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IPsurvey Home

IPsurvey introduction:

IPsurvey is an online tool that you can use to monitor a technical field determined by you. Published patents and utility models from the monitored technical field, is stored in a IPsurvey database. IPsurvey is only accessible for you and those you authorize but users can by e-mail share references to external users to. Using the comment and/or tagging feature on individual references knowledge sharing is made easy. You can also search within the database for specific references using the search function.

The surveillance is performed using the search tool, we normally use in the Danish Patent and Trademark Office, for example, in the database Derwent World Patents Index (DWPI). The found references are presented in IPsurvey with bibliographic information, abstracts and drawings retrieved in the European Patent Office (EPO) Open Source database (OPS). Each reference either link to Espacenet or PVSonline (for the Danish references). By following the link to Espacenet the published documents and status information can be seen.

A short presentation of the principles of IPsurvey - follow this link [IPsurveydemo.pdf](#)

Appendix

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Activation of user profile, at first login

As a new IPsurvey user, one will receive a Welcome e-mail when one's contact person, often the Database administrator, creates the user profile.

The e-mail contains, besides the name of the contact person (1) also a link (2) - sometimes just as text, to the activation page.

When given access to several databases, a welcome e-mail per database is received. The same credentials (e-mail and password) is used for all databases. The link (2) points to the database login page - not the activation page.

To activate your user, follow these step

1. Open the invitation e-mail title "Welcome to IPsurvey"
2. Follow the link to the activation page
3. Verify the name and number, if information is missing please add
4. Do not change this setting, it is decided by your administrator
5. Create your own password, it must contain one digit number and at least 5 characters
6. Click to save and activate the user profile. You will be re-directed directly to the database
Afterwards, is it always possible to change the created password, just activate the ["Forgot password"](#) from the login page

Sample first Welcome e-mail:

Dear Sir or Madam,

You've been added as an [IPsurvey](#) user by Rasmus. To access the system please follow the link below:

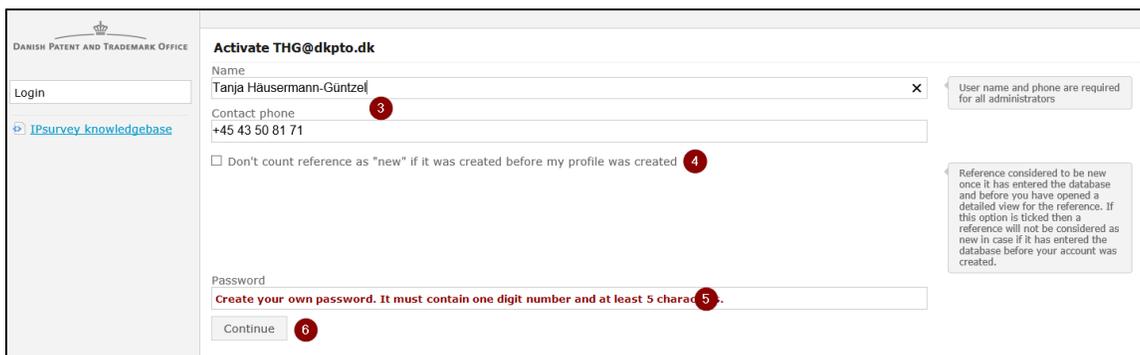
<http://ipsurvey-test.intellect.dkpto.dk/User/Activate?ticket=67bdd263-acbf-449d-af9b-6b146d0cda95> 2

Should you have any questions please contact Tanja by email thg@dkpto.dk or phone +4543508000.

Thank you and best regards,
Danish Patent and Trademark Office.

This email was automatically generated by [IPsurvey](#) system. In case of any problems or questions please send a message to ipsurvey@dkpto.dk or call on +45 43 50 80 00

Activation page:



DANISH PATENT AND TRADEMARK OFFICE

Activate THG@dkpto.dk

Name
Tanja Häusermann-Güntzel x

Contact phone
+45 43 50 81 71

Don't count reference as "new" if it was created before my profile was created

Password
Create your own password. It must contain one digit number and at least 5 characters.

Continue

User name and phone are required for all administrators

Reference considered to be new once it has entered the database and before you have opened a detailed view for the reference. If this option is ticked then a reference will not be considered as new in case if it has entered the database before your account was created.

Sample second or following Welcome e-mail:

Dear Sir or Madam,

You've been granted access to [PVS - database](#) profile in [IPsurvey](#) by Rasmus. To access company data please login with your existing credentials

<http://ipsurvey-test.intellect.dkpto.dk/User/Login?company> 2

Should you have any questions please contact Rasmus by email raf@dkpto.dk or phone [+4543508000](tel:+4543508000).

Thank you and best regards,
[Danish Patent and Trademark Office](#).

This email was automatically generated by [IPsurvey](#) system. In case of any problems or questions please send a message to ipsurvey@dkpto.dk or call on +45 43 50 80 00

Archiving and exporting unresolved references - intern

Archive and download unresolved references

Searchers and global administrators can now download unresolved references for the given period of time. To do it:

1. Open company administration menu
2. Click on the "Archives" tab



IMPORTANT:

- The archived accession number will never be resolved even if it is younger than 1 year.
- One number can only be placed to one archive. So if you creating a second archive which contains numbers from another archive then these numbers won't be added.

Create a **new archive** by providing name of the archive and two dates limiting when accession number was added to IPsurvey and Click "OK":

General information | Users and departments | Search profiles | List view defaults | Price lists | Archives

No archives have been created yet. You can one

Create new archive ✕

Name

Added after

Added before

The dates are defined like this:

- Added after: **DD-MM-YYYY** (Current year - 2 years)
- Added before: **DD-MM-YYYY** (Current year -1 year)

Example: Archive oktober 2013, for the periode April 2012 - April 2013:

- Added after: 01-04-2010
- Added before: 31-03-2012

i Comment Konstantin

The **added after** date is included and **added before** date is excluded because the comparison in database is made using 00:00 time value. For example added after: 01 Jan 2013 added before: 31 Dec 2013 reference entry date: 01 Jan 2013 at 12:35 then comparison will be performed as:

01 Jan 2013 00:00 <= 01 Jan 2013 12:35 <= 02 Jan 2013 00:00

but if reference entry date: 02 Jan 2013 09:00:

01 Jan 2013 00:00 <= 02 Jan 2013 00:00 <= 02 Jan 2013 09:00

To download the archive:

General information Users and departments Search profiles List view defaults Price lists Archives				Tools ▾
<input type="checkbox"/>	Name	Created	Creator	Total families
<input type="checkbox"/>	Unresolved Jan 2012 - Jul 2013	24-07-2013 10:57:04	Konstantin Volynskiy	347

Page 1 of 1 | 10 ▾ | View 1 - 1 of 1

1. Click on the archive name in the list view
2. choose "Open" when windows ask (to open or save the file), this opens the file in Excell
3. Copy the cell which is active in excell (ctrl+c)
4. Swich to "Internal" and "WPI" as the active database

5. Type "(or" and insert the accession numbers (ctrl+v) and type ")/AN" after the last accession number
6. List the following fields for all the found families ".li 1 an ap pr pn ica i ti ab"
7. Copy the listed fields to a word document and sort the families one at each page, include the licens heading on all pages.

[Last Update: 17/10/13

[WPI: SS 1] (or 2012-E72983,2012-E56930,2012-E56906,2012-E21399,2012-C60010,2012-E17569,2012-E15091,2012-E16990,2012-E08391,2012-E06173,2012-E08334,2012-E05670,2012-E04640,2012-D90829,2012-D76191,2012-D86224,2012-D82383,2012-D90820,2012-D79926,2012-D62688,2012-D90828,2012-D82237,2012-D77047,2012-D90821,2012-D50318,2012-D50753,2012-D45512,2012-D26690,2012-D31322,2012-D14645,2012-D22749,2012-C92843,2012-D01694,2012-B27975,2012-B08852,2012-C77881,2012-C71901,2012-C77870,2012-C71947,2012-C85750,2012-C87343,2012-A32937,2012-C51717,2012-C47030,2012-C19553,2012-C47025,2012-B79744,2011-L77787,2012-C06555,2012-B81751,2012-B81502,2012-B87033,2012-C06154,2012-B96028,2012-B53718,2012-B44223,2012-B53528,2012-B43539,2012-B46774,2012-A92261,2012-A97993,2012-B14322,2012-B14312,2012-B03122,2012-A86553,2012-A59606,2012-B14317,2012-A92520,2011-Q04600,2011-L62350,2012-A81714,2012-A60612,2012-A39721,2012-A16823,2012-A39666,2012-A25964,2012-A06632,2011-Q04471,2011-Q13820,2011-Q97234,2012-A09463,2011-Q90114,2011-Q66640,2011-Q04447,2011-Q07172,2011-Q04738,2011-Q58806,2011-Q54931,2011-Q30386,2011-P98190,2012-E24021,2012-D65707,2012-E04575,2012-D98621,2012-D65146,2012-D86237,2012-D72302,2012-D79420,2012-B89458,2012-D45482,2012-B11461,2012-D40594,2012-D10843,2012-B42111,2012-C96626,2012-B94837,2012-C51541,2012-C71043,2012-B94833)/an

Results in WPI 109

[SS 2] .li 1 an ap pr pn ica i ti ab

1/109 © WPI / Thomson

AN - 2012-D65707

AP - CN20101255870 20100818

PR - CN20101255870 20100818

PN - **CN102372095** A 20120314 DW201228

ICAI - B65B1/04; B65B37/00; B65B43/48; B65B43/52; B67B7/14

TI - Automatic medicine dispensing method, involves arranging liquid medicine bottle on machine frame, and sealing medicine cup by sealing mechanism, where discharging mechanism is utilized to move medicine bottle

AB - NOVELTY :
The method involves providing raw material into concentrated granular Chinese medicine. A liquid medicine bottle is arranged on a machine frame. A command and a control chain are received by an automatic machine. A bottle cover is matched with a bottle opening device of a rack. A cup assembly is connected to a medicine cup that is connected to a conveyor belt. A discharging mechanism is utilized to move the medicine bottle by a stepping motor. A sealing mechanism is utilized for sealing the medicine cup.

- DETAILED DESCRIPTION :
An INDEPENDENT CLAIM is also included for an automatic medicine dispensing machine comprising a discharging mechanism.

- USE :
Method for dispensing automatic medicine.

- ADVANTAGE :
The method enables ensuring mechanical automatic program, making the loading speed fast, saving time and labor, and avoiding cross infection medicine. The method allows ensuring cleanliness of the medicine, and detaching and maintaining the machine in easy and convenient manner.

- DESCRIPTION OF DRAWINGS :
The drawing shows a front view of an automatic medicine dispensing machine.

Example file ready to printout before it is send to the client: [Zealand_unresolved_2012-2013.pdf](#)

To delete an existing archive, mark the archive(s) in the list and choose "Delete archive" from the tools menu.

Comment from Konstantin:

The archive feature is made where you can say to IPsurvey not to resolve families even if they are younger than 1 year, just by defining the date range.

There are couple of scenarios where it can be useful:

1. You can choose shorter cycles for sending the unresolved families. In this case IPsurvey will never resolve the archived families.
2. When company has stopped with IPsurvey then all their families can be archived and send as a hardcopy.

Creating a new user

New users is to be created by the local administrator from the <Administration> menu tap <Users and departments>.

Minimum information needed to create a user:

- E-mail

- Users name, required for administrators
- Contact phone number, required for administrators
- Role in IPsurvey (Local administrator, Local user, Read only user)

Optional settings:

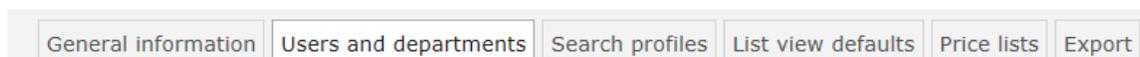
- Don't count reference as "new" if it was created before my profile was created

When an user is created in an existing database, all references are considered to be new for this user as they have not been viewed or opened in detailed view yet.

When ticked the "Don't count references.." box all references are marked as viewed for this user, whereas references entering the database after the users creation date are displayed as new.

New user pop-up dialog box

Administration menu taps



Danish Patent and Trademark Office (patent)

Here you get an overview of company's structure. IPsurvey groups search results by departments and use assigned to. Please make sure that all your users relate to one or several departments.

Danskepatent ▾  

US_filter ▾  

Orphans ▾



Desktop sharing with Mikogo

DKPTO/NPI uses the program Mikogo e.g. when presenting IPsurvey or to support a user typical an administrator, via a remote desktop session.

- User requirement for the HTML viewer:
- Invitation to a Mikogo session:
- How to join a session:
- Duing a session:

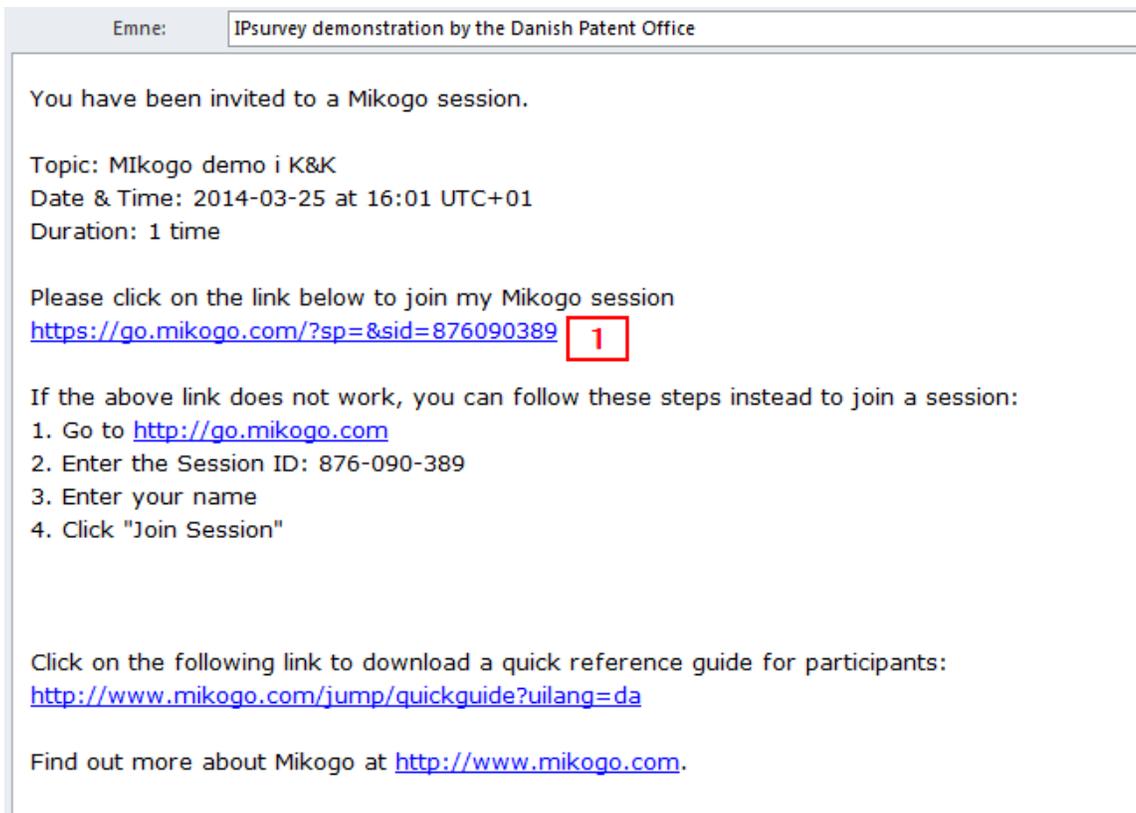
FAQ

User requirement for the HTML viewer:

A internet connection, a phone (conference phone if many user are sitting in the same room) and a browser. **No installation or download** is required when using the HTML viewer to join the session. ActiveX, Java, and Flash are **not** required and the HTML viewer works seamlessly with Windows, Mac and Linux computers and mobile devices. (Participant Reference Guide and Security Document).

Invitation to a Mikogo session:

The user(s) get an e-mail invitation to a Mikogo session. The e-mail contains information about date/time and expected duration of the session. By following the link (1) in the mail you are forwarded to the Mikogo webpage, see below.



How to join a session:

A new browser opens with the Session Login screen, please follow step 1-2 to join a session:

1. Enter the name of the user joining the session, please be aware that the name entered will be visible to other users joining the same session and for the presenter.
2. Click on link "For joining view-only" to avoid software download and temporary installation, softly after the connection will be established

Join Session

Enter session ID and name of participant

Please enter the 9-digit session ID from your meeting organizer.

316-513-371

Tanja

JOIN

OR

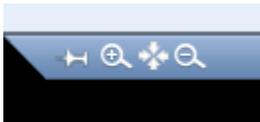
Click here to join without downloading

JOIN VIA BROWSER

For view-only webinars or presentations. No downloads, no plug-ins. The session will load directly through your web browser.

During a session:

The screen size (zoom ration) can be changed by clicking on the magnifying glass icon in the remote desktop top bar.



If the connection is lost during a session and the browsers is refreshed, because of the security level the session is "locked" and the presenter needs to "unlock" it while the browser refreshes.



To leave a session just close the browser or the remote desktop top bar.

END

Detail view for local user

A local user have the following field and information in detailed view:

Export one or more references as PDF

The detailed view for at least one selected reference can easily be exported to PDF and optionally distributed by email to recipients both with and without access to your IPsurvey database.

In the list view, select the relevant reference(s) and open the "Tools" menu and select the "Export selected reference(s) to PDF".

The reference(s) is created in PDF and will be opened in a new browser window named "PDF view". From here the Adobe download feature is used to name and save the PDF locally.

Just hover the mouse over the page to display the Adobe menu bar and choose where to save the file, as standard it is named "ExportToPDF.pdf"



Export references as PDF and distribute them by email

The detailed view for at least one selected reference can easily be exported to PDF and distributed by email to recipients both with and without access to your IPsurvey database.

In the list view, select the relevant reference(s) and either press "E" to email them or open the "Tools" menu and

select the "Email selected reference(s) (E)".

Reference number	Title	Abstract	Copy selected reference(s) to department (C)
<input type="checkbox"/> EP2108083.A2 Abstract from WO2008089765.A2	VERSTÄRKTE SCHAUFEL FÜR EINE WINDTURBINE	Taken from WO2008089765.A2 The invention introduces a reinforcement of a box girder of a wind turbine blade. The reinforcement connects the corners diagonally opposite inside the girder, and fixes them in relation to each other. The reinforcement increases the blade's resistance to overall collapse. The reinforcement consists of one or more individual elements, such as rods or plates.	<input type="checkbox"/> Delete selected reference(s) (D) <input type="checkbox"/> Tag selected reference(s) (T) <input type="checkbox"/> Untag selected reference(s) <input type="checkbox"/> Mark selected reference(s) as viewed (V) <input type="checkbox"/> Mark selected reference(s) as not viewed <input type="checkbox"/> Email selected reference(s) (E) <input type="checkbox"/> Export selected reference(s) to PDF <input type="checkbox"/> Print selected reference(s) (P) Show/hide columns
<input type="checkbox"/> EP1238581.A3 Abstract from WO2008071195.A2	Viehputzmaschine	A cleaning device for livestock, in particular for cattle provided with a foot-cleaning device comprising several rows of brushes (3). Said brushes are arranged both with their central axes parallel to the right angles thereto. Of the rows of brushes arranged behind one another at least two rows follow in succession which are staggered such that said two rows of brushes arranged behind one another share a common central axis. Next to the aisle there are sprayers (14), which during use are directed at the feet of the cattle. Near the end of the aisle a disinfecting device is positioned for the feet of the cattle. Said device comprises a grid under which upward directed sprayer members are provided and/or next to the sprayer members are arranged directed at right angles thereto. The foot-cleaning device comprises a guiding device also comprising a hide-brushing device (9) for the cattle and a downward directed device for an insecticide. <IMAGE>	<input type="checkbox"/>
<input type="checkbox"/> EP2094967.A2 Abstract from WO2008071195.A2	VERSTÄRKTES AERODYNAMISCHES PROFIL	Taken from WO2008071195.A2 The present invention relates to the prevention of deformations in an aerodynamic profile caused by lack of resistance to the bending moment forces that are created when such a profile is loaded in operation. More	<input type="checkbox"/> 14-12-2007 02-09-2009

A popup window opens with the following fields:

- Recipient(s): recent used recipients will be saved and suggested next time you email references
- Subject: recent used subjects will be saved and suggested next time you email references
- Message

AND METHOD FOR TREATING WASTEWATER OF POLYMERIZED TONER the polymerized toner are hardly decomposable wastewater. CONSTITUT

Email selected references

Your are emailing 2 reference(s), please enter one or several message.

Recipients

thg@dkpto.dk x Add a recipient

Press ENTER or TAB after each recipient

Subject

FYI possible new patent

Message

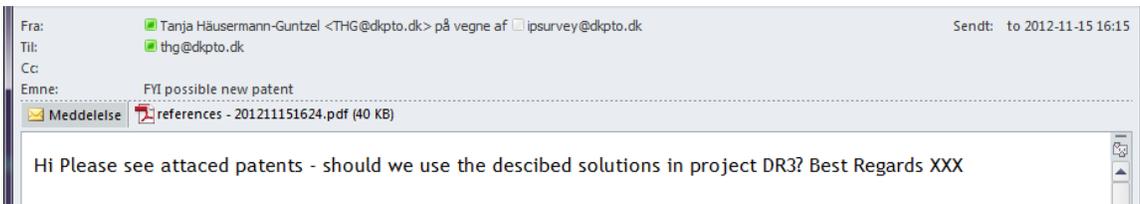
Hi

Please see attached patents - should we use the described solution

Best Regards
XXX

gastrodin is released after preparation is applicable

Enter recipients, subject and message and click "OK". The selected references will be sent to all the recipients as an attached PDF file. The email is sent on behalf of IPsurvey@dkpto.dk using the login user's email thg@dkpto.dk (see heading below).



Release 2.2.5

Release 2.4.5

Release 2.5.1

For local administrators

For local users

Searchers - Global admins

For local administrators

Collaboration on references in departments

If users of the same department wants to collaborate on processing the references this can easily be done by synchronizing the processed or "not-viewed" references.

Likewise when an user have to take over the processing of a department from another user e.g. which have left the company.

The <process> button is searchable and visible in detailed view (see below) as part of the bibliographic information. By clicking on the <process> button a company user can mark a reference as **processed**.

In the "Processed by" list local administrators and users sharing at least one department with the specific user, will see the name(s) of those who has activated the <process> button for the reference. Users can always cancel the "Process" action by clicking on the "cancel" link.

Method for controlling pressure of anesthesia machine and breathing

Details

(21) Application: CN102397608.A
(73) Applicant: BEIJING AEROSPACE CHANGFENG CO LTD
(72) Inventor: DIAO JUN
(41) Publication date: 04-04-2012
Date of entry: 25-08-2012
Processed by: Konstantin Volynskiy ([cancel](#))

<Process> button in detailed view

CN102397608.A

Method for controlling pressure of anesthesia machine and bre

Details

(21) Application: CN102397608.A
(73) Applicant: BEIJING AEROSPACE CHANGFENG CO LTD
(72) Inventor: DIAO JUN
(41) Publication date: 04-04-2012
Date of entry: 25-08-2012
Processed by: ✓ process

Example of collaboration

▾ Users in same department - how to synchronize references

How to synchronize processed references between two users sharing a department

The "Advanced search" field <Processed by> is used for searching and synchronization.

The <Processed by> field can be searched by several parameters (see below) and the search is automatically limited to **user who shares the same department(s)** with the current logged-in user. The department limitation is not applied for local administrators which are able to search across all departments in the database.

<p>You can search by several parameters</p> <ol style="list-style-type: none">1. no-one : Finds all references which no user has marked as "processed"2. user in company: Finds all references which were marked as "processed" by at least one user3. user in department: Finds all references which were marked as "processed" by at least one user from the selected user's department(s)4. specific user: Finds all references which were marked as "processed" by a specific user(s)	
--	--

When the <Advance search form> is filled, it is recommend to save the search it as a "saved search". The name chosen when saving the search, will be visible at the dashboard.

Processed by:

 or

Saved searches is added to the dashboard section "Saved filters" and automatically searched on logon and when manually refreshed (refresh).

Dashboard - Patent- og Varemærkestyrelsen

References in departments ([refresh](#)) ? -

IT	24
Mobile devices	78
Patent	56
Test	80
test2	17



Saved filters ([refresh](#)) ?

noabstract	0
-------------------	-------------------

Example of identifying inactive users

▼ How to identify inactive users, especially for local administrators

How to identify inactive users, especially for local administrators

Inactive users is defined "as users not processing references by activating the <Process> button". If no references is tagged, the user is defined as inactive..

The <Processed by> <Specific user> parameter finds all references which were marked as "processed" by the specific user(s).

The "Advanced search" with the following search parameters will identify inactive users:

1. <Date of IPsurvey entry>: date range for the period
2. <Processed by> <specific user>: Check one or more users to monitor.
3. <Save>: It is recommended to save the search and e.g. add it to the summary report mail.

Date of IPsurvey entry
greater ▾ 01-07-2016 **1** ?

Publication date
greater ▾ Click to select a date ?

Filed date
greater ▾ Click to select a date ?

Applicant
enter a part of applicant's name ?

Inventor
enter a part of inventor's name ?

IPC class
enter a part of class name ?

Departments
Select options ▾ ?

Processed by:
specific user ▾ Tanja Häusermann-Güntzel **2** ?

Search or [Save](#) **3**

Improvements

Cosmetic changes to the bibliographic section in detailed view

The table below shows which fields in the bibliographic section that are changed and there new definition.

Old field name	Renamed field	New field	Definition
(21) Application:	(10) Publication number:		Can be an application, patent or utility model
(30) Priority:	(22) Filed:		Date of filing the application
Date of entry:	Date of IPsurvey entry:		The reference IPsurvey entry date

Espacenet:	Original document:		Date Link to the original document e.g. in Espacenet, if not available the link is redirected to the bibliographic information in Espacenet.
		Processed by:	The name of the company user which has marked a reference as processed

Example of the bibliographic section in detailed view

CN202044728.U [Highlight in the list view](#) 1 of 1

Carbon-fiber golf club body [print](#)

Details

(10) Publication number:	CN202044728.U	(22) Filed:	23-05-2011
(73) Applicant:	JINJI YE	Priority number(s):	CN20112165345U 20110523
(72) Inventor:	JINJI YE	Original document:	Espacenet
(41) Publication date:	23-11-2011	IPC Cl.:	A63B53/10
Date of IPsurvey entry:	11-05-2012		
Processed by:	<input checked="" type="checkbox"/> process		

Cosmetic changes to status report:

Number of newly added or updated families is now shown first in the status report:

before

123 (+11)

after

+11 (123)

The link to the search results for the saved searches is removed from the status report

It was decided to remove the link to the search results from the status report because the result often was outdated as the saved searches usually operates with dynamic parameters such as "contains a tag" or "abstract contains" which results in different search results every time the search is executed.

	Cost	New	Updated	Test search
Patent- og Varemærkestyrelsen	DKK 20000	+0 (65)	+0 (0)	75

Navigation improvements:

Navigation between references in the detailed view

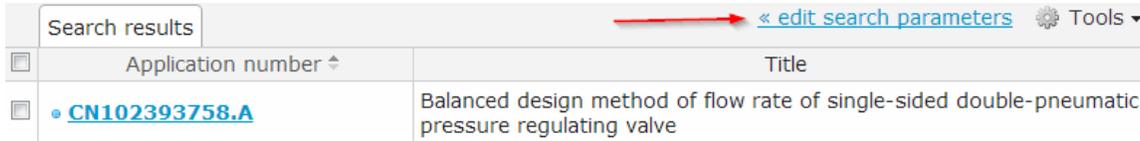
It is now possible to go to the next or previous reference from detailed view using the left and right arrow buttons on the keyboard.

Navigation between images in the detailed view

When an image is enlarged in detailed view the left and right arrow buttons are used to change between the next or previous image. Escape (Esc) closes the image and then the left and right arrows buttons are used to navigate between references.

Quick access to edit search parameters

It is now easier to edit the search parameters when viewing the search result in a list view. A new link was added:



Application number ↕	Title
• CN102393758.A	Balanced design method of flow rate of single-sided double-pneumatic pressure regulating valve

Improved traversing for "Not viewed in details" references

It is now possible to traverse forward from detailed view when viewing a list of "not viewed in details" applications:



CN102397608.A	Method for controlling pressure of anesthesia machine and breathing machine in suction valve and expiration valve cooperative control mode
	print

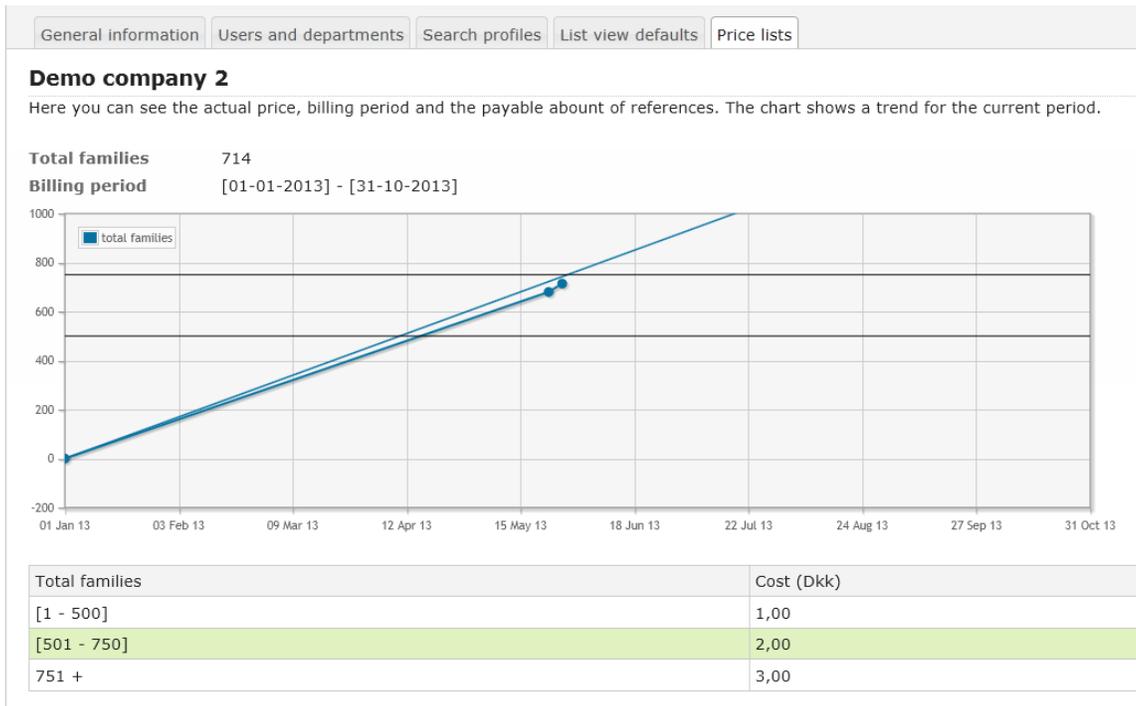
Database usage

The local administrator can get a quick overview of the database usage compared to the pricing from the dynamic graph (see below) which always shows the current number of **new families** in the database. The total number of new families added to the company's database and the corresponding billing period, which normally is one year, is stated above the graph.

Each time a family is added either by a search profile or by manually adding, the number of families for that day are displayed in the graph as a blue dot. By hover the dot with the mouse, the exact number of families added and the date will be displayed. The trend for the current billing period is displayed as a blue line.

Below the graph is the price levels as agreed upon in the contract listed, the currency is either Danish kroner (DKK) or Euro (EUR). Each price level is also displayed as a bold black line in the graph to indicate when the price level will change.

The "Price list" tab is opened from the company administration menu (which is opened from the left menu).



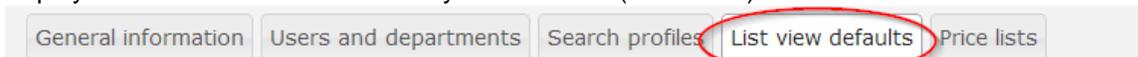
Default reference list - configuring "list view" for all company users

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The default list view is not applied to those users in the company, who have customized their list view. To reset those users with a customized list view, click on the link "Click here to reset all user settings to default"

How to configure which column(s) is part of the default reference list view:

1. Open the "List view defaults" tab from the company administration. The current default "list view" is displayed with some references from your database (see below).



Patent- og Varemærkestyrelsen

Here you can setup how the default layout for references list will look like. Setup visible columns via "Tools" [Click here to reset all user settings to default](#)

Application number ↕	Title	
• EP2453157.A2	Connection system for installation of a water-conveying device	The connection side terminal re terminal region. terminal regions and securing th
	INTERNAL RELIEF VALVE APPARATUS FOR USE WITH FLUID REGULATORS	Example intern coupled to a fir

2. The visible columns can be changed via the "Tools" menu in the right side, choose "Show/hide columns" to open the Setup columns box. The "application number" is always shown and the following columns (see

below) can be shown/hidden.

Check the relevant columns and finish with "save" to apply the changes for all users.

3. Drag and drop the columns to change their order. Click on a sortable column to change default sorting. The default list view is automatically applied to users who have not customized their list views, next time they open IPsurvey.
4. To reset the customized list view, click on the link "Click here to reset all user settings to default".

Setup columns box

Setup columns [X]

- Application number
- Title
- Abstract
- Applicant
- Inventor
- Priority number(s)
- Publication date
- Date of IPsurvey entry
- IPC class
- Drawings
- Tags
- Departments

Cancel Save

Manual insertion of reference numbers to the database

The local administrator can manually add one or more reference numbers to any of the existing search profiles in the company's database. The reference number will be retrieved from the OPS as soon as possible and the bibliographic data added to the database if it satisfies the language settings for the company. Read more about the [language filtering algorithm](#) for resolution.

How to add a reference(s) to a search profile:

A reference can be added to one of the existing search profiles:

1. Open the "Search profiles" tab from the company administration menu (which is opened from the left menu).
2. Select a search profile from the list and click on the search profile's name.
3. Scroll down to the "Manually added application" section and click on the "+ Add" button see below.
4. Insert the reference number(s) in the popup box.

Adding more than one reference number at a time, it must be as a comma-separated list of reference numbers.

The number format is [country code][document number][.kind code] - **CCNNNNNNN.KK** (where kind code is optional). Read more about [IPsurvey specific number formats](#).

Manually added applications

There are no manually added applications for this search profile. You can [+ Add](#) one.

Once the reference(s) are added in the table, IPsurvey will try to resolve them and add them to your database when they fulfill the [language filtering algorithm](#). There are several resolution steps before a reference is either added to the database or failed to, these are:

1. Steps **adding** a reference to the database:
 - a. "unresolved" - reference is queued for resolution
 - b. "family resolved" - IPsurvey has found a family for the reference
 - c. "resolved" - IPsurvey has found bibliographic data for the reference and accessible in detailed view via the hyperlink.
2. Reference **failed** to be added to the database:
 - a. "unresolved" - reference is queued for resolution
 - b. "failed" - IPsurvey has failed to find a family for the reference, after 5 attempts it stops trying and it will never be retried.

The name of the user adding the reference, the date of applying it to the database and the current resolution step are displayed in the reference list, see below.

Manually added applications ?

<input type="checkbox"/>	Reference number	Added by	Date of IPsurvey entry	Last database	Resolution
<input type="checkbox"/>	US10398717.B2	Tanja Häusermann-Güntzel	25-06-2020 14:38:40	wpi	resolved
<input type="checkbox"/>	EP2830438.B1	Tanja Häusermann-Güntzel	25-06-2020 14:49:01		unresolved

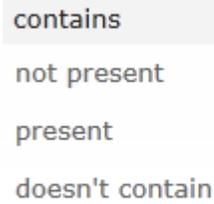
Page 1 of 1 | 10 | View 1 - 2 of 2

Search options in advance search

Search options when searching in abstracts, titles and comments

The abstract, title and comment fields all have the same set of search options, which are:

- **Contains** - search for references which contain the given keyword(s)
- **Not present** - search for references where the field is empty e.g. no abstract (for comments - search for references where there are no comments)
- **Present** - search for references where the field has a value e.g. abstract present (for comments - searches for a reference where there is at least one comment)
- **Doesn't contain**- search for references where the field does not contain the given keywords



The relevant search option is chosen in the drop down menu under the field name and as default is this field empty.

Title

contains ↕ enter keywords

Abstract

contains ↕ enter keywords

Comment

contains ↕ enter keywords

Quick access to refine the search parameters

When viewing the results of a search in list view the search parameters are easily accessible from the link in the top right corner "edit search parameters".

Search results		← edit search parameters  Tools ▾
<input type="checkbox"/>	Application number ↕	Title
<input type="checkbox"/>	• CN102393758.A	Balanced design method of flow rate of single-sided double-pneumatic pressure regulating valve

▼ Example - searching in more fields (combined search)

Searching for comment by a specific user:

1. Field <Comment>
search option "**Present**"
(1)
AND
2. Field <Departments>
select one or more departments in the drop-down menu **(2)**
Optional, depend on the usage of "Processed by" in the database.
3. Field <Processed by>
search option "**specific user**" and select one or more users in the

Simple search

Advanced search

Saved searches

The advanced search allows you to do a precise search for the results. All using 'AND' strategy.

Reference number

contains Enter a number, ex. EP2453157.A2

Title

contains enter keywords

Abstract

contains enter keywords

Comment

present enter keywords

1

Including tags

All Select options

Excluding tags

Select options

Languages

Select options

Date of IPsurvey entry

greater Click to select a date

Publication date

greater Click to select a date

Filed date

greater Click to select a date

Applicant

enter a part of applicant's name

Inventor

enter a part of inventor's name

IPC class

enter a part of class name

Departments

Enzyme additives for detergents

2

Processed by:

specific user John Doe

3

Search

or [Save](#)

For local users

Collaboration on references in departments

If users of the same department wants to collaborate on processing the references this can easily be done by synchronizing the processed or "not-viewed" references.

Likewise when an user have to take over the processing of a department from another user e.g. which have left the company.

The <process> button is searchable and visible in detailed view (see below) as part of the bibliographic information. By clicking on the <process> button a company user can mark a reference as **processed**.

In the "Processed by" list local administrators and users sharing at least one department with the specific user, will see the name(s) of those who has activated the <process> button for the reference. Users can always cancel the "Process" action by clicking on the "cancel" link.

Method for controlling pressure of anesthesia machine and breathing

Details

(21) Application: CN102397608.A
(73) Applicant: BEIJING AEROSPACE CHANGFENG CO LTD
(72) Inventor: DIAO JUN
(41) Publication date: 04-04-2012
Date of entry: 25-08-2012
Processed by: Konstantin Volynskiy ([cancel](#))

<Process> button in detailed view

CN102397608.A

Method for controlling pressure of anesthesia machine and breathing

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(41) Publication date: 04-04-2012
Date of entry: 25-08-2012
Processed by: ✓ process

Example of collaboration

Users in same department - how to synchronize references

How to synchronize processed references between two users sharing a department

The "Advanced search" field <Processed by> is used for searching and synchronization.

The <Processed by> field can be searched by several parameters (see below) and the search is automatically limited to **user who shares the same department(s)** with the current logged-in user. The department limitation is not applied for local administrators which are able to search across all departments in the database.

<p>You can search by several parameters</p> <ol style="list-style-type: none">1. no-one : Finds all references which no user has marked as "processed"2. user in company: Finds all references which were marked as "processed" by at least one user3. user in department: Finds all references which were marked as "processed" by at least one user from the selected user's department(s)4. specific user: Finds all references which were marked as "processed" by a specific user(s)	
--	--

When the <Advance search form> is filled, it is recommend to save the search it as a "saved search". The name chosen when saving the search, will be visible at the dashboard.

Processed by:

ignore

Search or [Save](#)

Saved searches is added to the dashboard section "Saved filters" and automatically searched on logon and when manually refreshed (refresh).

References in departments ([refresh](#)) ? -

IT	24
Mobile devices	78
Patent	56
Test	80
test2	17



Saved filters ([refresh](#)) ?

noabstract	0
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Example of identifying inactive users

▼ [How to identify inactive users, especially for local administrators](#)

How to identify inactive users, especially for local administrators

Inactive users is defined "as users not processing references by activating the <Process> button". If no references is tagged, the user is defined as inactive..

The <Processed by> <Specific user> parameter finds all references which were marked as "processed" by the specific user(s).

The "Advanced search" with the following search parameters will identify inactive users:

1. <Date of IPsurvey entry>: date range for the period
2. <Processed by> <specific user>: Check one or more users to monitor.
3. <Save>: It is recommended to save the search and e.g. add it to the summary report mail.

Date of IPsurvey entry
greater ▾ 01-07-2016 **1** ?

Publication date
greater ▾ Click to select a date ?

Filed date
greater ▾ Click to select a date ?

Applicant
enter a part of applicant's name ?

Inventor
enter a part of inventor's name ?

IPC class
enter a part of class name ?

Departments
Select options ▾ ?

Processed by:
specific user ▾ Tanja Häusermann-Güntzel **2** ▾ ?

Search or [Save](#) **3**

Improvements

Cosmetic changes to the bibliographic section in detailed view

The table below shows which fields in the bibliographic section that are changed and there new definition.

Old field name	Renamed field	New field	Definition
(21) Application:	(10) Publication number:		Can be an application, patent or utility model
(30) Priority:	(22) Filed:		Date of filing the application
Date of entry:	Date of IPsurvey entry:		The reference IPsurvey entry date
Espacenet:	Original document:		Date Link to the original document e.g. in Espacenet, if not available the link is redirected to the bibliographic information in Espacenet.
		Processed by:	The name of the company user which has marked a reference as processed

Example of the bibliographic section in detailed view

CN202044728.U [← Highlight in the list view](#) 1 of 1

Carbon-fiber golf club body print

Details

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Number of newly added or updated families is now shown first in the status report:

before

123 (+11)

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The link to the search results for the saved searches is removed from the status report

It was decided to remove the link to the search results from the status report because the result often was outdated as the saved searches usually operates with dynamic parameters such as "contains a tag" or "abstract contains" which results in different search results every time the search is executed.

	Cost	New	Updated	Test search
Patent- og Varemærkestyrelsen	DKK 20000	+0 (65)	+0 (0)	75

Navigation improvements:

Navigation between references in the detailed view

It is now possible to go to the next or previous reference from detailed view using the left and right arrow buttons on the keyboard.

Navigation between images in the detailed view

When an image is enlarged in detailed view the left and right arrow buttons are used to change between the next or previous image. Escape (Esc) closes the image and then the left and right arrows buttons are used to navigate between references.

Quick access to edit search parameters

It is now easier to edit the search parameters when viewing the search result in a list view. A new link was added:

Search results [← edit search parameters](#) Tools ▾

<input type="checkbox"/>	Application number ↕	Title
<input type="checkbox"/>	CN102393758.A	Balanced design method of flow rate of single-sided double-pneumatic pressure regulating valve

Improved traversing for "Not viewed in details" references

It is now possible to traverse forward from detailed view when viewing a list of "not viewed in details" applications:



Search options in advance search

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The abstract, title and comment fields all have the same set of search options, which are:

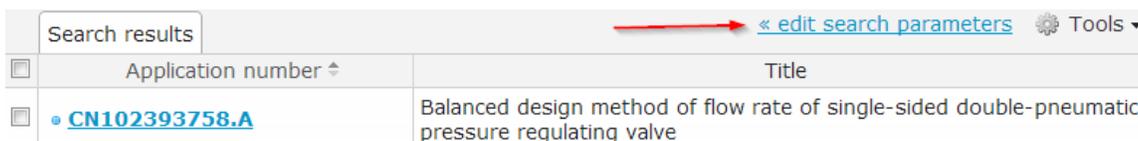
<ul style="list-style-type: none">• Contains - search for references which contain the given keyword(s)• Not present - search for references where the field is empty e.g. no abstract (for comments - search for references where there are <u>no</u> comments)• Present - search for references where the field has a value e.g. abstract present (for comments - searches for a reference where there is <u>at least</u> one comment)• Doesn't contain - search for references where the field does not contain the given keywords	
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The relevant search option is chosen in the drop down menu under the field name and as default is this field empty.

Title	contains	↕	enter keywords
Abstract	contains	↕	enter keywords
Comment	contains	↕	enter keywords

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Title

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Abstract

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Including tags

All Select options

Excluding tags

Select options

Languages

Select options

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Method for controlling pressure of anesthesia machine and breathing

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enter a part of class name ?

Departments
Select options ▾ ?

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specific user ▾ Tanja Häusermann-Güntzel **2** ▾ ?

or [Save](#) **3**

Database usage

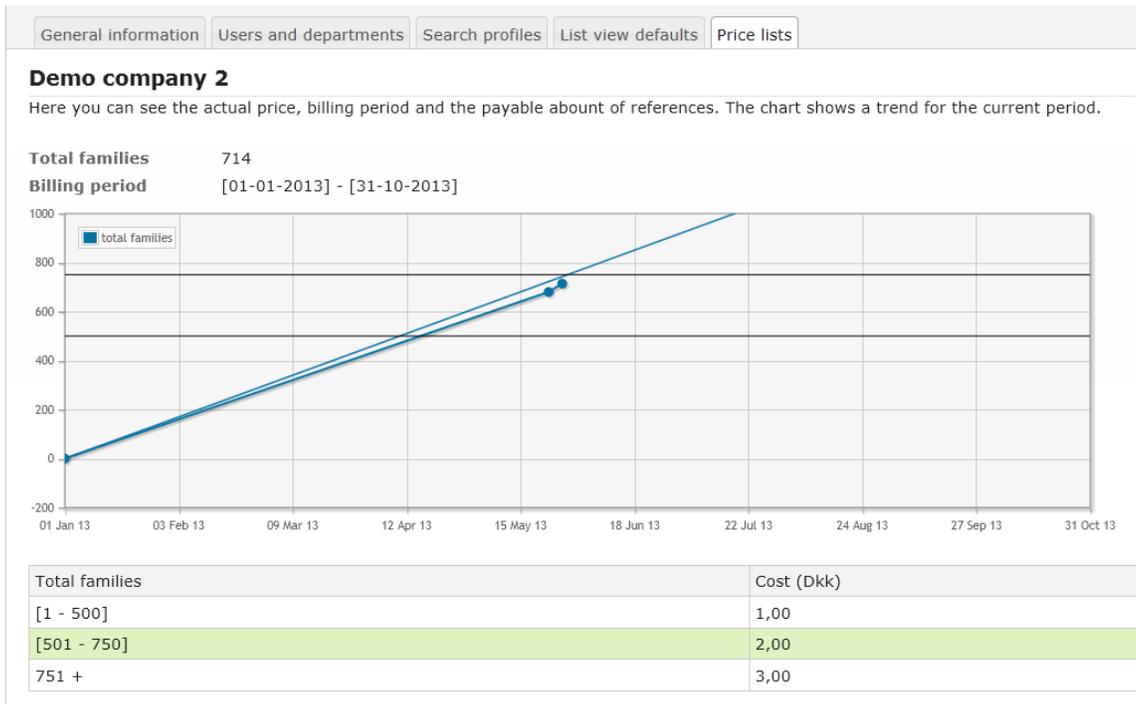
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Default reference list - configuring "list view" for all company users

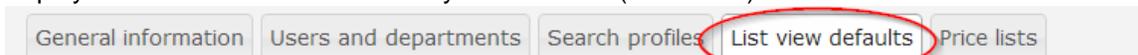
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Patent- og Varemærkestyrelsen

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Application number	Title	
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	INTERNAL RELIEF VALVE APPARATUS FOR USE WITH FLUID REGULATORS	Example intern coupled to a fir

2. The visible columns can be changed via the "Tools" menu in the right side, choose "Show/hide columns" to open the Setup columns box. The "application number" is always shown and the following columns (see below) can be shown/hidden.

Check the relevant columns and finish with "save" to apply the changes for all users.

3. Drag and drop the columns to change their order. Click on a sortable column to change default sorting. The default list view is automatically applied to users who have not customized their list views, next time they open IPsurvey.
4. To reset the customized list view, click on the link "Click here to reset all user settings to default".

Setup columns box

Setup columns [X]

- Application number
- Title
- Abstract
- Applicant
- Inventor
- Priority number(s)
- Publication date
- Date of IPsurvey entry
- IPC class
- Drawings
- Tags
- Departments

Cancel Save

Improvements

Improvements

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(30) Priority:	(22) Filed:		Date of filing the application
Date of entry:	Date of IPsurvey entry:		The reference IPsurvey entry date
Espacenet:	Original document:		Date Link to the original document e.g. in Espacenet, if not available the link is redirected to the bibliographic information in Espacenet.
		Processed by:	The name of the company user which has marked a reference as processed

Example of the bibliographic section in detailed view

CN202044728.U [← Highlight in the list view](#) 1 of 1

Carbon-fiber golf club body [print](#)

Details

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(41) Publication date:	23-11-2011	IPC Cl.:	A63B53/10
Date of IPsurvey entry:	11-05-2012		
Processed by:	<input type="button" value="process"/>		

Cosmetic changes to status report:

Number of newly added or updated families is now shown first in the status report:

before
123 (+11)
after
+11 (123)

The link to the search results for the saved searches is removed from the status report

It was decided to remove the link to the search results from the status report because the result often was outdated as the saved searches usually operates with dynamic parameters such as "contains a tag" or "abstract contains" which results in different search results every time the search is executed.

	Cost	New	Updated	Test search
Patent- og Varemærkestyrelsen	DKK 20000	+0 (65)	+0 (0)	75

Navigation improvements:

Navigation between references in the detailed view

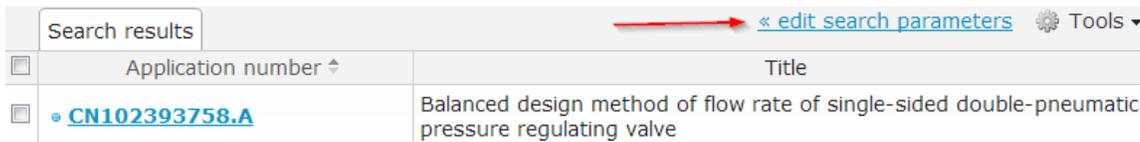
It is now possible to go to the next or previous reference from detailed view using the left and right arrow buttons on the keyboard.

Navigation between images in the detailed view

When an image is enlarged in detailed view the left and right arrow buttons are used to change between the next or previous image. Escape (Esc) closes the image and then the left and right arrows buttons are used to navigate between references.

Quick access to edit search parameters

It is now easier to edit the search parameters when viewing the search result in a list view. A new link was added:



Search results		« edit search parameters	Tools ▾
<input type="checkbox"/>	Application number ↕	Title	
<input type="checkbox"/>	• CN102393758.A	Balanced design method of flow rate of single-sided double-pneumatic pressure regulating valve	

Improved traversing for "Not viewed in details" references

It is now possible to traverse forward from detailed view when viewing a list of "not viewed in details" applications:



CN102397608.A	« Back to the list view or go to next reference >
Method for controlling pressure of anesthesia machine and breathing machine in suction valve and expiration valve cooperative control mode print	

Help tips

Help tips

Help tips are introduced all over the IPsurvey pages. New help tips will constantly be added.

References in total	
New since last report ?	0 (history)
Not viewed in detail ?	2006
Updated	1
Total	2658
Unassigned ?	0

Every time you see a question mark like on the screenshot above you can hover it with your mouse and get a help tip regarding the corresponding feature. The help tip is displayed as a separate text box and please notice that there can be a short delay when loading the help tip.

exact Click to select a date ?

Applicant
 enter a part of applicant's name

Inventor
 enter a part of inventor's name

IPC class
 enter a part of class name

Departments
 Select options

Processed by:
 ignore

or

Every reference in IPsurvey can be marked as "processed" by the current user.

When a reference is marked as processed then all other users who have access to the reference will see who has "processed" the reference.

You can also search by the "Processed by" field using the advanced search function. [See details.](#)

The help tip is closed when the mouse is moved away from it. There can be links to additional information in the help tip.

Manual insertion of reference numbers to the database

Manual insertion of reference numbers to the database

The local administrator can manually add one or more reference numbers to any of the existing search profiles in the company's database. The reference number will be retrieved from the OPS as soon as possible and the bibliographic data added to the database if it satisfies the language settings for the company. Read more about the [language filtering algorithm](#) for resolution.

How to add a reference(s) to a search profile:

A reference can be added to one of the existing search profiles:

1. Open the "Search profiles" tab from the company administration menu (which is opened from the left menu).
2. Select a search profile from the list and click on the search profile's name.
3. Scroll down to the "Manually added application" section and click on the "+ Add" button see below.
4. Insert the reference number(s) in the popup box.

Adding more than one reference number at a time, it must be as a comma-separated list of reference numbers.

The number format is [country code][document number][.kind code] - **CCNNNNNNN.KK** (where kind code is optional). Read more about [IPsurvey specific number formats](#).

Manually added applications

There are no manually added applications for this search profile. You can one.

Once the reference(s) are added in the table, IPsurvey will try to resolve them and add them to your database when they fulfill the [language filtering algorithm](#). There are several resolution steps before a reference is either added to the database or failed to, these are:

1. Steps **adding** a reference to the database:
 - a. "unresolved" - reference is queued for resolution
 - b. "family resolved" - IPsurvey has found a family for the reference
 - c. "resolved" - IPsurvey has found bibliographic data for the reference and accessible in detailed view via the hyperlink.
2. Reference **failed** to be added to the database:

- a. "unresolved" - reference is queued for resolution
- b. "failed" - IPSurvey has failed to find a family for the reference, after 5 attempts it stops trying and it will never be retried.

The name of the user adding the reference, the date of applying it to the database and the current resolution step are displayed in the reference list, see below.

Manually added applications ?

<input type="checkbox"/>	Reference number	Added by	Date of IPSurvey entry	Last database	Resolution
<input type="checkbox"/>	US10398717.B2	Tanja Häusermann-Güntzel	25-06-2020 14:38:40	wpi	resolved
<input type="checkbox"/>	EP2830438.B1	Tanja Häusermann-Güntzel	25-06-2020 14:49:01		unresolved

Tools ▾

Page 1 of 1 10 ▾ View 1 - 2 of 2

Search options in advance search

Search options in advance search

Search options when searching in abstracts, titles and comments

The abstract, title and comment fields all have the same set of search options, which are:

- Contains** - search for references which contain the given keyword(s)
- Not present** - search for references where the field is empty e.g. no abstract (for comments - search for references where there are no comments)
- Present** - search for references where the field has a value e.g. abstract present (for comments - searches for a reference where there is at least one comment)
- Doesn't contain** - search for references where the field does not contain the given keywords

contains

not present

present

doesn't contain

The relevant search option is chosen in the drop down menu under the field name and as default is this field empty.

Title

contains
⇅

Abstract

contains
⇅

Comment

contains
⇅

Quick access to refine the search parameters

When viewing the results of a search in list view the search parameters are easily accessible from the link in the top right corner "edit search parameters".

Search results		« edit search parameters  Tools ▾
<input type="checkbox"/>	Application number ↕	Title
<input type="checkbox"/>	• CN102393758.A	Balanced design method of flow rate of single-sided double-pneumatic pressure regulating valve

▾ Example - searching in more fields (combined search)

Searching for comment by a specific user:

1. Field <Comment>
search option "**Present**"
(1)
AND
2. Field <Departments>
select one or more departments in the drop-down menu **(2)**
Optional, depend on the usage of "Processed by" in the database.
3. Field <Processed by>
search option "**specific user**" and select one or more users in the drop-down menu **(3)**

Simple search

Advanced search

Saved searches

The advanced search allows you to do a precise search for the results. All using 'AND' strategy.

Reference number

contains Enter a number, ex. EP2453157.A2

Title

contains enter keywords

Abstract

contains enter keywords

Comment

present enter keywords

1

Including tags

All Select options

Excluding tags

Select options

Languages

Select options

Date of IPsurvey entry

greater Click to select a date

Publication date

greater Click to select a date

Filed date

greater Click to select a date

Applicant

enter a part of applicant's name

Inventor

enter a part of inventor's name

IPC class

enter a part of class name

Departments

Enzyme additives for detergents

2

Processed by:

specific user John Doe

3

Search

or [Save](#)

DANISH PATENT AND TRADEMARK OFFICE

Demo user 1
Demo company 2

- Dashboard
Get an overview here
- Search
- Profile
- Recycle bin 3
- Change company**
- Logout

[IPsurvey knowledgebase](#)

Select a company to login

Demo company 1

Please note that it is not possible to work with several at the same time

Cancel

Recycle bin

The **user specific** recycle bin allows users to delete references and if necessary to recover them again from the recycle bin. As the recycle bin is user specific, a reference is only deleted for this particular user.

References can both be deleted from list view and detailed view. The recycle bin is only visible in the left menu when it contains at least one deleted reference and the total number of deleted references is always displayed.

- Search
- Profile
- Recycle bin 2**
- Logout

You are currently working with
Demo company 2 company

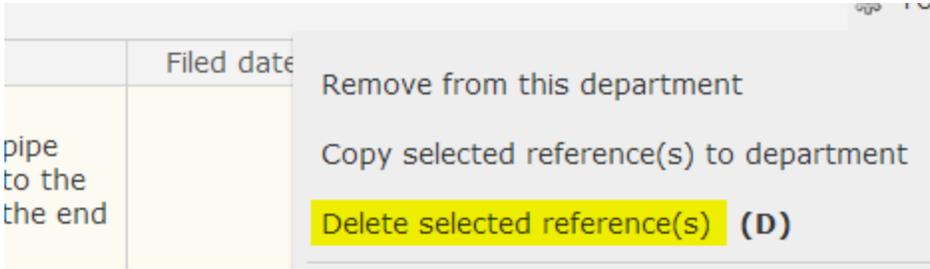
The deleted references are listed in the recycle bin, in list view and from the "Tools" menu it is possible to define with fields are displayed <show/hide columns>.

Deleting references:

List view

In list view, mark the reference(s) to be deleted and choose in the "Tools" menu **"Delete Selected Reference(s)"** or

use the short cut (D):



Detailed view

To delete references in detailed view, click on the "delete" icon in the top right corner.

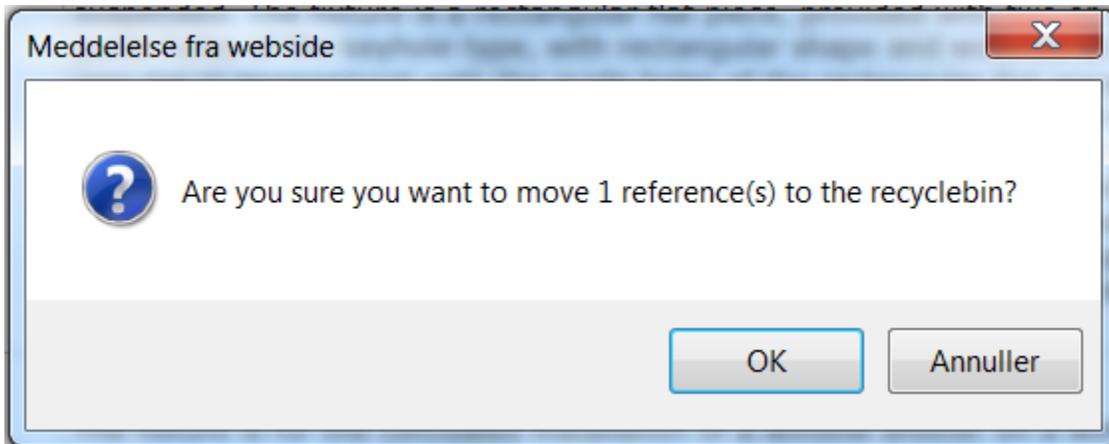
Portable golf ball handcart

 delete |  print

Details

(10) Publication number:	CN202044730.U	(22) Filed:	06-05-2011
(73) Applicant:	DONGGUAN XINFENG PLASTIC	Priority number(s):	CN20112144784U 20110506

To avoid deleting a reference(s) by mistake, the user has to accept to move the reference(s) by clicking "OK" in the pop-up box, independently of with method used when deleting.



Restoring reference(s):

List view:

To restore a reference(s) from list view, mark the reference(s) and choose "**Restore Selected Reference(s)**" from the "Tools" menu.



Detailed view:

To restore a single reference from detailed view (opened from list view in the recycle bin) click on "restore" in the

upper right corner. The title is strikethrough and the date and time for deletion is added to all the references in the recycle bin.

EP1817342.B1 WO2006059904.A1 [« Highlight in the list view »](#) 3 of 3

~~METHOD FOR AFFINITY PURIFICATION~~ (deleted 03-12-2013 at 16:50) restore print

Details

(10) Publication number:	EP1817342.B1	(22) Filed:	02-12-2005
(73) Applicant:	BAC IP B V [NL]	Priority number(s):	EP20040078282 20041202 EP20050817207 20051202 WO2005NL00829 20051202
(72) Inventor:	HERMANS WILHELMUS JOSEPHUS		

Search terms highlight in the search result

When searching in a IPSurvey database <Left menu><Search>, the search terms are highlighted in list view, to clarify why the reference(s) was found by the search.

Search results	
<input type="checkbox"/>	Title
<input type="checkbox"/> • DE102010041119	Method for checking operability of valve in gas passage of combustion engine of motor car, involves measuring signal strength of filtered measurement signal, and testing functionality of valves based on measured signal strength of signal
<input type="checkbox"/> • EP2058495.A1	A process for the determination of the correct fuel flow rate to a vehicle engine for carrying out diagnostic tests

Lists layout are saved when editing departments under the <Users and departments> menu

Following users request, the columns order and columns sizes for all list views are saved when administrating users and/or departments in the left menu <Administration><Users and departments> tab.

Enabled word wrap for all columns in the reference list view

In list view all columns are word wrapped properly, including dates and reference number, compared to the older versions where only title and abstract columns were word wrapped.

Not viewed in detail		
<input type="checkbox"/> Application number	Title	Filed date
<input type="checkbox"/> JP201304833 9.A	MICROWAVE MULTIPLEX RADIO DEVICE, AND POWER SAVING CONTROL METHOD	29-08-2011
<input type="checkbox"/> JP201303115 8.A	OFDM-BASED AUTOMATIC GAIN CONTROL CIRCUIT AND AUTOMATIC GAIN CONTROL METHOD	08-06-2012
<input type="checkbox"/> JP201302675 1.A	CONTROL DEVICE, CONTROL METHOD, AND PROGRAM	19-07-2011

Bug fixed: Wrong number in the status report compared with the counter "New since last report" on the dashboard

The number in the status report and the counter on the dashboard now match again.

Bug fixed: Not able to scroll in dropdown menus

When e.g. assigning references to a department it is possible to scroll in the dropdown menu.

End of release notes

Export of company information into HTML and PDF

The following Company information can be exported into a HTML or PDF file:

1. Company name and adresse
2. Type of database - application or patent
3. Preferred language - English, German or French
4. Name and users per department
 - a. users name
 - b. e-mail
 - c. role in IPsurvey (Local administrator, Local user, Read only user)
 - d. user status in IPsurvey - "active" or "suspended"
5. IPsurvey name and content for all search profiles assigned to the company

The <Export> tab is opened from the company administration menu (which is opened from the left menu), see the screenshot below..

Export Demo Company

Here you can export most of the company's data to a PDF or HTML file. The exported data includes:

1. Company name and address
2. Departments and users
3. Search profiles

[Export to HTML](#) or [Export to PDF](#)

Both types of export open in a new browser. The PDF file can be saved or printed by hovering the bottom of the page to activate the Adobe toolbar.

Below an example of a company export to PDF:

IPsurvey - Demo company 1

Address Helgeshøj Allé 81
Taastrup
2630
Denmark

Database type Application database

Preferred language English

Departments **CHEM1**

Konstantin Volynskiy (kov@dkpto.dk)	Local administrator (IPLA)	Active
Demo user 1 (demo1@demo.com)	Read only user (IPLR)	Active
Demo user 2 (demo2@demo.com)	Read only user (IPLR)	Active
Demo user 3 (demo3@demo.com)	Read only user (IPLR)	Active
Tone Kaaber Harrit (tkh@dkpto.dk)	Local user (IPLU)	Active
Annette Nystrup (anf@dkpto.dk)	Local user (IPLU)	Active
Kim Buchardt Christiansen (kbc@dkpto.dk)	Local user (IPLU)	Active
Helena Larsen (hes@dkpto.dk)	Local user (IPLU)	Active
Jacob Dahl Jensen (jdj@dkpto.dk)	Local user (IPLU)	Active
Anne Mette Broberg	Local user (IPLU)	Active

Link to Espacenet replaced with link to PVSONline for Danish references

When a Danish reference can be found in our own public database (PVSONline) then IPsurvey will display a link to PVSONline instead of Espacenet. In PVSONline the complete file wrapper including all publication types (A,B) is available only 4 days after publication.

(22) Filed: 03-12-2012

Priority number(s): DK20120000766 20121203

Original document: [PVS Online](#)

IPC Cl.: H02H7/085
F25B49/02

Found by sp.: [Internal test 1](#)

The link in detailed view points to <http://onlineweb.dkpto.dk/pvsonline> and when clicked upon the related reference

opens in a new browser window (see below). [Here is an example of such link](#)

To open a PDF version of the document click on the button <Åbn i PDF>.

The screenshot shows the website of the Danish Patent and Trademark Office (Patent- og Varemærkestyrelsen). The page displays search results for patent applications. At the top, there is a navigation bar with 'REGISTRE - PATENT & BRUGSMODEL | VAREMÆRKE | DESIGN' and 'Aktuel information | Om pvsonline'. Below this, there are buttons for 'Søgning', 'Søgeresultat', and 'Hjælp'. The main content area shows a search for 'BA 2012 00182' with options for 'Forrige', 'Næste', and 'Udskriv'. A tabbed interface is visible with 'PA 2012 00766' selected. The results table has columns for 'Dato' and 'Titel'. Each row includes a 'Dato', a 'Titel' (e.g., 'B1 - Meddelt patent (1.420 KB)'), and an 'Åbn i PDF' button. A mouse cursor is pointing at the 'Åbn i PDF' button for the first result. The text 'Fandt 14 dokument(er), viser side 1 af 1' is visible at the top right of the results table.

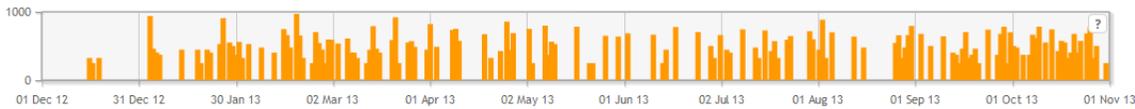
A patent file wrapper normally contains some or all of the following documents:

Danish title	English title
L - Alm. tilg. patentansøgning	Published patent application, only claims and (if available) drawings
A1 - Alm. tilg. patentansøgning	Published patent application
A8 – Patentansøgning med rettet forside	Correction of: Published patent application frontpage
A9 – Rettet patentansøgning	Correction of: Published patent application
B1 - Meddelt patent	Patent granted (Law 1993)
B2 – Patent ændret efter indsigelse	Patent amended (Law 1993)
B3 – Patent ændret efter adm. ompr.	Patent specification amended after administrative reexamination (acc. patent law 1993)
B8 - Patent med rettet forside	Correction of: Patent granted frontpage (Law 1993)
B9 – Rettet patent	Correction of: Patent granted (Law 1993)
Ansøgningsdokument	Filed application
Nyhedsrapport	Search report
Nyhedsrapport (GB)	Search report in English

Charts changed from linear to bar charts

Dashboard chart

The dashboard chart now uses a logarithmic scale to visualize the number of found references better.

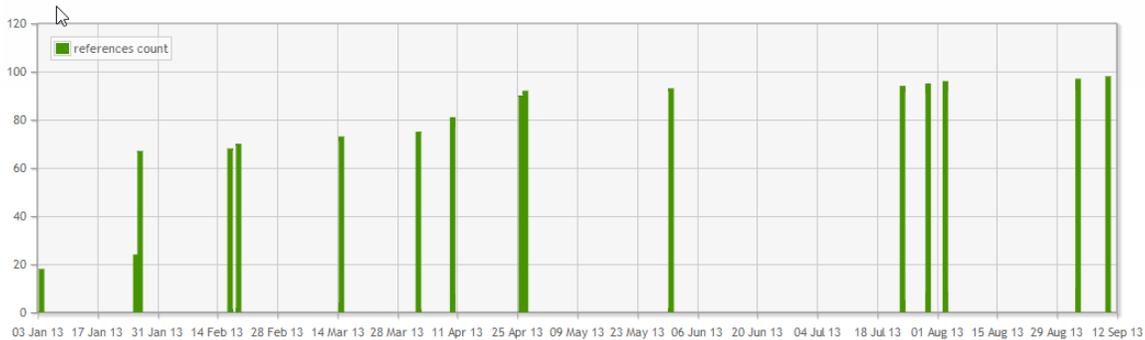


For administrators only:

Search profile execution chart

The chart is cleaned of other information as the "family count" now is displayed in the price list chart. The execution chart (see below) therefore only displays the total amount of resolved references added to IPsurvey by this search profile. Each bar displays the accumulated number of resolved references on a specific day within the last 12 months. To see the exact number of resolved references added on a specific day e.g. 31 of January once has to subtract the resolved references on the 30 of January.

Execution statistics for the last 12 month



Price list chart

The chart displays both the total amount of families (used for invoicing) and the trend-line. It displays a period of 12 months following the invoice period.



Recycle bin

The **user specific** recycle bin allows users to delete references and if necessary to recover them again from the recycle bin. As the recycle bin is user specific, a reference is only deleted for this particular user.

References can both be deleted from list view and detailed view. The recycle bin is only visible in the left menu when it contains at least one deleted reference and the total number of deleted references is always displayed.

Search

Profile

Recycle bin 2

Logout

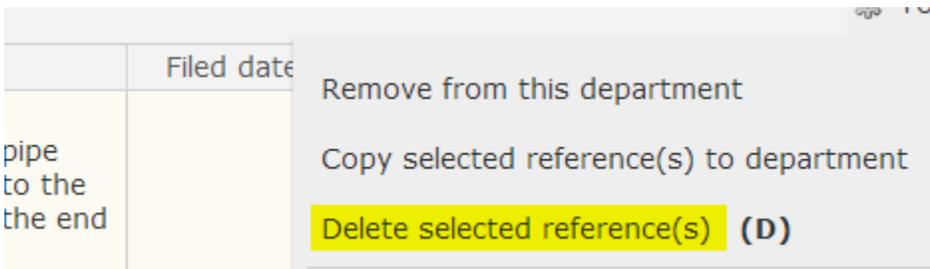
You are currently working with
Demo company 2 company

The deleted references are listed in the recycle bin, in list view and from the "Tools" menu it is possible to define with fields are displayed <show/hide columns>.

Deleting references:

List view

In list view, mark the reference(s) to be deleted and choose in the "Tools" menu "**Delete Selected Reference(s)**" or use the short cut (D):



Detailed view

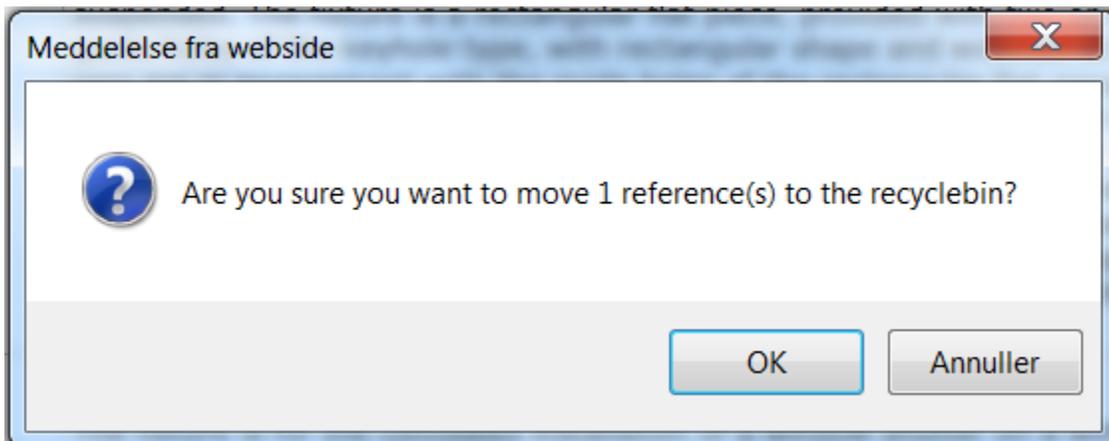
To delete references in detailed view, click on the "delete" icon in the top right corner.

Portable golf ball handcart delete | print

Details

(10) Publication number:	CN202044730.U	(22) Filed:	06-05-2011
(73) Applicant:	DONGGUAN XINFENG PLASTIC	Priority number(s):	CN20112144784U 201110506

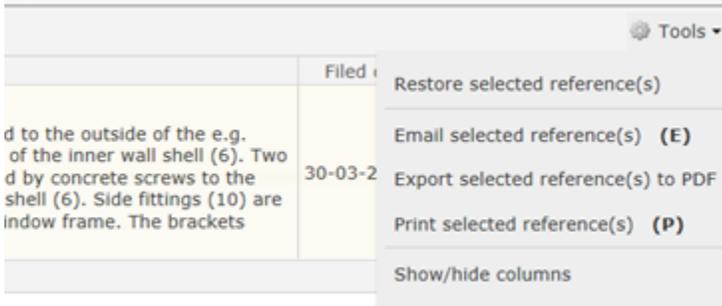
To avoid deleting a reference(s) by mistake, the user has to accept to move the reference(s) by clicking "OK" in the pop-up box, independently of with method used when deleting.



Restoring reference(s):

List view:

To restore a reference(s) from list view, mark the reference(s) and choose "Restore Selected Reference(s)" from the "Tools" menu.



Detailed view:

To restore a single reference from detailed view (opened from list view in the recycle bin) click on "restore" in the upper right corner. The title is strikethrough and the date and time for deletion is added to all the references in the recycle bin.



Search terms highlighted in the search result

When searching in a IPSurvey database <Left menu><Search>, the search terms are highlighted in list view, to clarify why the reference(s) was found by the search.

Search results		
<input type="checkbox"/>	Application number ↑	Title
<input type="checkbox"/>	• DE102010041119	Method for checking operability of valve in gas passage of combustion engine of motor car, involves measuring signal strength of filtered measurement signal, and testing functionality of valves based on measured signal strength of signal
<input type="checkbox"/>	• EP2058495.A1	A process for the determination of the correct fuel flow rate to a vehicle engine for carrying out diagnostic tests

Improvements and bug fixed

Lists layout are saved when editing departments under the <Users and departments> menu

Following users request, the columns order and columns sizes for all list views are saved when administrating users and/or departments in the left menu <Administration><Users and departments> tab.

Enabled word wrap for all columns in the reference list view

In list view all columns are word wrapped properly, including dates and reference number, compared to the older versions where only title and abstract columns were word wrapped.

Not viewed in detail		
<input type="checkbox"/> Application number	Title	Filed date
<input type="checkbox"/> JP201304833 9.A	MICROWAVE MULTIPLEX RADIO DEVICE, AND POWER SAVING CONTROL METHOD	29-08-2011
<input type="checkbox"/> JP201303115 8.A	OFDM-BASED AUTOMATIC GAIN CONTROL CIRCUIT AND AUTOMATIC GAIN CONTROL METHOD	08-06-2012
<input type="checkbox"/> JP201302675 1.A	CONTROL DEVICE, CONTROL METHOD, AND PROGRAM	19-07-2011

Bug fixed: Wrong number in the status report compared with the counter "New since last report" on the dashboard

The number in the status report and the counter on the dashboard now match again.

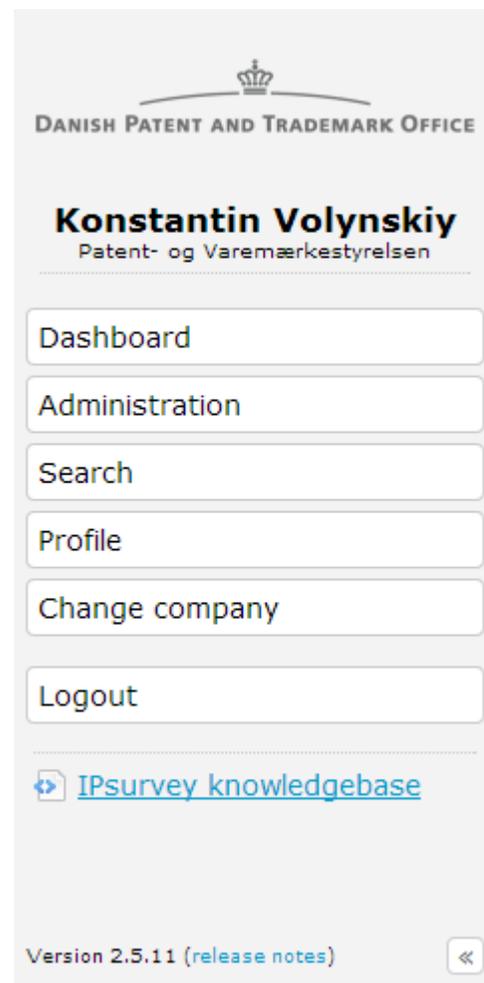
Bug fixed: Not able to scroll in dropdown menus

When e.g. assigning references to a department is it possible to the scroll in the dropdown menu.

Left menu improvements

Left menu improvements

- **The name of the current (active) company**, is now displayed right under the users name in the top of the left menu area.
- **<Change company> button** instead of link
- A link to the "**IPsurvey knowledgedatabase**" is added underneath the menu buttons.
- A link to the **release notes** is added next to the number of the current release in the bottom of the left menu area.
- The [recycle bin](#) is only visible when it contains at least one deleted reference.



Since it is not possible to work with several companies at the same time, users which are assigned to more than one company have to change between them.

To change company, click on the <Change company> button in the left menu and choose a company to switch to in the pop-up window.

Left menu	Pop-up window with companies assigned to the user
------------------	--

The advanced search allows you to do a precise search for the results. All search conditions will be applied together using 'AND' strategy.

Reference number	contains	Enter a number, ex. EP2453157.A2	?
Title	contains	enter keywords	?
Abstract	contains	enter keywords	?
Comment	contains	enter keywords	?
Including tags	All	Select options	?
Excluding tags	Select options		?
Languages	Select options		?
Date of IPsurvey entry	greater	Click to select a date	?
Publication date	greater	Click to select a date	?
Filed date	greater	Click to select a date	?
Applicant		enter a part of applicant's name	?
Inventor		enter a part of inventor's name	?
IPC class		enter a part of class name	?
Departments	Select options		?
Processed by:	ignore		?

or [Save](#)

Other changes

- The layout in the summery e-mail is optimized and text explanations improved

Release 2.9 (Complete)

Bug fixes

1. Can't edit comments if comment contains an XML markup - first part of several fix before bug is completely solved.
2. Tools menu broken in the Administration panel
3. Left panel state (open/close) is now saved across the application
4. When family contains more than 1 reference then switch between references resulted in broken layout

Improvements

1. When reference created after re-run of an archive it is now automatically tagged with "Archive re-run" tag
2. Performance improvement for the reference list view when "Tags" column is shown
3. Advanced search form improved:
 - a. Application number renamed to reference number and set to "contains" operator by default
 - b. Date of IPSurvey entry, Publication date and Filed date are now use "contains" operator by default
4. Now all links are clickable in user comments. Links open in new tab.

Other changes

1. Cost column removed from the summary mail

The license could not be verified: License Certificate has expired!

Release 3.0

Release 3.0

New features/improvements

- Epoquenet 4.0 support
- Better error reporting from Epoquenet
- New filtering metatags for search profiles (see below)

New filtering metatags for search profiles

Now it is possible to specify accept or ignore filters for search profiles.

One or several filters can be specified before the first DB command:

```
/* Accept: <<regex>> */
/* Ignore: <<regex>> */

..fi wpi|
bicycle and gold and red|
```

the <<regex>> should be replaced with a regular expression. Syntax for the regular expressions can be found here: <https://msdn.microsoft.com/en-us/library/az24scfc%28v=vs.110%29.aspx>

It is also possible to test regular expressions using this tool: <http://myregexp.com/>

Example:

Search strategy

```
1 /* Ignore: (EP|US|DE).*\.(A1|B1) */
2
3 ..fi wpi
4 bicycle and gold and red
5
6
```

Save or [cancel](#)

this will ignore all references with country codes EP, US and DE and kind codes A1 or B1

Release 3.00

Improvements

- Retrieval of references from the Espacenet document server
- IPsurvey search engine updated to newest version of EpoqueNet

Release 3.0.26

Bug fixes

1. Fixed a bug when some of archived accession numbers got resolved as a part of running a search profile
2. Fixed UI bug with tabs in "Administration section" when the current opened tab position got lost after page refresh

Releases

[Release 3.0.84](#)

[Release 3.0.71](#)

[Release 3.00](#)

[Release 2.90](#)

[Release 2.6.1 and 2.7.4](#)

[Release 2.4.5](#)

[Release 2.5.1](#)

[Release 2.2.5](#)

The license could not be verified: License Certificate has expired!

Release 3.0.71

Bug fixes:

Search form:

Both search functions, Simple search [1] and Advanced search [2], will now return, to the filled search form used for searching, when "edit search parameters" [3] is clicked.

Simple search **1** Advanced search **2** Saved searches

Search string

Languages
 Select options

Search or [Save](#)

Search results **3** [edit search parameters](#) Tools

Reference number	Title	Filed date	Date of IPsurvey entry	Tags	Departments
US xxxxxxxxxx	xxxxx [search_word] xxxxxxx	20-12-2013	19-05-2017		xxxxxxx
US xxxxxxxxxx	xxxxxxxxx xxxxxxxxxx [search_word] xxxxxxx	08-02-2013	19-05-2017		xxxxxxx

Number lists

Number of hits shown per list, can be altered from the default 10 in the drop-down menu to 20, 50, 100 or 200 and this setting is kept per list. The total number of hits is listed in the right corner.

Page 1 of 2 View 1 - 10 of 12

10
 20
 50
 100
 200

Improvements for administrator

Alphabetically sorting

All list containing either user or departments are now sorted alphabetically. If a list contains more then one column, most columns can also be sorted e.g. low/high. This is indicated by the arrows

Date of IPsurvey entry  at the end of the column name.

Tap - Users and departments [4]

Renaming "Orphans folder"

The folder Orphans has been renamed and font changed: "Users not belonging to any departments". This change is done to clarify that it contains users who **are not assigned** to any departments, e.g. suspended users. These users will have a blank dashboard, not be able to see any references in the database and will not receive any status mails.

Users not belonging to any departments ▾

+ New department + New user

Departments [5] are now sorted alphabetically.

Company database

Here you get an overview of company's structure. IPsurvey groups search results by departments and users can only see search results from the departments which he was assigned to. Please make sure that all your users relate to one or several departments.

A-department



5

B-department

C-department

Within each department it is now possible to sort each column alphabetically [6] or low/high. The user selected sorting will be remembered for each specific Department.

Number of user shown per list, can be altered from the default 10 via the in the drop-down menu to 20, 50, 100 or 200 [7]. This option is only available when the list have more then 10 hits. The setting is personal and will be remembered for each specific Department.

<input type="checkbox"/>	Email 6	Role in company	Status
<input type="checkbox"/>	AAA@yyy.zz	Local administrator (IPLA)	Active
<input type="checkbox"/>	BBB@yyy.zz	Local user (IPLU)	Active
<input type="checkbox"/>	CCC@yyy.zz	Local user (IPLU)	Active
<input type="checkbox"/>	DDD@yyy.zz	Local administrator (IPLA)	Active
<input type="checkbox"/>	EEE@yyy.zz	Local user (IPLU)	Active
<input type="checkbox"/>	FFF@yyy.zz	Local user (IPLU)	Active
<input type="checkbox"/>	GGG@yyy.zz	Local administrator (IPLA)	Active
<input type="checkbox"/>	HHH@yyy.zz	Local administrator (IPLA)	Active
<input type="checkbox"/>	III@yyy.zz	Local administrator (IPLA)	Active
<input type="checkbox"/>	JJJ@yyy.zz	Local administrator (IPLA)	Active

Page 1 of 2 10 **7** View 1 - 10 of 13

Tap - Export

When exporting [8] to either HTML or PDF the departments and user are automatically sorted alphabetically.

Company XX database

Here you can export most of the company's data to a PDF or HTML file. The exported data includes:

1. Company name and address
2. Departments and users
3. Search profiles

[Export to HTML](#) or [Export to PDF](#)

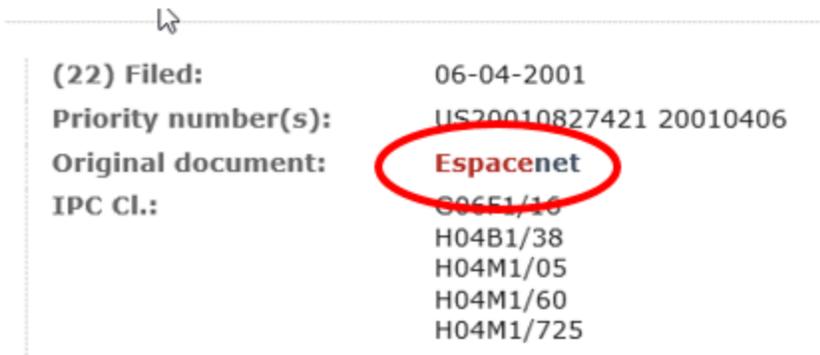
Release 3.0.84

Bug fixes:

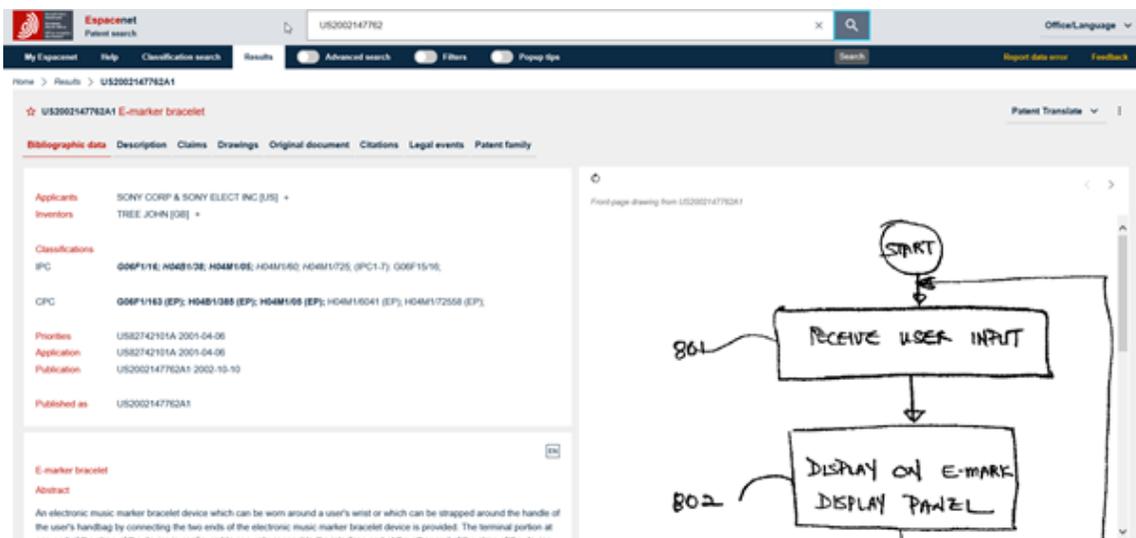
Application filter is re-activated for patent databases.

Improvements

Original document now links to the improved Espacenet layout.



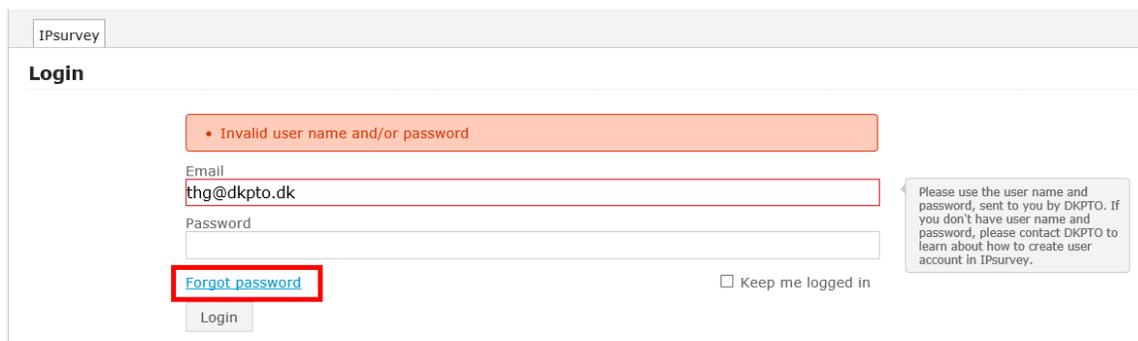
New Espacenet layout - click [here](#) for a short video introduction



Reset password

To reset one's password, follow these steps:

1. Open the IPsurvey logon page
2. Click on **<Forgot password>**



3. Type up your e-mail in the box, click on **<Request>**

Reset password

Reset password form

Email
thg@dkpto.dk

Request or cancel

In order to reset your password, please specify your email. You will get further instructions on this email after you click "Request"

- You will receive an e-mail with a link, redirecting to the a page where a new password can be added. Old password may be reused

Saved search filters

When the same parameters is used in the advanced search form it is possible to save it as a saved search. Fill the form and click on the link Save instead of the <Search> button.

The link opens the Save dialog box where the search is named before saving it, by clicking on <OK>.

Save

Please select a name for your search

Watch 1

Cancel Ok

Under the <Saved searches> tab (2) all saved searches are listed by name (1). From the drop down menu <Tools> (3) it is possible to include the result of a saved search in the status report (mail) and to delete saved search.

Simple search	Advanced search	Saved searches 2	Owner	Included in the report	Results 3	Tools
<input type="checkbox"/>	<input type="checkbox"/>	Watch 1	Tanja Häusermann-Güntzel	No	22	

Saved searches is automatically added lowest at the dashboard under the title Saved filters. The displayed result (4) is only updated at logon and opens the result directly in list view. Use the <refresh link> to update the search result if the saved search parameters or references is changed during the session.

Saved filters ([refresh](#)) ?

Watch 22 4

Searching for references in one's own database

Search options in advance search

Search options when searching in abstracts, titles and comments

The abstract, title and comment fields all have the same set of search options, which are:

- **Contains** - search for references which contain the given keyword(s)
- **Not present** - search for references where the field is empty e.g. no abstract (for comments - search for references where there are no comments)
- **Present** - search for references where the field has a value e.g. abstract present (for comments - searches for a reference where there is at least one comment)
- **Doesn't contain**- search for references where the field does not contain the given keywords



The relevant search option is chosen in the drop down menu under the field name and as default is this field empty.

Title

contains ⇅ enter keywords

Abstract

contains ⇅ enter keywords

Comment

contains ⇅ enter keywords

Quick access to refine the search parameters

When viewing the results of a search in list view the search parameters are easily accessible from the link in the top right corner "edit search parameters".

Search results		« edit search parameters  Tools ▾
<input type="checkbox"/>	Application number ↑	Title
<input type="checkbox"/>	• CN102393758.A	Balanced design method of flow rate of single-sided double-pneumatic pressure regulating valve

▼ Example - searching in more fields (combined search)

Searching for comment by a specific user:

1. Field <Comment>
search option "**Present**"
(1)
AND
2. Field <Departments>
select one or more departments in the drop-down menu **(2)**
Optional, depend on the usage of "Processed by" in the database.
3. Field <Processed by>
search option "**specific user**" and select one or more users in the

Simple search

Advanced search

Saved searches

The advanced search allows you to do a precise search for the results. All using 'AND' strategy.

Reference number

contains Enter a number, ex. EP2453157.A2

Title

contains enter keywords

Abstract

contains enter keywords

Comment

present enter keywords

1

Including tags

All Select options

Excluding tags

Select options

Languages

Select options

Date of IPsurvey entry

greater Click to select a date

Publication date

greater Click to select a date

Filed date

greater Click to select a date

Applicant

enter a part of applicant's name

Inventor

enter a part of inventor's name

IPC class

enter a part of class name

Departments

Enzyme additives for detergents

2

Processed by:

specific user John Doe

3

Search

or [Save](#)

Search by reference (publication) number

When searching by a reference number the following options are available:

option	description
exact	The reference number should match exactly as specified. See reference number format for details. You can omit kind code though, in this case the search will be performed by country code and document number.
contains	You can specify any part of reference number. For example "1234" will find all references where document number contains "1234"
starts with	You can specify the first part of reference number. For example "EP1234" will find all references with country code "EP" and document number starting with "1234"
ends with	You can specify the last part of reference number. For example "1234.B1" will find all references where document number ends with "1234" and kind code equals to "B1"
does not contain	Inverse version of the "contains" rule,

Search by abstracts, titles and comments

When searching in abstract titles and comments you can use the following constructions:

example	description
bicycle gold	Will search for text with both bicycle and gold.
bicycle and gold	Equal to the previous search string
bicycle or gold	Will search for text with either bicycle or gold.
gold	Will search for all forms of the word. For example gold, golden.
"gold bicycle"	In case of quoted text the search will be performed for the precise phrase.
"gold bicycle" and rubber	Will search for a text where both "gold bicycle" phrase and rubber are present. Only rubber will be searched in all known word forms
not bicycle	Will search for all references where the "bicycle" word is not present
bicyc*	Will search for text with words starting with "bicyc"

"bicyc**"	Will search for text with words "bicyc**" (including the final asterisk)
-----------	--

moreover you can specify the following search options:

option	description
contains	will perform an ordinary search as described above
not present	will search for references where the field is empty
present	will search for references the field has a non-empty value
doesn't contain	inverse "contains"

Highlight of search terms

When searching in a IPSurvey database <Left menu><Search>, the search terms are highlighted in list view, to clarify why the reference(s) was found by the search.

Search results	
Application number ↕	Title
<input type="checkbox"/> • DE102010041119	Method for checking operability of valve in gas passage of combustion engine of motor car, involves measuring signal strength of filtered measurement signal, and testing functionality of valves based on measured signal strength of signal
<input type="checkbox"/> • EP2058495.A1	A process for the determination of the correct fuel flow rate to a vehicle engine for carrying out diagnostic tests

How to save an advanced search

When the same parameters is used in the advanced search form it is possible to save it as a saved search. Fill the form and click on the link [Save](#) instead of the <Search> button.

The link opens the Save dialog box where the search is named before saving it, by clicking on <OK>.

Under the <Saved searches> tab (2) all saved searches are listed by name (1). From the drop down menu <Tools> (3) it is possible to include the result of a saved search in the status report (mail) and to delete saved search.

Simple search	Advanced search	Saved searches 2	Tools 3
Name	Owner	Included in the report	Results
Watch 1	Tanja Häusermann-Güntzel	No	22

Saved searches is automatically added lowest at the dashboard under the title Saved filters. The displayed result (4) is only updated at logon and opens the result directly in list view. Use the <refresh link> to update the search result if the saved search parameters or references is changed during the session.

Saved filters ([refresh](#)) ? -----
 Watch 22 4

Search by reference number

When searching by a reference number the following options are available:

option	description
exact	The reference number should match exactly as specified. See reference number format for details. You can omit kind code though, in this case the search will be performed by country code and document number.
contains	You can specify any part of reference number. For example "1234" will find all references where document number contains "1234"
starts with	You can specify the first part of reference number. For example "EP1234" will find all references with country code "EP" and document number starting with "1234"
ends with	You can specify the last part of reference number. For example "1234.B1" will find all references where document number ends with "1234" and kind code equals to "B1"
does not contain	Inverse version of the "contains" rule,

Search by title abstract and comment

When searching in abstract titles and comments you can use the following constructions:

example	description
bicycle gold	Will search for text with both bicycle and gold.
bicycle and gold	Equal to the previous search string
bicycle or gold	Will search for text with either bicycle or gold.
gold	Will search for all forms of the word. For example gold, golden.

"gold bicycle"	In case of quoted text the search will be performed for the precise phrase.
"gold bicycle" and rubber	Will search for a text where both "gold bicycle" phrase and rubber are present. Only rubber will be searched in all known word forms
not bicycle	Will search for all references where the "bicycle" word is not present
bicyc*	Will search for text with words starting with "bicyc"
"bicyc*"	Will search for text with words "bicyc*" (including the final asterisk)

moreover you can specify the following search options:

option	description
contains	will perform an ordinary search as described above
not present	will search for references where the field is empty
present	will search for references the field has a non-empty value
doesn't contain	inverse "contains"

Suspending an user

The administrator can suspend the users access to IPsurvey at any time, the most common reason is that the user has left the company.

A user with the status "Suspended" **can no longer** login to the database. **Suspending a user** has the same effect as deleting a user from the database. Because of the tagging/comment feature, is it **not possible** to completely delete a user from a database.

All users without relation to at least one department is shown in the system folder "Users not belonging to any departments". How to change other user settings, see [here](#).

How to suspend an user

Accessing the user profile:

1. Open the tab "Users and departments" from the <Administration> left menu
2. Click on the department which have the user assigned, the user list is displayed below the department title
3. Click on the users e-mail to open his or hers user profile.

General information **Users and departments** 1 profiles List view defaults Price lists Export Archives

Patent- og Varemærkestyrelsen

Here you get an overview of company's structure. IPSurvey groups search results by departments and users can only see search results from the departments which he was assigned to. Please make sure that all your users relate to one or several departments.

IT ▾  

Patent ▾  

Test ▾  

Mobile devices ▾  

test2 ▾   2  Tools ▾

<input type="checkbox"/>	Email	Role in company	Status
<input type="checkbox"/>	mij@dkpto.dk 3	Read only user (IPLR)	Active
<input type="checkbox"/>	crh@dkpto.dk	Local administrator (IPLA)	Active

Change the following settings in the users profile:

- <Departments>** which departments the user are assigned to, per default are all departments assigned. It is recommended to transfer suspended users to the system folder "Users not belonging to any departments".
To do this, open the department drop-down menu and click on <Uncheck all> to unassign the user from all departments and transfer them to the system folder "Users not belonging to any departments".
- <Status>** from "Active" to "Suspended"
- <Status report frequency>** to "Never" if the user is suspend in all departments.
- Click on **<Save>** to save the changes in the database

To verify the changes, open the tab "Export" from the <Administration> left menu and select one of the two export formats HTML or PDF

Edit profile for mij@dkpto.dk

Read only user (IPLR)



change

Department **a**
Patent, test2

Name
Michael Junker

Contact phone
43508255

Global role
General

Role in Patent- og Varemærkestyrelsen
Read only user (IPLR)

Status **b**
Suspended

Status report frequency **c**
Paused

Send status report even if no progress detected

Don't count reference as "new" if it was created before my profile was created

d
Save or [cancel](#)

Tagging references

What is tags

Tag is a single word or a short phrase which can be used to categorise references according to one or another property. They are company specific and created by local users or administrators.

Tags are used to group or identify references in and across departments and between users.

Tags are [searchable](#).

Situation where tagging are useful:

- Classifying references according to relevance - High, Medium, Low, Relevant, Noise
- Inform other users e.g. patent department or co-workers to take action e.g. add watch, what is status, file opposition, feedback needed etc.
- Adjusting scope of search profile based on user feedback, non-relevant references easily identified
- Subdividing of references across departments and search profiles

A reference can have one or more tags.

Local users can add or remove own tags both from [detailed reference view](#) and [list view](#). Tagging a [group](#) of

references is possible from list view.

Read only users can both search for and see tags, but not add or remove them.

Local administrators can [restrict which tags](#) the local users can see and use when tagging references. Using predefined tags keeps the consistency of information sharing between users and the ability to retrieve relevant references.

Tagging a group of reference

Follow these steps to apply or remove tag(s) from the selected references in two steps.

1. Open list view for e.g. a department or references with the status "Not viewed in detailed"
2. Select one or more references - add check mark in left column
3. Click on the "Tag selected reference(s) (T)" in the "Tools" menu (or press "T")
This opens the pop up menu "Add tag to selected reference(s)"
4. Type the name of the tag followed by enter to save the tag or choose it from the drop down menu
If tags are controlled by the administrator, only those are available

Application number	Title
WO2012043433.A1	METHOD FOR CLEANING FILTER MEMBRANE, AND MEMBRANE FILTER
<input checked="" type="checkbox"/> WO2012047923.A1	SYSTEMS AND METHODS FOR AUTOMATED CONTROL OF MIXING AND AERATION IN TREATMENT PROCESSES
KR20120036147.A	TREATMENT SYSTEM FOR HIGH CONCENTRATION WASTEWATER
<input checked="" type="checkbox"/> WO2012045349.A1	METHOD AND INSTALLATION FOR SYNTHESISING HYDROCARBON
WO2012045373.A1	
<input checked="" type="checkbox"/> WO2012045743.A1	
CA2755161.A1	
JP2012081382.A	
WO2012025393.A1	
CA2749435.A1	ATION-MAGNETIC SEPARATION SYSTEM
KR20120015964.A	BED ELECTRODE SYSTEM, MASS FLOW ENERGY STORAGE SYSTEM AND WATER ION METHOD EMPLOYING THE SAME
CA2748148.A1	ION OF SULFATE FROM WATER

Search by tag(s)

You can also search by tag(s) using the advanced search function for this purpose there are two search fields included:

1. Search for references which include given tag(s). Here you can choose if you want to search for references where all specified tags are set or for references with at least one of the specified tag set.
2. Search for references which doesn't include given tag(s). In this case only references where the specified tag(s) are not present will be found.

Administrator controlled tags

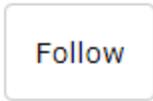
In order to keep tag name consistency the local administrator can restrict tags for local users to a predefined list. Only tags from the predefined list will then be visible, usable and searchable for the local users.

The local administrator will still be able to create their own tags and use any other tags. This means that the tag restriction is not applied to the local administrators, but tags, which are not in the predefined "restricted list" will only be visible to local administrators.

When the "Restrict tags for local users" option is enabled, the detailed reference view will always have a tag heading in red when no tags are active "No tags selected" and it is not possible for the local user to type their own tags. The only possible action for the local user is to select/deselect the tag(s) and when selected the tag colour is changed to dark blue.

Tags -----

No tags selected



Tags -----



To enable **restricted tags** do the following:

1. Open the company setting "Administration menu"
2. Enable the "Restrict tags for local users"
3. Name the tags which should be visible to the users, by entering their name in the box and finish with **enter** to save each tag name.
4. When the tag list is complete, save the company information to applied the tags to the users.

Terminology

A

Applicant

Chart on the dashboard

Collaboration on references in departments

D

Date of entry

Date search format

Database usage

Department

Detailed reference view

E

E-mails from IPsurvey

H

Help tips

I

Inventor

IPC class

IPsurvey number format

K

Kind codes

L

Language filter algorithm

List view for references

M

Manually added references

N

New since last report

Not viewed in details

O

Original document

P

Preferred language

Priority

"Processed by" property

Publication date

Publication and patent number format

R

Reference in department

Reference number format

Resolved family

S

Saved search

T

Tags

U

[Unassigned reference](#)

[Unresolved patent family](#)

[Updated reference](#)

[User profile](#)

Applicant

An applicant is a person or organisation (e.g. company, university, etc.) who/which has filed a patent application. There may be more than one applicant per application. See [espacenet definition](#) for more details.

Chart on the dashboard

Chart on the dashboard displays the number of new references added to the database for the last year.

You can hover any bar on the chart to see the precise number of references found on this date or you can click on the bar to get these references listed in list view.

Date of entry

The date when the reference entered the IPsurvey database. A reference enters the IPsurvey database when the corresponding bibliographic data is found in [espacenet](#).

See also [date search format](#)

Date search format

IPsurvey accepts the following format when searching by date: DD-MM-YYYY (Day-Month-Year)

Where DD is the day number, MM is the month number and YYYY is the year number.

Example: IPsurvey format 31-12-2012 when searching for the 31 of December 2013.

You can also specify the following options when searching by dates:

option	description
exact	the date should match exactly to the specified value
greater	the date should be greater or equal then the value specified
lower	the date should be lower or equal then the value specified
between	the date should be between the two specified dates (both dates included)
relative	the date should be greater or equal to current date minus the specified number of days

Department

A department is a company structure unit. Departments are used to group users and references. A user can only access a reference when the user and the reference are from the same department.

As a part of the advanced search you can specify a list of departments to restrict your result only to these references which relate to the selected departments.

Detailed reference view

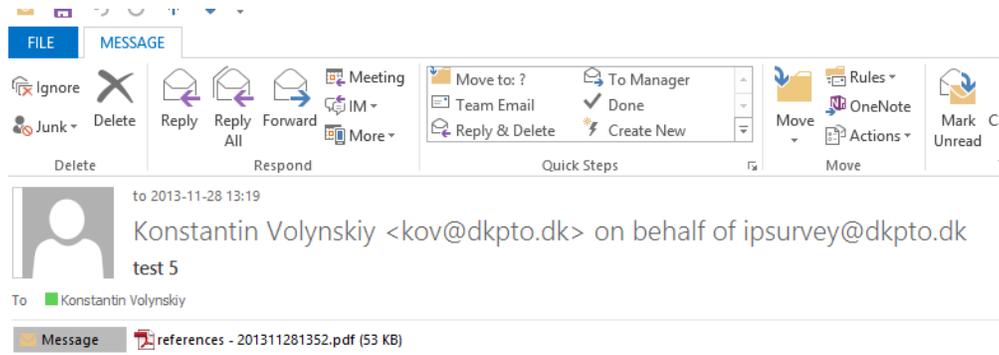
The detailed reference view contains bibliographic information about the reference, including (when available)

drawings, tags and comments.

How to send emails from IPSurvey

With the setting "Directly from IPSurvey" the e-mail will be sent from ipsurvey@dkpto.dk and reply to address will be ipsurvey@dkpto.dk

With the setting "On behalf of current user" the e-mail will be sent from ipsurvey@dkpto.dk but **reply** to will be the **e-mail of the current user**. Outlook shows such messages as:



test 5

Inventor

The inventor is the person named in a patent application as the inventor. There may be more than one inventor.

Please consult espacenet for more details.

IPC class

The International Patent Classification system (IPC), established by the Strasbourg Agreement 1971, is a hierarchical system which uses language-independent symbols to classify patents and utility models according to the area of technology to which they relate.

The technical content of almost all the patent documents published worldwide is classified using this system.

IPC classification symbols are made up of a letter denoting the IPC section (e.g. A), followed by a number (two digits) denoting the IPC class (e.g. A63), then a letter denoting the IPC subclass (e.g. A63B). A number (variable, 1-4 digits) denotes the IPC main group (e.g. A63B49). This is followed by a forward slash "/" and a number (variable, 2-6 digits) denoting the IPC subgroup (e.g. A63B49/02).

Please see espacenet for more details.

Kind codes

Kind codes are used to identify the different publication stages of a patent application or a patent.

The "standard" kind codes are:

A - patent application, published 18 months after filing or 18 months after the priority date

B or C - patent specification, published as soon as possible after grant

Read more about [publication number formats](#) and the special [IPSurvey number format](#) when manually adding references.

For more information on kind codes, see the [WIPO handbook](#).

List view for references

List view for references is a table-like presentation of one or several references. You can perform group actions from the list view like: tagging, managing departments, marking as views, etc.

Manually added references

Any local administrator can add one or several references to a search profile manually, [read how to do it here](#). These references will be kept in a special table at the bottom of the search profile page.

Manually added references are treated in the same way as all other references entering the database via a search profile, meaning that the reference is searchable and can both be tag and commented etc.

Please read about the reference number format here: [Publication and patent number format](#)

New since last report

Number of new references entered the database since the last status report was sent. You can adjust the status report settings in your profile.

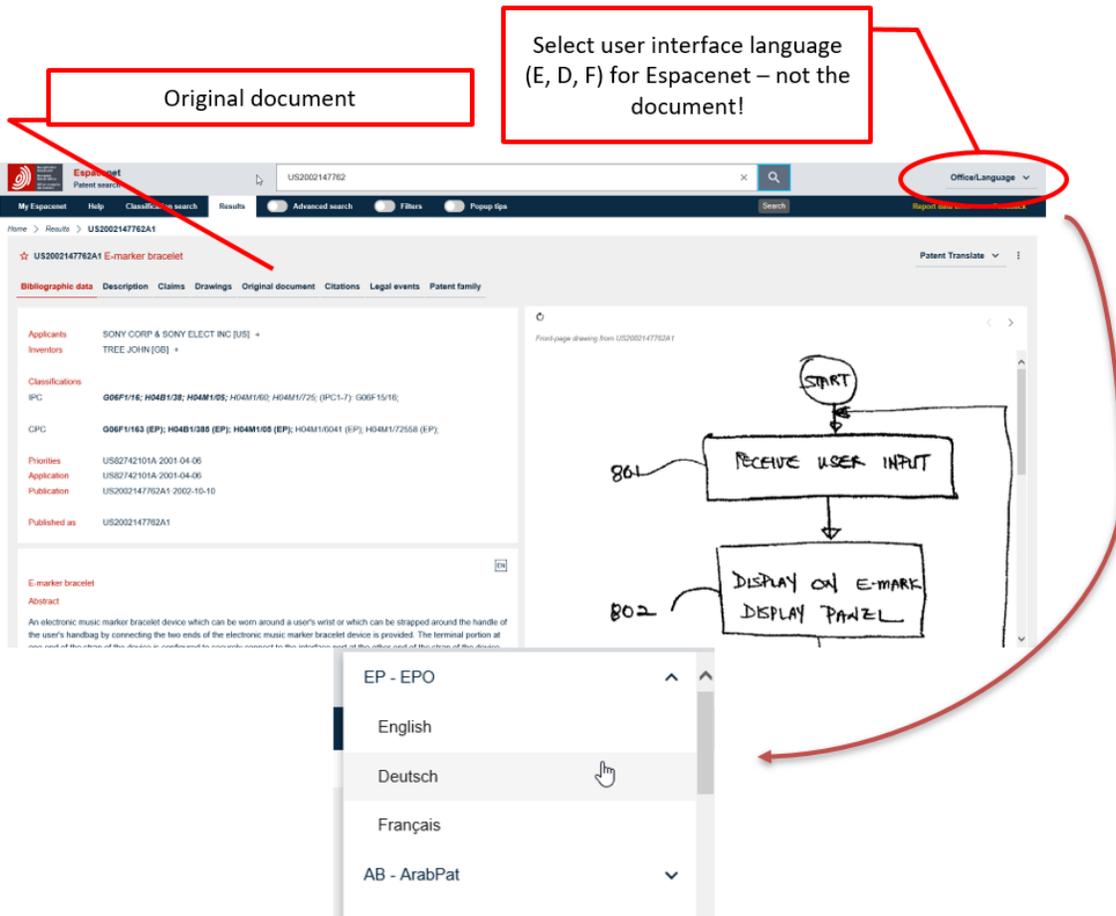
Not viewed in details

Number of references which were never opened in the detailed view. To open a reference in detailed view click on the reference number either from list view or on the dashboard.

Original document

Direct link to the reference in Espacenet. Besides the bibliographic data as known from IPsurvey, often the complete description, claims, original document and legal status is available in Espacenet.

See below how to select preferred user interface language (English, German, French) and switch to the original document view.



Preferred language

Preferred language is a global company setting. This setting is used when filtering out references before they get into the IPsurvey database.

[Read more about the filtering algorithm.](#)

Language filter algorithm

Before IPsurvey allows a reference to an application database it checks the reference's language using the following algorithm;

1. if at least one title is present
 - if there is a title in preferred language then use it
 - otherwise
 - if there is a title in English then use it
 - otherwise
 - set title to an empty string
2. if at least one abstract is present
 - if there is an abstract in preferred language then use it
 - otherwise
 - if there is an abstract in English then use it
 - otherwise
 - set abstract to an empty string
3. If no title and no abstract is set then discharge the reference
4. Otherwise allow reference to the database.

Priority

The priority date is the filing date of the very first patent application for a specific invention. Within 12 months of that first filing, a subsequent patent application for the same invention can be filed claiming this "priority right".

See also [date search format](#).

Processed by property

Every reference in IPsurvey can be marked as "processed" by the current user.

When a reference is marked as processed then all other users who have access to the reference will see who has "processed" the reference.

You can also search by the "Processed by" field using the advanced search function. [See details](#).

Search by "Processed by"

You can search by several parameters:

option	description
no-one	will search for all applications which were not marked as "processed" by any user who share the same department with the current user
user in company	will search for all applications which were marked as "processed" by at least one user who share the same department with the current user
user in department	will search for all applications which were marked as "processed" by at least one user from the selected user's department(s)
specific user	will search for all applications which were marked as "processed" by the implicitly defile user(s)

Publication date

The publication date is the date on which a patent application is first published. It is the date on which the document is made available to the public, thereby making it part of the state of the art.

See also [date search format](#).

Reference in department

To add or remove a reference to/from [department](#) you should open the reference in detailed view and edit "Departments" section. Alternatively you can do the same directly from the list view when viewing a list of references.



Only local administrators can add or remove references to department.

Reference number format

A reference number can be either of the following, application number, publication number or patent number. In most databases all reference numbers of all countries are standardised to one format, irrespective of the way in which they are printed on the documents.

Read more about the application number format for the Espacenet database [here](#).

Read more here about the [publication and patent number](#) formats.

Publication and patent number format

For the publication and patent number, different number format applies depending on the patent-granting authorities, but for the IPsurvey databases the following standardised publication format is used

	CCnn..nnn.K(k)	CA2142643.A1
CC	Is the country code	Read more about country specific number formats when adding references to IPsurvey.
nn..nnn	Serial number. May be up to 15 digits. The first n may be a letter.	
K(K)	Optional kind code. May be 1 or 2 characters.	

In general the publication number is typed without spaces and with or without the kind code (optional). A dot is separating the patent number and kind code.

IPsurvey number format

In general the publication number (PN) is typed without spaces, with or without the kind code (optional, [mandatory](#)). A dot is separating the publication number and the kind code.

General PN format	General IPsurvey format	IPsurvey example
CCnn...nnn.K(K)	CCnn...nnn.K(K)	EP1234567

For certain countries and patent-granting authorities specific rules apply for the publication number format. These are:

- [Japan \(JP\)](#)
- [Korea \(KR\)](#)
- [USA \(US\)](#)
- [WIPO \(WO\)](#)

Optional kind code:

The [kind code A](#) is never attached to the serial number.

Mandatory kind codes:

The [kind codes D-Z](#) should always be part of the publication number by adding the first letter of the kind code to the end of the serial number. Example:

PN format	IPsurvey format	IPsurvey example
CC nn...nnn K(K)	CCnn...nnnK.K(K)	DE112007003319T.T5 DE112007003319T

For the following countries, the [kind codes B](#) and [C](#) should always be part of the publication number by adding the first letter of the kind code at the end of the serial number. Example

Country	Country code	Mandatory kind code
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Austria	AT	B,C, D-Z
Australia	AU	B,C, D-Z
Bosnia and Herzegovina	BA	B,C, D-Z
Bulgaria	BG	B,C, D-Z
China	CN	B,C, D-Z
Denmark	DK	B,C, D-Z
Finland	FI	B,C, D-Z
Japan	JP	B,C, D-Z
Iceland	IS	B,C, D-Z
Korea (South)	KR	B,C, D-Z
Norway	NO	B,C, D-Z
Poland	PL	B,C, D-Z
Slovakia	SK	B,C, D-Z
Uruguay	UY	B,C, D-Z
Taiwan	TW	B,C, D-Z
The Netherlands	NL	B,C, D-Z
Yugoslavia/Serbia and Montenegro	YU	B,C, D-Z

Country specific publication number format:

Korea, USA and WIPO

The conversion table below is used to convert publication numbers from Korea, USA and WIPO into the right IPsurvey number format, where

XX	Document type. May be 1 or 2 characters.
YY	Is the filing year. May be 2 or 4 digits.
CC	Is the country code
nn..nnn	Serial number. May be up to 15 digits. The first n may be a letter.
K(K)	Optional kind code. May be 1 or 2 characters.

Country	Time range	PN format	IPsurvey format	IPsurvey example
KR	1/3/2001 -	CC XXYYYYnnnnnn n K(K)	CCYYYYnnnnnnn.K (K)	KR20081234567.A
US	All	CC n,nnn,nnn K(K)	CCnnnnnnn.K(K)	US1234567.A
	1/3/2001 -	CC YYYY/0nnnnnn K(K)	CCYYYYnnnnnn.K(K)	US2003123456.B2
	19/10/1978 - 30/06/2002	CC YY/nnnnn K(K)	CCYYnnnnn.K(K)	WO0112345.A1

WO	01/07/2002 - 31/12/2003	CC YY/nnnnnn K(K)	CCYYnnnnnn.K(K)	WO03123456.B1
	01/01/2004 -	CC YYYY/nnnnnn K(K)	CCYYYYnnnnnn.K(K)	WO2005123456.A2

Japan

The traditional Japanese calendar year consisted of Emperor and the year of his reign and for a period between 1926 and 1996 these information was part of the publication number format for Japan. Traditional Japanese publication numbers therefor consisted of Emperor, year of his reign, and a serial number for this period. See an example below:

(19)日本国特許庁 (J P)

(12) 公開特許公報 (A)

(11)特許出願公開番号

特開平5-229847

(43)公開日 平成5年(1993)9月7日

Publications after 29th of Marts 1996 is entered in IPsurvey with the general publication number format CCnn...nnn.K(K).

The concordance table below is used to convert publication numbers from Japan into the right IPsurvey number format, where

XX	Document type. May be 1 or 2 characters.
YY	Is the filing year. May be 2 or 4 digits.
CC	Is the country code
nn..nnn	Serial number. May be up to 15 digits. The first n may be a letter.
K(K)	Optional kind code. May be 1 or 2 characters.

in the table is typed as shown on the front page.

JP kind code	Time range	PN format	IPsurvey format	IPsurvey example
General notes		Always 6 or 7 digits, leadings 0 added in nnnnnn. Years with 1 or 2 digits.	When n > 1 digit leading zeros are omitted. Years always 2 digits.	
A1, K1	25/12/1926 – 10/04/1989	CC YY-(n)nnnnnn K(K)	CCSn(nnnnn).K(K)	JPS12345B.B2
	11/04/1989 – 24/12/1999	CC Y-(n)nnnnnn K(K)	CCHYYn(nnnnn).K(K)	JPH021.A1
	11/04/1989 – 24/12/1999	CC 1Y- (n)nnnnnn K(K)	CCHYYn(nnnnn).K(K)	JPH11123456.A1

B1, B2, K2	12/01/1927 – 26/12-1989	CC YY- (n)nnnnnn K(K)	CCSYn(nnnnn)K.K (K)	JPS541234B
	01/03/1989 – 29/03/1996	CC Y- (n)nnnnnn K(K)	CCH0Yn(nnnnn)K.K (K)	JPH0412345B.B4
U	13/09/1971 – 10/04/1989	CC YY-(n)nnnnnn (K)	CCSYn(nnnnn)K.K (K)	JPS4112345U.U
Y1	25/12/1926 – 05/06/1996	CC YY-(n)nnnnnn K(K)	CCSYn(nnnnn)K.K (K)	JPS241234Y
	17/01/1927 – 28/02/1989	CC YY-(n)nnnnnn K(K)	CCSYn(nnnnn)K.K (K)	JPS48123Y.Y2
Y2	01/03/1989 – 29/03/1996	CC 1-(n)nnnnnn K(K)	CCH01n(nnnnn)K.K (K)	JPH011235Y.Y2
	01/03/1989 – 29/03/1996	CC 2-(n)nnnnnn K(K)	CCH02n(nnnnn)K.K (K)	JPH021235Y
	01/03/1989 – 29/03/1996	CC Y(3-9)-(n)nnnnnn K(K)	CCH0Y(3-9)n(nnnn n)K.K(K)	JPH0412345Y
K5	Same as Y1/Y2 publications			

Resolved family

A family with at least one reference which satisfies the company's [preferred language](#).

Saved search

Every time you do a search you can save your search settings using "Save" button at the bottom of the search form. All saved searches appear on the dashboard and in the "Saved searches" pane when open the "Search" page. [How to save a search](#).

Tags

Every reference can have one or more tags. Tag is a single word or a short phrase which can be used to group several references by one or another property.

Every user with general access rights can add or remove tags using [detailed reference view](#) or do group tagging using the [list view](#).

You can also search by tag(s) using the advanced search function for this purpose there are two search fields included:

1. Search for references which include given tag(s). Here you can choose if you want to search for references where all specified tags are set or for references with at least one of the specified tag set.
2. Search for references which doesn't include given tag(s). In this case only references where the specified tag(s) are not present will be found.

Unassigned reference

Reference is unassigned if it's not assigned to any department. To assign a reference to a department click on the reference and edit the "Departments" section. Alternatively you can assign a department via the list view.

Unresolved patent family

A patent Family* which has been found by a search profile, but without any reference assigned. IPsurvey keeps searching for references in the OPS network for a duration of the 12 months. If IPsurvey don't have success within this time period of 12 month finding at least one reference in the OPS, the patent Family* gets archived with the status "unresolved" and IPsurvey will no longer attempt to retrieve that specific patent Family* from the OPS.

It is possible to have a hard copy of the DWPI abstract for these archived references, please contact ipsurvey@dkpt.o.dk for further information about the price.

*A patent family is a set of patent filings made in various countries to protect a single invention.

Updated reference

Updated references are families where at least one member changes status from incomplete to complete.

All references relates to a patent family, having one or several family members. **Incomplete references** relates to a family where **no family** member have an abstract and **complete references** is part of a family where at least one family member have an abstract. A incomplete reference becomes complete either when a new family member is added to IPsurvey with an abstract or an existing family member is updated with an abstract e.g. Korean application publishes an english abstract. This complete family member is marked as updated in the summary report and on the dashboard.

User profile

In the user profile these settings is variable:

- **Role in current company:** A user must be either "Local administrator", "Local user" or "Read only user" depending on their line of work. When assigned to more than one company, they can have different **roles**, in each company they are assigned to.
- **Status in database:** Active or Suspended. A suspended user do not have acces to the database. If an user is assigned to more than one company, the users has to be suspended in each company.
- **Status report frequency:** Paused, daily or with a specific interval (weekday, weekly, fortnightly, monthly). Paused is intended for suspended users.
- **Send status report..:** The status report is always created, also when no new or updated references has entered the database since last report
- **Don't count references....:** When creating a new user in an existing database all existing references are marked as "not viewed in detail" on this users dashboard as they are considered to be new for this user (they have not been viewed or opened in detailed view yet). When ticked only references entering the database after the users creation date are displayed as "not viewed in detail" on the dashboard.

How to change a setting in the users profile:

Accessing the user profile

1. Open the tab "Users and departments" from the <Administration> left menu
2. Open a department drop-down menu with the user assignen, unassigned users are grouped in <Users not belonging to any departments>
3. In the user list, click on the users e-mail to open the users profile
4. Change one or more of the settings, to apply the changes press <Save> or <cancel> to discharge the changes.

General information **Users and departments** 1 profiles List view defaults Price lists Export Archives

Patent- og Varemærkestyrelsen

Here you get an overview of company's structure. IPsurvey groups search results by departments and users can only see search results from the departments which he was assigned to. Please make sure that all your users relate to one or several departments.

IT

Patent

Test

Mobile devices

test2 2

	Email	Role in company	Status
<input type="checkbox"/>	mij@dkpto.dk 3	Read only user (IPLR)	Active
<input type="checkbox"/>	crh@dkpto.dk	Local administrator (IPLA)	Active

Changeable user profile settings

- **<Department>** Overview of the department with the user assigned. Per default all departments are checked on user creation.
 - Add user to a new department: Open the department drop-down menu and tick the new department(s)
 - Remove user from one or all departments: Uncheck the specific department(s) or click on **<Uncheck all>** to remove the user from all departments and transmit it to the system folder "Users not belonging to any departments".
- **<Name>** Name as displayed in IPsurvey e.g. when commenting
- **<Contact phone>** For information only, mandatory for local administrators
- **<Role in "Company">** May be either "Local administrator", "Local user" or "Read only user", more about [roles](#)
- **<Status>** "Active" or "Suspended". Suspended users are not able to login to the database. How to suspend an user
- **<Status report frequency>** Either specific day or "Paused" e.g. when the user is suspend in all departments.
- **<Don't count reference as "new" if it was created before my profile was created>** When ticked, only references entering the database after the users creation date are displayed as "not viewed in detail" on the users dashboard.
- **<Save>** saves the changes in the database and returns to the **<Users and Departments>** menu
- **<Cancel>** discharges all changes and returns to the **<Users and Departments>** menu

Regardless if the profile changes is saved or discharged IPsurvey returns to the **<Users and Departments>** menu afterwards.

Edit profile for demo3@demo.com

Local user (IPLU)



Department
MECH1, MECH2, Testing, Medicine

Name
Demo user 3

Contact phone

Role in Demo company 2
Local user (IPLU)

Status
Active

Status report frequency
Every Monday

- Send status report even if no progress detected
- Don't count reference as "new" if it was created before my profile was created

User name and phone are required for all administrators

You can not delete user, but you can set status to suspended

Status report is a short email with an overview of how many new entities were found from the last status report

Reference considered to be new once it has entered the database and before you have opened a detailed view for the reference. If this option is ticked then a reference will not be considered as new in case if it has entered the database before your account was created.

Save or [cancel](#)