Invention Navigator Portable

User manual: Version 2.3.

Contents

1. Introduction, Imprint

Dear users of the Invention Navigator editions,

In this user manual, we would like to briefly present you the Invention Navigator Portable and explain how to access data in your Knowledge Network for patents. This manual is also applicable for the research and work with the Invention Navigator Professional from version 7.0.
The manual will regularly be adapted to the extensions of the software. Please accept our apologies when this update occasionally occurs with delay. We are also pleased to assist you personally. Call us, if you have any questions. By clicking the Help-button in the software you can access online help on our website which can also be downloaded as PDF files. These help files include videos which guide you through the functions in an easy and intuitive way.

1.1. Installing Invention Navigator Portable?

The Invention Navigator portable belongs to the software family of the Invention Navigator and is used within your in-house patent information system (Knowledge Network). Unlike all other editions you are able to access your data via the internet from any computer without having to use local INav databases. For individual users without access to the internal Knowledge Network, SIP can provide you with an appropriate solution. Please contact us concerning this.
The Invention Navigator portable is not a web solution. You will have to download the software Invention Navigator Portable to be able to access your data. This method has various advantages to browser based solutions; multiple window technology, menu structures and functions (e.g. drag-and-drop) used in Office programmes, faster loading, managing personal data in the company and public data on SIP's servers, thus enabling faster search performance.

There are multiple ways to use and access the software.

1. Using the following link (Click Once□)

Click the following link or copy it into the address bar of your browser:

http://www.service4ip.de/download/inav/portable/INavPortable.application

Then simply follow the installation instructions.
You will be asked to install the Invention Navigator portable. You do not need administrator rights on your computer. To uninstall the Invention Navigator portable use the common method via the control panel.

Updates for new versions are performed automatically.

□ **Click Once** is a technology by Microsoft which allows you to start Windows applications with one click via the internet. Such applications are also known as Smart Clients. You require Microsoft .net Framework from version 3.5.
2. Downloading and saving of a ZIP file from the download area on our website. Use this method if the ClickOnce version is not possible on your computer.

2. Download and save the Zip-file from the download section of our website.
Choose this version if the ClickOnce version is not executable on your PC.

http://www.service4ip.de/download/inav/portable/INavStandalone.zip

Download the file on a USB stick or directly onto your computer, unpack the file and then open
the Invention Navigator Portable version by clicking the setup icon *INav Portable* (see figure
1).
If you install the programme using a USB stick, you prevent the installation of the programme
on your computer but you are also responsible for updating the programme. As of April 2012
the ZIP version will also be able to detect whether a newer version is available.

Figure 1: file structure INav Portable

3. MSI-Version

http://www.service4ip.de/download/inav/portable/INavPortableSetup.msi

After downloading this version and starting the downloaded file an installation assistant opens
which will guides you through the installation of the Invention Navigator Portable. You can
decide where the file is saved.

You can also find the current versions in the Download area on our website.

1.2. Login and password

Regardless in which way you access the Invention Navigator portable, initially the Login window will open. Enter your User Name and password, which can be obtained from the colleague responsible for the Invention Navigator Knowledge Network in your company or directly from SIP. In many companies it is necessary to enter a username and password to log on to the internet. You can enter these details in the Invention Navigator Portable. To do this, click on the button "Options".

When you log in, you can change your password and activate auto login.

Your login details are connected to certain user rights. Depending on your authorisation settings (R&D, Professional, Premium) you have access to different functions. Another rights feature implies whether you can search only in your own stock, i.e. in folders visible to you, or whether you can search the whole of the global database Search4ip.
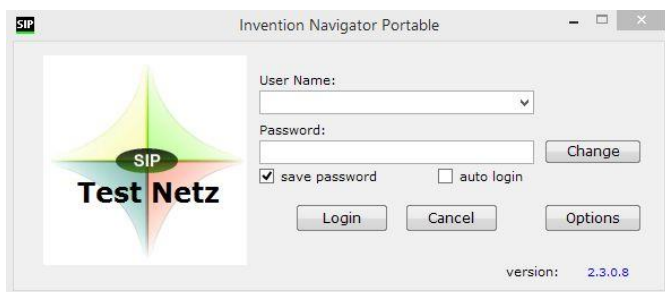
Figure 2: Login window

If you check the box auto login, Invention Navigator will open instantly without having to enter your login details, once you click the icon on your computer.

You can deactivate the auto login feature by removing the check form the box in the menu tab "Tools".
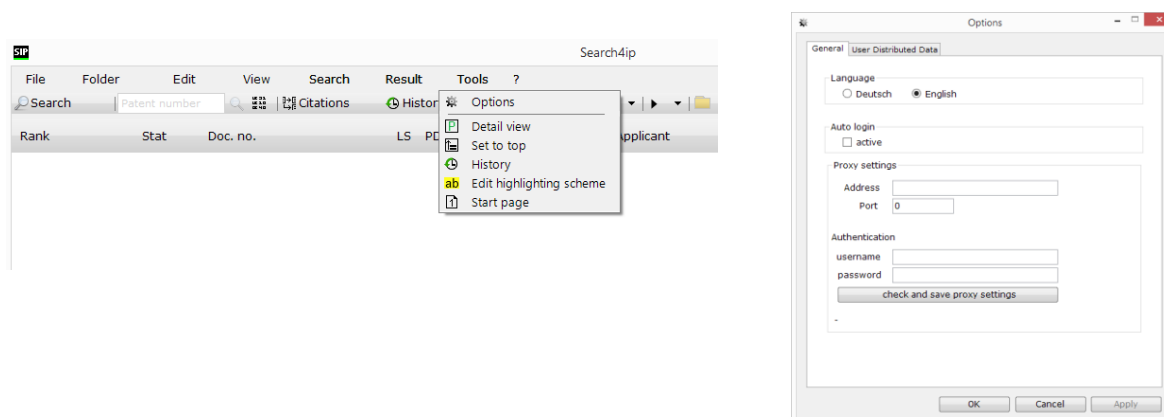
Figure 3: reset auto-login, change language settings

When logging in for the first time or when downloading a new version (update) the search surface will be displayed in English.

Change the language settings into German by accessing the tab "Tools" / "Language". You have to restart Invention Navigator for your changes to take effect.

Please contact us directly if you are experiencing difficulties with the software.

It happens from time to time that specific functions and access permissions have not been enabled for your company. We are happy to help you and are also able to inform your IT department about required access permissions and activations. Please contact support@s4ip.de to get assistance.

1.3. Opening the Knowledge Network

After logging in, Invention Navigator Portable will open exactly as you left it or alternatively corresponding to your preferences.

When logging in for the first time, it can occur that you only see a blank page. Click the tab "Folder" and choose the "Folder Selection/Administration" button or directly use the folder (without blue arrow) icon to open the Folder Selection/Administration.
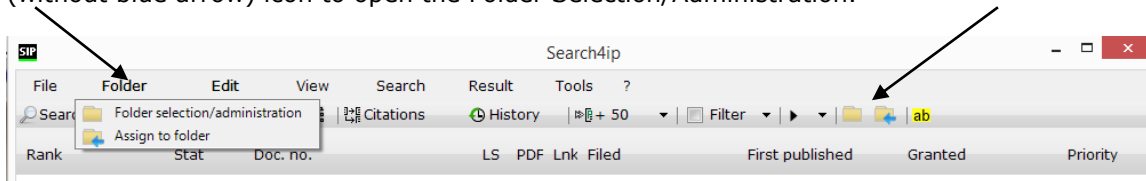
Figure 4: Opening Folder selection/administration and Assign to folder tree

Folder trees will open in a new window, which represent the file structure of your Invention Navigator Network. These windows can be placed on your screen according to your preference.

The window **"Assign to folder"** can be opened multiple times. This can be of great advantage if you want to assign documents to multiple folders/folders and are using a complex tree structure.
The tree structure **"Folder selection/administration"** will often show other folders and structures than the tree structure **"Assign to folder"**. In the **"Folder selection/administration"** window you can see folders which contain patents you are authorised to read and in **"Assign to folder"** you can see folders which you are authorised to assign patents to.
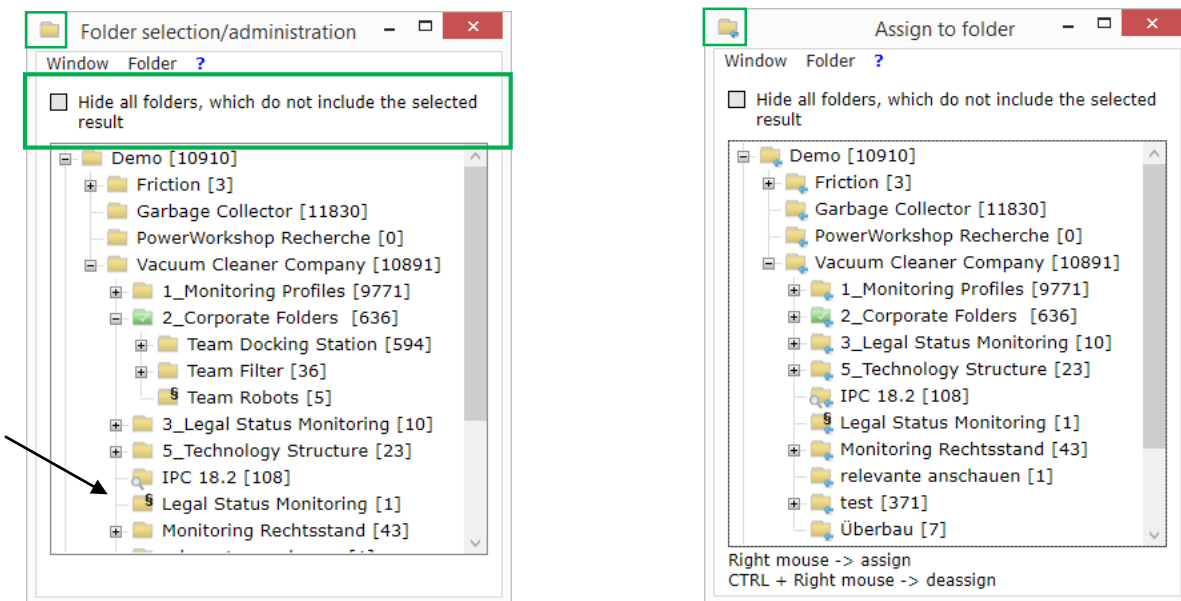
Figure 5: View of the "Folder selection/administration" window "Assign to folder" window

1.3.1. Different folder types in the Knowledge Network

The Invention Navigator Knowledge Network contains different folder types which are explained in detail on the following pages.

The family-based folder

If you assign patents to a family-based folder the entire family is assigned and displayed as one hit. If you assign another family member of the same family, the amount of hits will not change.

When opening a family-based folder only one member of the SIP-Patent is displayed. This is typically the most recent document, i.e. the grant if available.
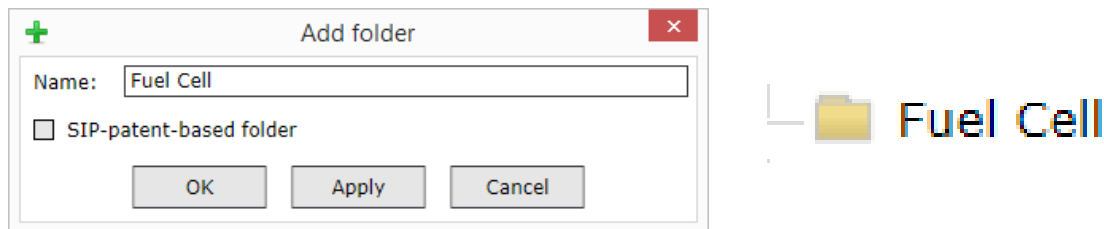
Figure 6: Creating a family-based folder / folder icon family-based folder

A family-based folder is created by performing a right click in the window **"Folder selection/administration"** on the folder you would like to add a sub-folder to. Select "add folder" in the context menu. A new window opens in which you can assign a name for the new folder and select whether you want to create a family-based folder or a SIP-Patent-based folder. If you leave the box unchecked, a family-based folder will be created.

The SIP-Patent-based folder

With the Invention Navigator Portable from version 2.2.24 a new folder type was introduced. Typically all folders in the Knowledge Network were family-based folders. An exception is the SIP-Patent-based folder, marked with an S

Definition SIP-Patent:

A „SIP-Patent" contains all publication levels of one application: e.g. application, and grant, corrections, audit reports

*EP 123456 A2, EP 123456 A3, EP 123456 B2 - **the SIP Patent is**: EP 123456*

If, for example, a result list of a search is displayed SIP-family-based, the grant and the application of the patent is displayed as one hit in the result list. Here, the most recent publication is displayed.

A family-based folder is created by performing a right click in the window **"Folder selection/administration"** on the folder you would like to add a sub-folder to. Select "add folder" in the context menu. A new window opens in which you can assign a name for the new

folder and select whether you want to create a family-based folder or a SIP-Patent-based folder. Check the box to create a SIP-Patent-based folder.
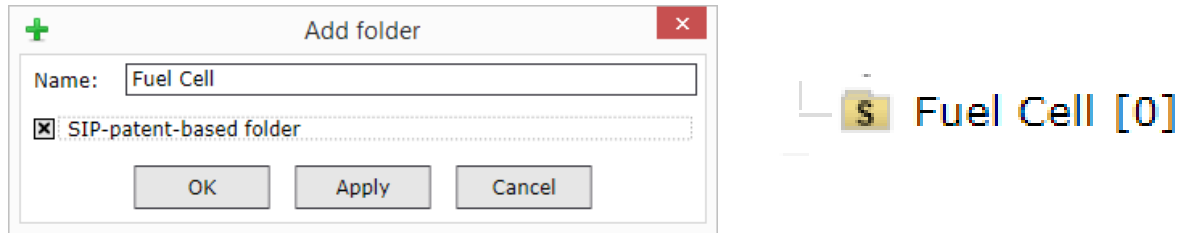

Figure 1: Creating a SIP-Patent-based folder / folder icon SIP-Patent-based folder

When assigning a hit from the result list to a SIP-Patent-based folder, the exact SIP-Patent currently displayed in the result list will be assigned to the folder. When assigning from Detail View, the currently displayed SIP-Patent is assigned to the folder. Select another SIP-Patent of the patent family by clicking on it in the patent family list (Detail View → expand patent family), thus displaying it in Detail View.

A SIP-Patent-based folder displays the amount of SIP-Patents. In a SIP-Patent-based folder multiple SIP-Patents of a patent family can be displayed. Once a new SIP-Patent is added to the folder, the amount of hits increases.

In the result list or in Detail View one representative of the family, i.e. a SIP-Patent is displayed. If you click on a hit in the result list or if you open the hit in Detail View. The folders which contain the hit are displayed blue. A family-based folder can contain any SIP-Patent while a SIP-Patent-based folder must contain the selected SIP-Patent for the folder to be displayed blue.

Find additional information in our Online Help.

Additional folder types

Folder with magnifying-glass icon:

This folder is equipped with an automatic search (Alert, Monitoring Profile) which is carried out on a weekly basis. If new patents are found by the automatic search they are filed in this folder. The user can choose to be informed via e-mail about newly filed patents. Typically these folders are created by the network administrator.

Folder with §-Icon:

This folder is equipped with a legal status monitoring, i.e. patents are automatically monitored regarding changes in their legal status (granted, lapsed,…). Authorised users receive an e-mail notification outlining the changes in legal status. Typically these folders are created by the network administrator in order to monitor specific critical patents regarding their changes in legal status.

You can decide in which way the Invention Navigator (INav) will open when you start it. If you want the window **"Assign to folder"** to open instantly when starting up, check the box "Show on start". Proceed in the same manner with the **"Folder selection/administration"** window. There is also another special feature. If you would like the result list of a specific folder to automatically open, proceed in the following manner.

1.3.2. Automatically open folders on start-up

Select the folder in the **"Folder selection/administration"** window and click on it using the right mouse button. Select the feature **"Show patents on startup".** The folder will change its colour to green and will be marked with a small icon. Now, as soon as you log in, patents in this folder will automatically be displayed in the result list.

Here, it needs to be noted that greyed out options in the context menu signify that you do not have the rights to perform these changes.
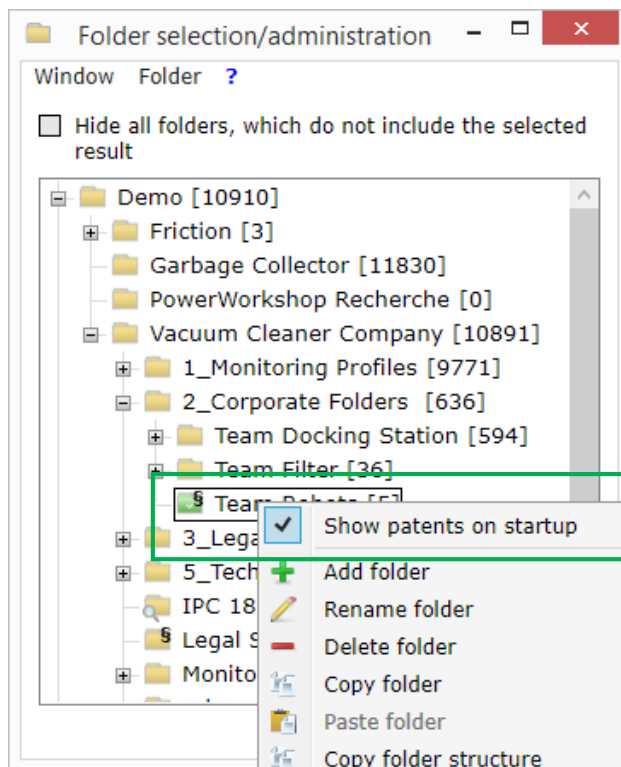
Figure 8: Automatically display folder contents on start up

2 The result list

Once you have selected a folder in the **"Folder selection/administration"** window the result list will open. You can change the way the result list is displayed by clicking on the button "View" in the menu.
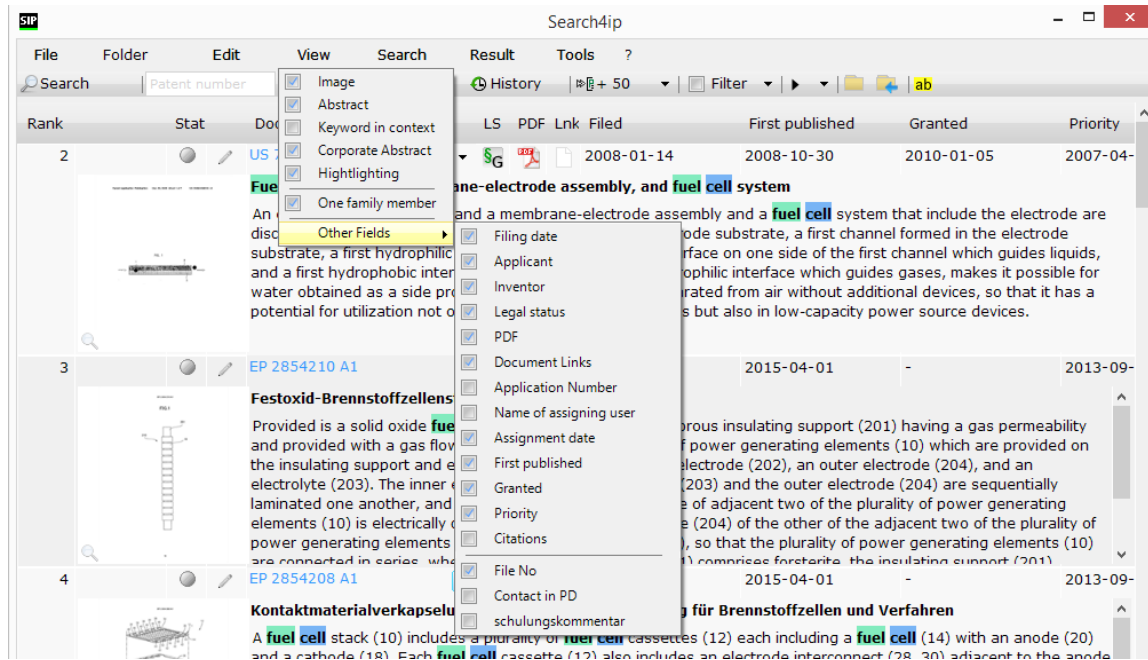
Figure 9: menu item View

Here, you can set which information will be displayed in the result list. Select here if you would like to see the image and the abstract of a patent or whether the filing date, the applicant or the inventor should be displayed. Additional display options include the legal status, the PDF, a document link, the application number, the name of the assigning user, the assigning date, first published date, priority and the citations.

If you conduct a keyword search you can display the areas in which the keywords occur in the title list. To do this, select the item "Keyword in context". Please note that displaying the results in this manner is slower than displaying the Abstract.

If "One family member" is selected, only one member of the family contained in the list is displayed and not all found results.

To put it simply, one family contains all publications of an invention in different countries. Each folder contains all members of a family. However, only one family member, determined by the **"set to top" function** is displayed.

Figure 10: Set to top

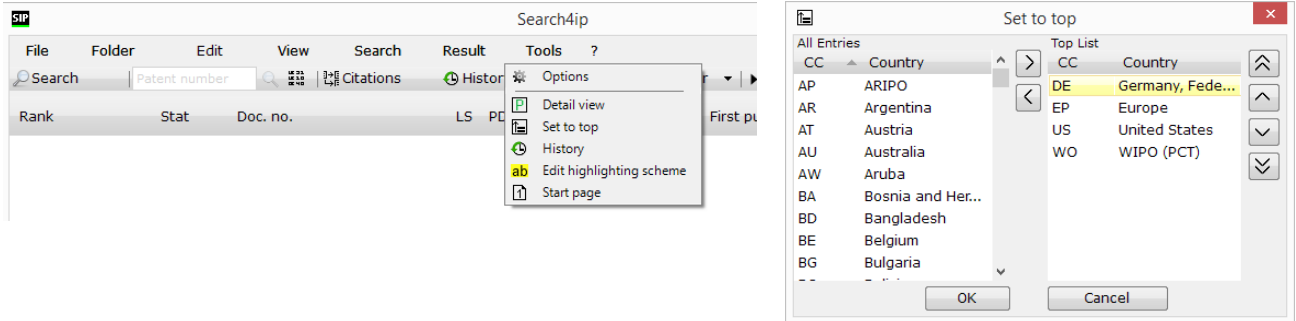Now the question arises, which publication stage of the member is displayed? By default, the most recent publication (except research report) is displayed. This would mean in the example of a DE document with an existing granted patent that the granted IP right is displayed. However, the exception proves the rule. For the countries JP, KR, CN, GB it is always the case that the application is displayed even though a granted patent exists patent. The reason for this is the data availability. The offices only supply for applications (text data for the abstract/title or images) but never for the granted patent. Therefore, instead of showing you the granted patent, we show you the application. (As an extended legal status "granted" will be displayed.)

Please note: During a search only specific family members can be found and are combined accordingly.

Set to top, i.e. the family member displayed will be predefined according to the wishes of the company.

With the menu item **Tools / Set to top** any user can individually determine which family member will be displayed.

If, for example, after a search various family members are displayed in the opened list, the arrow next to the patent number will turn blue. By clicking, other family members can be viewed. By clicking on the family member it will be selected and displayed.

(Attention! Only family members which are contained in the result list according to your search will be displayed. The entire patent family is displayed in Detail View!)
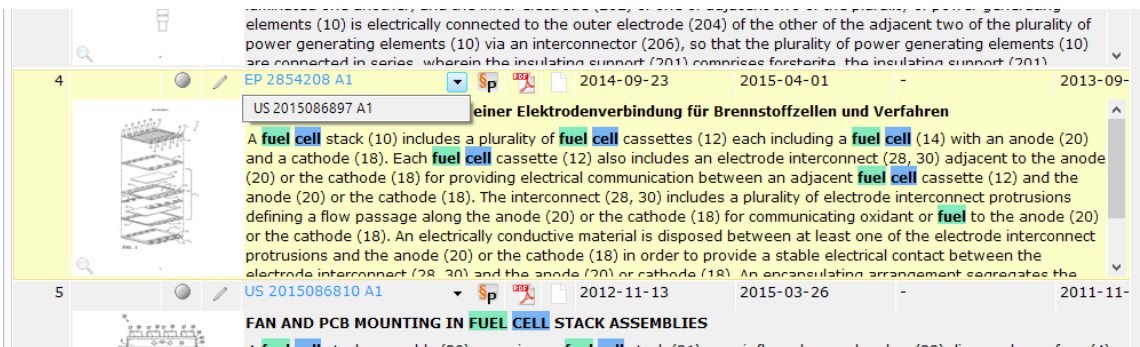

Figure 11: View of the title list, expanded family view

To display all members of a patent family, open the Detail View by double clicking on the list item or the patent number.

Figure 12: Detail View with expanded patent family

2.1. Filtering the list and information about the list's contents

The columns can be adjusted or hidden altogether. Clicking on the column header will sort the list displayed. The list is usually sorted by the „Last in – First out" criterion. This means that patents which have been entered in the database recently, will be shown first. In the most important countries (DE, EP, WO, US) this will be the most recent publications. In other countries, where publications come in with a delay of some months, it is possible that older publications will be displayed. Furthermore, the „application date" instead of the „publication date" is shown. The application date will instantly give you an impression as to whether you are dealing with a new invention, a subsequent application or a late grant.

Please always note, that only the list displayed is sorted. You can see in the footer of the result list whether all patent families contained in the folder or all are displayed.
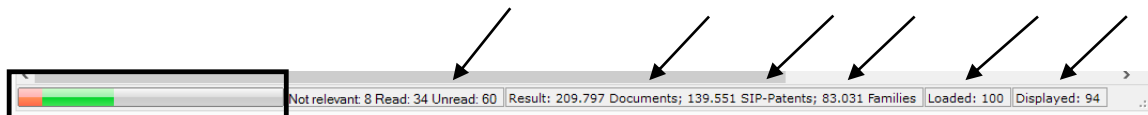

Figure 13: View of the footer with information about the title list's contents

Not relevant: shows the number of SIP-Patents or families in the folder marked "not relevant"

Read: shows the number of SIP-Patents or patent families in the folder marked as "read"

Unread: shows the number of SIP-Patents or patent families in the folder marked as "unread"

The coloured bar illustrates the number of read / not relevant families in the folder. This way you can see instantly if the folder contains documents which still should be viewed.

Result: shows you how many hits (patents) your search delivered or how many hits are contained in your folder.

SIP-Patents: shows you how many SIP-Patents were found with your search

Families: shows you how many families were found with your search

Loaded: shows you how many patents were loaded. After a search, 50 patents are automatically loaded. When displaying the contents of a folder in the window "Folder selection/administration" , 100 patents are automatically loaded. You can load additional patents by selecting the menu item "result" and choose how many patents you would like to load. You can choose between 50, 500, 5000 patents or the complete result.

Displayed: indicates how many families or SIP-Patents are contained in the list. This is also primarily interesting for research purposes rather than monitoring.
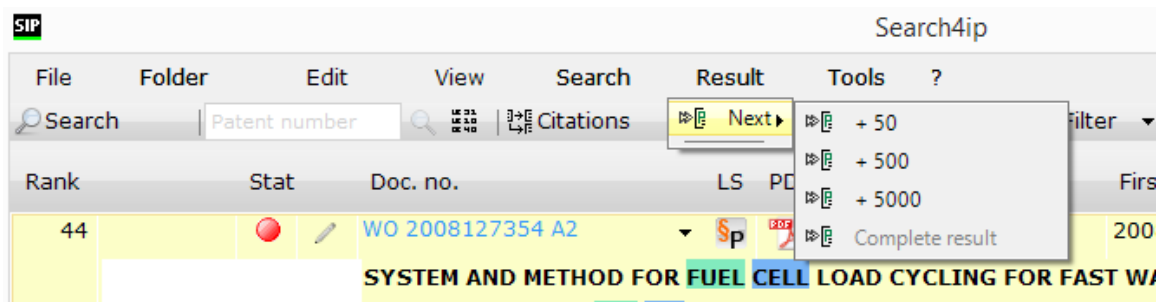

Figure 2: Load results

If you check the item "Filter", filtering options are activated. If you remove the check, all filters are removed. You can select the filtering options by using the pulldown menu. Once you check the "unread", "read" or "not relevant" boxes, the hits marked in this manner will be displayed.

2.2 Read, Unread, Not Relevant

Repeatedly the terms „read", „unread" and „not relevant" are used. The following will explain how this rating is achieved and which effects it has on your results.

Workflow in patent monitoring usually consists of the following steps:

read -> check relevance -> assign -> comment

As soon as you receive new patents for review and read them, you will notice immediately that hits are displayed which don't have any relevance to the topic you are researching, especially if you are not using intellectual pre-selection (cause: false classification, rough filters). Apply „not relevant" for these SIP-Patents. When opening the programme the next time these hits will be shifted to the bottom of the list. To hide them entirely, uncheck the box „not relevant" in the Filter menu. These hits will not be displayed in the folders visible for you (You can always show them again by using the Filter menu).

Once you have read a patent, assigned it or commented on it, or if it simply belongs to the state of the art, you can set it as „read". You may also filter these documents during the patent monitoring process and the Invention Navigator will only show you the documents not yet edited. As soon as another family member is found during automatic monitoring, this hit is instantly marked as „read" and you do not have to view it anymore.

See also: 7. Special features in the monitoring (here company specific exceptions are described)

In many cases you will already be able to make the decision to mark a patent as "not relevant" in the result list. In order to mark a list entry (a SIP-Patent) as "not relevant", click twice on the "button" next to the image. Click once – the button turns green – the SIP-Patent will be marked as "read". Click a second time – the icon turns red. Click again – SIP-Patent will again be marked as "unread"

At times it can be sensible to mark multiple hits in the list as „read" or „not relevant". Now typical Windows functions come into play.

With „Ctrl" and A you select all the list entries. Holding down "Ctrl" and clicking on individual hits selects hits which are not in a row. With „Shift" and mouse click several successive hits are selected. Selected list entries are displayed in yellow.

Hint:

When marking patents, please note what is displayed in the result list!
If you **check the box** in the menu tab **"View" → "One family member"** and mark an entry as „read" / „not relevant", all SIP-Patents found by the search (drop-down menu next to the displayed patent number) will be marked as "read" / "not relevant".

If you **do not check the box** in the menu tab **"View" → "One family member"** only the displayed SIP-Patent will be marked as "read" / "not relevant".

Hint! In order to select entries in your result list, place your cursor on the left side of the entry. This way, you avoid selecting the text and select the entire list entry.
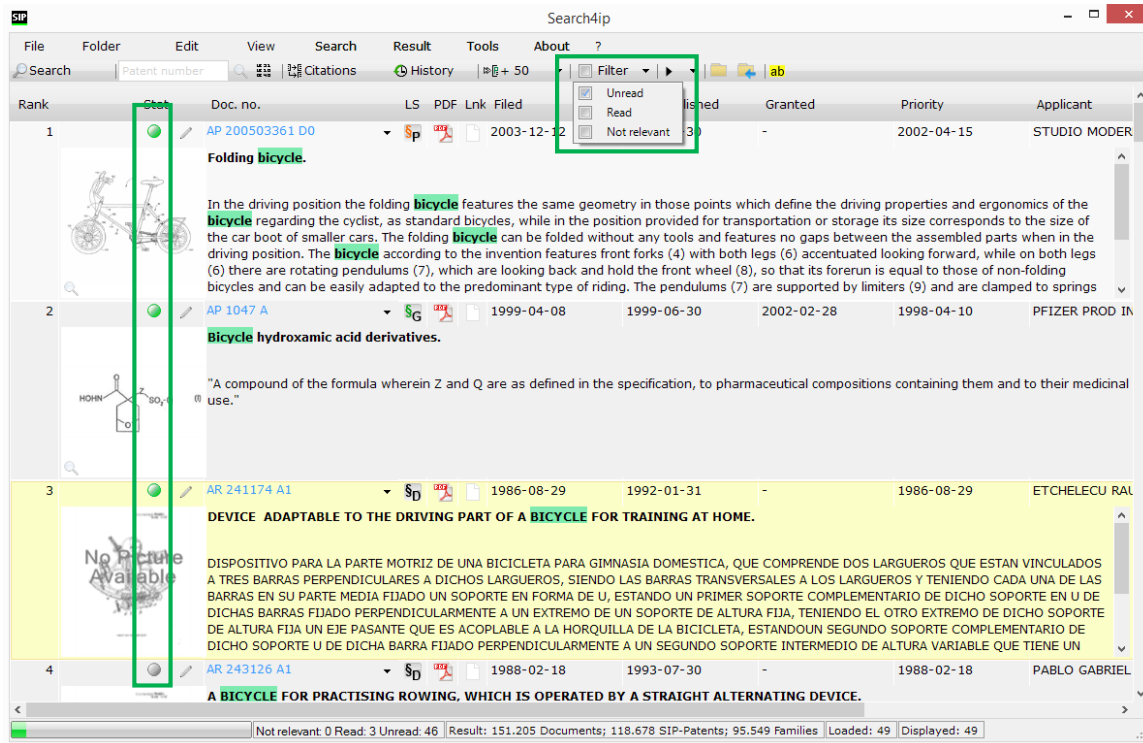
Figure 35: Buttons for marking a patent family as "read" und "not relevant", Filter settings

By using the "Edit" menu you can mark multiple selected patents as „read", „unread", or „not relevant".
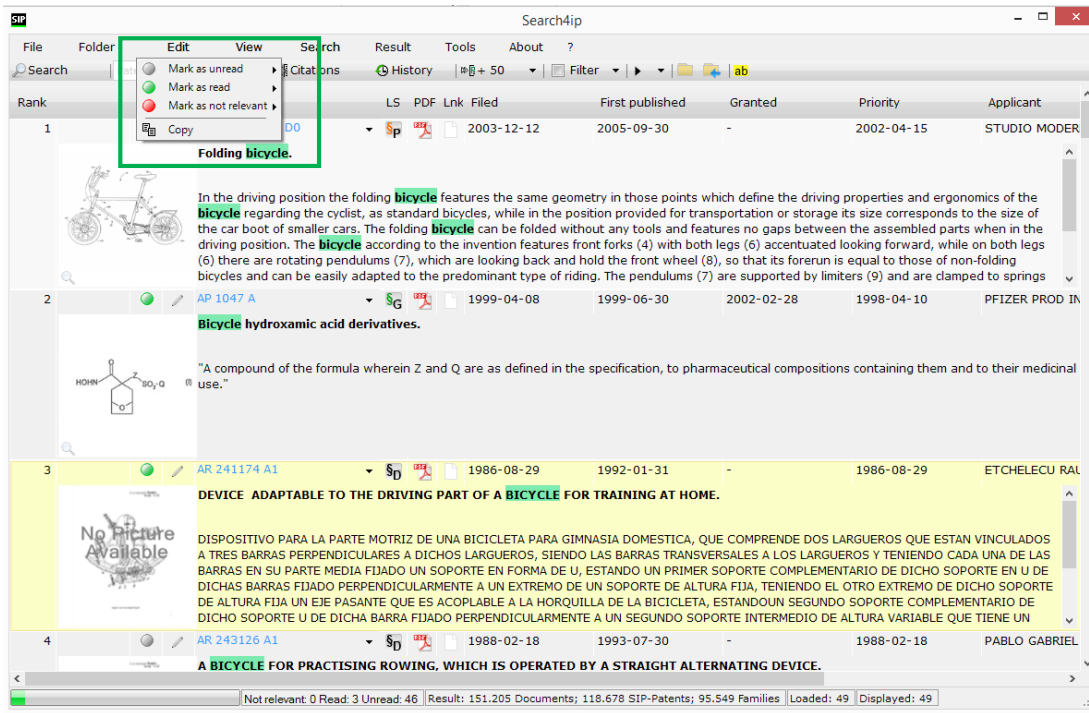

Figure 46: Menu "Edit"

2.3. Detail View

2.3.1.   Features und information in detailed view

The use of the result list has previously been explained. You will undoubtedly ask yourself now how a patent can be evaluated if additional information as claims, images or descriptions are required.
By clicking on the text or patent number the Detail View will open in a new window.

Next to the patent number of the patent family's representative, the extended legal status of the patent family's representative is displayed. Besides „published" and „granted" there also exists the legal status „dead". SIP calculates this legal status by the patent's age and legal status information from the INPADOC database. A patent will remain „granted" or „published" until we receive the legal status code „lapsed" from the office or until the maximum duration of an IP right[1] is reached.

Many offices tend to send this information with delay or not at all. Therefore it is recommended, the patent department or the patent attorney check the legal status directly with the office.

Figure 57: View of Detail View / Patent-View

The duration of a patent will be calculated with 25 years in Search4ip, as it will not be distinguished whether the patent displayed is a publication from the pharmaceutical/chemical sector, as in this field an extension to 25 years is possible.

In the top section of the Detail View, next to the number of the displayed family member you can see various icons.
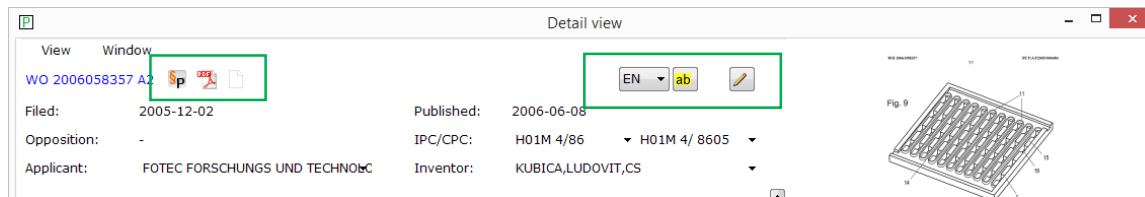

Figure 18: Icons in Detail View

The first icon on the left hand side shows the simplified legal status of the displayed family member.

G   Granted
P   Published
D   Dead
U   Utility model
?   Legal status not specified

If you click on this icon you will be transferred to our website www.patentfamily.com to find detailed information regarding the legal status of the patent.

The next symbol opens the original PDF - document.

The next symbol enables you to create a document link. **Find out more in the chapter: Document Link**

The next symbol displays the available languages in the patent. Here, you can change the language when viewing EP patents.

The „ab" – icon opens the editing window for the Synonym-Highlighting. **Find out more in the chapter: Synonym-Highlighting.**

The icon with the pencil-symbol opens the window for viewing and editing the document-based comment and the corporate abstract. **Find out more in the chapter: Corporate Abstracts, comments and evaluations**

Alternatively you can use the menu item „Window" to access the previously described features. In addition to this, other functions are available.
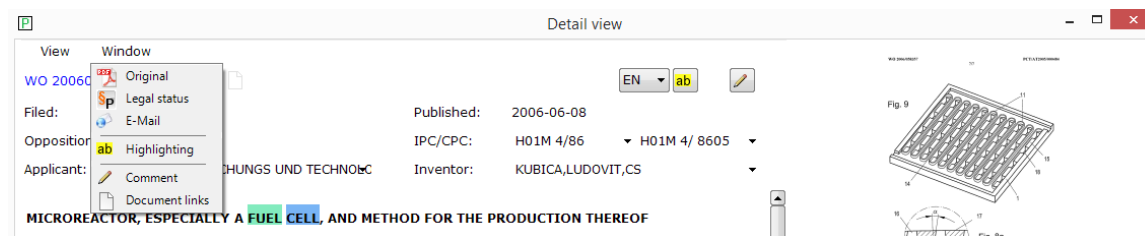

Figure 19: Menu "Window"

The button "E-mail" with the globe symbol opens a new email in your email programme (tested for Outlook, Firefox Thunderbird and Lotus Notes), in which the patent link (in browser view) will automatically get pasted. This way you can inform colleagues who do not have access to the Invention Navigator Network about an IP right.
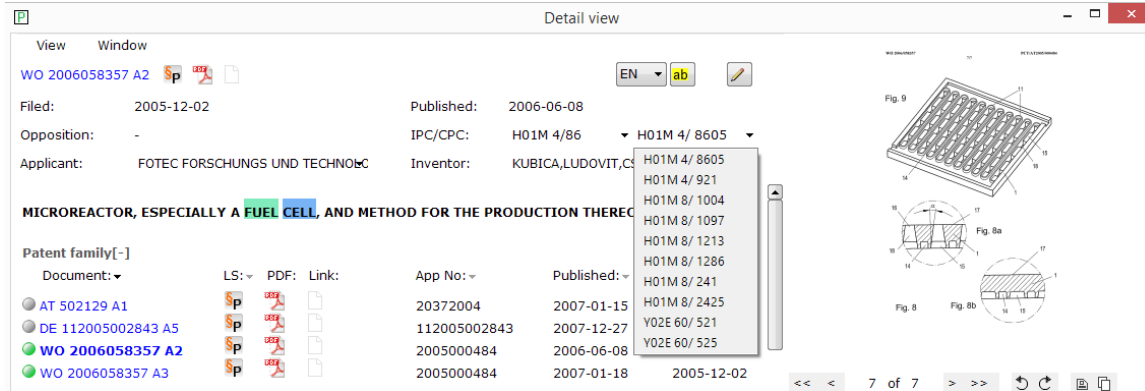
Figure 20: Detail view – Display IPC/CPC

Below the patent number the bibliographic data is displayed. By clicking on the arrow symbols a drop-down-menu will open and further information can be accessed.

The window in the top right corner displays the first image / title image. Double clicking on the image will open it in a new window. Use the arrows and the symbols under the image to see further images or just click your way through the mosaic. The mosaic view can be enlarged by holding down Ctrl and scrolling the mouse wheel. The images can be saved, turned, enlarged or reduced in size, etc.

Below the bibliographic data, the patent family is displayed. This window can remain open and you can instantly see all family members with publishing date and, if assigned by your company, the contents of additionally defined fields (via Invention Navigator Professional)

Below the bibliographic data text information like title and abstract are displayed. You can display texts for offices containing claims and descriptions. Often, German or English abstracts, claims or descriptions do not exist. In these cases we display the text of other family members and quote the source's patent number.

An additional section is the corporate abstract, which you can utilise – if used by your company - to display a text compiled by a colleague. This text will be displayed with every family member. This abstract usually contains a summary of the invention's contents.

2.3.2.   Mark as "not relevant" or "unread"

You can also mark a patent as „not relevant" in Detail View. Click the button „not relevant" or „read" below the patent information. This way you will automatically scroll to the list's next document. If you use the arrows for scrolling to the previous or next item, the family remains in the „unread" status. If an item is marked „read" / „not relevant" you can change to „unread" by removing the check (by clicking in the check box).

2.3.3.   The document link

There are two options to link external documents to the content of the Invention Navigator solutions. Documents (PDF, images, Excel documents, Word documents, …) are not physically attached. A link to the document is created which is subsequently linked with a folder or the patent document.

It is possible to link external documents with a patent document or with a folder in the Knowledge Network.

"Attaching" a document to a patent is possible in Detail View and in the result list.

Use the menu item "View" in the result list to show the document link in the result list. The column LNK will display a white icon (empty document).

Proceed in the same manner to show the document link in Detail View (menu item "View"). The white icon is displayed for all members of the patent family.

As soon as a document is linked with a patent the icon will change and receive a black frame.

Link a patent or a patent family

If you want to link a patent, simply input the patent number. You can also select if you would like to link the patent or the entire patent family. In the bottom section of the window, the Search4ip web-view of the patent is displayed. An advantage is that you will always see the most recent version of the patent. For example you can see the legal status and the family when opening the link. It is also possible to open the PDF without having to search for it in the Invention Navigator.

Link a document

You can also link any document using the menu item. A new window opens. In this window click the button with the three dots. Your Windows Explorer will open where you can select the document to be linked. If the document is located on your PC, only you will be able to open the document. If the document is located on a shared drive, all Invention Navigator users authorised to access this drive are able to open the document.

Overview document link

As soon as you have linked a patent or document, you can see in the list when the link was created, who created the link, the title of the link, date and time of creation and, if applicable, a description for the link.

In the first column the patent number linked with the document /patent is displayed. If the link was changed the name of the person who carried out the change and the date of the change is displayed.
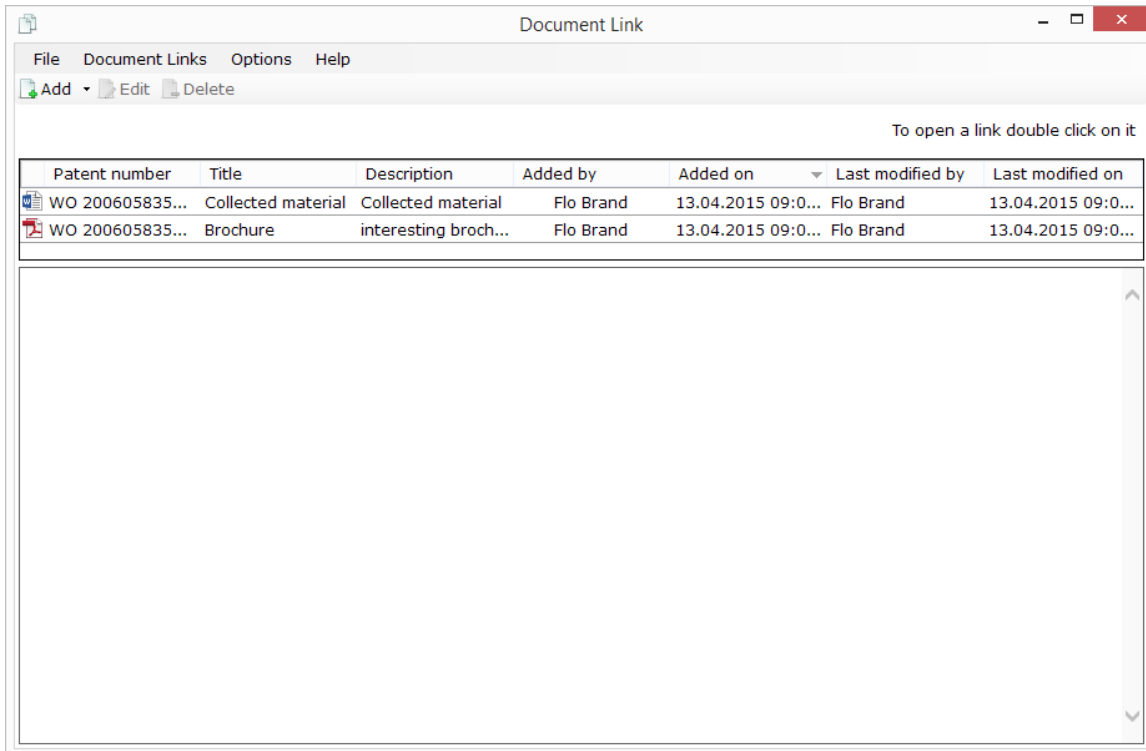
Figure 61: Document link

Linking locally filed documents is also possible from the folder tree.

Select the folder you would like to attach a document/patent to and open the context menu via right mouse click. Select "document link"

The document link window opens and you can attach locally saved documents or patents to your folder as described above. A document icon with a black frame is added to the folder.
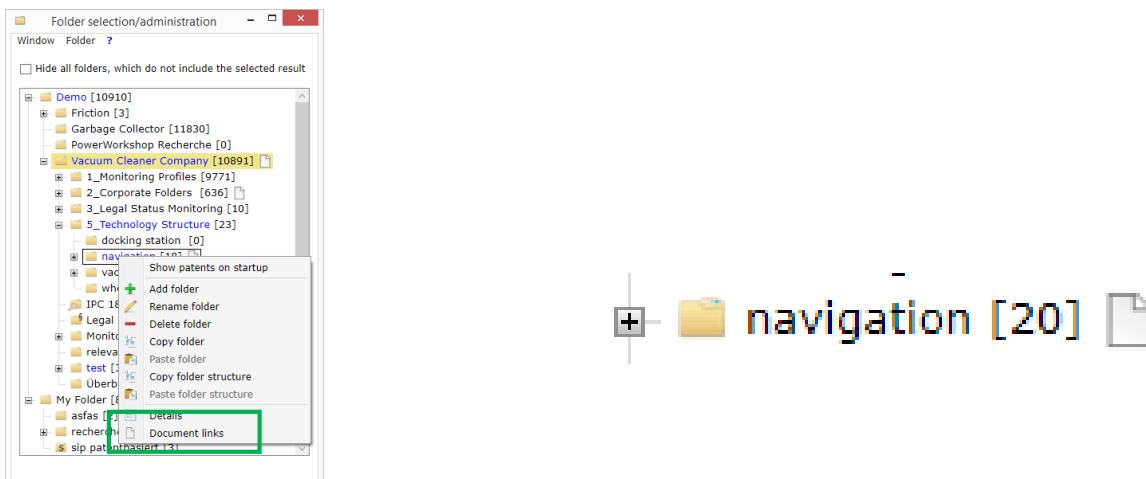

Figure 22: Document link to folder / Document link icon

3. Synonym-Highlighting

In order to evaluate the contents of a patent document quicker and check its relevance, the Synonym-Highlighting can be used.

If a keyword research takes place, the keywords will automatically be highlighted. However, to get a good impression about the result contents, Synonym-Highlighting with synonym lists is a sensible and helpful tool.

The text highlighting feature organises keywords in groups. This helps you manage related terms and classify them in so called synonym groups. You can assign an optical format to any synonym group.

3.1 Creating Highlighting schemes

Right click on the word for it to be selected. The entire word will be selected. If you only want to select part of the word, hold the left mouse button and move your mouse over the part of the word you would like to select. Then right click to open the context menu. A window will open, showing you the options:

- select the exact word
- select words which contain the term (right/left truncation)
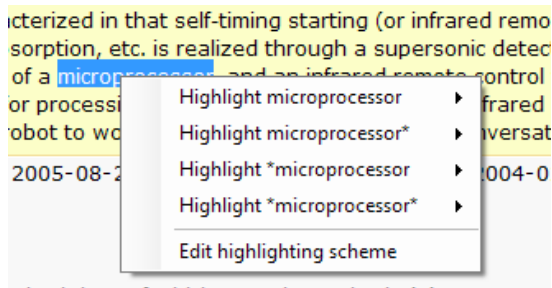
Figure 7: Selecting the term

Select the relevant option. Now a new window „New group" will appear and also possibly a group which has already been assigned a colour. A group (synonym group) signifies a list of terms highlighted in the same colour. To assign a new term to an existing group, just click on the term. To create a new group, click „New group". A new window will open in which you can select background colour and text format for the highlighting feature.
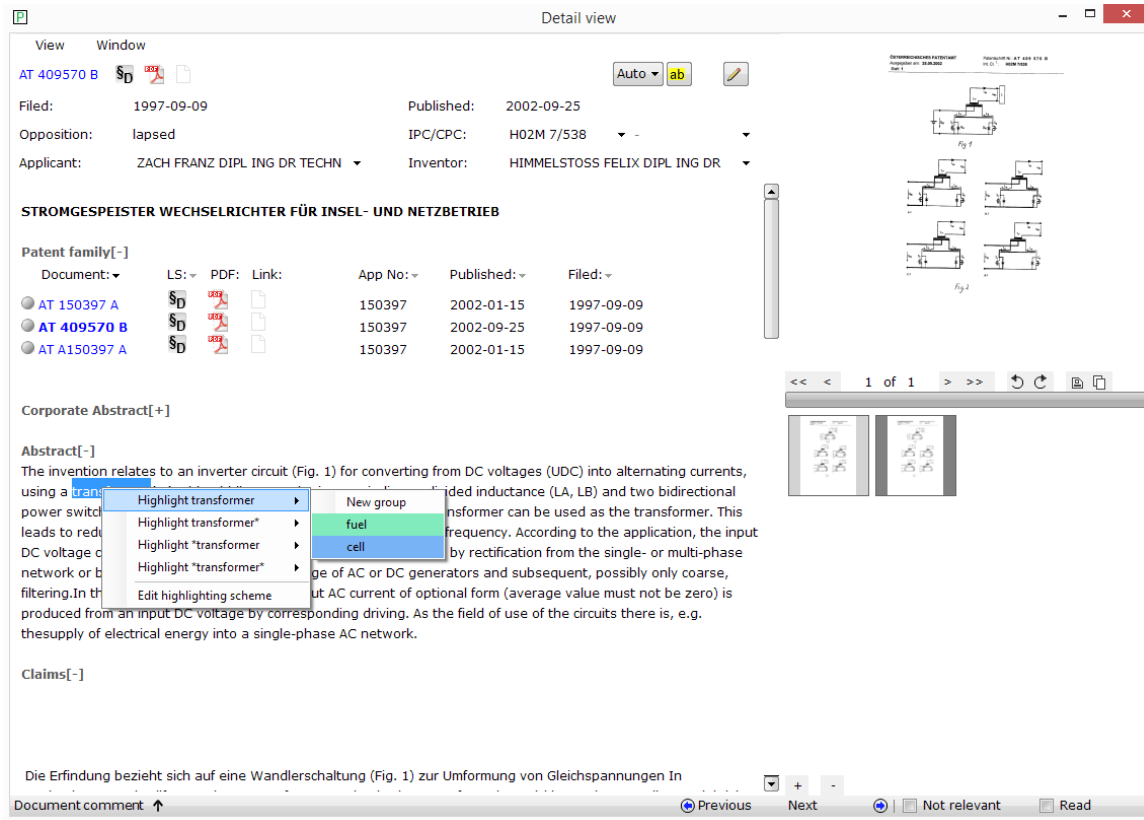
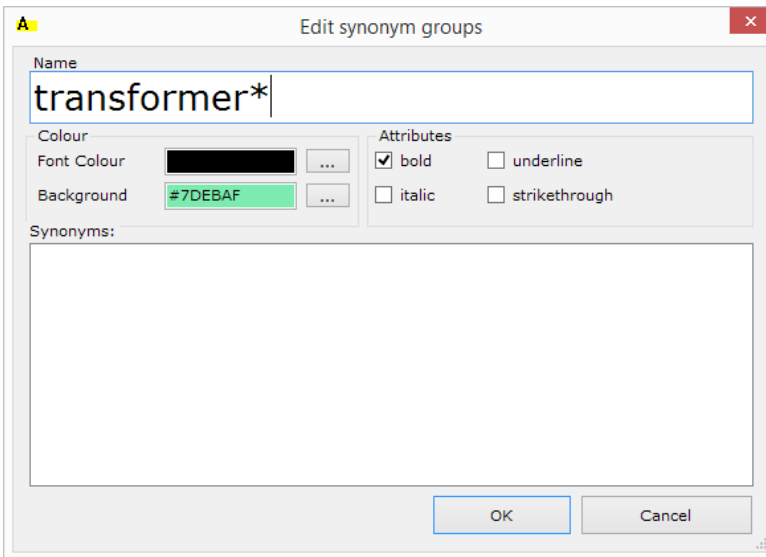*Figure 24: extended highlighting*

Figure 8: editing options in highlighting

By clicking the button marked with three dots a new window will open in which synonym font, colour and background colour can be selected.
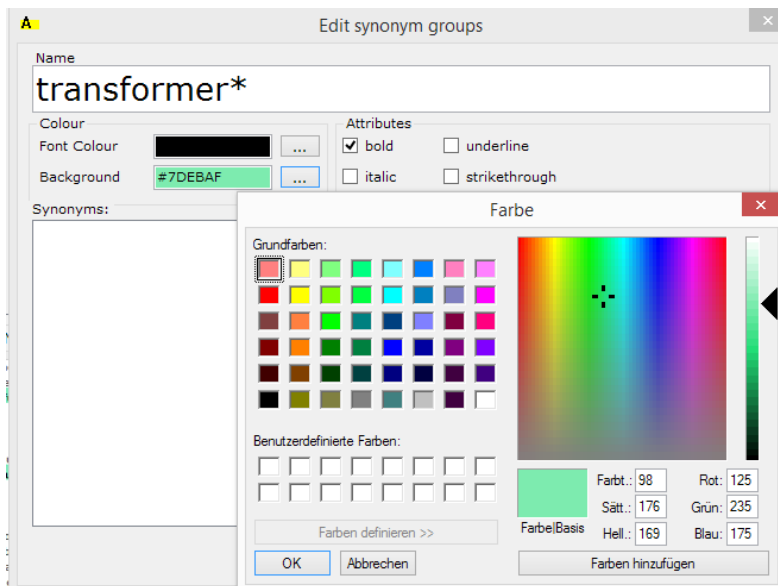

Figure 26: Selecting font and background colour

3.1.1 Edit highlighting

If synonyms and synonym groups were created in this manner, you can edit them via „edit highlighting".

By clicking „edit highlighting" or directly clicking the ab icon a new window for creating and editing highlighting patterns will open. The window is separated in two sections. The left sector with the list of synonym groups and options for editing and the right sector with the synonyms. Synonyms are displayed once a group is selected by marking the text (blue).

Right click in **Section 1 – groups** and a menu for creating new groups will open.

Select a group and right click in **Section 2 – synonyms** and a menu for editing the groups will open.

The functions are also available to you in the menu. You can easily enter synonyms via the menu item Synonym/ add more.
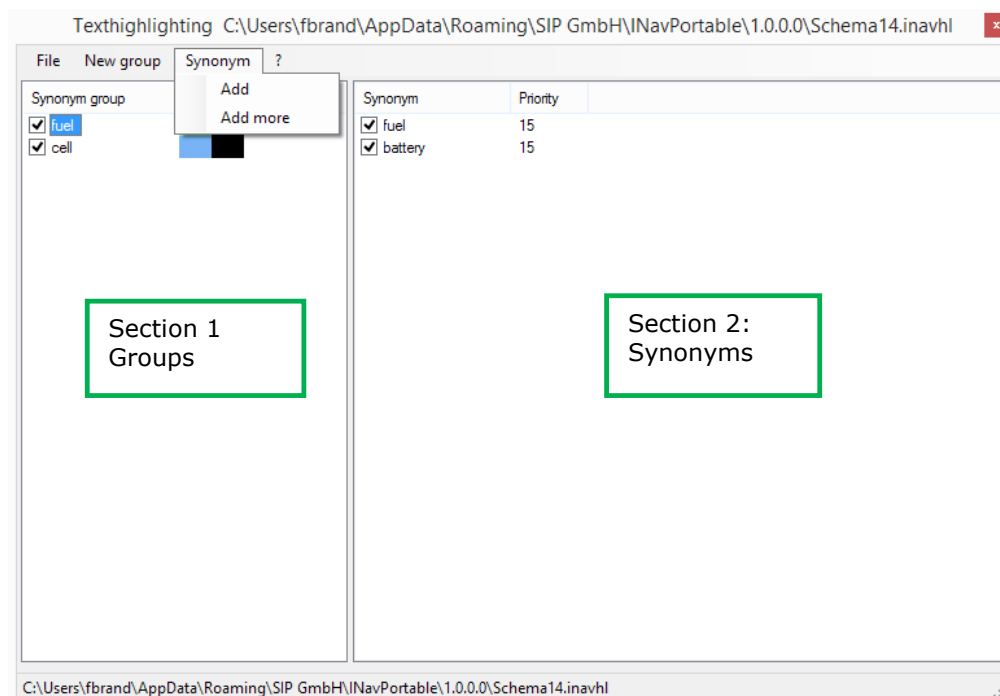
Figure 27: Window "edit highlighting"

The terms will then be classed as synonyms. If you want to include synonyms of a group in another group, use drag-and-drop to pull the synonym on the name of the desired group. Groups and synonyms can easily be deleted by using the "Del" key on your keyboard.

Also use drag-and-drop to pull a synonym group in a text box during a search query.

You can find further information and descriptive examples in video format on our homepage. To access this information simply click this *Link*.

3.2. Saving and opening highlighting schemes

Creating Highlighting schemes is an important, recurrent and often time-consuming task. Therefore it is helpful to save your highlighting patterns and edit them as required.

To do this click the menu item "File" and save your highlighting pattern as an .inavHI file. This file can be shared with other Invention Navigator Portable users.
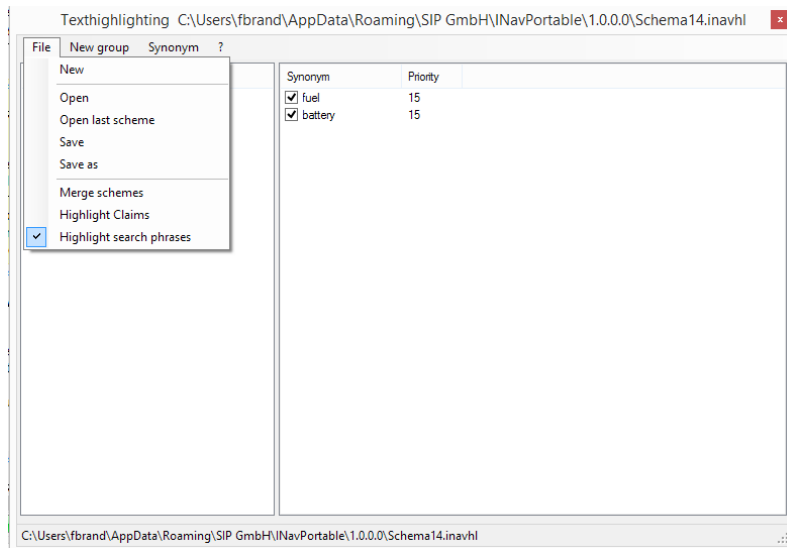

Figure 9: Submenu file for creating, saving and opening highlighting schemes

If you shut down the Invention Navigator Portable without saving your highlighting scheme, it will automatically be saved and you may directly access it when logging on by selecting "open previous pattern"

3.3. Display of text highlighting

As soon as text highlighting has been set up, coloured markings will be displayed in the title list as well as in Detail View. When you scroll to the next document, the highlighting pattern will be applied to the new document. In the scroll bar you can exactly see where and how often your synonyms occur. When the highlighting pattern is set up in a clever way, it is very easy to skim through the document and swiftly grasp its contents.

Invest your time when creating your highlighting patterns. You will surely save this time when browsing through your monitoring profiles.
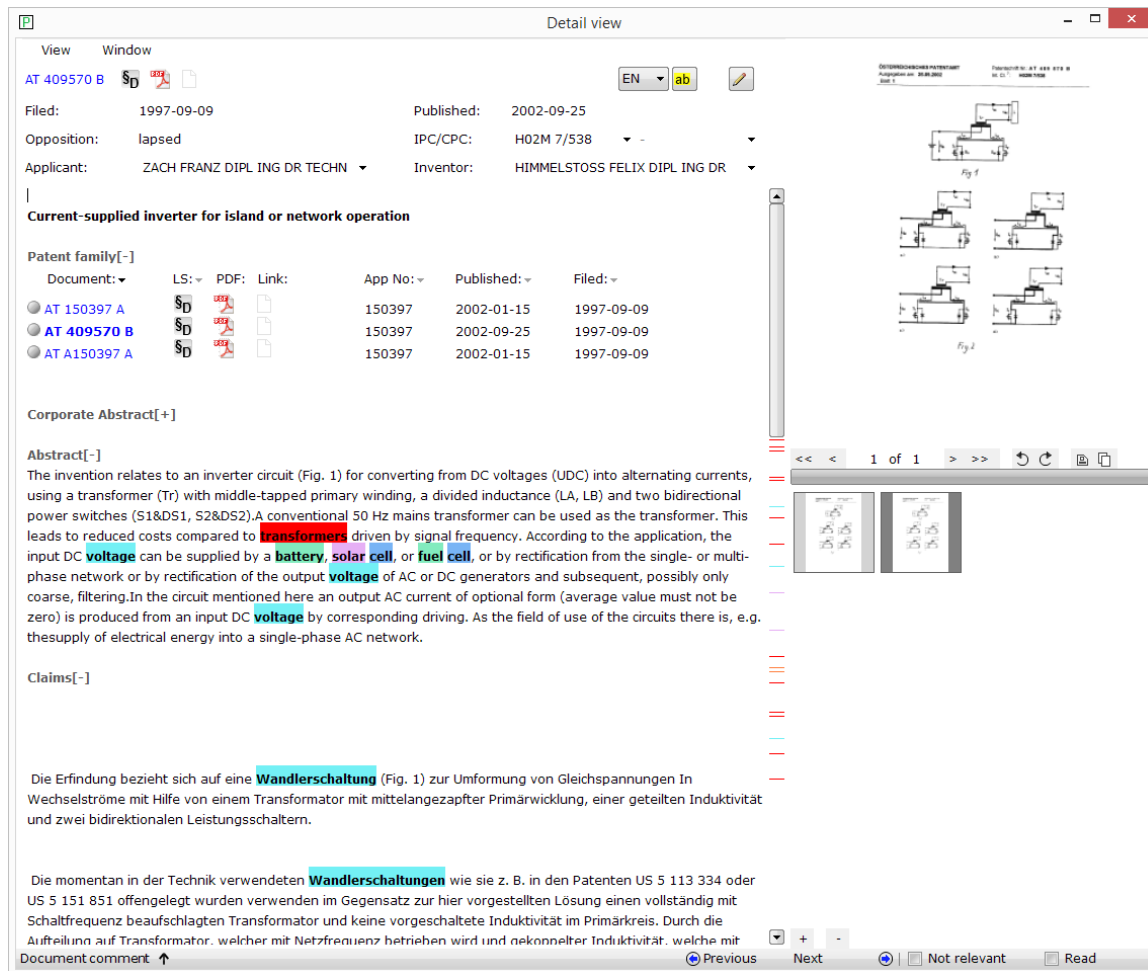
Figure 109: View of claims with highlighting and "active" scroll bar

4. Assigning patent families within the document structure of the Invention Navigator Network

In addition to the perusal of the documents and checking their relevance, relevant patents should also be assigned to technical areas.

Once you open the Invention navigator Portable, the document structure is already pre-set. In the window **"Folder selection/administration"** you can, as explained earlier, see a folder tree whose contents you are authorised to access.

In the **"Assign to folder"** window you can see folders where patents can be filed.

As soon as you select a patent in the title list or open Detail View it will instantly be displayed in which folder the patent family was filed. These folders are highlighted in blue. It should be noted, that in its hierarchic structure the main folder contains all documents contained in its subfolders.
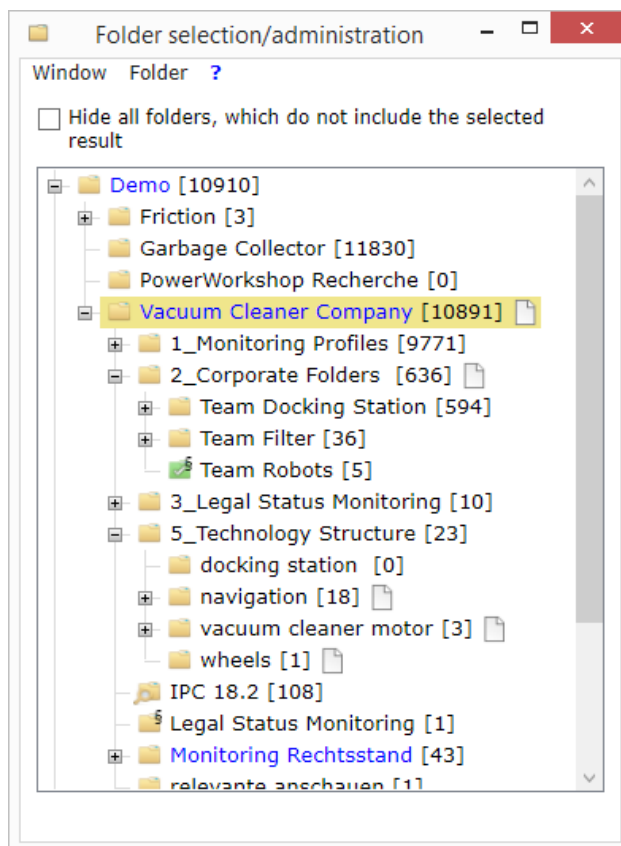
Figure 30: Folders which contain patent families selected in the title list or in Detail View are highlighted blue

Assigning documents to different folders is possible in various ways.

Drag-and-Drop:	Select a patent in the result list by clicking on the patent (highlighted yellow). Use drag-and drop to transfer the patent into the respective folder in the **"Assign to folder"** – window. You can instantly see if the patent was assigned to the folder, as the folder name will turn blue and the number behind the folder icon will increase.
Right-click:	Select a patent in the result list by clicking on the patent (highlighted yellow). Now, open the **"Assign to folder"** – window and assign the patent to the respective folder by right click.
From Detail View:	Assign the patent currently open in Detail View to a folder by simply performing a right click on the respective folder in the **"Assign to folder"**-window.

You can assign multiple documents by selecting them, using the "Ctrl" or "Shift" key, and pulling them into the folder in the *„Folder selection/administration"-*window via drag-and-drop or by right clicking on the folder in the **"Assign to folder"**-window.

You can delete a patent family from a folder by selecting the patent family in the title list or by opening the respective Detail View and right clicking while holding down the "Ctrl" key (the blue arrow will change to red).

Attention!

As soon as a patent has been assigned to a folder using the result list, it is automatically set to "read".

When assigning from Detail View this this does not happen automatically. As it is possible to assign a comment to a patent, the process will be closed as soon as the comment is assigned and the patent will be marked as "read".

See also: *edit and assign folders*

4.1. Creating, renaming and deleting folders

According to your rights it is possible to create or delete a folder. To do this, right click on the folder in which you would like to add additional folders in the **"Folder selection/administration"**-window. A context menu will open. Select "Add folder" to create a new folder. Assign a name and the new folder is created.
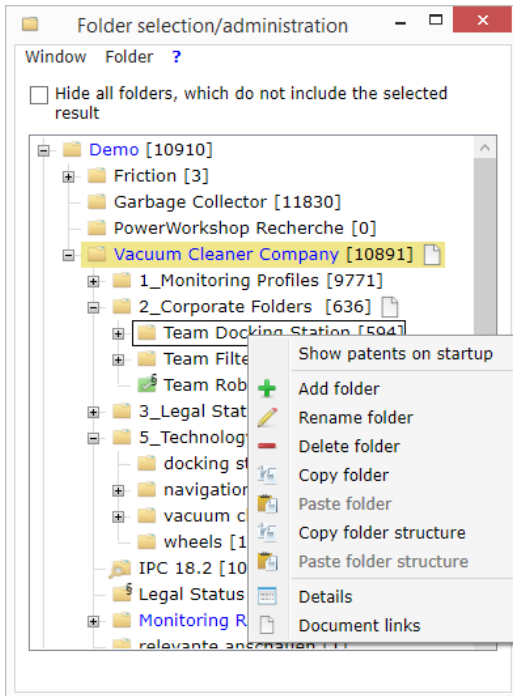

Figure 31: Context menu

To delete or rename a folder, select it and click „delete folder" / „rename"

Hint! By clicking on a folder while holding down F2 you can rename the folder.

Please note, that you can only create, delete and rename folders if you have the necessary rights to do so. If you are authorised you can also move the folders within the tree structure using drag-and-drop.

5. Research in the Invention Navigator Portable

Invention Navigator Portable allows you to search in your own tree structure/public folders and in the global database **search4ip**. A distinction is made between the number search, the citation search and the regular search using different search fields.
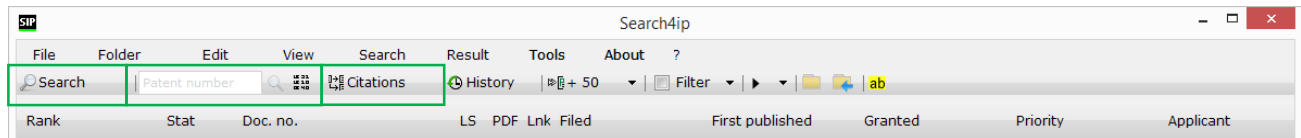
Figure 11: Different types of searches

5.1. The Number Search

You are able to copy entire lists of patent numbers (publication numbers) into the number search which can opened by pressing the button "Number Search". You can enter a single number into the input field in the menu and start the search by clicking on the magnifying glass symbol or by pressing the Enter key. This search is quite tolerant and will try to compensate for as many "formatting errors" as possible. You can search for application numbers by using the "Advanced" tab. Here you can also use truncations to try out different spellings.

Hint!

Copy the number list you receive from Excel, Word, Outlook or documents in a text editor as WordPad, WordPad++ and then copy the list into the window. The advantage in this method is that you do not have to "drag along" existing formatting which can block the search.

Why copy, when there is an easier way? You can easily pull numbers, for example from Outlook into the title list or the number search by using drag-and-drop. The numbers will then be searched. Try it out!

5.2. The search

The search in the database and in the global database is usually performed via the search surface by pressing the button "Search".
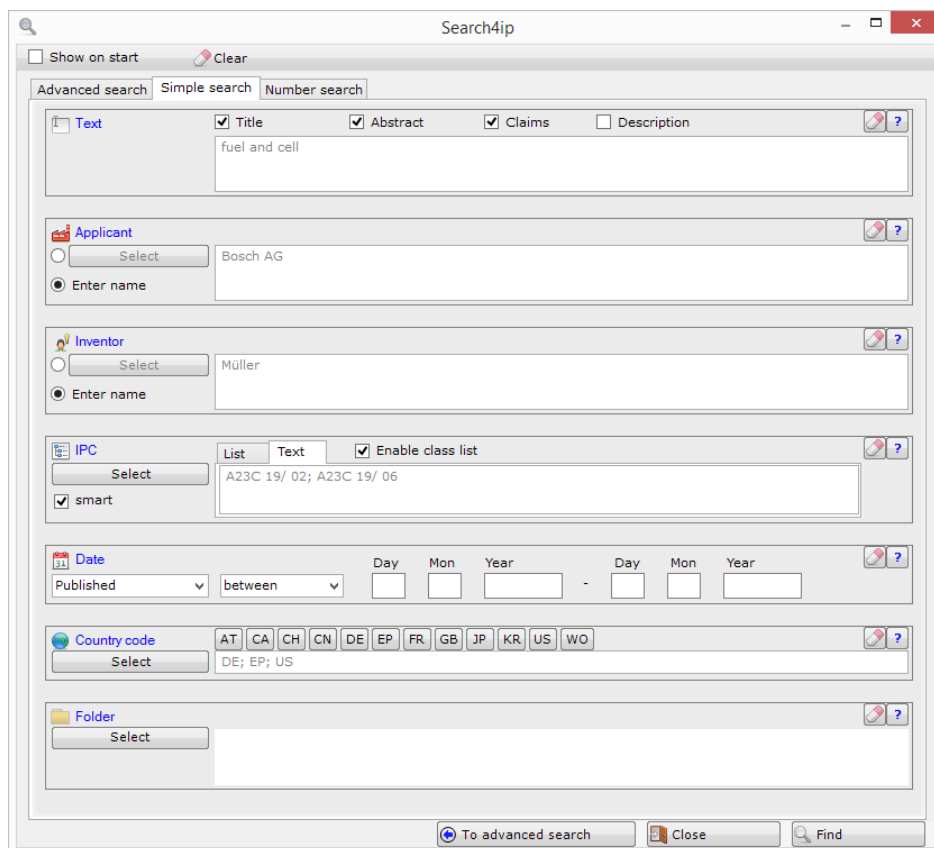
Here, it is differentiated between the simple search and the advanced search, which will be explained as follows.

Hint!

Depending on your license (Premium, Professional, R&D), different search fields are available.

5.2.1. The simple search

The most commonly used search fields are displayed and automatically linked with "AND". If you notice that the simple search is not sufficient for your query, you can simply transfer the terms already entered into the advanced search by clicking the "To advanced search" button.

Figure 33: The simple search

5.2.2. The advanced search

When opening the advanced search you will initially see an empty window and a list with the different search fields. In order to create a search query simply click on the search field you would like to add to the search or transfer it in the search mask using drag-and-drop.

This way you can easily create your individual search query. If you would like to find helpful advice regarding the different search fields, click on the "?"-icon to get re-directed to our online help pages.

The search fields "Corporate Abstract" and "Comment" will be covered in more detail in **Chapter 8**

If the box, next to the button "Folder" is checked you are only allowed to search in the folders visible to you in the folder tree. Transfer this search field into your search mask using drag-and-drop and select the folder/s you would like to search by clicking the "folder" button in the search field.

Hint!

Create your search and transfer the folders you would like to limit your search to into the search mask.
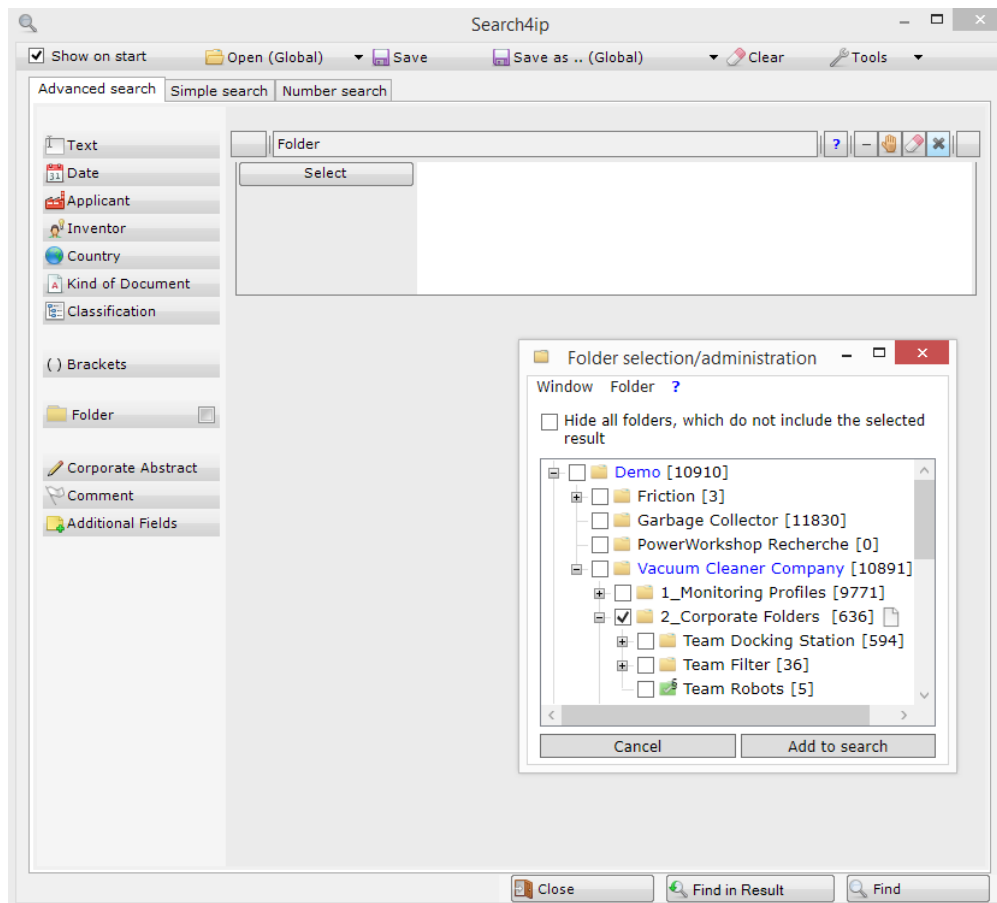
Figure 124: Search mask (Standard User) with search field „Folder"

If the box is not checked the search will be performed in the entire global database Search4ip. If you are not able to remove the check, you do not have the rights to perform a search in the global database.

Brackets

With this button you can create sections in your search mask, which are processed first and then subsequently linked to other sections.

Proceed as follows:

First pull the bracket into the sector for the search mask. Now pull the search fields that should be linked using „AND" into this bracket (see figure). This way you can also create nested searches. Search queries in brackets are always performed first and simultaneously and then link the results. This way the search becomes very fast and flexible.

This process is clearly described with videos on our Homepage.
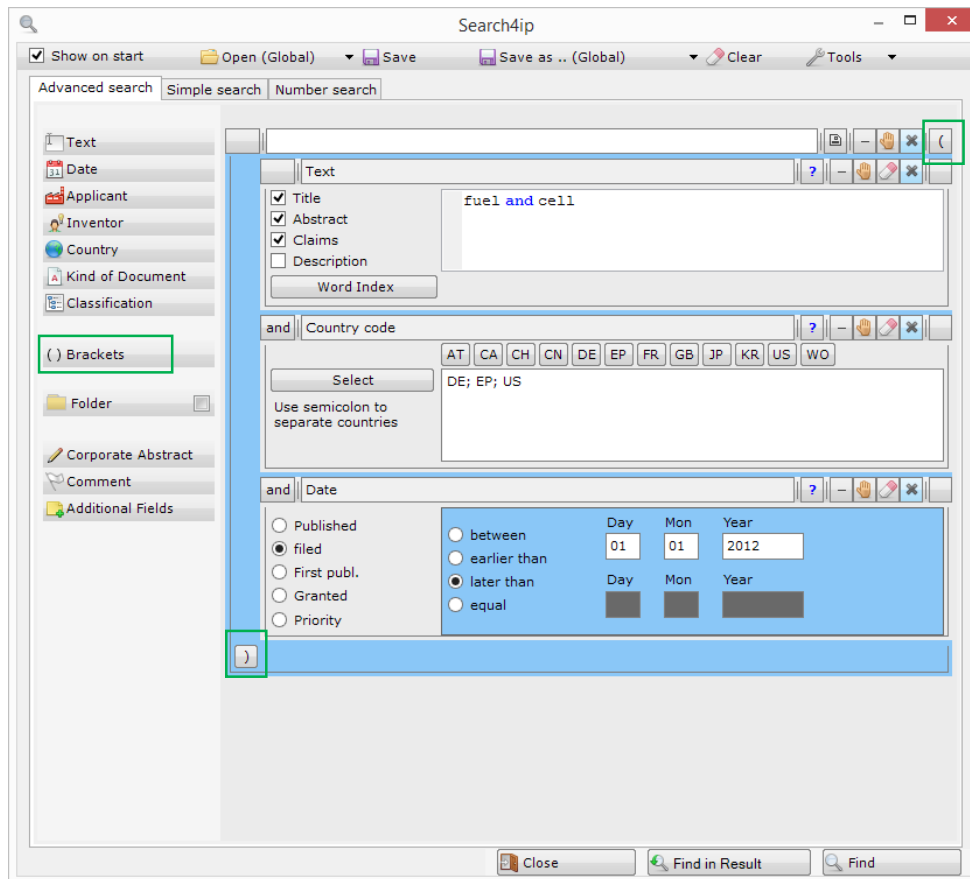
Figure 135: Use of brackets

5.3. Combining searches

An alternative way to set up complex searches is to create different single searches and combine them.
Within a session (i.e. using the INav Portable without logging out) every search is automatically saved.

The saved searches can be opened by using the menu item "History". By clicking on the name highlighted blue (1) the search will open. By double clicking on the number starting with the letter R (Result) next to the magnifying glass icon (2) you open the result list. The open list is highlighted yellow.
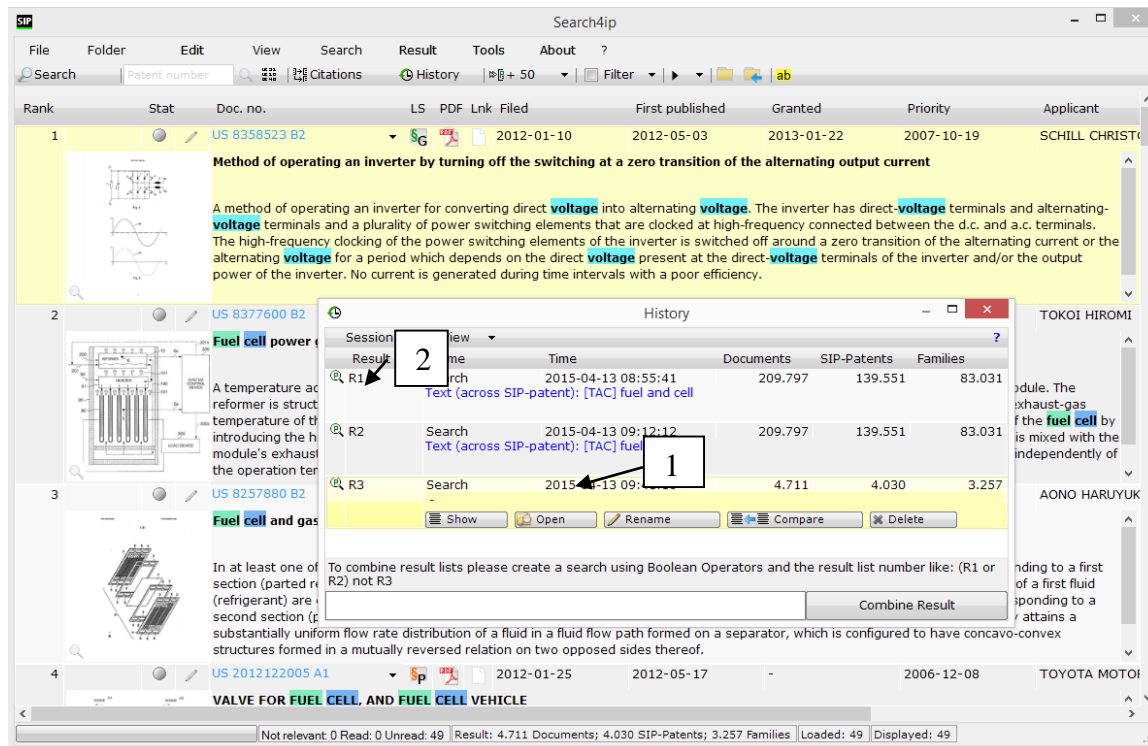
Figure 36: View of the search history, combining searches using drag-and-drop

If you would like to find all patents containing the term "bicycle" as well as the term "lamp" point the cursor on the section Number – in our example R1. Hold the mouse button and pull this number into the title list (green arrow in figure 24) using drag-and-drop. The cursor will change to a plus sign. Now release the mouse button. A selection field for combining the searches will open. Now click on the icon in the middle and both result list are combined with "AND".
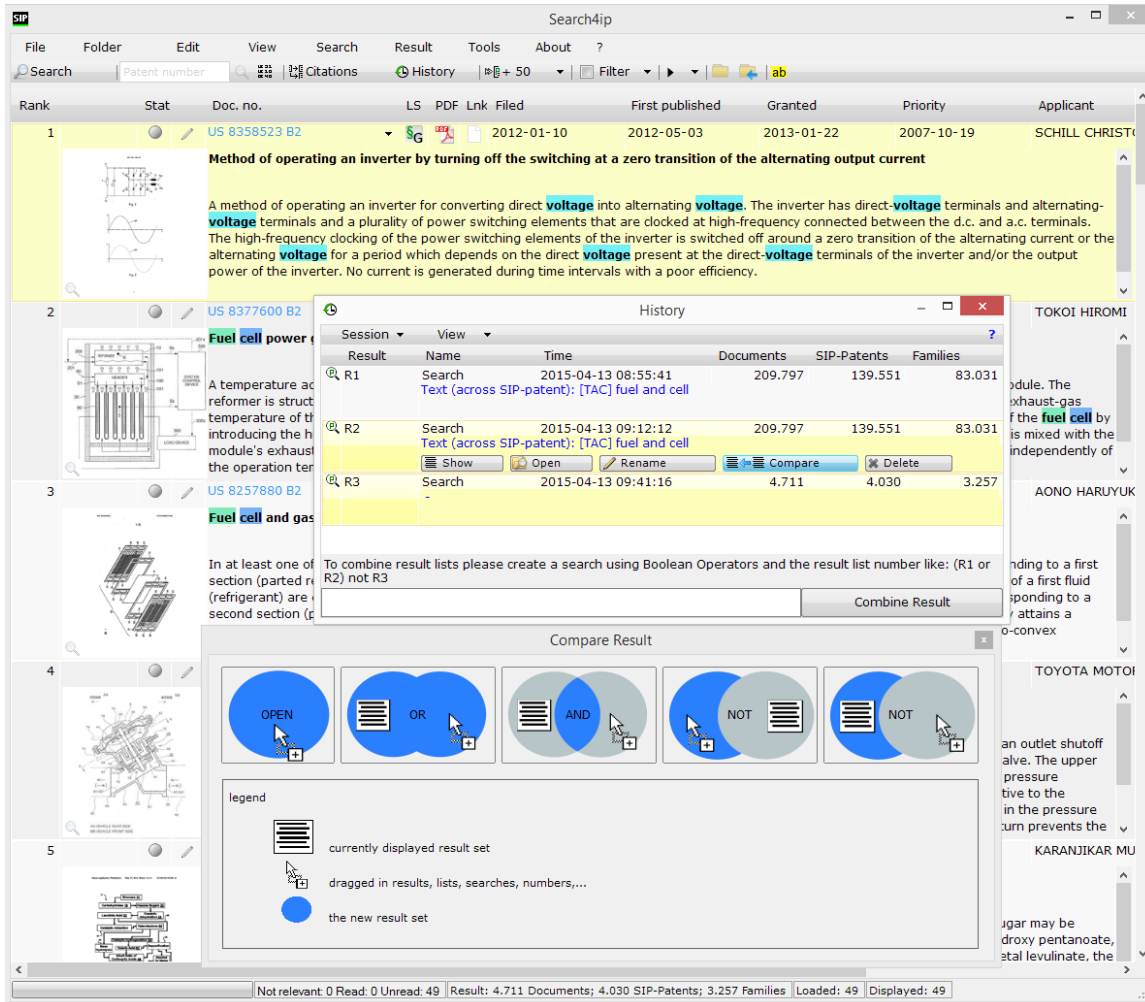
Figure 37: Selecting the link between the searches

In the R&D version the search history will automatically be deleted after logging out and will not be available afterwards. In the Professional version searches remain available and can also be saved.

Take a look at this procedure in the video: Combining searches on our Homepage.

5.4. Saving and editing searches

Open the search mask and click on the button "Save". Save your searches as global searches or as a file. Via "Open" you are also able to rename or delete searches. Global searches are stored on the SIP server and you can open, start or edit them at any time. Simply pull a search from the list into the search mask and combine the search with additional search fields.

A search can also be saved as a file. This is useful if you want to share a search with a colleague or if you have a support query.
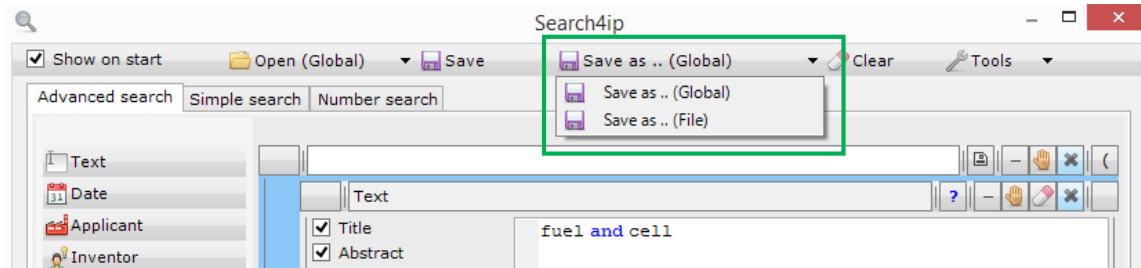
Figure 38: search mask: here you have the option to save searches or to edit saved searches by using "Open"
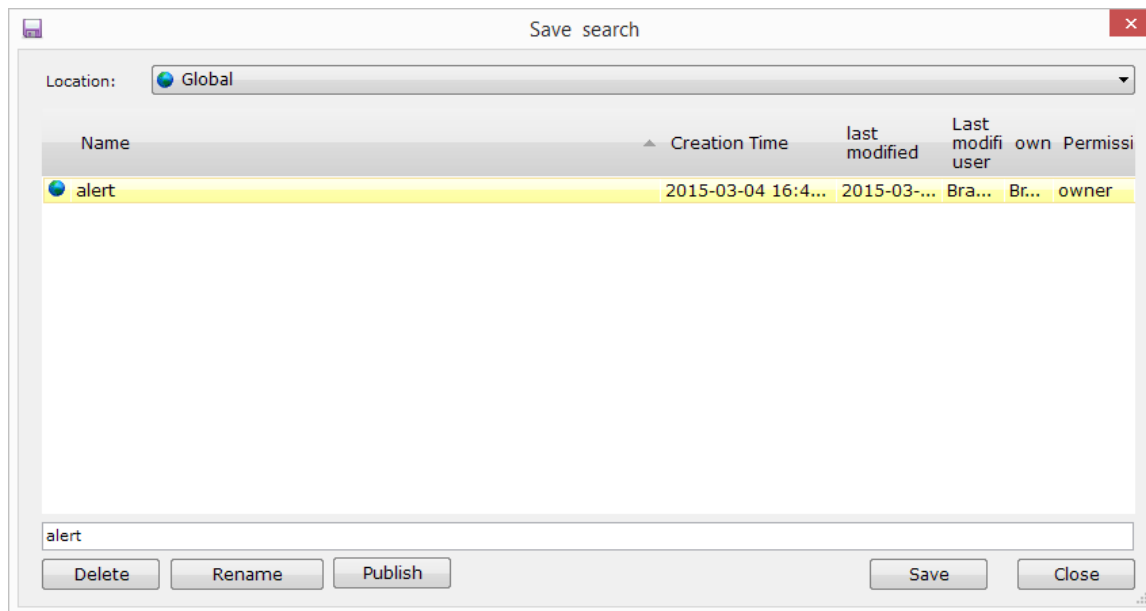
Figure 39: window "save search"

5.5. Working with results

The result list and Detail View are displayed in the same way as opening a folder in the tree (Folder selection/administration). You can store documents found this way in folders in the previously described manner. If you find hits already contained in a network folder during a global search and select that document with the cursor (highlighted yellow), you will instantly see by the blue highlighting of the "Assign to folder" or "Folder selection/administration" window, in which folders the family has already been filed.
You can also see whether a patent family has already been assessed as read or not relevant (button red/green/grey on the left of the image in the title list or bottom left in Detail View).

6. SIP Ranking

When searching for keywords, sorting is processed by frequency and occurrence of the search terms. When using other searches the ranking is irrelevant.

7. Special features in the monitoring

Depending on the company it may be desired that only specific countries be displayed. This pre-filter is set on network level. It only concerns families which reach your folders via patent monitoring (automatic researches). You can find patents from other countries by using the global database.

7.1. "Read" is changed to "Unread"

Monitoring competitors' IP rights in the INav Portable is SIP-Patent-based. The advantage of this is, that items marked as "not relevant" or "read" are not constantly displayed.

In many companies it is desired that specific family members are displayed to you again. A filter is stored in the network, defining exactly when a document is changed from "read" to "unread". In most cases these are grants and publications in specific countries.

8. Corporate Abstracts, Comments and Evaluations

By using the pen icon in Detail View (on the left of the main image) you can open a new window which you can use to comment on and evaluate IP rights on document level.

Depending on your rights you can assign a corporate abstract (equal to the network comment), which will be displayed with every family member.

Figure 40: View of a company specific evaluation window

This abstract should be a description of the invention and contain information that apply to all family members.

In addition to the comments valid for the patent family (family abstract), any individual IP right of a family can now be opened and commented on.

For every company, individual assessments (evaluations) can be set up. For every evaluation individual icons can be selected. The image above shows you one specific example.

By using the button "add comment" you can now assign comments and evaluation criteria specifically set up for your company. The rights for which evaluation criteria can be read or assigned can be set up individually for every user. The same applies to the right to delete comments or evaluations.

These evaluation levels have a different weighting. In this example the evaluation "Monitored" is higher than "Interesting". Now, if different patents are assigned to a different patent family members with the highest evaluation will always be displayed in the title list.
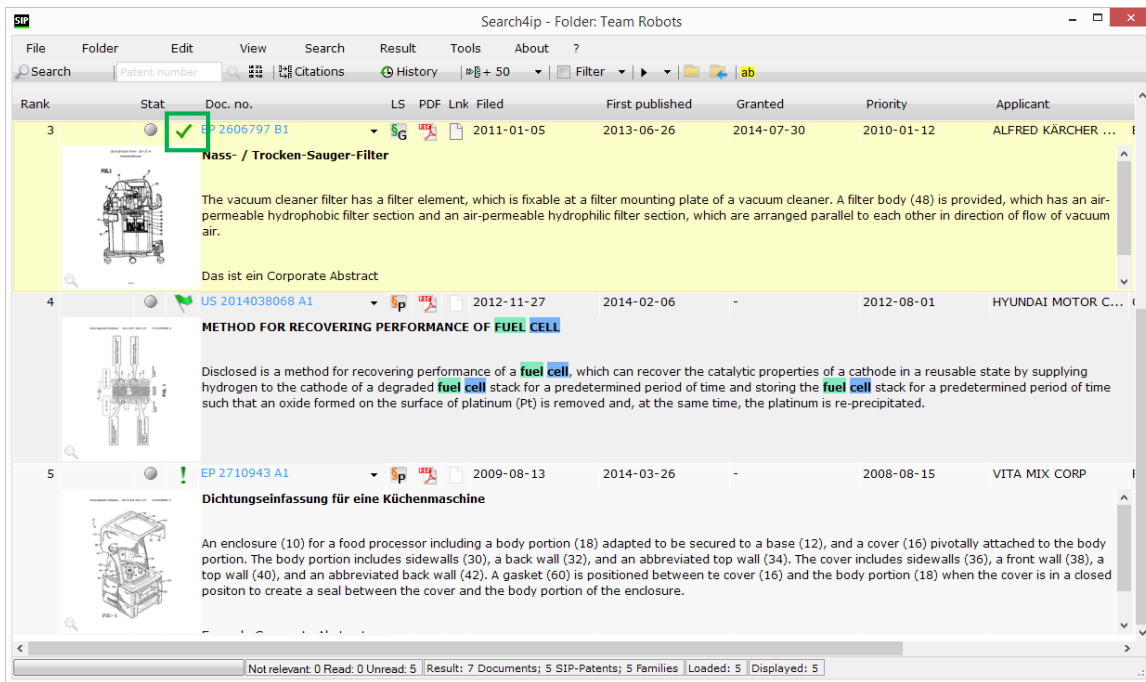
Figure 41: List with highest evaluation as flag-icon

By clicking on the icon in Detail View the evaluation window will instantly open and you can see how and by whom the specific family members have been evaluated.

8.1. Fast comment from Detail View

Another option to assign comments directly from Detail View is the document comment. You can easily open/close the comment window by clicking the button "Document comment" located at the bottom left of the Detail View window and assign comments in a fast way.
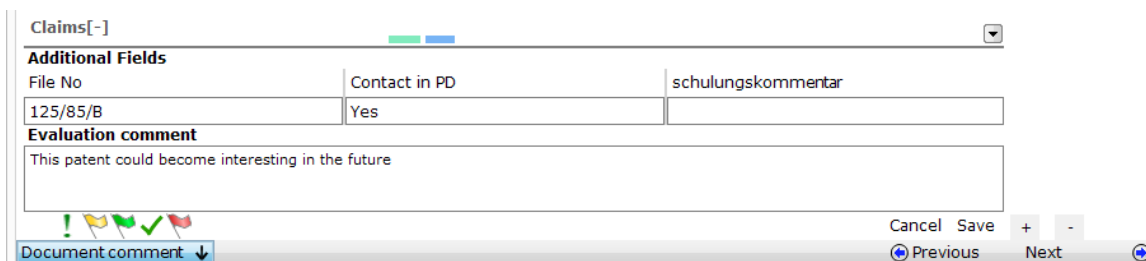
Figure 42: Fast evaluation using the document comment

In Detail View the icon of the highest evaluation is displayed next to the patent number. When looking at the patent family, the highest evaluation of the respective IP right is displayed.
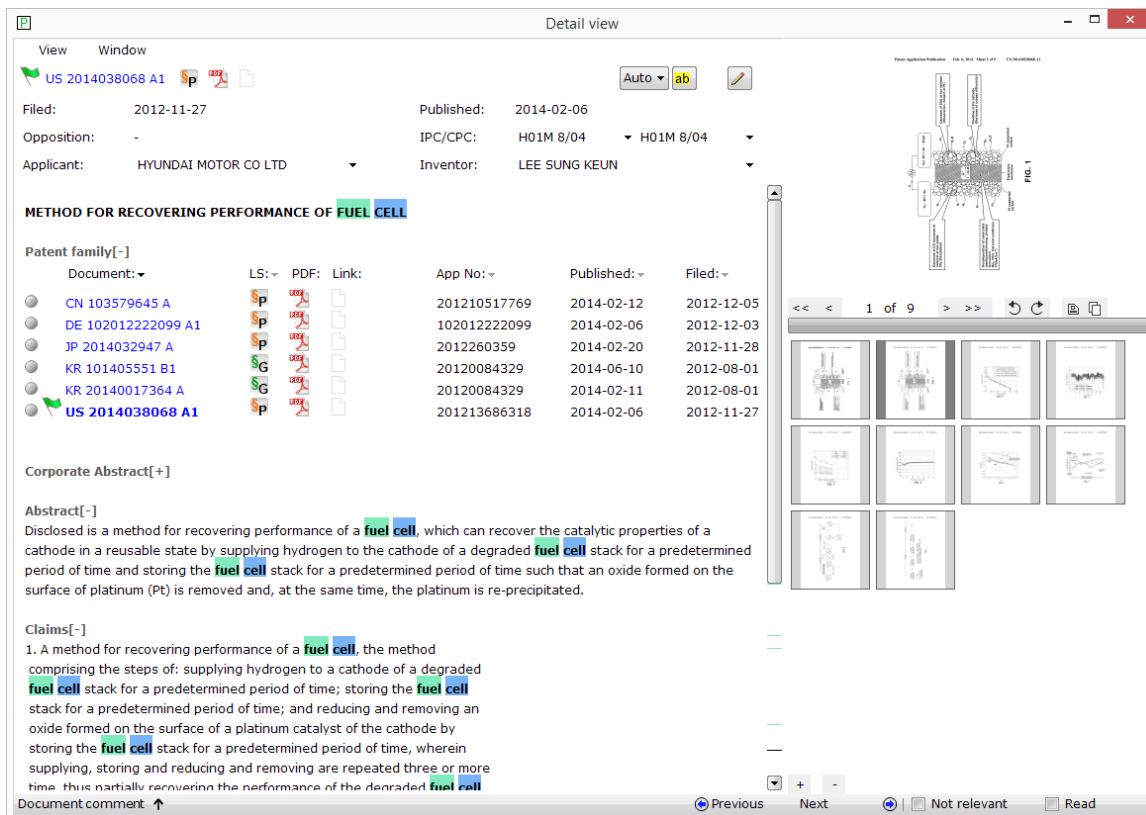
Figure 143: Detail View with expanded patent family and comment

8.2. Searching for evaluations

It is possible to search for evaluations in combination with patent data. In order to do this, pull, in the same manner as with a regular search, the field "Comment" into the search mask and enter your search criteria. Combine this with optional fields. The following image shows you the numerous options.
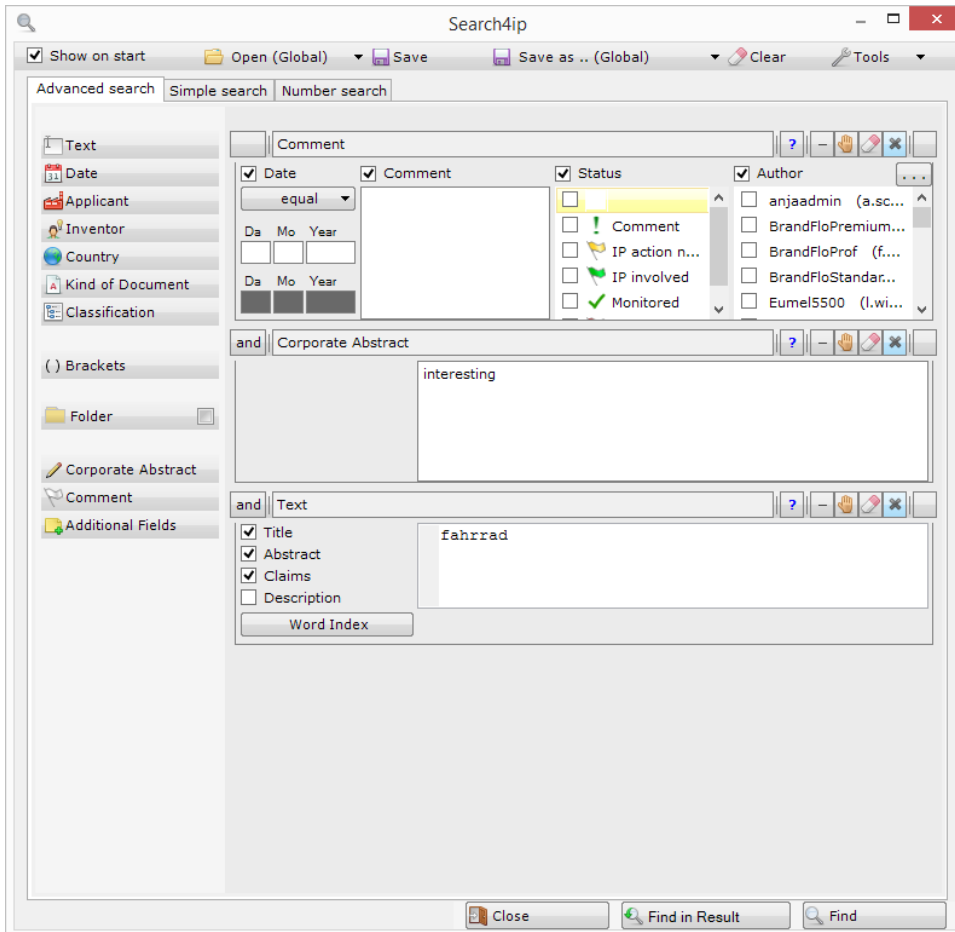
Figure 44: Searching for comments

9. Additional features

9.1 Details

As you have probably already noticed, the menu item "Details" will be displayed when you right-click on a folder in the Folder selection/administration.

Depending on your rights you may rename a folder or add a description or a comment to the folder.

In addition you can (as long as you have the rights) deposit saved searches which will be started automatically once a week. This way you can set up monitoring profiles (Alerts) or automate regularly performed searches in your own network, e.g. newly evaluated documents. To get notified when new patents reach a specific folder, click on "Details" and check the box "Send me an email if new patents are assigned" and select if you want to get notified on a weekly or monthly basis.

Figure 45: Folder Details

9.2. Exporting lists

In the menu tab "File" you find multiple options to export your results. The R&D version offers the Excel export.
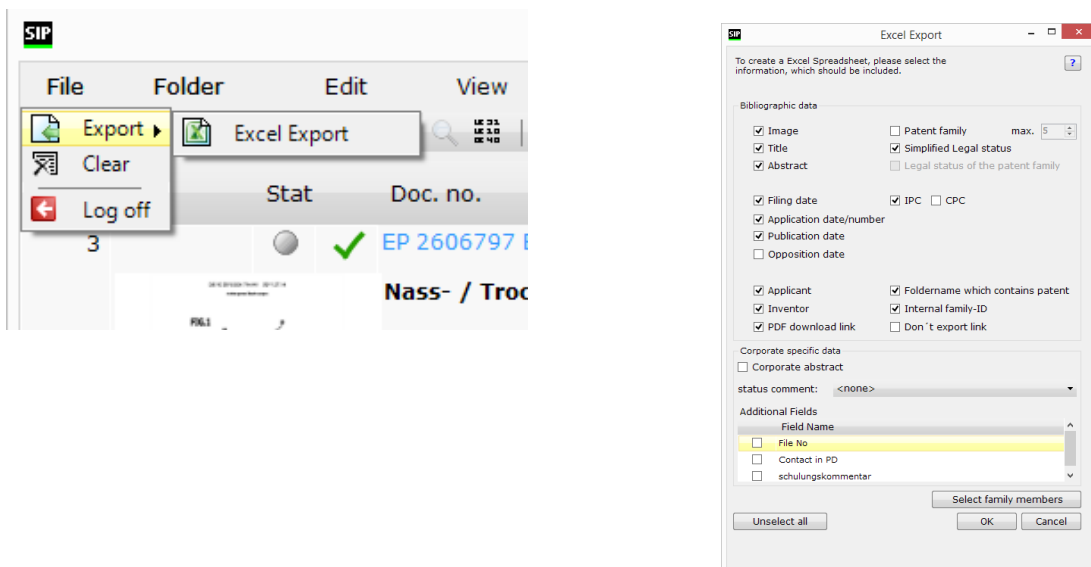
Figure 46: Example Excel Export / Selection Window

When using the Excel export, you can export a large number of results (max. 2000) in order to display them in a clear and descriptive manner. You can determine which information should be included in the export by using the selection window.

In addition to the family members already displayed you also have the option to select other family members to be exported. Click the button "select family members" to add the desired family members.

Figure 157: Example Excel Export

44

We wish you much success in working with the Invention Navigator Portable.

Please feel free to call us if you have any queries or contact us via email on service@s4ip.de.

Your SIP Support Team