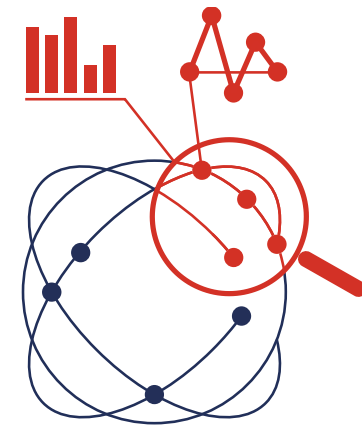
WHAT

1. Orbit Intelligence Database
2. Orbit Settings
3. Search Tools
4. Review Tools
5. Saving Results

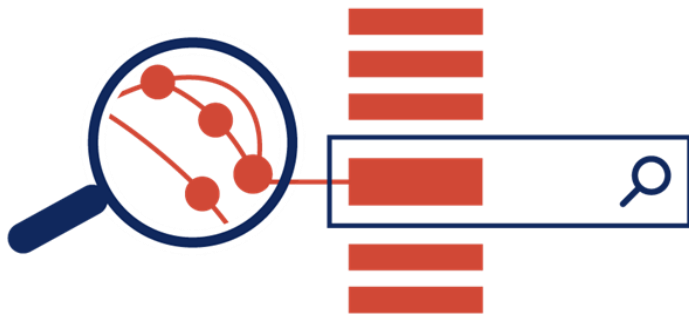


1. Orbit Intelligence Databases

- Three collections: Fampat
Fullpat
Fulltext
- Comparison of collections
- Selection of collection



Data Grouping



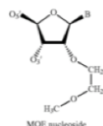
- FamPat
1 record per patent invention
(family grouping)
- FullPat
1 record per patent
- FullText
1 record per patent publication



Database Construction

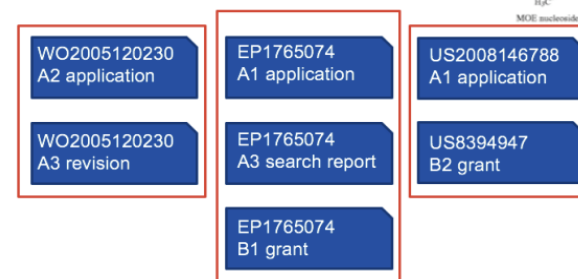
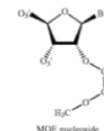
6 FullText publications

Positionally modified sirna constructs



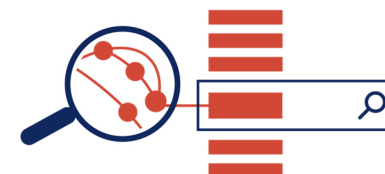
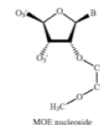
3 FullPat records

Positionally modified sirna constructs



Single FamPat record

Positionally modified sirna constructs



Fampat Family: definition

Strict family
Same priorities

Doc D1 Priority P1
Doc D2 Priority P1 Priority P2
Doc D3 Priority P1 Priority P2
Doc D4 Priority P2 Priority P3
Doc D5 Priority P3

4 strict families

Family P1

Family P1-P2

Family P1-P2

Family P2-P3

Family P3



Silence
Generation

Fampat
family

Strict family



- Japanese « brothers »
- Linking EP/PCT and National phase equivalents
- Matching US provisional applications to relevant US published Application
- No duplication

Extended family
At least 1 priority in
common

Doc D1 Priority P1
Doc D2 Priority P1 Priority P2
Doc D3 Priority P1 Priority P2
Doc D4 Priority P2 Priority P3
Doc D5 Priority P3

1 extended family

Family D1-D2-D3-D4-D5



Noise Generation
(D1 and D5 does not
share any priority)



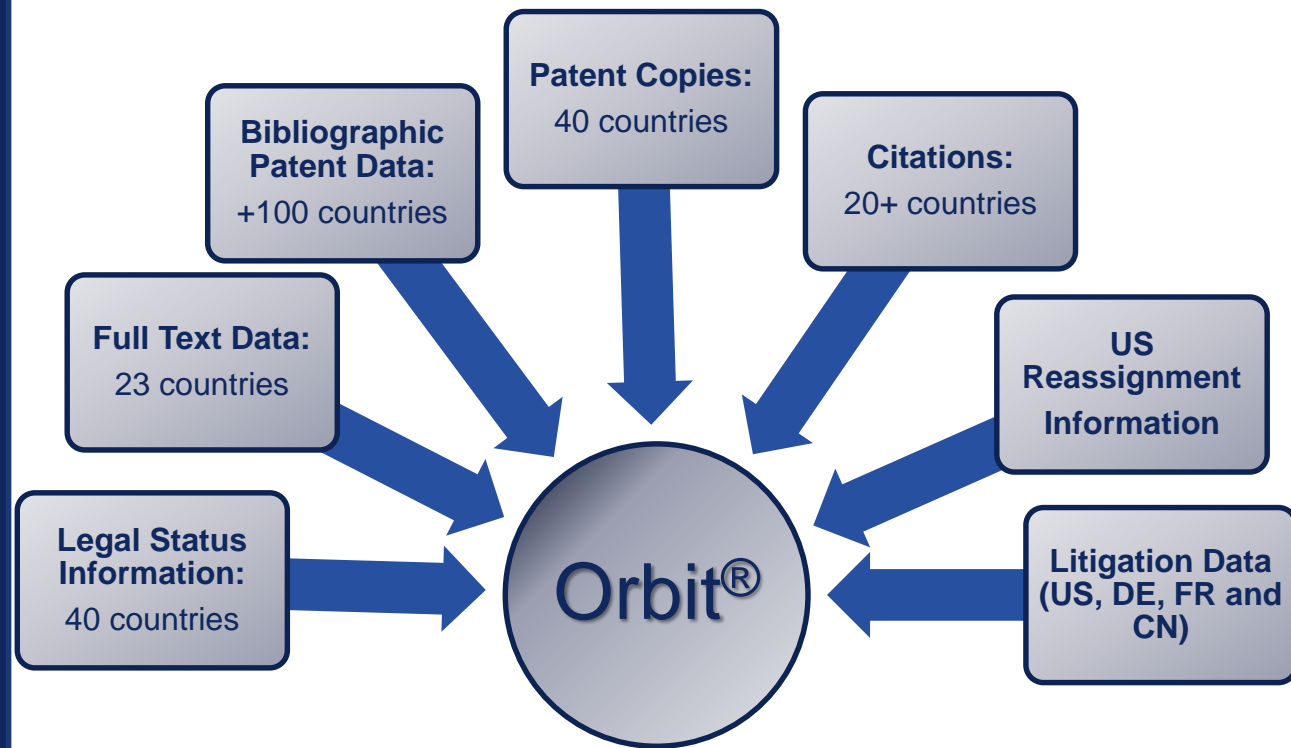
Why FAMPAT family?

- Fampat families based on their priority numbers are bound to the concept of invention.
- The count of families in a company's portfolio is a better indicator of the inventivity of the applicant than the total number of published patents.



FAMPAT collection

- Weekly update
- Composite database :



Data Grouping Option

Fampat ↻ *Fullpat*

The screenshot illustrates the process of switching from a standard patent list view to a family-based view. The top section shows the 'FAMPAT' view with 90 results. A dropdown menu for 'Family grouping' is open, highlighting 'Results grouped by patent families'. A red arrow points from this option to the bottom section, which shows the 'FULLPAT' view with 159 results grouped by patent families.

Top View (FAMPAT): 90 results for my list: a2e portfolio - Collection: **FAMPAT**

Family grouping ▾ Display ▾

- Results grouped by patents
- Results grouped by patent families**
- Results grouped by extended patent families

Bottom View (FULLPAT): 159 results for FamPat SS 1 grouped by patent - Collection: **FULLPAT**

Patent grouping ▾ Display ▾

#	Title	Applicant/Assignee	Publication number	1st Publ. date	Publ. date
1.	Fall back trajectory systems for	WAYMO	US2017199523		2017-07-13



Collections

selection of collections

By default, the only collection available is **FamPat**. This is the collection that brings together families of invention patents.

For the display, from  then  and

 : choose the option YES then Confirm.

Display the list of databases to search on the search page:

YES	▼	?
NO		
YES		

3 collections will now be available in the advanced search:

Features exclusive for Fampat

- WorkFiles
- Evaluation modules

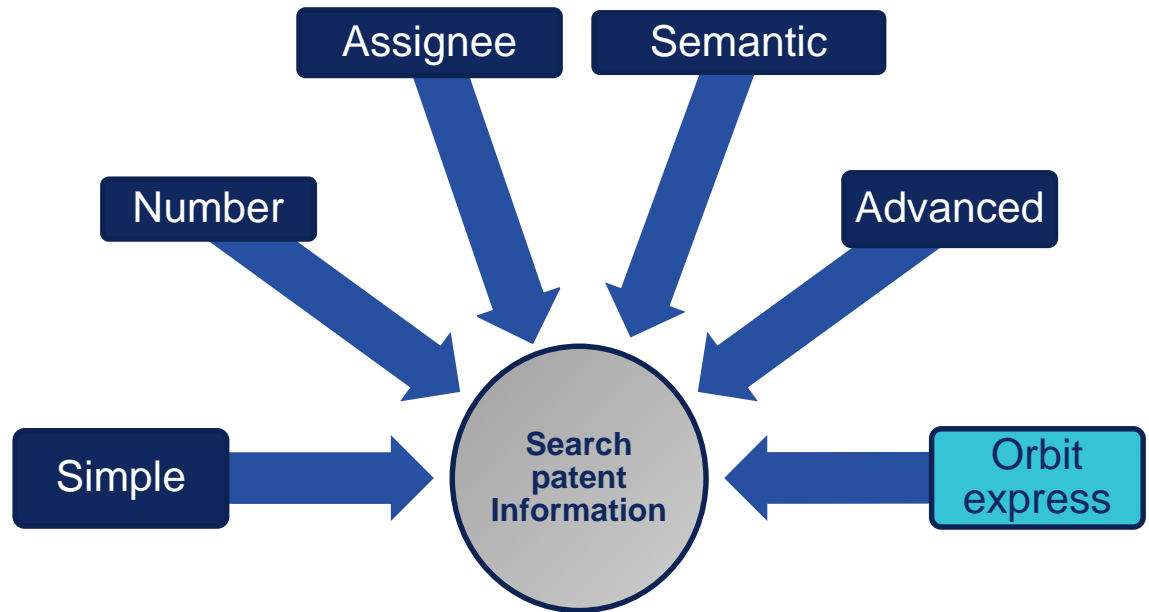


Search Tools

- Research methodology: simple case study
- Keywords, classifications, numbers, etc...
- Truncations & Operators
- Similarity / refining search
- Semantic searching



Which type of search?



Simple Research: N°, keywords, names Automatic selection of the search fields

Advanced Research: crossing of multiple search criteria

Assignee research: dedicated to assignees

Number search: dedicated to numbers

Semantic search: use of a text to find similar patents, extraction of concepts and similarity

Orbit Express : <https://m.orbit.com>



Advanced Research

Keywords

The screenshot shows a patent search interface. On the left, a dropdown menu is open, listing search fields with checkboxes: Title, Abstract, Claims, Description, Object of invention, Advantages over prior art drawbacks, Independent Claims, Concepts, and Full Text. The 'Claims' field is currently selected. To the right, there is a table with six rows, each representing a search criterion. Each row has a dropdown menu for the search field, a text input field for the search term, and a color-coded button with an edit icon.

Search Field	Search Term	Color	Edit
Title, Abstract, Claims, Description, O	E.g.: Telecom+ OR phone	Yellow	✎
Title, Description, Object of invention	E.g.: Telecom+ OR phone	Magenta	✎
Title, Abstract, Object of invention, A	E.g.: Telecom+ OR phone	Cyan	✎
Title, Abstract, Object of invention, A	E.g.: Telecom+ OR phone	Green	✎
Title, Abstract, Object of invention, A	E.g.: Telecom+ OR phone	Orange	✎
Title, Abstract, Object of invention, A	E.g.: Telecom+ OR phone	Grey	✎

- **Search Language** : English (+ other languages if needed, including non-Latin characters)
- **Operators Language** : English for all interfaces except the French interface
- Six input lines articulated by one AND
- Use the truncation and operators
- **Multilingual Dictionary** ✎ : synonyms and translation in English, German and French
- **Tree of the relevant concepts** ✎ : semantic content of the patent, patent language. Edit fields and add truncations and operations

Adjust the search fields on the basis of the location in which your words must be found



Advanced search

Classifications

▲ Classifications

and ▼ Technology domain ▼

Names

Assignee (current)

Technology domain
IPC
CPC
IPC, CPC
ECLA, ICO
US (main)
US (main & x-ref)
FI
F-Terms


and ▼ Technology domain ▼

and ▼ Technology domain ▼

and ▼ Technology domain ▼

and ▼ Technology domain ▼

and ▼ Technology domain ▼

- **Technology Domaines**  : 35 areas defined by Questel and derivatives of the IPC
- **IPC**: international classification, majority of offices covered
- **CPC** : European classification, combined with US
- **IPC/CPC** : a part of the tree is common
- 5 input lines, articulated with an OR or an AND
- Use of truncation # and +
- Identification of the main classes of a selection of families with the function (p.15)



Advanced search

Assignee

▲ | Names

Assignee (current - only latest) ▼

Assignee (original, intermediate, current)

Assignee (current - only latest)

- Default: research on the **owner**
- **Corporate Tree** :retrieves the main subsidiaries of a company and go back to the parent company 🏢, increase the completeness of research.
- Selection of applicants one by one

Possibility to select all affiliations
using the search by dedicated assignee

- 🔍 Searches
- Easy search
 - Advanced search
 - Semantic search
 - Assignee search
 - Number search





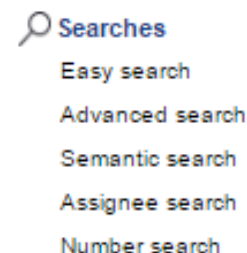
Advanced search

Numbers

▲ Numbers, dates & country

▼
Publ. number
Appl. number
Priority number
Application or Priority number

- With  allows to find publication numbers and search them in the proper format (up to 100). Automatic reformatting
- Uses also copy/paste of text containing publication numbers
- Function  Upload File to import some N° from an xls file (issuance of an import report)



Search more than 100 N°

Search by dedicated number

- Allows to find hundreds of numbers.
- Use the function « Detect » to reset in Questel format



Advanced search

Dates

Date: Application ▼ From ▼

ities): No Restriction
Application
Priority
Publication

- Allows to filter by date (publication, application or priority)
- A date among all of the dates of the family

Need to search the 1st date ?

- Other fields: 1st date of
Application , publication or priority

Dates

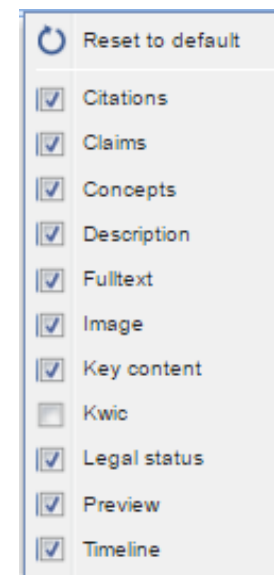
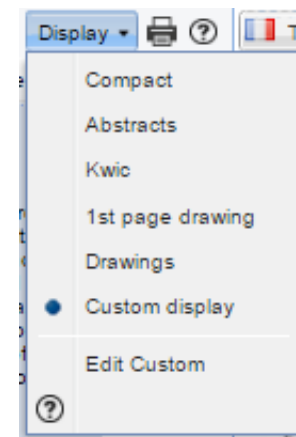
Grant date
Earliest grant date
Date of published app.
Earliest priority date
Earliest application date
Earliest publication date
Earliest publication of each application
Latest publication of each application
Other patent dates



Results Display

Customization

- Customize display view
- Display the Preview tab to customize
- Selection the tabs to display
- Automatic sorting of results by relevance
- Representative member
(from user settings)



Preferred language for text of records:

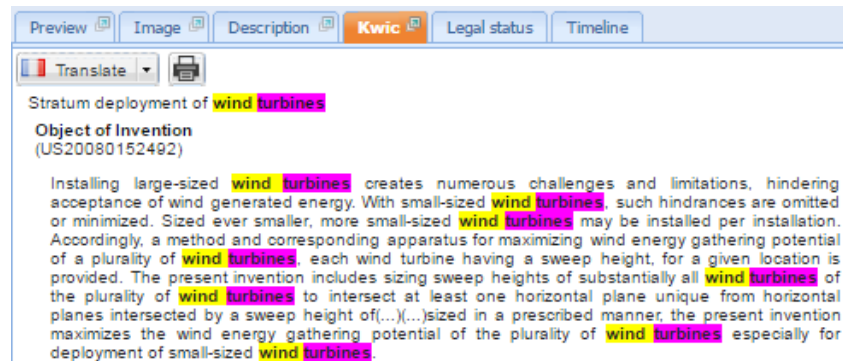
Preferred Patent authority from which fields should be displayed:



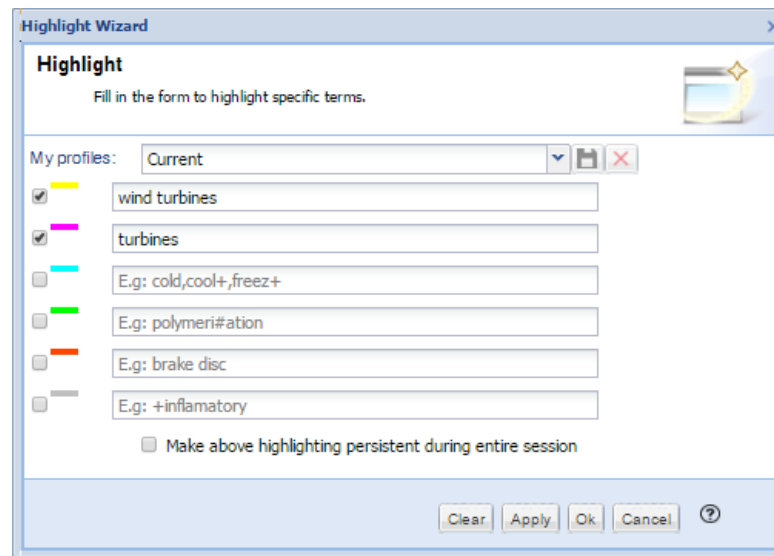
Results Display

KWIC, highlight

- **Tab KWIC (Key Word In Context)** : to display the distribution in the family of terms searched on the basis of the search fields



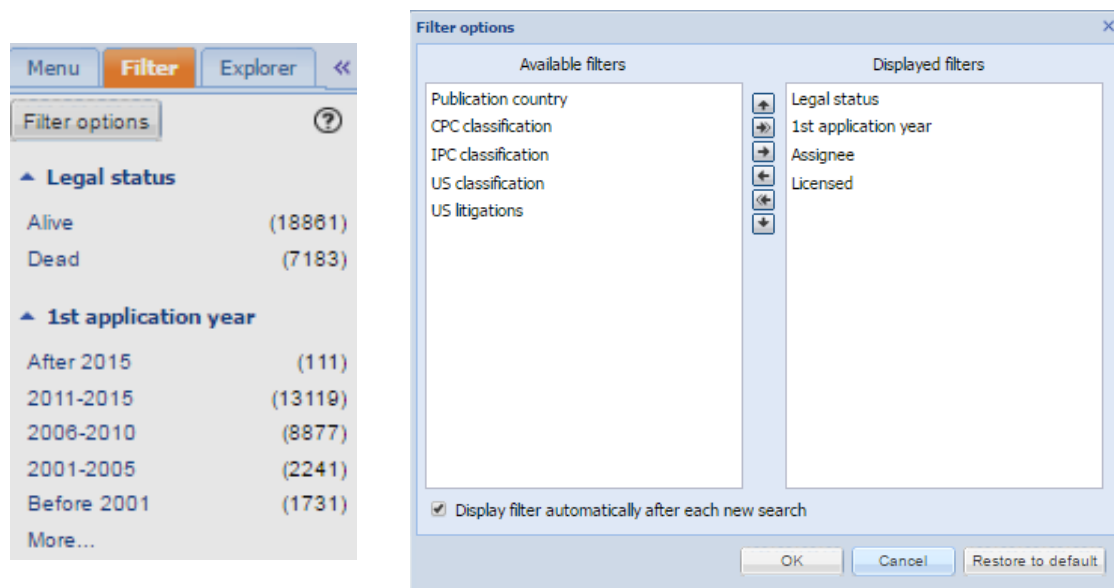
- **Highlighting**  : navigate through the tabs, possibility of adding highlighted words, ability to save the highlight.



Results Display

Filter and view document

- **Filter:** three options by default, possibility to add others, allows to filter the result of a search

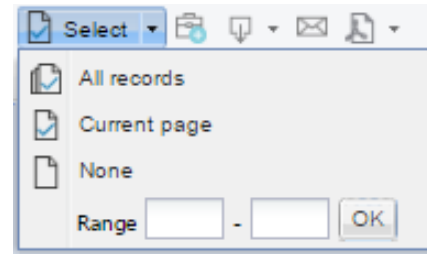



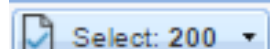
- **View document:** allows clicking on the title to view a particular family and focus on claims of a member, for example.
- **Back to list** allows to view again the result list



Selection

Selection button:



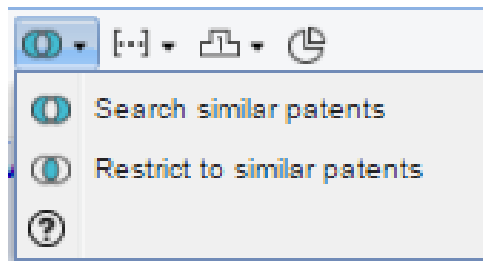
- Click all records button to select the entire families
- Check box at the top of the results list selects the current page 
- Number of selected families indicated 



Research Tools

Similarity

Selection of one or several families (up to 10 000)



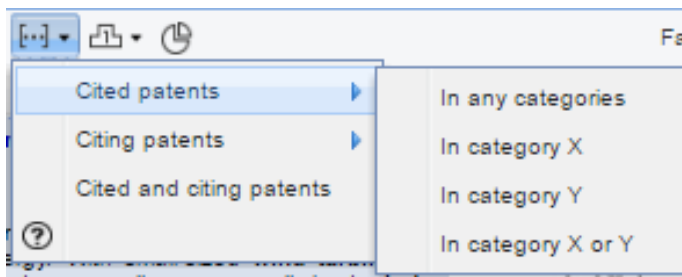
- **1st option** : to find similar patents in all database
- **2nd option** : to find similar patents only in the results of the selection list
- List organized by relevance: **relevance score** display
- Using the KWIC tab to determine similar values of each families
- Used to define new keywords, new classes...
- Cross with other questions to refine




Research Tools

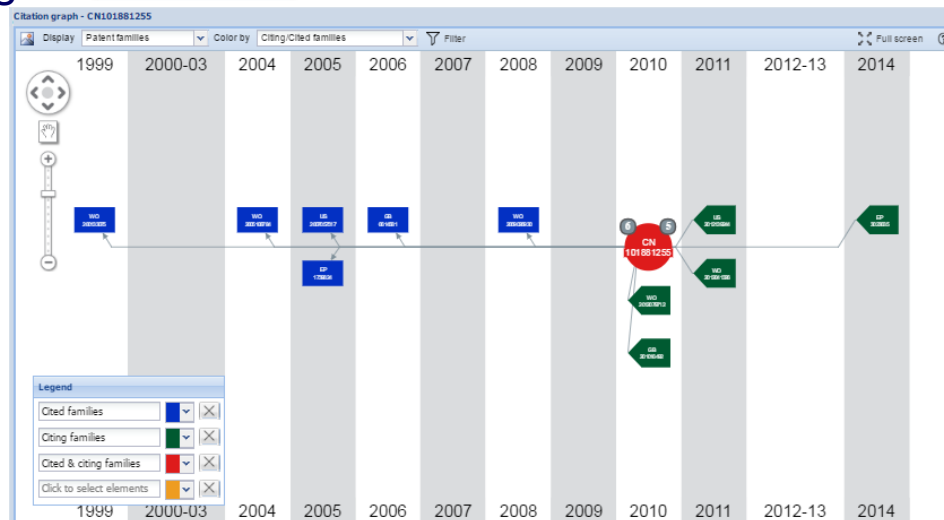
Citations

- **Selection** of one or several families (up to 10 000)



Allows to find the cited families (prior art) /cited (applications) on the basis of the categories of relevance (examiners and applicants)

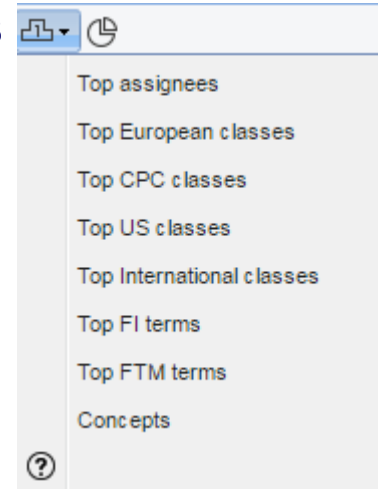
Citations Tab: display of citations (citing, cited) examiners and applicants, literature cited for a family. Possibility to display this information graphically by clicking on  **Citation graph**



Research Tools

TOP

Sampling on a selection of families: to identify the top classes, top assignees and key concepts



- Link to the definition of the classes
- Ability to select and return to the advanced search page to refine or extend the previous research.



5. Saving Results



Save families (results):

Export, PDF or Workfile or list

Save search query:

Search saved or alert or export of history

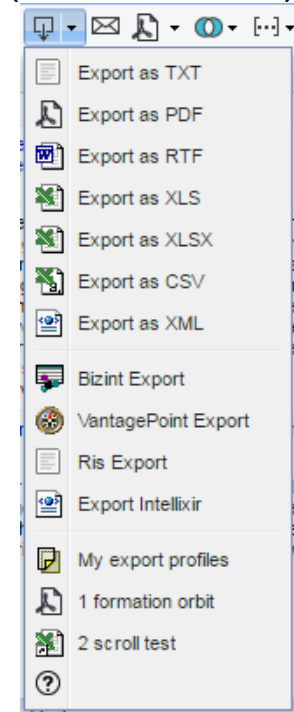


Save

Exports

Selection of one or several families (max. 20 000)

- **More formats**



- Choose export data

- Download or email (23 email addresses max)

- For recipients of the emails, it is not necessary to have an Orbit logon to access the exported documents.

- Ability to save the **export profile**




Save

Save search

- **From the search history or the results list:** ability to save search script

 Save or

Save entire strategy

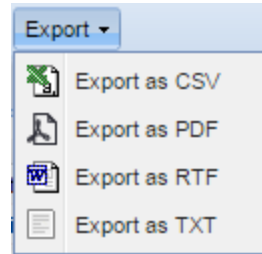
- Script executed **manually**
- No limit on saved searches
- Stored in  My searches
My saved searches



Save

Export of history

- **From search history:** possibility of exporting the history



- The queries can then be copied/pasted into the command line to be sought again.



Save

Workfiles



Directory

Can contain subdirectories or workfiles



Workfiles

Can contain patent families or designs

Static, except manual updates or alert feeds



Lists

Can contain patent families or publications

Lists are not static



Sharing directories

Sharing is only done at the level of directories



Inbox can't be shared



Why Use Workfiles?

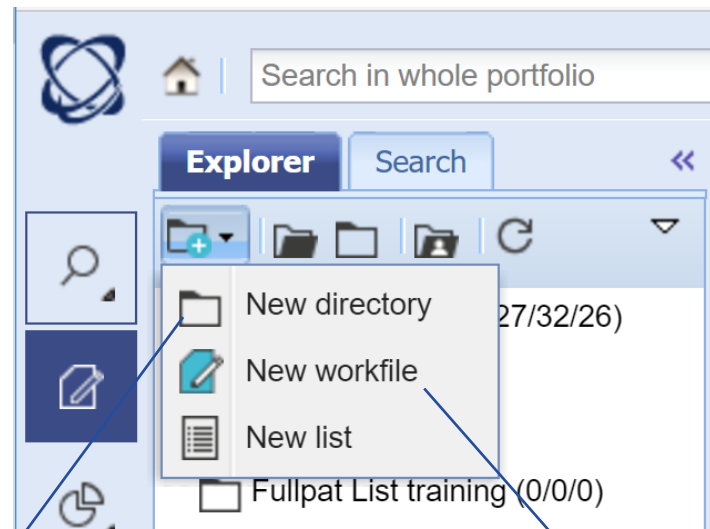
- ✓ **Organise:** archive patent families & designs
- ✓ **Update:** update static data in workfiles
- ✓ **Evaluate:** additions of stars, notes, attachments & personal fields
- ✓ **Collaborate:** creation of group readers & sharing directories
- ✓ **Analyse:** run analysis from workfile
- ✓ **Synchronise:** use workfile data with Orbit Express & Orbit Intellixir




Save

Workfiles

Creating Directories & Workfiles

A dialog box titled 'Create directory'. It has a 'General' section with a 'Name' field (which is highlighted with a red border and a red exclamation mark icon) and a 'Desc.' field. Below the 'General' section is a 'Sort' section with a 'Sort key' field. At the bottom of the dialog are 'OK' and 'Cancel' buttons.A dialog box titled 'Create workfile'. It has a 'General' section with a 'Name' field (which is highlighted with a red border and a red exclamation mark icon) and a 'Desc.' field. Below the 'General' section is a 'Sort' section with a 'Sort key' field. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

 This field is required

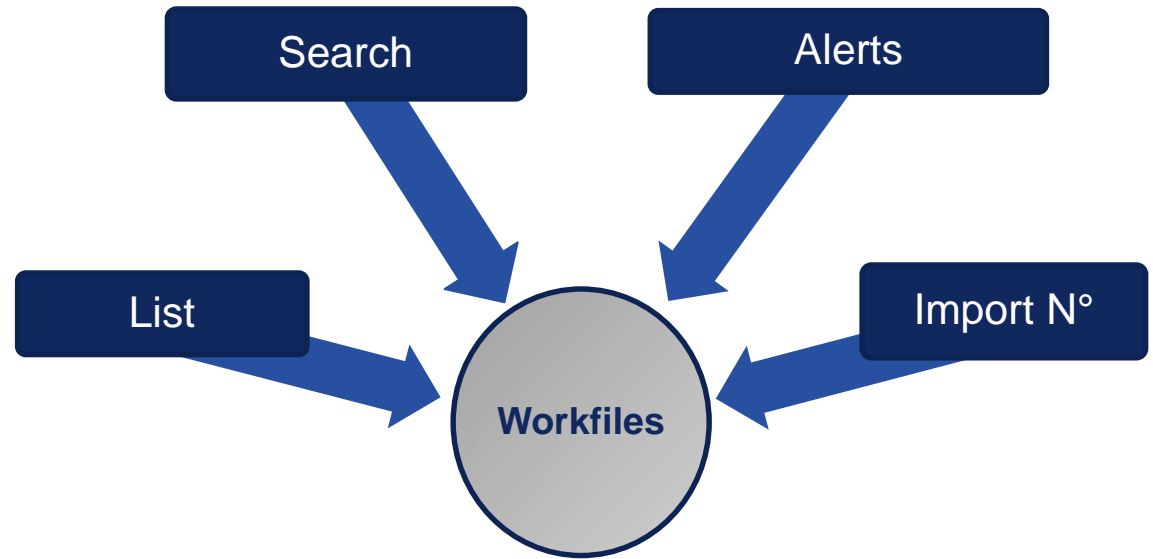


You can create a workfile from the workfile module or hitlist

Save

Workfiles

Feed Workfiles



You can add records to your workfile, list or directory using either one of:

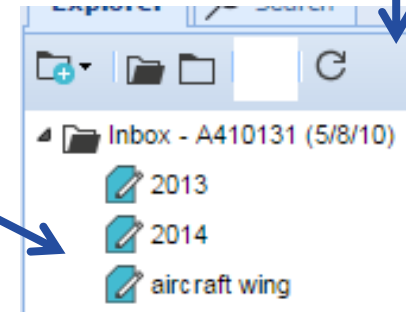
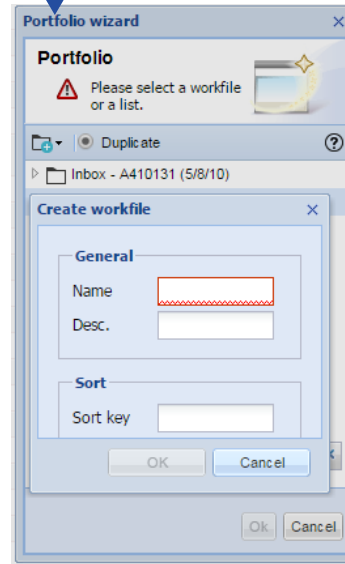
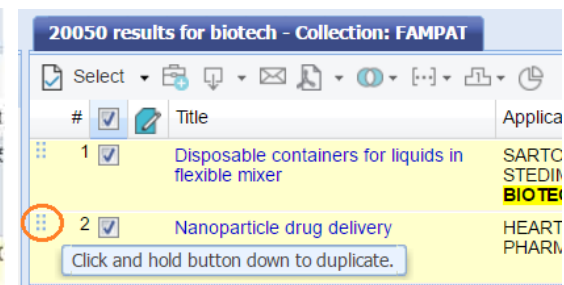
- Hitlist results (search)
- Duplicating Lists
- Alerts with results delivery in workfiles
- Number import



Save

Workfiles

Feed by List/ Search



- Feed from an existing folder or create a new folder
- Workfile accessible from Explorer
- Selection of the directory if not Inbox by default



Save

Workfiles

Feed by an Alert

The screenshot displays the Questel QPilot interface. The 'Template' section shows the 'Format' dropdown menu open, with 'Classical' selected. A blue arrow points from this selection to the 'Portfolio wizard' dialog box. The 'Portfolio wizard' dialog box has a title bar 'Portfolio wizard' and a message 'Select a correct target directory.' Below this, there is a list of directories: 'Inbox - A410131 (6/8/10)' and 'formation (2/3/0)'. A blue arrow points from the 'formation (2/3/0)' directory to the 'OK' button. The 'Data' section shows the 'Format' dropdown menu set to 'Document'. The 'Delivery' section shows the 'E-mail address(es)' field with the value 'pmangemba@questel.com'.

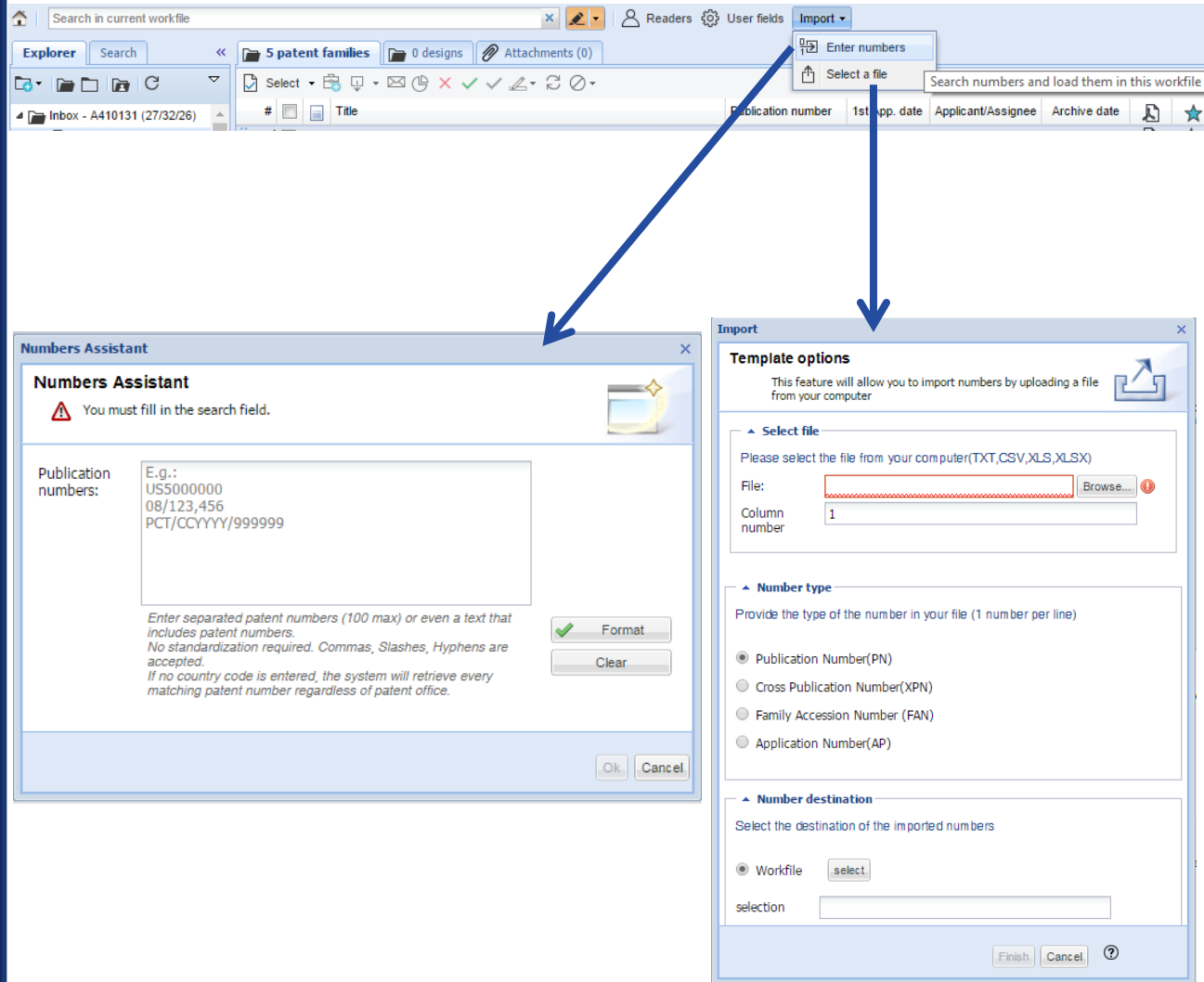
- Only one directory can be selected.
- The Workfile will be created during the 1st run of the alert, the folder will be the name of the alert
- An alert cannot be sent in an existing workfile but to a directory
- Update of the families in a Workfile if monitoring code EU or QW



Save

Workfiles

Feed by N° import



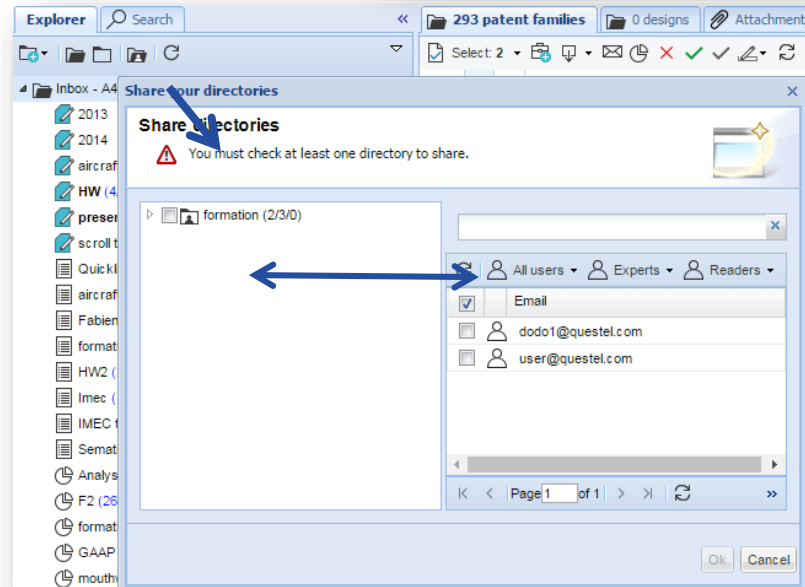
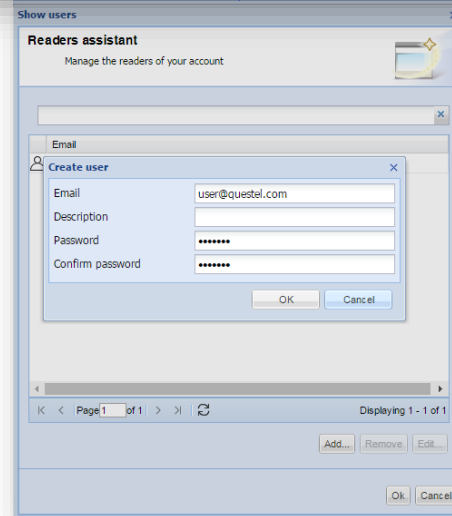
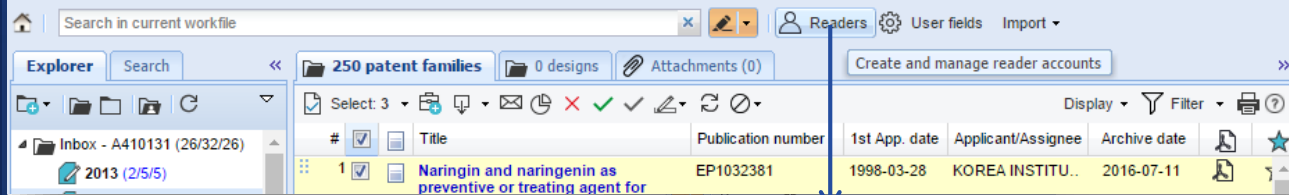
- From Workfile module
- Select a Workfile



Share

Readers

- Email address and password are the identifiers for readers to access to the interface Workfiles and to share documents
- Associate a reader with a directory



Appraise

Stars

- Allocation of the same number of stars to selected families
- From 0 to 5 stars
- Star(s) assigned to a family
- Last distribution of stars is displayed

The stars are exportable & filterable

#	Title	Publication number	1st App. date	Applicant/Assignee	Archive date	Star
1	Naringin and naringenin as preventive or treating agent for hepatic diseases	EP1032381	1998-03-28	KOREA INSTITU...	2016-07-11	★
2	Oxazolo[5,4-c]quinolin-2-one compounds as bromodomain inhibitors	CA2904364	2014-03-13	EPIGENETICS; ...	2016-07-11	★
3	Novel substituted bicyclic compounds as bromodomain inhibitors	CA2915622	2014-06-20	ZENITH EPIGEN...	2016-07-11	★
4	Substituted phenyl-2,3-benzodiazepines	CA2915419	2014-06-17	BAYER HEALTH...	2016-07-11	★

OR

#	Title	Publication number	1st App. date	Applicant/Assignee	Archive date	Star
1	Naringin and naringenin as preventive or treating agent for hepatic diseases	EP1032381	1998-03-28	KOREA INSTITU...	2016-07-11	★
2	Oxazolo[5,4-c]quinolin-2-one compounds as bromodomain inhibitors	CA2904364	2014-03-13	EPIGENETICS; ...	2016-07-11	★
3	Novel substituted bicyclic compounds as bromodomain inhibitors	CA2915622	2014-06-20	ZENITH EPIGEN...	2016-07-11	★
4	Substituted phenyl-2,3-benzodiazepines	CA2915419	2014-06-17	BAYER HEALTH...	2016-07-11	★
5	Quinazoline derivative			BANYU PHARM...	2016-07-11	★
6	Novel quinazolinones as bromodomain inhibitors				2016-07-11	★
7	Substituted dihydropyrido[3,4-b]pyrazinones as dual inhibitors of bet proteins and polo-like kinase				2016-07-11	★
8	Oral immediate release formulations for substituted quinazolinones	US20100000000	2012-10-01		2016-07-11	★
9	Mif modulators	US2010267714	2010-05-04		2016-07-11	★
10	Tricyclic heterocycles as bet protein inhibitors	US2015011540	2014-07-07		2016-07-11	★
11	Novel bicyclic bromodomain inhibitors	CA2915838	2014-06-20		2016-07-11	★
12	Substituted phenyl-2,3-benzodiazepines	CA2915419	2014-06-17		2016-07-11	★

OR

#	Title	Publication number	1st App. date	Applicant/Assignee	Archive date	Star
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3	Novel substituted bicyclic compounds as bromodomain inhibitors	CA2915622	2014-06-20	ZENITH EPIGEN...	2016-07-11	★
4	Substituted phenyl-2,3-benzodiazepines	CA2915419	2014-06-17	BAYER HEALTH...	2016-07-11	★

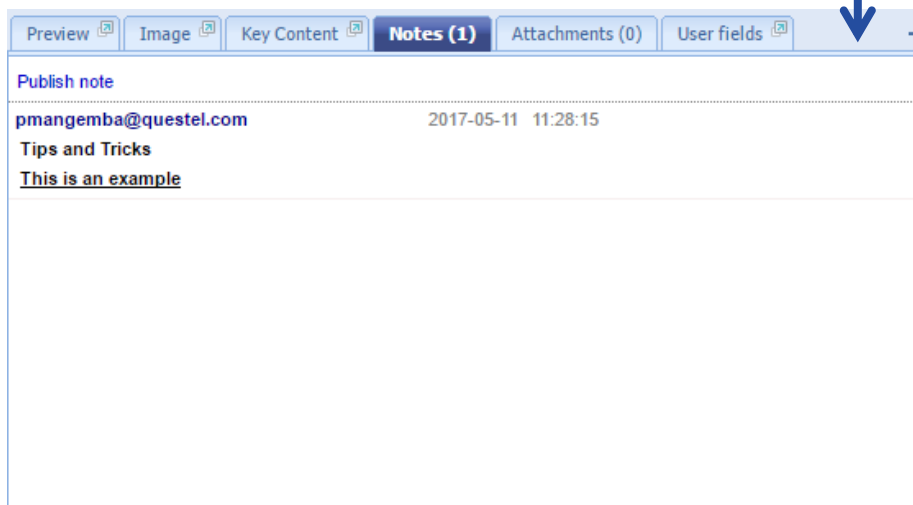
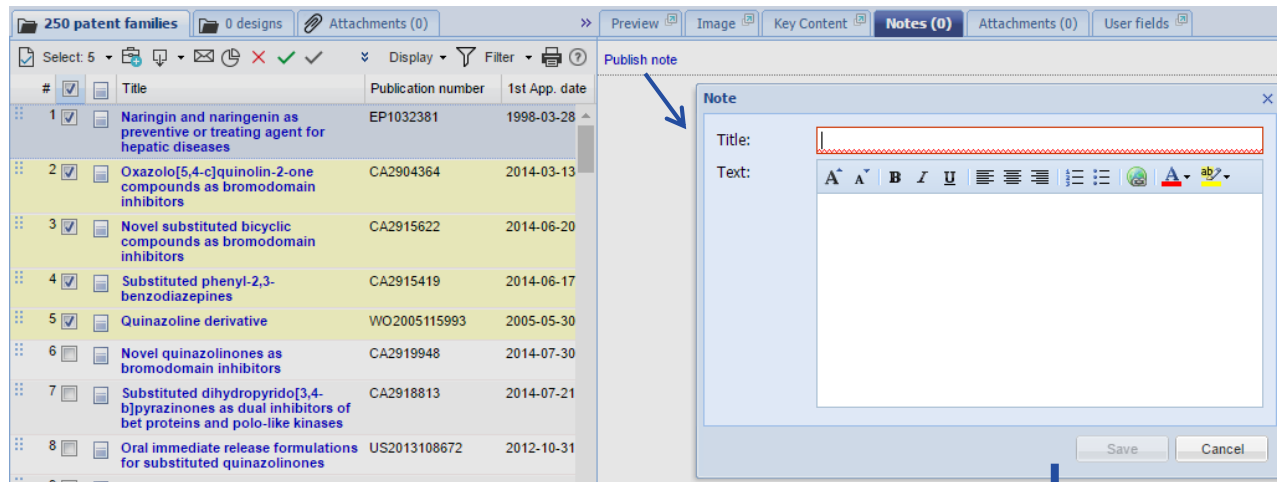


Appraise

Notes

- Note (s) assigned to a family
- Possibility to modify and/or delete

The notes are exportable & filterable



Appraise

Attachments

The screenshot shows a patent database interface with a table of 250 patent families. The table has columns for #, Title, Publication number, 1st App. date, Applicant/Assignee, and Archive date. The first six rows are visible, showing various patent titles and their details. An 'Upload file' dialog box is open, with fields for 'File' and 'Desc.' and buttons for 'OK' and 'Cancel'. A blue arrow points from the 'Upload file' dialog to the 'Attachments (1)' tab in the interface.

#	Title	Publication number	1st App. date	Applicant/Assignee	Archive date
1	Naringin and naringenin as preventive or treating agent for hepatic diseases	EP1032381	1998-03-28	KOREA INSTITU...	2016-07-11
2	Oxazolo[5,4-c]quinolin-2-one compounds as bromodomain inhibitors	CA2904364	2014-03-13	EPIGENETICS, ...	2016-07-11
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4	Substituted phenyl-2,3-benzodiazepines	CA2915419	2014-06-17	BAYER HEALTH...	2016-07-11
5	Quinazoline derivative	WO.2005115993	2005-05-30	BANYU PHARM...	2016-07-11
6	Novel quinazolinones as	CA2919948	2014-07-30	JENNY SU EPI...	2016-07-11

The 'Attachments (1)' tab shows a table with the following data:

Name	Description	User	Date	Time
WO with Related image		pmangemba@questel.com	2017-05-11	11:36:17

Attachments are
searchable



Appraise

User fields: creation

*User fields are
exportable, filterable
and searchable*

The screenshot shows the 'Manage User Fields' dialog box within the 'User fields wizard'. The dialog has a title bar with 'User fields wizard' and a close button. Below the title bar, there's a section 'Manage User Fields' with the instruction 'Define your own fields.' and a 'Create a field' button. A list on the left shows field types: Type, Date, Internal Classification, Multi-values selection, Single value selection, and Text. The 'Multi-values selection' type is selected. The dialog contains four input fields: 'Type' (set to 'Multi-values selection'), 'Label' (with a red dashed border), 'Code' (with a red dashed border), and 'Sample'. To the right of these fields are examples: 'E.g.:Product name', 'E.g.:PRDT', and 'E.g.:My phone'. At the bottom right are 'Next', 'Clear', and 'Cancel' buttons. A blue arrow points from the 'User fields' menu item in the top navigation bar to the 'Create a field' button.

This screenshot shows the same 'Manage User Fields' dialog box, but with the 'Label' dropdown menu open. The dropdown list contains the following options: 'Multi-values selection' (highlighted), 'Single value selection', 'Text', 'Date', 'Number', and 'Web link'. The other elements of the dialog, including the 'Type' field, 'Code' field, 'Sample' field, and the 'Next', 'Clear', and 'Cancel' buttons, remain the same. A blue arrow points from the 'Label' input field in the previous screenshot to this dropdown menu.



Appraise

User fields: allocation

The screenshot shows the '250 patent families' interface. The top bar includes tabs for '250 patent families', '0 designs', and 'Attachments (0)'. Below the top bar is a toolbar with various icons. The main table lists patent families with columns: #, Title, Publication number, 1st App. date, Applicant/Assignee, and Archive date. The table contains 5 rows of data. To the right of the table is a sidebar with tabs for 'Key Content', 'Notes (1)', 'Attachments (1)', and 'User fields'. The 'User fields' tab is active, showing a dropdown menu with options: 'Deadline for review', 'Level of priority', 'Review teams', 'Responsible group', and 'Review Notes'. A calendar widget is visible in the top right corner, showing the month of May 2017.

#	Title	Publication number	1st App. date	Applicant/Assignee	Archive date
1	Naringin and naringenin as preventive or treating agent for hepatic diseases	EP1032381	1998-03-28	KOREA INSTITU...	2016-07-11
2	Oxazolo[5,4-c]quinolin-2-one compounds as bromodomain inhibitors	CA2904364	2014-03-13	EPIGENETICS; ...	2016-07-11
3	Novel substituted bicyclic compounds as bromodomain inhibitors	CA2915622	2014-06-20	ZENITH EPIGEN...	2016-07-11
4	Substituted phenyl-2,3-benzodiazepines	CA2915419	2014-06-17	BAYER HEALTH...	2016-07-11
5	Quinazoline derivative	WO2005115993	2005-05-30	BANYU PHARM...	2016-07-11

OR

The screenshot shows the '250 patent families' interface. The top bar includes tabs for '250 patent families', '0 designs', and 'Attachments (0)'. Below the top bar is a toolbar with various icons. The main table lists patent families with columns: #, Title, Publication number, 1st App. date, Applicant/Assignee, and Archive date. The table contains 5 rows of data. To the right of the table is a sidebar with tabs for 'Key Content', 'Notes (1)', 'Attachments (1)', and 'User fields'. The 'User fields' tab is active, showing a dropdown menu with options: 'Deadline for review', 'Level of priority', 'Review teams', 'Responsible group', and 'Review Notes'. A calendar widget is visible in the top right corner, showing the month of May 2017.

#	Title	Publication number	1st App. date	Applicant/Assignee	Archive date
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3	Novel substituted bicyclic compounds as bromodomain inhibitors	CA2915622	2014-06-20	ZENITH EPIGEN...	2016-07-11
4	Substituted phenyl-2,3-benzodiazepines	CA2915419	2014-06-17	BAYER HEALTH...	2016-07-11
5	Quinazoline derivative	WO2005115993	2005-05-30	BANYU PHARM...	2016-07-11



Analysis

Filter

- Filter a folder or directory
- Filter is not deleted when viewing another folder



Display ▾ Filter ▾

1st App. date	Applicant/Assignee	Archive date			
2013-04-19	ABBVIE; TSUVU I	2016-07-11		★ 3	
2014-03-11	ABBVIE; TSUVU I	2016-07-11		★ 2	

Filter Wizard

Filter

Select your filter criteria

☐ Title

☐ IPC

☐ CPC

☐ ECLA, ICO

☐ US (main)

☐ Locarno (designs)

☐ Training

☐ Publication country

☐ Assignee or owner

☐ Inventor or creator

☐ Ranking

☐ Granted

☐ Since FamPat week

☐ New documents

☐ Update date

☐ Read

Assigned ▾

ARIPO ▾

Between: - ▾ and: - ▾

No ▾

No ▾

No ▾

No ▾

Apply Ok Cancel

Filter Active
when orange

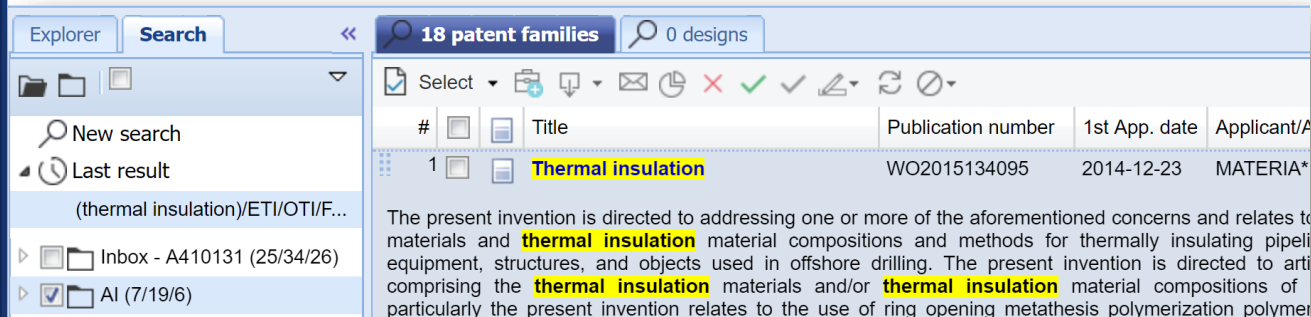
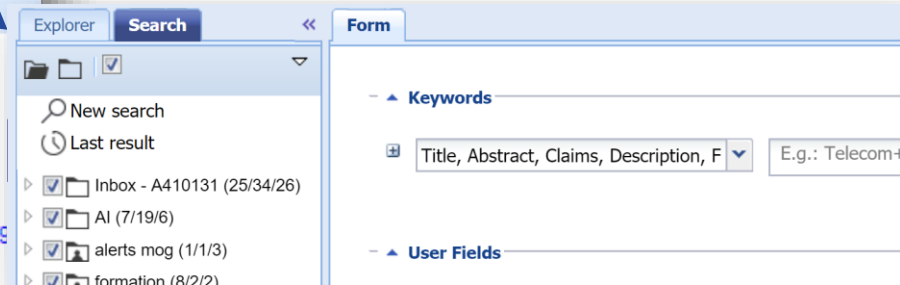
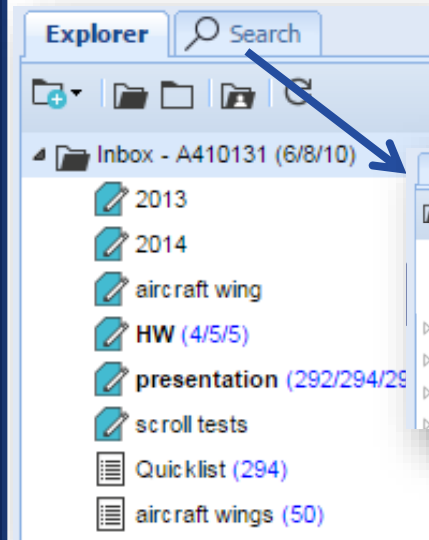
Select: 2 ▾

Display ▾ Filter ▾

#	Title	Publication number	1st App. date	Applicant/Assignee	Archive date			
1	NEW! Isoindolone derivatives	CA2870446	2013-04-19	ABBVIE; TSUVU I	2016-07-11		★ 3	

Analysis

Search



- Selecting a folder, a directory or the entire portfolio
- Different types of data usable for search.
- Blocked items and recycle bin are not searchable



Analyze

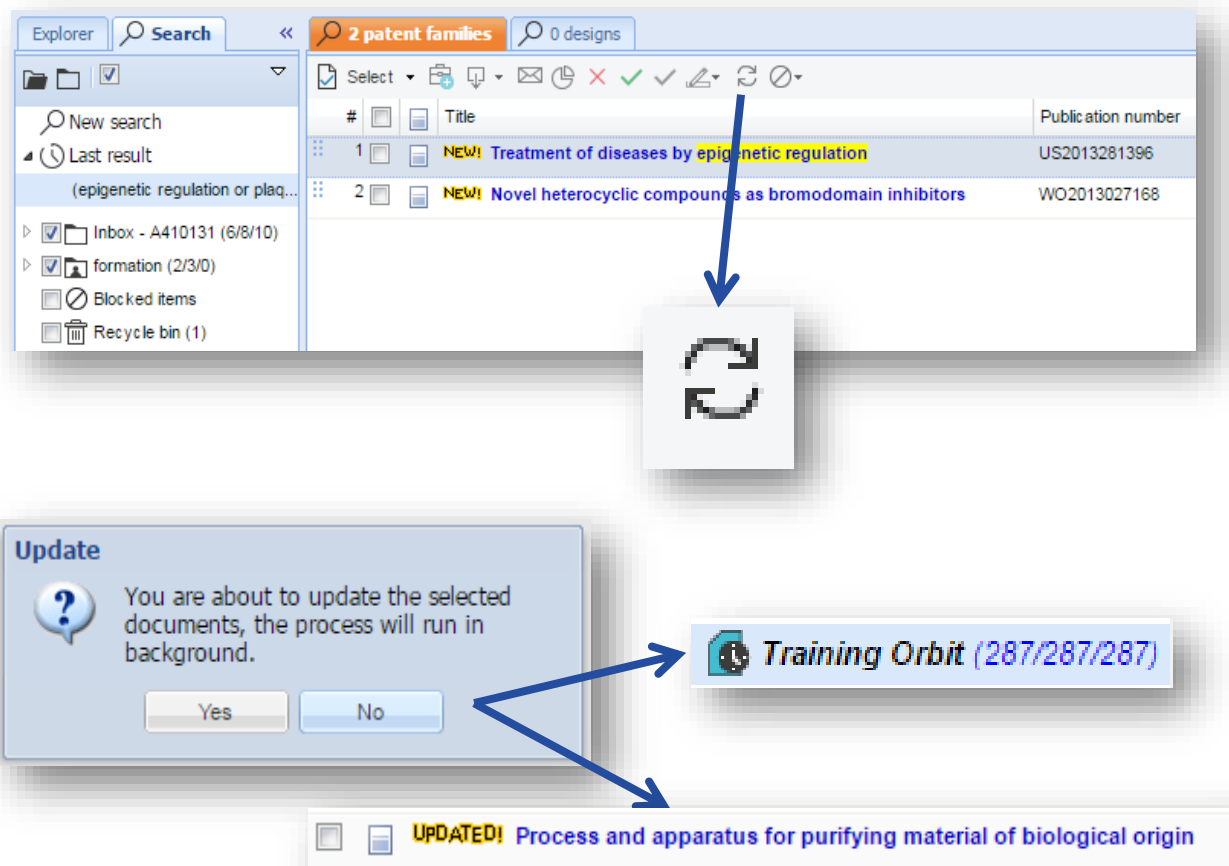


- The analysis module is available after a selection of families.
- Only saved analysis
- All graphs are available + graphs related to the analysis of the user fields



Exploit

Update



- Update of selected families
- Update the contents of the families: new members, new information etc...
- Tag “updated” is present on the family for a week



Exploit

Block

The screenshot illustrates the process of blocking patent families in a software interface. It is divided into three main sections:

- Top Section:** Shows a list of patent families. The first family, "NEW! Treatment of diseases by epigenetic regulation", is selected. A blue arrow points from this entry to the middle section.
- Middle Section:** A context menu is open, showing two options: "Block selected documents for all future updates of current workfile" and "for whole portfolio". A blue arrow points from this menu to the bottom section.
- Bottom Section:** Shows the "Blocked items (1)" list. A blue arrow points from this list to a detailed view of the blocked item, which is "A centrally managed and accessed system and method for performing data processing on multiple independent servers and datasets".

The interface includes a sidebar with "New search", "Last result", and a folder list. The top bar shows "2 patent families" and "0 designs". The bottom bar shows "1 patent families", "0 designs", and "Attachments (0)".

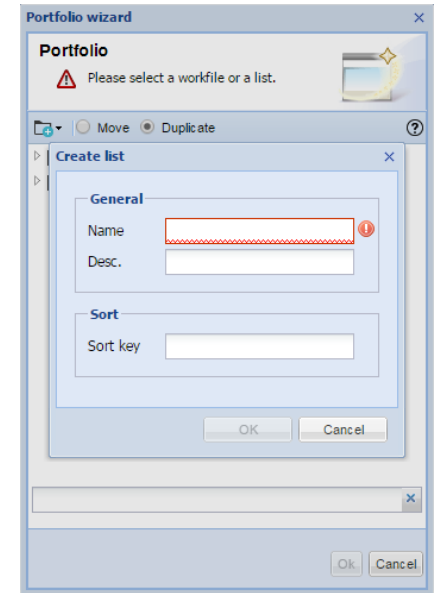
- Blocking updates (manual or via an alert) for a selection of either a workfile or all workfiles
- Families are sent to “Blocked items”.
- Possibility to restore



Save

Lists

- **Related to the search module**
- Allows to save the results of one or more searches.



- No limit on number of lists
- **Automatic update** of families when the list is opened
- **Ability to cross the contents** of a list with another question



Lists should not be confused with workfiles
Directories are the only ones that can be
shared and evaluated.

Workfiles are linked to the folders module



Save

Alerts

- ✓ Convenience
- ✓ Consistency
- ✓ Accuracy
- ✓ Time saving
- ✓ Reliability
- ✓ Collaboration




Save

Alerts

- **From the search history or the results list:** ability to create an alert



- **Automatic execution** (weekly or monthly)
- Defined monitoring codes
- Send to 23 recipients max.
- Possibility to send the results in a folder, in this case, the folder will be created in the 1st run of the alert and fed according to the chosen frequency
- Contractual limit in the number of alerts
- Stored in  **My searches**
My saved searches



How To Create Alerts?

The screenshot displays the 'Patent family searches (FamPat)' interface. On the left is a navigation menu with sections: 'Searches' (Easy search, Advanced search, Semantic search, Assignee search, Number search), 'My session' (Search history, Search results, Console), 'Past sessions' (Previous history), 'My searches' (My saved searches, My alerts), and 'My recent lists' (a2e portfolio (159)). The 'Search history' item is highlighted with an orange box. The main area shows a table of search results with columns: Search Step, Result(s), Query, Assistant, Source, and Action. Three results are listed, each with an 'Alert' link highlighted in orange in the Action column. Below the table is a search bar with the text 'Combine strategies, E.g.: (1 or 2) not 3, 1 and (phone+)' and a 'Search' button.

Search Step	Result(s)	Query	Assistant	Source	Action
3	1781	1 AND 2	Search history	FAMPAT	Show results • Modify • Save • Alert • Delete
2	1781	((GOOGLE)/PA/OPA) AND (FR OR DE)/PN	Advanced search	FAMPAT	Show results • Modify • Save • Alert • Delete
1	24777	((GOOGLE)/PA/OPA)	Advanced search	FAMPAT	Show results • Modify • Save • Alert • Delete

Combine strategies, E.g.: (1 or 2) not 3, 1 and (phone+)

Search



Creating Alerts

My alerts

General

Name: ! characters not accepted: / ; \ # " | ? :

Title: !

Subaccount: (Optional; alphanumeric characters only)

Run Alert Every: ☒ Week ☐ Month

☒ Retrieve records once they have an abstract

- ☒ in human or machine translated English
- ☐ in human English only
- ☐ in any human language

update code: (optional)



Specifying Update Codes

General

Name:

characters not accepted: / ; \ # " | ? :

Title:

Subaccount:

(Optional; alphanumeric characters only)

Run Alert Every:

☒ Week ☐ Month

☐ Retrieve records once they have an abstract

☒ in human or machine translated English

☐ in human English only

☐ in any human language

update code:

UE

Strategy

Edit strategy:

	Step #	Query	
Delete	1	(GOOGLE)/PA	Insert step
Delete	2	(FR OR DE)/UECC	Insert step
Delete	3	1 and 2	Insert step



Update Codes

Search by	Index	Search Hints	Examples
New families in the database: - Weekly - Monthly	/UP /UP4	Search the code in the following format: YYYY-WWW (week) YYYY-MM (month) YYYY+ (year)	2014-23 /UP 2014-06 /UP4 2016+ /UP
*Addition of equivalents or new publication stages: - Weekly - Monthly Country of the latest equivalent (available from week UE 2017-10)	/UE /UE4 /UECC	Search the code in the following format: YYYY-WWW (week) YYYY-MM (month) YYYY+ (year) Included in the search script, this field allows to restrict UE weekly results (see above) to new equivalents (new members in the family). With presence of the field, result will provide all families containing new equivalents. By specifying one or several country codes, result will only provide families containing new equivalents corresponding to these extension countries.	2014-23 /UE 2014-06 /UE4 UECC=YES DE /UECC (FR OR US OR JP) /UECC
Addition of citations (weekly)	/UCT	Search the code in the following format: YYYY-WWW (week) YYYY+ (year)	2014-23 /UCT

<http://static.orbit.com/orbit/help/guides/en/FamPat.pdf>



Collections

- ☐ world patents (full text & biblio) grouped by invention-based families (FamPat) ?
- ☐ world patents (full text & biblio) displayed Modify selection of FullText Sources
- ☒ 21 authorities (full text only) displayed by individual country (Full Text) ?

Multi Bases selection

Include the following full text sources for searching:

Document type:	A	U	B	Document type:	A	U	B	Document type:	A	U	B
EUROPE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	AMERICA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ASIA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EP (Europe)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	US (USA) from 1971 **	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CN (China)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AT (Austria) **	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	US (USA) from 1880 to 1973	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	IN (India)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BE (Belgium)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CA (Canada)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	JP (Japan) **	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CH (Switzerland) **	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	BR (Brazil) **	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	TH (Thailand) **	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DE (Germany)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	MIDDLE-EAST	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	TW (Taiwan)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DE (German Translations)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	IL (Israel)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	KR (Korean) **	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ES (Spain) **	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	WORLD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	RU (Russia & ex URSS) **	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FR (France)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	WO (PCT - Patent Cooperation Treaty)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
GB (Great Britain)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
Scandinavia (DK-FI-SE)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>								

Document type: *

A = Published patent applications
U = Utility models
B = Granted patents

*: A, B and U codes are the most often used by patent offices to designate respectively applications, granted and utility models. Some patent offices may use different codes to designate these documents.

None All Ok Cancel ?



Alert Format

Template

Format: Classical Acrobat (.pdf)

☐ With page break between records

Data

RSS Document

Classical Acrobat (.pdf)

☐ With short field tag format

Acrobat (.pdf)
Acrobat (.pdf)
Text (.txt)
Word (.rtf)



Alert & Workfiles

▲ Collections to survey

- ☐ world patents (full text & biblio) grouped by invention-based families (FamPat) ?
- ☒ world patents (full text & biblio) displayed by individual country (FullPat) ?
- ☐ 21 authorities (full text only) displayed by individual country (Full Text) ?

Template

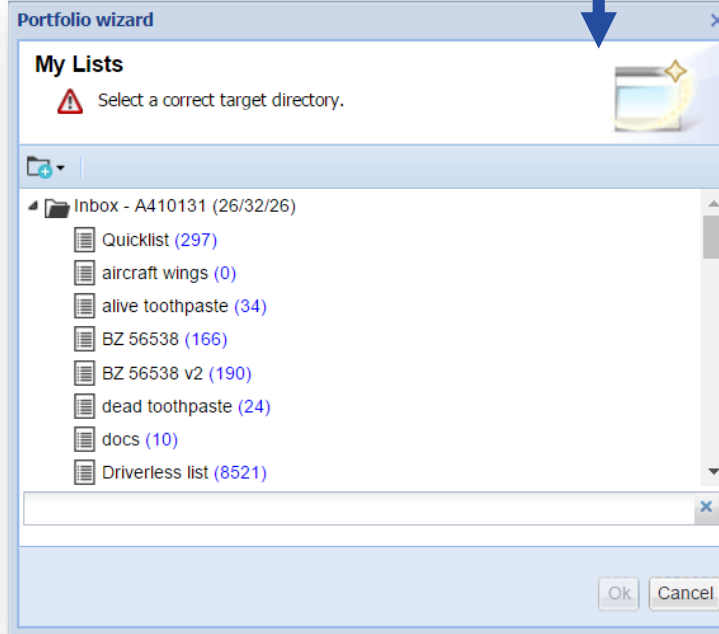
Format:

Add to workfile

Parent Directory:



Select Directory



Data

☒ Standard Format: Document ▾

☐ Custom **Edit**

Include: ☐ Key content ☐ Claims ☐ Description ☐ Legal status

☐ With images

Alerts [X]

Fields selection

Select information you want to receive in your alert results

Select : All, None

- ☐ FamPat family accession number
- ☐ FamPat family numbers and dates
- ☐ Publication number only
- ☐ PCT number
- ☐ English title - native or translation
- ☐ English title
- ☐ Title - other languages
- ☐ Priority numbers and dates
- ☐ Oldest priority date

Ok Cancel



Reception

Delivery

E-mail address(es): (Up to 23 e-mails, separated with a semicolon)

Save

Save & Execute

Clear

clients@questel.com

Orbit Intelligence Workfiles: AI/Alerts for Driverless/DRIVERLESS VEHICLES - 36 families

36 families have been added or updated in the workfile [AI/Alerts for Driverless/DRIVERLESS VEHICLES](#).

#	Title
1	NEW! Method of fulfilling orders in a warehouse with an order fulfillment area Update : 2017-19
2	NEW! Software application to request and control an autonomous vehicle service Update : 2017-19
3	NEW! Systems and methods for optimizing data gathering in a network of moving things Update : 2017-19
4	NEW! Dynamically adjusting insurance policy parameters for a self-driving vehicle Update : 2017-19
5	NEW! Information display device mounted in vehicle including detector Update : 2017-19



Manage Alert Settings


Menu

Explorer


Search history

Search results

Console

 Past sessions

Previous history

 My searches

My saved searches

My alerts

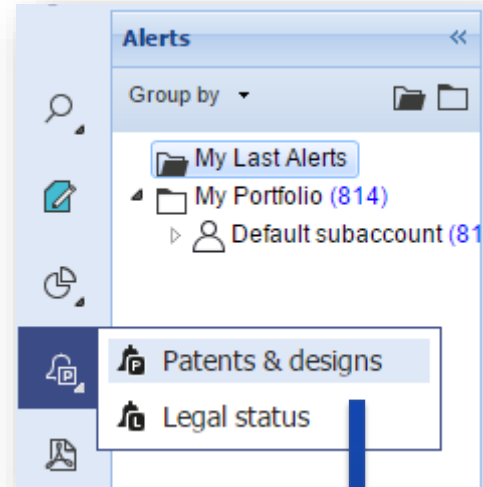
<<

My alerts

Name	Collection	Creation ...	Actions
ALERT R11	FAMPAT	2017/05/03	Execute / View / Edit / Delete
DRIVERLESS FULLPAT	FULLPAT	2017/05/10	Execute / View / Edit / Delete
DRIVERLESS VEHICLES	FAMPAT	2017/05/10	Execute / View / Edit / Delete
TEST EP	FULLTEXT	2017/04/03	Execute / View / Edit / Delete
XYZ ALERT	FAMPAT	2017/05/15	Execute / View / Edit / Delete



Manage Alert Results

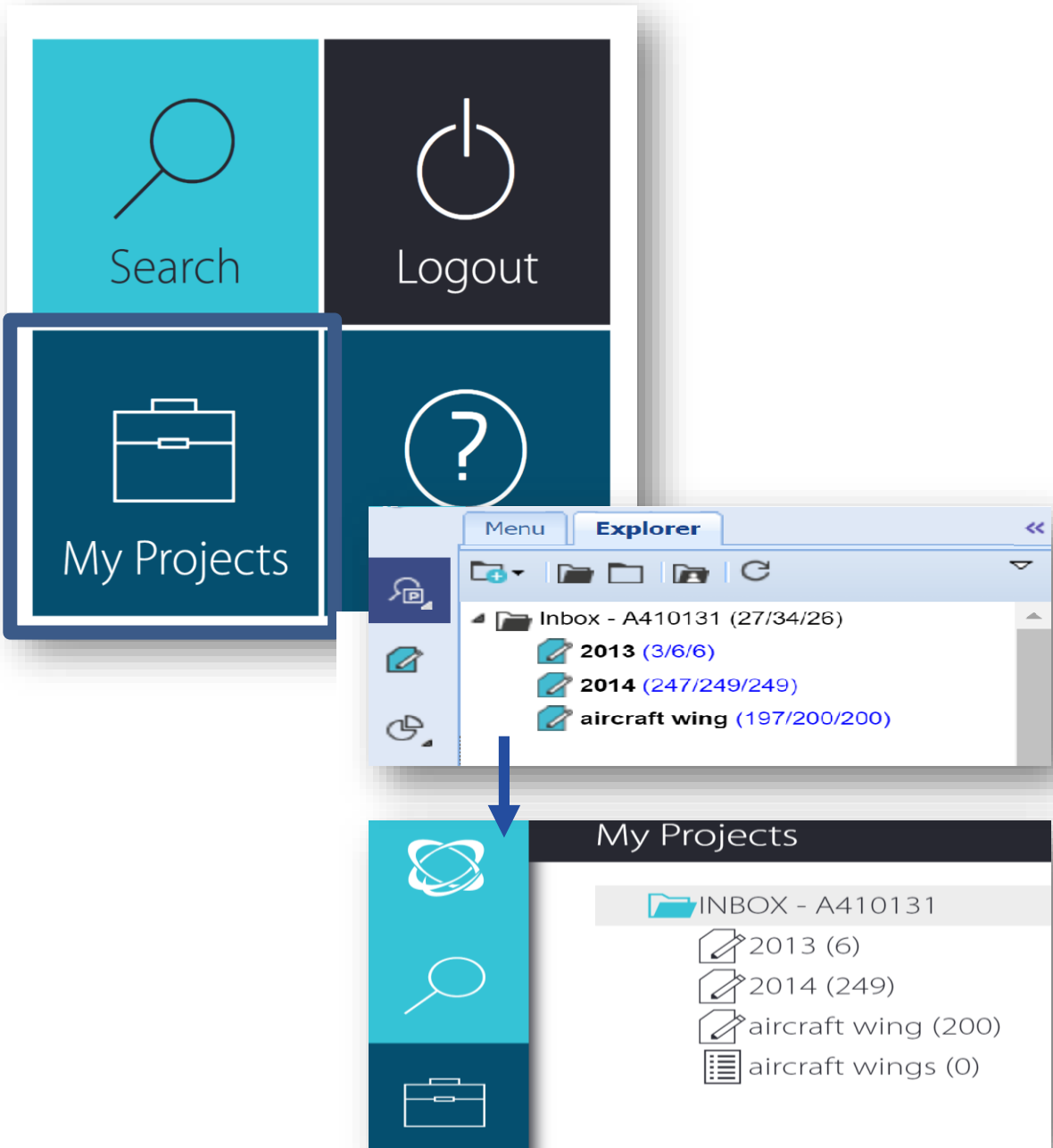


My Last Alerts							Search alerts		
subaccount	name	update	executionDate	file	title	numberOfResults	link	link	link
51586_SAVEDALERT	2015-41	2015/10/07	DESIGNS	A1	1				
ALERT R1	2017-09	2017/03/05	FAMPAT	TEST FOR EXEL	0				
ALERT R11	2017-19	2017/05/14	FAMPAT	TEST FOR PDF	0				
ALERT SANDVIK	2017-19	2017/05/14	FAMPAT	TEST FOR CATRIN	17				
ALERT TO TEST SET	2017-19	2017/05/14	FAMPAT	SETTINGS	7631				
APPLE	2015-07	2015/02/24	JPFULLB	ALERTS	11				
APPLE	2015-06	2015/02/24	JPFULLB	ALERTS	0				



Synchronise

Orbit Express



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

