Orbit, the Questel IP Portal
Workfile Guide for Readers

www.Orbit.com
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1 – Introduction

The Orbit.com portal

Orbit.com is the Questel portal for Patents and Designs & Models.

The portal is comprised of a number of modules.

1- The Search module:
- **Patents**: conduct advanced searching of patents in the FamPat, PlusPat, and FullText collections
- **Designs & Models**: conduct advanced searching of designs and models in the collections of 14 industrial property offices
- **Order a search**: order patent searches conducted by our experts

2- The Watch module:
- **Patents & Drawings**: keeps the results of the SDI or Alert profiles which you have created on Questel (via Imagination or QWEB), QPAT or Orbit. Alert results in TXT, RTF, PDF, XLS or XML file formats remain stored in the alerts portfolio for a year
- **Legal Status**: create alerts on patent legal status actions

3- The Xpress Search module: conduct simple patent searches in the FamPat collection

4- The Workfile module: store documents of your choice in workfiles which may then be analyzed and shared

5- The Downloads module:
- **Patent Copies**: download the facsimiles of patent specifications in PDF format and keep them stored for a month
- **File Histories**: order file histories from Digipat, our document services division

6- The Legal Services module:
- **Validation of European Patents**: order the validation of your European patents in each member of the EU member states through our partner Valipat
- **Legal Status**: create alerts on patent legal status actions
- **File Histories**: order file histories from our Digipat, our document services division
- **IP Litigation**: access US patent litigation records from our partner MaxVal’s service

The FamPat collection covers worldwide patent families grouped by invention and containing fulltext. The patent families cover all disciplines and consist of documents published by almost 100 national offices. Each record includes the various stages of publication of each member of the family and contains:

- First page information including: publication numbers and dates, application numbers and dates, priority numbers and dates, assignee(s), inventor(s), EPO classification codes (ECLA, ICO), US and JP classifications, title, abstract, and drawing
- US, EP and WO publications are enhanced by information extracted from the full text and searchable in three fields – patent object, advantages of the invention and disadvantages of the prior art, and independent claims
- Full text claims and descriptions are searchable for AT, BE, BR, CA, CH, CN, DE, DK, EP, ES, FI, FR, GB, IN, JP, KR, RU, SE, TW, WO, US,

This guide is devoted to the Workfile module for readers.
2 – Access to Orbit and the workfiles

The minimum recommended configuration

The recommended configuration for your computer:

- Browsers: Internet Explorer 8 or Firefox 7 or Google Chrome, with pop-up windows authorised
- Screen Resolution: 1280x1024
- Acrobat Reader 9 (including non-Latin font packs)
- Adobe Flash player
- Java 1.6

To benefit from the optimum ergonomic context for the Orbit service, your screen resolution should be set to 1280 by 1024 pixels. This screen resolution permits Orbit to display documents in a split-screen or dual window view: the text of the document in the left-hand window and the drawings or PDF specification in the right-hand window. If your screen resolution settings are less than 1280 by 1024 pixels, Orbit will automatically adapt display of the document to just one pane or window.

To verify or modify your screen resolution, consult “Properties” and “Settings” by right clicking on your desktop.
To access Orbit, enter in the address box of your browser: www.Orbit.com.

The portal is available in four languages: English, French, Japanese, and Chinese. To change the language, click on the flags available at the top right-hand part of the Orbit welcome page.

If you wish to access Orbit in HTTPS mode, click on the option: Secure version available on the left side of the top menu bar before you connect. To revert to HTTP mode, click on the Standard version option which will appear in the same place.
Login to Orbit and access to the Workfiles module

On the welcome page at the top left-hand corner Identification zone, enter your Login ID and Password and then just below on left, click on workfiles in the direct access menu. If you check the box Remember, the logon and password will be saved for future connections, though you will not be automatically logged in. The ID and password will be erased when you clear your browser’s saved passwords or form data.

If you use the Login button, you will be connected to the module defined in your user settings under the option: Default module after login.

The Subaccount box may be used for tracking billing of searches, creation of alerts and patent pdf downloads.

Depending on what your administrator has chosen, you will arrive directly in the workfile portfolio or on the Patent Information Report page.

Direct access to the portfolio

At your first connection, a message appears at the top left of the screen indicating the status of the navigation menu.

By clicking on the orange Orbit.com tab, you can navigate to other modules, access your user settings, change your password, logout, and go to the online form for customer support.

Clicking on the orange Orbit.com tab displays the list of modules available to browse through the portal.
Access via the Patent Information Report page

On this page, your administrator may have incorporated the logo of your company at the top right. They may also have chosen to replace the terms "Files" and "Directories" with other descriptions.

From here you may select the directory and workfile you wish to see.

You can also restrict what will be shown to already read documents or those not yet read. After clicking on the display button, you'll arrive at the results page displaying the list of documents corresponding to your selection.
After clicking on the Show button at the bottom of the page, you'll arrive at the results page displaying the list of documents corresponding to your selection.

In order to navigate in your portfolio, click on the directory or file name of interest in the menu on the left side of the page. To return to the Patent Information Report page, click on the home icon just to the right of the Orbit.com tab in the upper left corner of the page.

**Disconnecting**

To log out, click on the Logout link in the upper right hand corner of the workfile portfolio or Patent Information Report screens.
3 - Structure of the portfolio

The portfolio is structured in three levels: the directories, sub-directories and the workfiles. The hierarchical tree of the portfolio is displayed in the left-hand vertical bar of the screen. At the top of the tree, the two numbers next to the Workfiles heading indicate the number of documents that have not been read, followed by the total number of documents present in the portfolio. The numbers next to each directory indicate the number of workfiles each contains, and the numbers next to each workfile indicate the number of unread documents and the total number of documents contained therein.

As with the Patent Search Module, the magnifying glass icon , available in the top right corner of the screen, permits you to adjust the font size of the characters. Click on this icon to choose from one of three font sizes.

The directories and sub-directories

The directories and sub-directories are represented by this icon when they are closed and by this icon when they are open. To open a directory or sub-directory and display the list of workfiles which they contain, click on the associated arrow available to the left of the directory name. To close the directory or sub-directory, click again on this arrow. The number in parentheses to the right of the directory or sub-directory name indicates the number of the workfiles present in that directory or sub-directory. If a directory or sub-directory has been given a description by the administrator, you can view it by moving your cursor over its name.

When a directory or sub-directory name is highlighted with a blue background, documents in the workfiles contained within that directory appear in the right window in the form of a list – similar to a hitlist. These documents are grouped by workfile and each workfile document list may be displayed in turn by clicking on the name of each workfile. The right window follows the selections made in the left window.
The workfiles

The workfiles contain the FamPat family patent documents. Mousing over the name of a workfile displays the text of the description (optional field) – if one was given at the time the workfile was created.

The number in parenthesis to the right of the workfile name indicates the number of the documents present in that workfile. You may display more precise information by using the Tree counter function – a simple arrow to the right of the Refresh (dual blue curved arrow) icon. This function permits you to display the Number of documents read and/or Number of non-classified documents (see chapter 7 « Portfolio customization: User defined fields »).

The pictogram to the left of a workfile name indicates the current status of that workfile:

- : status normal, no action is taking place with this workfile
- : workfile is currently being updated but remains accessible.

When a workfile name is highlighted by blue background, only documents contained within that specific workfile appear in the right window in the form of a list.
Sorting directories and workfiles

The directories and workfiles are by default sorted in ascending alphabetic order. You may modify this order by using the Sort function available in the top menu to the right of the Refresh (dual blue curved arrow) icon. This function permits selecting the type of sort required:

- Name (default sort)
- Number of unread documents
- Number of non classified documents (see chapter 7 « Customization of portfolio »)
- Total numbers of documents
- Sort key (see below)

With each of these options, the sort is ascending. You may request a descending sort by deselecting the option Ascending.

The Sort key permits the administrator to create a personalized sort, for example a chronological sort. If the sort key option is checked in the menu, this means that the directories and folders are ordered according to custom sort criteria.

You cannot create a sort key or change the sorting key created by the administrator but you can disable sorting based on this key by selecting another option from the menu.
4 - Document lists

Display of a document list

When you select a workfile the list of documents that it contains will appear in the right window, showing 25 results per page by default. This number may be changed (200 document results is the maximum) in your User settings (see chapter 11 « User settings »).

The name of the workfile and total number of documents display in a tab at the top of the list.

If you select a directory, documents from all workfiles contained within that directory appear in the list. Documents are grouped by workfile and the name of each workfile is specified. You may hide the contents of a workfile by clicking on the minus sign (–). To unhide or return to display of contents, click on the plus sign (+).

The name of the directory and the total number of documents (all workfiles taken together) displays in the tab at the top of the list.

To view the list, use the navigation tools (page and records arrows) available at the bottom of page.

Only one publication number per family is displayed in the list of documents. This representative or preferred family member may be changed in your user settings (see chapter 11 « User settings »).

The default setting is to show the oldest member of the family but the administrator may have selected a different option.

To the left of the title, the NEW icon indicates that the document has been in your portfolio for less than 8 days. The “New” indicator is one of the selection criteria for the filter (see chapter 4 « Document lists: The filter option »).

The date the record was added to your portfolio is indicated in the column Import date as well as in the Imported field displayed in the Preview tab (see chapter 4 « Document lists: Side-by-side / split-screen view »).

If the icon says “Updated”, this indicates that the document has been updated within the last 8 days. The update of a family is done by the addition of new data such as new members, new stages of
publication, classification code changes, abstracts, and/or citations. The “Updated” indicator is also part of the filter criteria (see chapter 4 « Document lists: The filter option »).

The date the record was updated in the portfolio is indicated in the field Last update displayed in the Preview tab (see chapter 4 « Document lists: Side-by-side / split-screen view »).

In the example of the preceding page, the list displays the publication number, the earliest priority date, the title and the assignee. Two other list formats are available in the Layout menu.

The Details view displays the abstract and the first page drawing - when the drawing is available – in addition to the publication number, the earliest priority date, the title and the assignee.

The workfile that the record is in is also displayed in each record in this view.
In the **List** and **Details** views, you may add several additional columns integrating the various classification codes: IPC (international classification), ECLA (European classification), US PCL (US classification) and FI- and F-Terms (Japanese classifications). You can also add or remove the **Date** (date of earliest priority and/or date of publication) column and the week of entry of the documents into the FamPat collection. This function is available in your user preferences (see chapter 11 « User settings »).

The **Drawings** view displays a list of first page drawings as well as the preferred family publication number. Mousing over a publication number will display a tool tip with the title of the document.
In the Details and Drawings views, clicking on the drawing opens a new window which permits you to view the drawing in zoom format (by default) or to access mosaic of drawings for the publication. You may change the image viewing options in your user settings (see chapter 11 « User settings »).

If there is no first page drawing, a link provides access to the mosaic of drawings for the publication – where available. Click on the link Image unavailable, check for mosaic.
Sorting document lists

By default, the list is sorted in descending chronological order. Orbit indexes documents during each of the following events:

- Introduction of new documents
- Update of documents
- Document duplication
- Movement of documents

Documents having undergone one or another of the above actions are placed at the top of list by the date, indexing the most recent to the oldest.

This rule is also valid for the display of the list of documents in multiple folders.

When the user is displaying a directory containing many files, documents are not sorted by folder but with date indexing in all files combined.

You can change this default sort (if the list contains less than 1000 records) by sorting the list by one of the categories below:

- Title
- Assignee
- Date of 1st (earliest) priority document
- FamPat week
- Level of relevance (see Chapter 9 "Portfolio valuation: Evaluation / ranking")

To sort the list, click on the heading of the column corresponding to your sort criteria. Adding or removing columns undoes the sort.
Side by side - split screen view

The left menu is retractable by clicking on the chevron symbol << available at the top of the menu. The other chevron symbol << available in the toolbar at the far right top of the page provides access to the split screen view for displaying the list of documents in side by side windows.

In the left window, the list view is retained, with layout choice of Details, Drawings, or neither, and in the right window three tabs are offered: Preview, Image and User Fields. By default, the Preview tab is open.

- **Preview**: Displays document view on right for result selected with blue background in the list.
- The preview document provides title, first page drawing, abstract, inventor(s), assignee(s), list of family members, classifications, citations and priority data, dates of entry in and update of the workfiles of the portfolio. Various links are provided (see chapter 5 «Display of the documents: Tabs: Biblio and Image»). One may navigate up and down the document list in the left window by using the up and down arrows of the keyboard. The right window view will synchronise.
- **Image**: Displays first page drawing with zoom function
- **User fields**: Displays the list of User Fields designated for this document (see chapter 7 «Portfolio customisation»).
If the side by side split-screen windows are active, you may click on the + sign situated at top right of tool bar to see a dropdown menu of tabs available. Click on the category to add or suppress tabs.
The tabs **Claims**, **Description**, **Key Content** and **Full text** display data contained in these fields in the FamPat database. These tabs are automatically provided in the document view (see chapter 5 «Display of documents »).

The tabs **Notes** and **Attachments** provide access to notes written by users as well as access to attachments added by users.

The tabs **Drawing**, **First page** and **Complete** display of the original PDF document. These tabs are automatically provided in the document view (see chapter 5 «Display of documents »).

In the example below, the Image tab is suppressed and the Drawings tab is added.

**Printing the list**

To print the document list, use the print function available in the toolbar. By clicking on the icon, a new window opens containing the document list currently displayed. This permits you to obtain a complete print of that page. It is also possible to save the page in HTML format.
The filter

At the top right corner, with a small funnel icon, is the Filter button.

The Filter permits you to limit the display of documents to those which correspond to a number of predefined criteria. To choose a filter option, click on the Filter icon which will open a new window showing the filter options. Select a filter by checking the corresponding box and entering the specific filter criteria. You may select and use a number of filter options together. Click on the Apply button to confirm your selections or on the Ok button to validate and close the window.
• **Title:**
  To limit display of documents to those having the same keywords in the title

• **ECLA - European Classification:**
  To limit display of documents to those having the same ECLA classification code

• **US PCL (main) – United States Patent Classification:**
  To limit display of documents to those having the same main US classification class

• **IPC - International Patent Classification:**
  To limit display of documents to those having the same IPC classification class
  Note: The hyphen and forward slash characters (– and /) are not accepted. To filter using a complete code, use double quotes around the code. Example: "G06F-001/16"

• **Publication Country:**
  To limit display of documents to those having the same publication authority/country

• **Assignee:**
  To limit display of documents to those having the same assignee name. Use unique parts of the name or the complete assignee name. The filter searches both the Patent Assignee & Patent Assignee History fields.

• **Inventor:**
  To limit display of documents to those having the same inventor name. You may use unique parts of the inventor name or the complete name.

• **Ranking:**
  To limit display of documents to those having the same ranking, i.e. same number of user-assigned stars – within a possible range of 0 to 5 stars

• **Granted:**
  YES = records containing a document with a grant publication stage
  NO = records without a document with a grant publication stage

• **Since FamPat Week:**
  To limit display of documents to those having entered the FamPat database since a certain update. Enter a FamPat update code in the following format: YYYY-WW (e.g. 2010-08 = documents entered in FamPat since update week 8 of 2010).

• **New Documents:**
  YES = records that have been in the workfile for less than eight days (these will have the **NEW** icon)
  NO = records that have been in the workfile for eight days or more

• **Updated Documents:**
  YES = records having been updated manually or automatically (these will have the “UPDATED” icon)
  NO = records without updates

• **Read:**
  YES = documents having been read (these will have a green checkmark next to them in the hitlist)
  NO = unread documents

The filter applies to viewing the list as well as to the documents,

**Please Note:** The filter, when applied, will filter all workfiles. You must turn it off if you do not wish to have it applied to subsequent workfile views.
When a filter is activated, the **Filter** button is orange. Mousing over the small arrow on the right side of the button displays a text bubble indicating the nature of the filter.

Deactivate the filter by clicking on the **Filter** button, this will turn the background to neutral. Reactivate it (without changing the filter specification) by clicking on it.
5 – Display of documents

Biblio and Image tabs

To display a document in the list, click on the publication number and it will display directly in the side by side windows in the Biblio and Image tabs. If the resolution of your screen only permits a single window, only the Biblio tab will be displayed.

- The Biblio tab contains title, abstract, inventor(s), assignee(s), assignee history, legal representative(s), members of the family, priority data and the classifications.

- The Image tab contains the first page drawing.

By default, the names of fields are displayed in full (Detailed option) for better comprehension. You may display the names of the fields with the field code (Short option) by changing your settings (see chapter 12 « User settings »). The Short field code format may be useful for some types of exports.

By using the navigation tools available at bottom of the screen, you display the following or preceding documents in the same tabs. You may also use the up and down arrows of your keyboard.

The chevrons available at top left << and in middle top >> of the page permit retracting or hiding from the view the left column with family members and/or right window with Image tab, effectively moving to one window the display of the Biblio tab (or other tabs).

To return to the list of documents, click on Back to list, available in the toolbar at top left. Click on the chevrons at extreme right and left of screen to return to side by side document view.
As in the **List** and **Drawings** views, by clicking on an image, a new window will open with either the **mosaic of drawings** or **zoom** function for drawing, depending on the option defined in your user settings (see chapter 12 « User settings »). If the first page drawing is not available, you may click on the link to check for the mosaic of drawings.

By mousing over the image, you display two icons which are tools to permit you to **zoom/unzoom** image (plus/minus sign) or **collapse/uncollapse image** (upward/downward chevron)
Links available in the documents

European, US and International patent classification codes have active links to their definitions. Clicking on a given classification code will open a separate window with that specific code definition.

In the column **Links** of the table **Published As**, a number of icons are provided:
- **Orders a copy of the original PDF**
- **Opens a view of the drawing mosaic**
- **Displays a citations graph**
- **Opens a window to the patent authority register**
- **Links to information on US patent litigation**

These icons are also available in the **Preview** tab.
By clicking on the PDF icon, you have access to the complete original PDF for that publication. You may download the patent copy on the fly in a new window or add it to your patent portfolio – depending on the PDF option defined in your settings: Portfolio / On the fly (see chapter 12 « User settings »). The mosaic icon permits downloading of all drawings in a publication on the fly.

By clicking on the Graph citations icon, you obtain a visual representation of the citation links and relationships for that specific individual publication.
By default, the graph is based on the patent documents. To obtain a representation for the family, check or select the option **Graph by family**.

The reference patent appears on violet background, the cited patents on green background and the citing patents on blue background. The arrowed lines are different colors according to relevancy codes: red to the X documents; blue to the Y documents; green to the A, D, E, L, P & T documents and black to those documents not having any relevancy codes.

By default, the graph displays the patents cited in all categories of relevancy codes together in graph. You may use a filter for the graph to display a single category code or a selection of category codes by using the tool **Category** available at the top middle to right of the window. Check or select the codes to filter the view according to the desired category codes.

The relevancy category codes for cited patents are available in the search reports of the following publications: EP, WO, FR, BE, CH and NL.

- **X** - Particularly relevant if taken alone
- **Y** - Particularly relevant if combined with another document in the same family
- **A** - Technology background
- **D** - Document cited in the application
- **E** - Earlier patent document, but published on, or after, the filing date
- **L** - Document cited for other reasons
- **P** - Intermediate document
- **T** - Theory or principle underlying the invention
- **Other** - Absence of relevancy category code
By default, the graph is displayed by publication date. You may request to display the inventors (on turquoise background), ECLA codes (on violet background) and/or IPC codes (on light pink background). A mouse over the patent number displays the title and turns on yellow highlight for the classification codes and/or inventors recorded on that patent as well as for patents linked by citations.

In the example below of ECLA view, mousing over the patent number brings up a bubble with the title and yellow highlight for the citation link.
By double-clicking on a patent number, you display details and the patent in a new window. The icons available at the top left of the graph permit you to export in **GIF** or **PDF** formats.

A right click on the document permits you to **Center on this document** or to **Add citations to graph** specific to this document.
Links to **Registers** for Patent or Intellectual/Industrial Property Offices are provided for the following publications: WO, EP, US, AU, BE, CA, CH, CN, DK, EA, EE, GB, GR, IN, JP, KR, MA, NZ and PT.

**Example**: Link to Epoline Register

A link to the MaxVal service provides access to litigation information specific to US publications.
United States District Court
Eastern District of Tennessee
Knoxville Division

Comnetest Instruments Ltd.,

Plaintiff,

v.

Computational Systems Inc.,

&

CSI Technology, Inc.,

Defendants.

Case No. ____________

COMPLAINT

The Plaintiff, Comnetest Instruments Ltd., alleges as follows:

PARTIES

1. Plaintiff Comnetest Instruments Ltd. ("Comnetest") is a New Zealand company
   having a principal place of business at 28B Moorhouse Avenue, Christchurch, New Zealand.

2. Plaintiff Comnetest has a principal place of business in the United States at 6700...
5 – Display of documents

The tabs **Claims, Description, Key content** and **Full text** permit you to expand your evaluation beyond the information offered in the Biblio and Image tabs, by providing access to complete text.

**Claims and Description Tabs**

The tabs **Claims** and **Description** permit the display respectively of all the claims and the description for a document.

The display of claims and the description apply only to one member of the family, the family member number displayed in the view in the list – according to your preferred or representative family setting.

Claims and Description coverage at the present time is the following:

- US Patents from 1920
- US Applications from 2001
- PCT Applications from 1978
- European Patents from 1980
- European Applications from 1978
- Canadian Patents and Applications from 1978
- French Applications from 1920
- German Patents and Applications from 1987
- German Utility Models from 2004
- British Applications from 1920
- Austrian Applications and Utility Models from 1902
- Belgian Applications from 1925
- Swiss Patents from 1920
- Japanese Applications and Utility Models from 2006
- Spanish applications and Utility models from 1980
- Chinese applications and granted patents and utility models from 1985
- Swedish granted patents from 1994
- Danish granted patents from 1993
- Finnish granted patents from 2000
- Russian granted patents and utility models from 1924
- Brazilian applications and utility models from 1983
- Indian granted and applications from 2005
- Korean applications and utility models from 2008 (only claims)
- Taiwanese applications from 2010

When Claims and/or Description information is not available for the patent number in the list, the following messages will display: « **No Claims available for this record** » or « **No Description available for this record** ». 
Example: Tab Claims

Example: Tab Description
**Key content tab**

In the toolbar, click on the **Key content** tab which displays information extracted from the full text:

- Object of the invention
- Advantages of the invention and drawbacks of the prior art
- Independent claims

The display of key content applies to one member. The choice of family member is made from publications in the English language as below and according to the following order of priority:

- European Applications (except euro-PCT) from 1988*
- US Applications from 2001
- US Patents 1971 to 2000
- PCT Applications from 2000*

* It is possible to find older documents, back to 1980 for EP and back to 1984 for WO.

**Example** : **Key content** for EP application:

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**Full text tab**

The **Full text** tab groups together the information provided in the tabs **Biblio, Claims** and **Description**.

**Printing of the document**

To print the document correctly, use the print function available in the toolbar. A click on the button opens a new window containing the tab currently displayed (including image), which permits you to obtain a complete printout of that page. The option to **Save the page** in html format is also provided*.

* (this **Save the page** option is not available with Firefox browser)
Drawings, First page, and Complete tabs

The Drawings, First page and Complete tabs display in the right window the parts of the original document facsimile in PDF format. The viewer used will be either Acrobat Reader or Google Document viewer, depending on your user settings (see chapter 12 « User settings). Contrary to the downloading of patent copies available in the table « Published As », this function does not add the PDF files to your portfolio in Patent Copies module.
Biblio and Image tabs

On the left of the page, there is a column **My patents** with a complete list of patent numbers currently in a FamPat Family with their kind codes also known as the publication stage. To hide this list, click on sign <<.

By passing your cursor over a number, you display the definition of the publication stage or kind code.

By clicking on a number of the family, you display the specific detail for that member in the different tabs of the two windows. To return to the « **Family** » view, click on option **Patent Family** at top of list.
6 – Reading tools

Tab organization

There is no limit to the number of predefined tabs offered in default display, nor are the tabs fixed in position. You may organize tabs to optimize viewing, by adding, suppressing or moving one or more of them. By clicking on the + sign you will see a dropdown menu with a list of all possible tabs. The + sign is available at right top of page for right window and at center top of the page for left window.

To suppress a tab in the right window, deselect the tab name in the dropdown list to right. To suppress a tab in the left window, deselect tab name in the dropdown list to left. To add a tab in the right window, select tab name in the dropdown list to right. If this tab is present in the left window, it will be moved to right window. To add a tab in the left window, select tab name in the central list. If this tab is present in the right window, it will be moved to left window. The minimum number of tabs is one per display window. To return to a standard display, select option Reset to default – top option in the dropdown list.

In the example below, the Full text tab has been suppressed in left window, the Notes tab added also in left window and the Image tab been suppressed in right window.
The read / unread function

When a document has been opened (displayed), it will appear in the list of documents with a green check sign ✓ - which is automatically added to the left of the publication number.

It is also part of the Preview tab listing, listed as Read Date.

The status « Read / Unread » is one of the Filter criteria and is available for all users as an element to filter results.
Translation

Click on the **Translate** option available in the top toolbar. Select a language from the dropdown menu. A new window will open and original language fields will be translated to your language of choice.

**Note**: translations are not exportable.
Highlighting

Click on the button in top toolbar to open the search term highlighting option, available in document view and in document list view.

The highlighting parameters pertain to all the documents in a specific workfile.

The highlighting applies only to windows with FamPat text. It does not apply to text in a facsimile of the original document (PDF patent copy).

Choose a highlighting color by selecting the box corresponding to the color and then enter the term(s) you wish to have highlighted in that color.

Separate search terms with a space if you want them to be highlighted only if they are adjacent in the order you have specified.

Separate search terms with a comma if you want them highlighted both when they are used in a phrase and separately. This permits treatment of synonyms with the same color.

All the truncation operators are authorized and are advised for highlighting the same word stem with different endings and beginnings:

- + Unlimited
- ? 0 or 1 character
- # exactly 1 character

These truncation operators may be used on the left or right of at term or within a term.

The symbols ? and # may be used a number of times together; e.g. ?? = 0 to 2 characters.

Click on the Apply button to validate the highlighting which you have defined before closing the highlighting assistant window or click on button Ok to validate highlighting and close assistant window in one step.

The Clear button empties all boxes in the assistant window. The Cancel button closes the assistant window.

You have the possibility to save highlighting profiles which you may then recall and apply to a workfile of your choice at any time.

Enter a name for the profile in the box Save as and click on the disk icon to save.

Icons are available for erasing & changing profile name or for deleting profile.

The list of your highlighting profiles appears in the box My profiles.

The highlighting profiles which you have created in the Patents Search module are also accessible in the Workfiles module.
The Hide/Mark occurrences button will have an orange background when the highlighting is active for display.

### Highlighting occurrences bar

The highlighting also creates a term density and position gauge for all term occurrences in the text. This highlighting occurrences pattern appears in the vertical grey bar (in middle between windows or at right with only one window). If you have chosen to place a tab containing text in the right window, you will have a second highlighting occurrences bar at right.

By moving the cursor up and down the bar, you can view patterns of term clusters and relationships. Each dash or line of color in the bar represents an occurrence of the term in the text displayed. Click on a color element in the bar to center on that occurrence in the text.

Click on the button if you wish to deactivate the highlighting and suppress this occurrences bar. The background will return to neutral.

### Tab Keyword Statistics highlighting graph

The Keyword statistics tab provides a graph or bar chart of highlighted keywords where you may visualize the total number of occurrences by color for each member of the family, calculated on the basis of text in the complete specification.

This chart permits one to see keyword distribution and density in a family and between members. By passing the cursor over each block of color, a tooltip bubble provides the highlighted keyword, patent family member number containing keyword, and the number of occurrences.
7 – Customization of portfolio

Notes

To add a note to a document or to access existing notes, add the Notes tab to your tab toolbar. Click on the plus sign (+ -center top) to display a dropdown list of tabs available and select the Notes option.

In the Note tab access bar, you will see between parentheses the number of existing notes. To add a note, click on the link Publish note. Then complete the title and text boxes of your note. Validate by clicking OK.
Once created, the note displays, including author, date and hour of creation.

A note added to a publication will be automatically visible in all the other members of the family as well as in the family view. All notes added to a family view will also be visible for each publication of the family. Likewise the modification or deletion of notes will have an effect for the family view and each publication view.

It is possible to modify or to suppress a note by using the links Edit and Delete.

The presence of notes in a document is signaled by the icon in the list of documents. The number at the right of the icon indicates the number of notes.
Evaluation - Ranking

The Ranking tool is available on top toolbar at right of the screen when a document is displayed.

Click on the number of stars, with possible range of 1 to 5 stars, to assign a level of relevance ranking to a document, for example 3 stars ★★★★★.

You may at any point modify this ranking by adding or removing the number of stars.

The numbers of stars, signifying the assigned ranking, are visible in the list of documents.

Ranking applies to the entire family. A ranking assigned to one family publication member will be automatically propagated to all the other publications of the family and will be visible in the family view. Any ranking added to a Family view will also be propagated to each publication of the family. Likewise the modification or deletion of ranking will have an effect for the family view and each publication view.
Attachments

It is possible to insert an attachment into a workfile or a document. This function is reserved by default for the expert. The reader may access any existing attachments but may not add a new attachment or file unless the expert/administrator specifically permits a reader to do this (see chapter 12 « User settings »). Only the expert may delete attachments. All types of file formats are authorized (rtf, pdf, xml, excel, etc.). The limit is 2 Mb per file, 8 attachments per workfile and 8 attachments per document.

- To insert an attachment:

An attachment may be applied to a workfile or a document. To add attachment to workfile, click on the Attachments tab to right of workfile tab and click on the option Insert a file, indicate the complete path of the file on your computer by using the Browse button, and then click OK.

To add an attachment to a document, click on + sign in top right and select Attachments in dropdown menu. This will open the attachment tab. Click on Insert a file, indicate the complete path of the file on your computer by using the Browse button, and then click OK.

The list of attachments includes the Questel logon of author, the date and hour of insertion. In the tab entitled Attachments, the number of attachments to a document (to entire family) or to the workfile is specified between parenthesis.
You may add a brief description to a file by selecting the **Edit** option, accessible by a right click on the line with file details.

To access an attachment, open the **Attachments** tab and select the **Download** option, accessible by a right click on the line with file details.
The presence of attachments is signaled in the list of documents:

- By the number indicated in Attachments tab (for the files inserted into a workfile)
- By a paper clip symbol on the line of the document (for the files inserted into a document) accompanied by a number indicating the number of files

The Attachments tab displayed at the directory level does not permit insertion of files. It permits display of files which were inserted at the workfile level of that directory.

**To delete an attachment:**

To delete an attachment, open Attachments tab. Select option **Delete** accessible by a right click on the line with file details.
User-defined fields

Only the expert has the possibility to add up to 20 user fields to documents. These fields are created to apply to all workfiles in the portfolio. The contents of these fields are displayed by clicking on the tab **User fields**. These fields are also available in the portfolio search function. Readers are able to view the user fields but are not able to make any additions, deletions or changes.

- **To view user fields in documents:**

  The user fields appear by clicking on **User fields** tab which you may add in the right window when you using side by side windows, or in the window of your choice when you display the document. Click on + sign in top toolbar to see dropdown menu of tabs.

  Example: Document with 2 user fields: Internal Classification & Number of covered Countries

  ![Example: Document with 2 user fields](image)

  Note that the **Classification type field** is provided in User settings and in the **Analysis module**.
8 – Document analysis

Accessing the analysis tool

Developed by our partner Intellixir, this function performs elaborate statistical analyses on your selection. For most charts, it is possible to generate an Excel file or to save the image in HTML or RTF. Some graphs can be saved in PDF or GIF. This module requires an additional subscription and logon validation. Please contact your Questel Account Executive for access and pricing information.

To use the statistical analysis module, select documents (15,000 maximum) from your hitlist, and then click the Analyse button in the toolbar at the top of your screen. The results will be displayed in a new browser window. To get more information regarding information presented in the analysis screen, click on the information button available next to the analysis description line towards the top of the screen for most of the main analysis module screens.
The default display is an analysis of temporal coverage of documents by publication date, meaning the number of families published annually is represented in the form of a graph. The year of publication taken into account is the oldest member of each family.

Clicking on one of the columns in the graph will take you to a view of the publications for that year.

Clicking on one of the titles displayed in blue will open a window showing details for that document.
The Documents menu offers the following options:

- Distribution dates by publication date (PD) and priority date (PR)
- Patent country
- Originating country
- Patent country timeline
- Originating country timeline
- Patent country acceleration
- Originating country acceleration
- Patent/publication stages (kind codes)
- Citations

**Distribution date (PR)** provides the number of families by priority year represented in the form of a graph. The year of priority consideration is taken from the oldest member of each family.

Clicking on a **column** displays the list of this year’s priority documents. Clicking on a **title** will open a new window displaying details of the document.

- The **Patent country** option analyzes the number of documents by country of publication. Every country in the family is taken into account. The result provides a graph and a map.
The Originating country option analyses the number of documents by priority country. Every country in the family is taken into account. The result also provides a graph and a map. For both options, Patent country and Originating country, the columns of the graph and map countries are clickable and point to the list of families having at least one member assigned to the country clicked.

The Patent country timeline and Originating country timeline bubble diagram showing the breakdown by country and year of publication of patents relates to the analyzed result as a whole. All countries of publication of a family are taken into account. The year of publication taken into account is the oldest member of each family.

The Originating country and Patent country timeline options present the same type of bubble diagram for the countries and years of priority.
• The **Originating country acceleration** option presents a list of priority countries have the strongest increase in frequency in the batch of documents. It is, in other words, a list of candidates for emerging countries considered "weak signals". The list of countries is ranked in descending order of a coefficient of acceleration.

• **Patent country acceleration** provides the same type of analysis for filing countries.
- Patent kind codes presents a pie chart showing the distribution of the statutes of publication of these families in the parsed output. Each portion of the pie is clickable and points to the list of the documents concerned.

- Citations provides a list of families classified by descending number of citations. The number of citations is limited to the analyzed results.

Assignees menu

The Assignees menu offers the following options:

- Top assignees
- Evolution
- Appearance
- Acceleration
- Assignee timeline
- Assignee/NPN
- Assignee citations timeline
- Patents age
- Collaboration
- Self citation
- Citations map
- Grouping

Note: Individuals who are both applicant and inventor are excluded from the analysis on applicants.
The **Top assignees** option allows you to get the Top 50, modifiable to the Top 10, 20, 100 or 200.

In the 2nd part of the graph, application names with a bold black font indicate that different names of these assignees have been grouped on the same line. You can make your own combinations by using the grouping tool.

By clicking on the **name of an applicant**, you may view the applicant patent families.

Details of names grouped under the name “Sony”
Clicking on the title of a family allows you to browse details of the family in a new window.

- **Evolution** presents the evolution over time of the number of families associated with major assignees. On this diagram, the values are represented in the form of areas overlapping in alphabetical order from top to bottom.

Mousing over a specific year/assignee highlights in yellow those areas relating to the assignee as a whole and displays the number of patents in the year selected as well as the total for the assignee.
Double-clicking an assignee name will display an evolution graph for just that particular assignee.

- **Appearance** provides a list of assignees classified in chronological order of appearance in the results. It allows you to view the “story”, by observing the progressive arrival of different assignees and detect, at the bottom of the table, the last players arriving in the area.

- **Acceleration** provides a list of assignees that have the highest increase in frequency over the past two years. The list of assignees is classified according to the descending order of an acceleration factor calculated as follows: \( \text{Coefficient} = \frac{\text{maximum number of families per year} - \text{minimum number of families per year}}{\text{minimum number of families per year}} \)

- **Assignee timeline** shows the evolution over time of 15 major assignees. The size of each bubble is relative to the number of families owned by the assignee (on the y-axis). Publication year appears on the x-axis. The order of assignees is chronological from bottom to top, showing the progressive arrival of assignees in the result list.
- Assignee/NPN This page displays main assignees based on the number of publication numbers (within FamPat families). Below the initial bar graph is a listing of Assignee names with a second column showing the number of publication numbers for the assignee and a third one displaying bars having a size proportional to the number of publication numbers.

**Note:** You can have several lines corresponding to the same assignee. These assignees can be grouped by using the "Assignee/Grouping menu". Assignees in bold characters are the one that have been grouped (automatically by the system or manually).

Click on an assignee name to get a family list corresponding to the chosen assignee.

- Collaboration presents a graph showing the links between assignees from the hitlist, indicating strong collaborations between these actors. The black number located along each links indicates the number of collaborations. White numbers on a plum background at the top right of the box containing the name of an assignee indicates the number of families belonging to the assignee in the result list.

  The **Duration** tab sets the time interval (in years) that the displayed relationships must match and the **End date** tab set the end date for the window of time you are looking at.

  Set the **Occurrences** tab to Min to hide the assignees having the lowest number of families. Set to Max, this tab can hide assignees having the highest number of families.

  Set the **Co-occurrences** tab to Min to hide the assignees having the lowest number of collaborations or set it to Max to hide assignees with the highest number of collaborations.
- Citation map shows citations between applicants.
  A white number on plum background located at the top right of the box containing the name of an assignee indicates the number of families held by the assignee. Black numbers located next to the links connecting boxes indicate the number of citations between two assignees. The arrow indicates the direction of the citation. Clicking this link opens a new window presenting the documents corresponding to these citations. Adjusting the Duration and End date tabs to see the progressive appearance of citations. Occurrences tab set to Min hides the assignees having the lowest number of families. Set to Max, this tab can hide assignees having the highest number of families. Co-occurrences tab set to Min hides the assignees having the lowest number of citations. Set to Max, this tab can hide assignees having the highest number of citations.

- Assignee citations timeline displays the evolution over time of the number of documents corresponding to top 15 most cited assignees. The top 15 assignees are the one having the most citations in the sets of patents. The diagram is a bubble chart where each bubble size is calculated using the number of citations corresponding to the assignee and the year. Assignees are ordered by the first year they appear from bottom to top. You can click on a bubble to get a list of families corresponding to the chosen assignee and year. From this list, clicking on the title of a family will open a new window giving further details concerning that family.
- Patents age displays the average patent age for the top 15 assignees with the greatest number of families in the batch of documents analyzed. Each assignee is represented by a different symbol color on the graph.

How to read this graph:

If we divide the graphs into four quadrants, you can then spot:

- Top left: assignees having many patents with a low average age (main assignees still active)
- Top right: assignees having many patents with a high average age (main assignees now inactive)
- Bottom left: assignees having few patents with a low average age (less important assignees but very active)
- Bottom right: assignees having few patents with a high average age (less important assignees, inactive)
- Self citations displays the ratio for top 15 most cited assignees. The top 15 assignees are the ones having the most citations in the sets of patents analyzed.

- Grouping is a tool that allows you to consolidate names of companies or organizations. For example, a parent company and all its subsidiaries under the same assignee label.

Display All names with Name sorting or choose a filter. This option is available for the Assignees, Inventors, and Agents analyses and can be found at the end of each of their dropdown menus.
The names that appear in the list in bold with the plus sign [+] are groups that already exist by default.
To see the contents of a group, click the plus sign [+].

To create a new group, select the names that you want to group and then click Group. In the window that opens, enter a group name and then click OK.
The new group appears in the list in bold with a plus sign [+].

It is also possible to remove one or more names from a group. Click on the box next to the group and then on **Ungroup** to have all companies in the group listed separately without looking at the list first, or click on the plus sign [+] to pull up the list of group members so that you can select specific names before clicking on **Ungroup**.

The groups that you create are taken into account then in your analyses. The grouping is retained for analyses carried out on new results, except for groups proposed by default by the service which will revert to their original group format if you have separated them.

**Inventors menu**

The **Inventors** menu offers the following options:

- Top inventors
- Appearance
- Acceleration
- Collaboration
- Grouping

The analysis here works the same as it does for the Assignees, except for the grouping function which is not saved for subsequent analyses.

**Agent menu**

The **Agent** menu offers the following options:

- Top again
- Evolution
- Appearance
- Acceleration
- Agent/timeline
- Agent/NPN
- Collaboration
- Citations map
- Agent/Citations/Timeline
- Patents age
- Self citations
- Grouping

The analysis here works the same as it does for the Assignees, except for the grouping function which is not saved for subsequent analyses.
Technologies menu

The Technologies menu provides statistics on different IPC, US, ECLA, and FI classifications. For each of these classifications, analysis options are:

- IPC
- IPC sub-classes
- ECLA codes
- USC
- FIT

The analysis here works the same as it does for the Assignees, except for the grouping function which is not available.

Sample analysis using the Top ECLAs option:

A pie chart can be displayed above the table if you select only the Top 10 or Top 20 options. By clicking on a classification code, the definition of the code is provided along with a list of patents classified with this code.
Sample analysis with the IPC tag cloud option:

Sample analysis with the FI Terms timeline:

Data crossing menu

Data crossing allows you to display statistics graphs on the relationship between assignee or agent and classification, between assignee or agent and inventor, or between assignee or agent and country. The options are:

- Assignee/IPC
- Assignee/ECLA
- Assignee/US class
- Agent/IPC
- Agent/ECLA
- Agent/US class
The **Assignee/Classification** options displays a hierarchical graph showing IPC codes associated to main assignees.

The element having the most documents is automatically placed to the left of the graph. To look more closely at an element (an applicant or a targeted code) double click the tag for this item. This will bring up another window displaying further information.

To place another element (an applicant or a targeted code for example) click this item in the list on the left and then click on the “refresh” icon at the top of the page (to the right of the graph size dropdown menu).

Use **Duration** and **End date** tabs to see the progressive appearance of elements.

Use the **Occurrences** tab to filter out elements having a low number of documents (select **Min**) or having a high number of documents (select **Max**).

Use the **Cooccurrences** tab to filter out elements having low number of links (select **Min**) or having high number of links (select **Min**).
In the following example, we clicked on the IPC E02B-003/14 code in the left hand menu. The graph below shows the code that we had selected is now highlighted in the graph.

Double clicking on an IPC code will display a list of patents classified with this code and double clicking on an assignee will display a list of documents corresponding to that assignee.
The **Assignee/Inventor** option displays a graph showing assignees’ direct relationship (patents co-filing) and indirect relationship (via inventors) in the set of documents. Green boxes are for assignees, yellow boxes are for inventors.

Double clicking on a name in the menu on the left will center the graph on that name. You may need to zoom in to see it clearly. Double clicking on a name in the graph will bring up a new window listing documents related to that assignee or inventor.

The **Assignee/Classification code/Bubble** options display bubble graphs showing the top 15 classification codes used by the top 15 assignees. Each bubble size is calculated using the number of documents corresponding to the classification.
code and the assignee. You can click on a bubble to get a family list corresponding to the chosen code and assignee.

The **Assignee/PR Countries or PN Countries/Bubbles** provide a bubble diagram showing the top 15 priority (or publication) countries for the 15 major assignees. The size of the bubble is proportional to the number of families situated at the intersection of the priority (or publication) countries (on the x-axis) with assignees (on the y-axis). It is possible to click on a bubble to reach a list of corresponding documents.
Mapping (beta) menu

This menu is the beta version of our concepts analysis tool. Concepts are extracted from the full text, standardized syntactically and semantically analyzed using sophisticated proprietary tools. The options are as follows:

- Concepts tag cloud
- Concepts treemap
- Cluster view
- Concept/NPN
- Concepts/Time
- Assignee/Concept
- Assignee/Concept/NPN
- Agent/Concept/Bubble
- Agent/Concept
- Agent/Concept/NPN
- Administration

Using the Concepts tag cloud gives you a representation of the main concepts in alphabetical order. Their size and color are defined using the number of corresponding documents. Moving the mouse over a concept opens a tooltip showing the number of associated families. Clicking on a concept in the tag cloud brings up a new window listing patent families that correspond to the chosen concept.

The Concepts treemap provides a graph of 40 key concepts. Each large rectangle corresponds to a concept, and each small rectangle inside corresponds to a document (document names will display in the left corner just over the map as you mouse over the graphic). As a patent may contain several concepts, it may appear in several rectangles in the treemap. Clicking on a concept opens a new window with a list of documents containing this concept. By default the 20 top assignees are available in dropdown lists for highlighting their corresponding documents in the treemap.

It is possible to add another assignee to these dropdowns. Use the Add button to open this window. You can filter by first letter or character string contained in the name. To add the assignee, click on their name in the list and then click on Select.
The concepts **Cluster** option provides a graph of 20 key concepts. It helps you envision shared concepts between documents.

By default, the first 5 concepts are activated, but you can enable or disable them and others by using the list on the left.

Each yellow ball represents a document. A double click on this ball opens a list showing the corresponding documents in the family. Clicking on the blue title will open another window with further details for that family.

Using the button will change the display to group the concepts as circles with the number of documents contained displayed: A double click on a concept circle opens the corresponding list of documents and clicking on their titles will bring up further details for each. You can change the grouping back to the ball display by clicking on the button.
The Concept/NPN option provides a list of concepts classified by descending number of publication numbers. It highlights the concepts that produced the most patents with the average number of numbers by family and by concept.

The Concepts/time option is a bubble diagram which shows the evolution of the use of 15 key concepts over time. The size of the bubbles is relative to the number of appearances of the concept by year of publication. The order of concepts (axis) is a chronological classification, from bottom to top, showing the progressive arrival of concepts in the scanned documents. Click on each bubble to reach the corresponding list of documents.

The Assignee/Concept/Bubble option provides a diagram bubble showing the top 15 concepts used by the top 15 assignees. The size of the bubbles is proportional to the number of families located at the intersection of concepts, read on the category axis (with assignees) read on the value axis. Click on each bubble to pull up the corresponding list of documents.
**Assignee/Concept** displays a network graph showing the use of the concepts by principal assignees. Green boxes are for assignees, yellow boxes correspond to concepts.

Use the **Duration** and **End date** tabs to see the progressive appearance of collaborations. Use the **Occurrences** tab to filter out assignees/inventors having low number of documents (minimum selected) or having high number of documents (maximum selected). Use **Co-occurrences** tab to filter out assignees/inventors having low number of collaborations (minimum selected) or having high number of collaborations (maximum selected).

The **Assignee/Concept/NPN** option provides a diagram bubble to observe the evolution of the use of the principal applicants based on the concepts and the number of publications. The size of each bubble is relative number of publications by applicant and concept. The order of applicants (axis) is a chronological classification, from bottom to top, showing the progressive arrival of depositors in the base. It is possible to click on each bubble to reach the corresponding list of documents.

In the Concepts menu, the Agent analyses function the same way the Assignee ones do.

**Administration** is a tool that allows you to merge and/or hide concepts.

**Merge**: Check the boxes next to the concepts you want to merge and then click the blue **Merge** option. In the window that opens, enter the name you prefer for the grouping, and then click **OK**.
Hiding: Check the concepts you want to remove from view, and then click Hide. The hidden concepts will appear in red in the list with the reference to "hidden" in brackets and will be not taken into account by the following charts. It is possible to unmask a hidden concept.

Note: Merged and hidden concepts are not saved for analysis on new lists of results.
**Previous analysis**

Analyses are kept in Orbit for six months. To access your old analyses, click **Previous Analysis** in the left menu.

The **Description** column indicates the search script that was analyzed. The **Date** column shows the date in the format DD/MM/YYYY and analysis time. Online status indicates that the analysis is available. To view an analysis, click **Goto analysis**.

Saved analyses are static. The information displayed is current as of the time the original analysis was conducted. If relevant updates have been added to Orbit since the analysis was first run, they **will not** be incorporated into the re-display of the analysis.
9 – Searching within workfiles

Access to the Search form:

By clicking on the function **Search** available in the toolbar, a search window opens which permits you to conduct searches in your workfile portfolio.

This search is executed primarily on the documents imported from the FamPat database. You may also conduct a search of the notes, attachments and user fields. The original facsimiles of patents may not be included in the search.
Criteria and Search tool

The available criteria for searching are:

1 – Search in (textual fields of FamPat record):
   - Title
   - Title, abstract (proposed by default)
   - Title, abstract, claims
   - Abstract
   - Claims
   - Description
   - Full text

2 – User fields

3 – Classification:
   - ECLA
   - ICO
   - IPC (proposed by default)
   - US

4 – Assignee

5 – Inventor

6 – Publication, application and/or priority number

7 – Publication country/patent office

8 – Notes

9 – Attachments

10 – Date of import into the workfile

The use of truncation, operators and parenthesis is possible in all the boxes of the search window.

Truncation or wildcards are symbols that replace one or more characters, which lets you search for different variations of a term. All truncation symbols are used at the beginning, end and embedded in the words. The shortened term must be at least three characters for truncation to properly function.

<table>
<thead>
<tr>
<th>+ or *</th>
<th>Truncation replacing any number of characters</th>
<th>Bicycle-shed+ inflammatory</th>
</tr>
</thead>
<tbody>
<tr>
<td>?</td>
<td>Truncation replacing zero or one character</td>
<td>bicycle? alumin?um</td>
</tr>
<tr>
<td>#</td>
<td>Truncation replaces exactly one character</td>
<td>Polymeri #ation</td>
</tr>
</tbody>
</table>

Attention: truncation must be used to search for classification codes that are not complete. The truncation symbol # may be used where codes are auto posted to find all documents within a subclass or group; e.g. for IPC: ANN# or ANNA-NN#

Boolean operators allow you to link a number of terms in defined relationships.

<table>
<thead>
<tr>
<th>OR</th>
<th>Finds references containing at least one of the words</th>
<th>sulfur or sulphur</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td>Finds references containing all of the words</td>
<td>plutonium and isotope</td>
</tr>
<tr>
<td>NOT</td>
<td>Finds references with The first term without the second term</td>
<td>suv not vesicle</td>
</tr>
</tbody>
</table>
Selection of workfiles

To conduct a search, you need to select the workfiles of your portfolio in which you wish the search to be carried out. You may select one or more workfiles, one or more directories by selecting the box at left of name of workfile or directory. You may also select to search the entire portfolio by clicking on the box to the left below the word Search. When you select this, all boxes in portfolio tree are selected. To the right of this box are two buttons, the button with – which folds the portfolio tree to the level of directories and the button + which unfolds the portfolio tree.

Putting terms into search query boxes

● Section Search In:

Enter your search terms in the query boxes – using dropdown menu to target search. Clicking in the Keyword text box automatically expands the box to allow you to enter a long query. Also, when you enter the first character, an additional text box opens (equivalent to clicking the plus sign to the left of available drop-down menu). You can add up to five text boxes. This feature allows you to search multiple terms in different fields. Each component will be combined by the AND operator. To close these additional input lines, click the minus (-) sign.

You can also enter the terms interchangeably in uppercase or lowercase. The search engine is not case sensitive. The terms you enter will appear in your results highlighted in yellow. Each text box is associated with a new highlight color, rose for the 2nd box, grey for the 3rd box, blue for the 4th box, green for the 5th box and red for the 6th box. You can change these default colors provided or cancel the highlight by clicking the color square available to the right of each box.

You can use truncation and operators (see Truncation and Operators section).

By default, Orbit uses implied adjacency between your search terms. Meaning two words separated by a space will be searched and found as such. A comma is equivalent to the OR operator.
**User Fields section**

All user fields created are listed and searchable. User fields with **Date** values: A calendar will display. You may also limit your date search by using the **From**, **From to** or **To** options. User fields with **List**, **Dictionary** and **Classification** values: A drop-down list is available with the values as defined when creating the user fields. User Fields with **Text** and **Number** values: You can use truncation and operators (see Truncation and Operators).

**Classification section**

Select the classification in the dropdown menu. Clicking in the classification box automatically expands the box to allow you to enter a long query. Also, when you enter the first character, an additional classification box opens (equivalent to clicking the plus sign to the left of available drop-down menu). You can add one further classification box. This feature allows you to search different classification codes together either with a **AND** or **OR** operator. There is dropdown menu for **AND** **OR** option. To close additional input lines, click the minus (-) sign. Enter codes to be searched using truncation (if you searching a code that is not complete) and the Boolean operators. A space between two codes = **AND** operator, a comma = **OR** operator.

**Example**: A61K+ OR A61G+ (equivalent to A61K+,A61G)

**Others section**

For searching of **Assignees** or **Inventors**, enter the names using truncation and operators. A space between two names or between a last and first name searches the terms adjacent in the order as entered. A comma between two names = **OR** operator.

**Example**: TEXAS OR SONY (equivalent to : TEXAS,SONY)

For searching of **Publication Country / Patent Office**, enter the two character patent office code(s). A space between two codes = **AND** operator, a comma = **OR** operator.

**Example**: EP AND US (equivalent to : EP US)

For searching of **Publication number**, enter the numbers respecting the rules below:

- Always enter the country code on two characters before the publication number.
- Do not enter the status code (A, B, etc ...) with the number.
- Enter the year in four digits for the numbers including the year and are published from the year 2000.
  **Example**: US20050257307
- Enter the two-digit year for the numbers including the year that were published before 2000.
  **Example**: WO9912345
- For U.S. patents that are not Utility Patents, specify the type of document after the country code.
  Examples: USD419277 (Design Patent), USH001830 USH001830 (Statutory Invention Registration - SIR), USRE36522 (Reissue), UST109201 (Defensive Publication), USPP11184 (Plant Patent)
Characters, such as space, comma or slash, sometimes present in the document number as published, are accepted by Orbit.

To search multiple publication numbers at the same time, separate numbers by commas.

By clicking the [button to the right of the box, you access a wizard that lets you enter up to 100 publication numbers. This tool is particularly effective when you copy / paste a list of numbers from a word or excel file. Numbers can be separated by a space, a comma, a semicolon or a carriage return.

By clicking the Format button, you get your list of numbers in the Questel standardized format. All the numbers on this list are checked. You can choose to delete certain numbers by deselecting. When your list is completed, click Validate, then click the OK button to send the numbers to search wizard.

The following is a guide to formatting Application and/or Priority Numbers

**Questel standardized format: YYYYCC-NNNNNNN**

Example: Converting GB9410620 to standardized format

<table>
<thead>
<tr>
<th>GB</th>
<th>Two-letter Country Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>94</td>
<td>Year of Application (Convert to a four-digit year 94 Þ 1994)</td>
</tr>
<tr>
<td>10620</td>
<td>Application or Priority Number (Must be seven digits, fill in missing digits with zeros) 10620 &gt;</td>
</tr>
<tr>
<td>0010620</td>
<td>Final Number 1994GB-0010620</td>
</tr>
</tbody>
</table>

**Questel standardized format for WO/PCT numbers: YYYYWO-CCNNNNN**

Example: Converting PCT/DE00/02241 to standardized format

| 2000 | Year of Application or Priority |
| DE   | Designation as a WO/PCT |
| 02241 | Application or Priority Number (Must be five digits, fill in missing digits with zeros.) |
| Final Number 2000WO-DE02241 |

**Questel standardized format for US Provisional number: YYYYUS-PNNNNNNN**

Example: Converting US Provisional 60/534950, filed January 8, 2004, to standardized format

| 2004 | Year of Application or Priority |
| US   | Country Code |
| P    | Designation for Provisional Application or Priority, replaces series code 60 |
| 481952 | Application or Priority Number |
| Final Number 2004US-PS34950 YYYYUS-PNNNNNNN |

To search multiple numbers at the same time, separate numbers by commas.
● Metadata section

**User Notes and Attachments:** The contents can be searched, using truncation and operators (see Truncation and Operators section). **Note:** A space between two classifications is equivalent to the **AND** operator. A comma between two classifications is equivalent to the **OR** operator.

● Dates section

You can restrict your search to a range of **publication, application** or **priority dates**. Enter the date or dates in the format YYYY-MM-DD or use the calendar tool.

**Display of results**

The list of results displays in a tab which opens automatically to the right of the tab « Form ». The title of this tab specifies the number of results and indicates your search in command language. The name of directories and workfiles in which the documents have been found are indicated. The display of documents works in the same fashion as it does with viewing documents in workfiles. You also have all the options available in the toolbar such as Export options, Highlighting, Other Actions and Analysis.
10 - Export of documents

**Accessing the export assistant**

To export a selection of documents in a list, select the documents which you wish to export either by clicking on the option **Select all records**, select all the documents on a page by clicking the box in the column header row to the left of the Publication Number column, or by selecting individual records by clicking on the check boxes next to the records in the list. By using the navigation tools at the bottom of the page (blue arrows to move from page to page, yellow to move from record to record) you may select the documents in a number of pages and the export will apply to all those selected documents. The export function is limited to a maximum selection of 2500 documents.

Once your selections are made, click on the **Export** function available in the toolbar at the top of the page and choose the type of file format.

Another window will open which will provide a range of options.
Export templates and data formats

- With the PDF or RTF exports, you have a choice between the First Page like and Classic templates.

1 - The First Page like template gives you a document display that looks similar to the first page of a patent specification.

Data extracted: First page like includes title, publication number and date, priority number and date, application number and date, FamPat family information, assignee, inventor, classifications, abstract and the first page drawing.

You may opt to have search terms highlighted.

The following data may also be included:

- Complementary FamPat information: Key info, description, claims, citations
- User data: fields, notes, ranking (RANK = number of stars)
- Dates generated by Orbit: Date the record was first read (DREAD), date of import into the workfile (DPEXM), last date the record was updated in the workfile (DUPDATE)
- The name of the directory and file

2 - The Classical template allows you to export selected documents without a predefined layout. You will have the choice between Complete or Custom field exports. With both options you can include search term highlighting and a page break between documents.

Data extracted: Complete, exports all the bibliographic information, with the description and claims.

Note: Citations are not included with the Complete export option.

The following data may also be included:

- Complementary FamPat information: First page drawing
- User data: fields, notes, ranking (RANK = number of stars)
- Dates generated by Orbit: Date the record was first read (DREAD), date of import into the workfile (DPEXM), last date the record was updated in the workfile (DUPDATE)
- The name of the directory and/or file
Data extracted: Custom, exports only the information you specify. Click on the Edit button to open a popup listing the available options. Mousing over a data title will bring up a list showing what fields are included with that selection.

In the Other input box you may enter field tags of your choice, separated by a space.

Once you have made your selections here click on the Ok button and the window will close, leaving you with the first export window. Make any additional data option selections and click on the Next button at the bottom of the page to get to the Delivery options window (see next page for details).

With the export in TXT, XLS, XLSX, CSV or XML, the file format will default to the Complete export option but you have the choice of Complete and Custom in all these formats.

- For all these exports you may include the first page drawing, user fields, notes, ranking, the date the record was first read (DREAD), date of import into the workfile (DPEXM), last date the record was update in the workfile (DUPDATE), the directory name, and the workfile name.
- Option specific to XML: Two types of DTD (Full XML or Lite XML)

With the Email (permalink) option, no options are available. You will receive an e-mail with a list of publication numbers and titles. Clicking on a number will open a new window displaying bibliographic information and the first page image.

The Bizint, Vantage Point and Intellixir exports provide compatible XML formats for Bizint and Intellixir and TXT for Vantage Point.

After making your file, template and data format selections, click on the Next button at the bottom of the box to access the Delivery options menu.
Delivery mode

You may elect to have the results exported in zipped format. This is available for all file types and is required if you have included images with TXT or full XML formats.

Two delivery methods are available:

- **Download**: Download and save exports. This option will give you a link reading “Click here to download file”. Double click to open before saving or right click and use Save Target/Save Link as.

- **Send by Email**: Results may be sent by email. The sender address cannot be modified. The receiver address, by default, is the one associated with the user ID. Other addresses may be added, separated by a semicolon. You may customize the subject line and add comments in the body of the email. The email will also contain the database name (FamPat), number of documents exported and links to download the files. The links will remain active for 30 days. Exports will be sent in the form of a link or attachment, depending on your user settings. For the large files (over 2MB), attachments will automatically be replaced by a link.

Once the delivery method is selected, click on **Finish** to complete the process or **Cancel** to abandon your request.

In either case, downloading or email, you will have links to the patent copies if you have selected PDF, RTF, XLS, or XLSX and the option “Links to original patent documents in exports & alerts” is selected in your user settings (see chapter 11 « User Settings»). First page drawings will be included with PDF and RTF exports.
Export profiles

Profiles you create will appear beneath the heading **My export profiles** at the bottom of the export format listing.

If the format used in the export will be one that is used multiple times, you may elect to save the export profile.

Export profiles are stored in the **Exports** listing under **My export profiles**. The **My export profiles** button allows you to modify a saved profile.

To save an export profile, give a name to the profile and click on the **Save** button at the bottom of the popup.
The **My export profiles** button allows you to modify or delete a saved profile.

You may click on a profile name in the dropdown menu and display a given profile. Use the buttons **Load** to make changes or **Delete** to suppress profile.
Example of export file with template First page like

Links to the original Patent copies

Links to the drawing mosaic
11 – User Settings

The **User Setting** options are accessible by clicking on the orange **Orbit.com** tab.

Readers only have access to limited **General**, **Display** and **Workfiles** options.

**General Settings**

- **My profile**
  For readers, only your first and last name may be altered in this section.

- **Exports & Alerts**
  **Links**: Opt in or out of links to patent documents in exports & alerts
  **Preferred format**: Permits to define the format (**Text** or **HTML**) of email message which is sent as well as the manner of sending a file (**With link** or **With Attachment**). For large files (over 2MB), attachments will automatically be replaced by a link.
Display Settings

- **Results**
  - **Results per page**: You can select the hitlist display 10, 25, 50, 100 or 200 results per page. By default, the number is 25. Display time is increased with 100 or 200 results per page.

- **Field Format**: You can choose the field format for tabs and hit list:
  - **Detailed (spelled out)** (by default): name field is displayed in full.
  - **Short (code)**: name field is displayed with code.
  Examples: inventor (IN), assignee (PA), english claims (ECLM).... All the field codes are available in the FamPat FactSheet.

- **Click on Image**: Two options are available when you click on image:
  - **Zoom** (by default): enlarge the picture
  - **Mosaic**: access to mosaic

- **Record display settings in FamPat collection**

- **Preferred Patent authority from which fields should be displayed**: Only concerns the workfiles module in combination with option following

- **Preferred publication from which the number should be taken for display in hitlist**.
  Three options are available for the publication number:
  - **Earliest publication** (by default): the member displayed will be the first published.
  - **Most recent publication**: the member displayed will be the most recently published.
  - **Use above list**: the member displayed will be defined by the set indicated in the “Preferred patent authority from which fields should be displayed”.

- **Patent Family Table Display Order**
  You can display the patent family table by **Ascending** (by default) or **Descending** publication dates.

- **Patent copies**

- **PDF viewer**: Here you may choose the application—Acrobat Reader or Google Document Viewer—which you prefer to use to open PDF files in the Drawings, First Page, and Complete document display tabs when viewing information at the
record level. When viewing these tabs in the preview pane from the hitlist view, Google Document Viewer is used regardless of your settings.

**Change password**

Enter your current password. Create a new password and then re-enter the new password and click on the **Confirm** button.

**Workfiles settings**

- **Include columns in workfiles hitlist**
  
  Allows changes to the view of documents in a hitlist:
  - Add supplementary columns for different classification codes (IPC, ECLA, US, & FI-FTerms)
  - Choose the type of date to display (date of publication or priority)

- **Notify me when**
  
  Permits the user to be notified by email when a **ranking** has been assigned or changed or when a **note** or **attachment** has been added.
12 – Client support

Keyboard shortcuts

Available in the main screen, shows shortcuts for navigating.

Customer service

Customer service can be reached by telephone from 9 am – 9 pm Eastern Standard Time Monday through Friday at 1-800-456-7248 or by e-mail at help@questel.com.

Incident reports

You can send us a technical incident report via e-mail should you have any issues while navigating around the site. Click on the envelope icon at the top right of the screen. Please try to include as much information as possible regarding what part of the site you were using and what you were doing when the incident occurred.
You can also contact the helpdesk by clicking on the main Orbit.com tab and selecting the Help Desk option. This will open a new window where you can fill out an online query.

Training

Questel offers a catalogue of training dedicated to the use of Orbit.com. Information on content, prices, and the training schedule is available by clicking on: http://www.questel.fr/en/customersupport/training.htm
**Contextual help buttons**

Online help is available by clicking on the help buttons (small blue round icons with question marks on them) that appear next to most fields and at the top of each page.