



Derwent Innovation

Derwent Innovation Administrator User Guide

Clarivate Analytics IP and Standards User Assistance Team

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Derwent Innovation
Powering IP Innovation

 **Clarivate**
Analytics

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Chapter 1 Create Users by Bulk Upload

Create User Data File

The user data file is comprised of a header row and one or more user data rows (one row per user).

Create the header row by entering some or all of the 13 possible user fields on a single line, in the sequence shown following.

Fields may be either tab- or comma-delimited. If you are working in Excel, saving your .xls or .xlsx file as a .csv automatically inserts the comma delimiters.

Begin entering users on the second line, each user on a new line.

EMAIL (Email), FNAME (First Name), and LNAME (Last Name) are mandatory. All other fields are optional.

Mandatory fields are shown in bold below. All other fields are optional.

Acceptable file types are .csv, .tsv, or .txt. Special characters are allowed in file names.

Fields

1. **Email (EMAIL) (1 to 255 characters in xx@zz.yy format)**
2. **First Name (FNAME) (1 to 20 characters)¹**
3. **Last Name (LNAME) (1 to 35 characters)¹**
4. Address (ADDRESS) (1 to 40 characters)
5. Floor/Suite (FLOOR) (1 to 40 characters)
6. City (CITY) (1 to 35 characters)
7. **State/Province/Region (STATE)² If the country field is United States or Canada, the State field is required.**
8. Zip/Postal Code (ZIP) (1 to 15 alpha-numeric characters are allowed)
9. **Country (COUNTRY)²**
10. Phone (PHONE) (1 to 50 characters alpha-numeric characters are allowed)
11. Fax (FAX) (1 to 30 characters alpha-numeric characters are allowed)
12. **Industry (INDUSTRY)²**
13. **Role (ROLE)²**
14. Organization (ORGANIZATION)

¹At this point in time, Derwent Innovation is unable to process (via upload) registration for users whose first and last names are identical. As a workaround, please enter the appropriate the honorific (e.g., Ms and Dr) for the first name and then, after registration is completed, ask that user to update their first name using their My Account settings.

²See [User Data Tables](#) in the Appendix of this document for the correct values for these fields. The values entered into your user data file must be formatted exactly as shown in the tables.

User Data Format Rules for .csv Files Created in Excel

You can create your upload file in Excel as you do any other spreadsheet and save it as a .csv for bulk creation of users. Saving your .xls or .xlsx file as a .csv automatically inserts the comma delimiters, so all you do is save the file (as .csv) and it is ready to be uploaded.

1. The first (header) row must contain these field names, each in a separate column, in the order shown:

EMAIL FNAME LNAME ADDRESS FLOOR CITY STATE ZIP COUNTRY PHONE FAX INDUSTRY ROLE ORGANIZATION

2. Subsequent data rows contain the field values, in the same sequence they appear in the header
3. When omitting a field that is not required in the middle/interior of the string, the column in the spreadsheet must be retained and shown as blank
4. When omitting fields at the end of the string, just leave those columns blank on your spreadsheet
5. Populate the US State, Canadian Province, Country, Industry, and Role fields with predefined values from User Data Tables in the Appendix. All input must be exactly as shown in those tables, e.g. (US) Alabama, (CA) Alberta, (AF) AFGHANISTAN.
6. Save your spreadsheet as a .csv

Upload User Data File

1. Click the Administration tile on the Dashboard, then click the **Create Users** tile.
2. On the Create Users screen, enter the appropriate claim ticket number and click **Go**.
3. The Create Users screen re-displays with the Import radio button selected and the Welcome Email Message field enabled.
4. Click **Upload** and choose a file of user details from your local computer. Choose the file and click **Open**.
5. Once the user data file has been "opened," the Create button in the lower right of your screen will be enabled.
6. Customize the **Welcome Email Message** that will be sent to new users when they are created. Do not edit the password variables contained in the body of the message.

7. Optionally, use the **Select Group** dropdown to select a group to assign users to (if you are using groups manage your users). If a group is selected, you also have the option to make that group the primary group for the users you are creating.
8. Click **Create** and your upload will begin.
9. Once your users have been created, the Create Users page re-displays with a success message.

Chapter 2 Create Users Individually

1. Click the Administration tile on the Dashboard, then click the **Create Users** tile.
2. On the initial Create Users screen, enter the appropriate claim ticket number and click **Go**.
3. When the Create Users screen re-displays, choose the **Create** radio button.
4. Enter the **Email Address** for the user(s) you are creating.

If you are creating one user, **Email Address**, **First Name**, and **Last Name** are mandatory fields. All other fields are optional.

You may enter a list of email addresses in the Email Addresses text box. Separate the email addresses with a comma, or enter each on a new line. When entering multiple addresses in this manner, Email Address is the only mandatory field. First Name and Last Name are not allowed and all other fields are optional.

5. Enter the **Address, City, State/Province/Region, Zip/Postal Code, Country, Phone, Fax, Industry, Role**, and **Organization Name**.
6. Customize the **Welcome Email Message** if desired.

You can enter customized information to appear in an email message that new users receive. The purpose of this message is to inform new users about their account setup, password, etc.

Do not edit the password variables contained in the body of the message. Derwent Innovation automatically adds the password to the message when the email is sent.

7. If you are utilizing groups in your system configuration, you can assign the new user(s) you are creating to a group and, optionally, make that their primary group. If you do not make a group assignment now, it can easily be done later from the User Management page.
8. Click **Create** to complete the process.

Chapter 3 Manage Transactional Purchase Access

Use the Transaction Access tool to control who can purchase these three transactional items:

- Patent file histories
- Patent special order PDFs
- Literature full text PDFs

The default setting allows users to make transactional purchases. The ability to purchase transactional offerings can be blocked for a single user or multiple users within an account.

1. Start on the User Management screen and select the users you want to work with.
2. Click the **Transaction Access** link on the toolbar to display the Transaction Access screen.
3. Use the checkboxes to enable or disable the ability for selected users to purchase transactional items.
4. Click **Save** to save your choices.

Transaction Access for Groups

Transactional access can also be blocked or enabled at the group level. If two groups' permissions conflict, the least restrictive permissions apply. Explicit permissions given to users always supersede permissions from group settings. Permissions obey the following hierarchy:

User permissions > Group permissions > Contract permissions

Regardless of user or group permissions, you must enable transactional access at the contract level.

Find out more:

- Groups and Group Management
- Contract Defaults

No Charge for Most Documents

There is no charge for most documents in Derwent Innovation.

Within all of Derwent Innovation there are only three items/documents that are billed as transactional (over and above the contract billing):

- Patent file histories
- Special order patents
- Literature full text PDFs

For patent file histories, there is no "standard" price and you will always receive a quote and be given an opportunity to agree to the charge or decline to proceed with the order.

For special order patents, the standard charge is \$9.00 (USD). If the record you requested costs more to acquire, you will always receive a quote and be given an opportunity to agree to the charge or decline to proceed with the order.

For Literature full text PDFs, the price varies per article and may also vary based on the use rights requested for an article.

Chapter 4 Change User Subscription Type

Change subscription type (Analyst, Pro, or Express) from the **Change Subscription Type or Remove Users from Contract** dropdown on the User Management screen toolbar.

The dropdown shows you how many "seats" are available for the different subscription types and the different claim tickets associated with the contract you are working in.

The number of active users cannot exceed the number of seats available. The drop down shows you the number of seats used and number of seats available.

1. Start on the User Management screen and select the checkbox next to one (or more) **Email (User ID)** entries. To select all users, use the global select all checkbox next to the Email (User ID) header.
2. Use the **Change Subscription Type or Remove Users from Contract** dropdown to choose the desired new subscription type for selected users.
3. Click **Go**.

This action is reversible.

Chapter 5 Transfer Data and Remove Users

Transfer Data

Administrators can transfer ownership of saved work items from one active Derwent Innovation user to another active Derwent Innovation user. The transfer is a separate step and must occur prior to removing or disabling the original user's account and both the original owner and the new owner must be on the same contract.

The transfer option is only selectable when a single user is selected.

1. Start on the User Management screen and select the user whose data is transferred.
2. Select **Transfer Data only (from single user)** from the Change Subscription Type or Remove Users from Contract dropdown.
3. Click **Go**. The Transfer user data popup will display with the email address of the user whose access is to be deleted or disabled shown in the **From** field.
4. In the **To** field, enter the email address of the user who will be the recipient of the saved work data from the user whose access is to be deleted or disabled.
5. Click **OK**. The system then reviews your To user information to confirm that it is a recognized user of Derwent Innovation and that it is on the same claim ticket as the From user.
6. Once the validation is complete, the data is transferred and a confirmation pop-up displays telling you that the transfer was successful.

Remove Subscription Access (Retaining Data)

This option removes users from a subscription, they can no longer access Derwent Innovation and their "seats" on the contract become available to be assigned to others. The users remain registered and their registration information remains in the Derwent Innovation database. The subscription type will appear as None. This action is reversible.

1. Start on the User Management screen and select one or more users.
2. Choose the **Remove Subscription access (retains data)** option from the **Change Subscription Type or Remove Users from Contract** dropdown
3. Click **Go**.

Prior to disabling a user in this manner, you can use the option to transfer the selected user's saved work items to another user. If the saved work items are not transferred to another user, they are retained and will be available to this user in the event the user is again given access to the system.

Delete User and Data

This option denies access to users, makes their seats on the contract available for other users, and removes all of their registration information and saved work from the system. This action is not reversible.

1. Start on the User Management screen and select one or more users.
2. Choose the **Delete User(s) and data from Contract** option from the **Change Subscription Type or Remove Users from Contract** dropdown.
3. Click **Go**.

Prior to disabling a user in this manner, you can use the [Transfer Data only \(from single user\)](#) option to transfer the selected user's saved work items to another user. Saved work items not transferred to another user will be deleted.

Chapter 6 Reset Passwords

From the User Management page:

1. Select the user whose password you want to reset.
2. Click the lock icon in the User Details panel to display the Reset Password screen.
3. Optionally, select **Also send me email with this user's temporary password** to receive a copy of the user's temporary password.
4. Click **OK** to reset the user's password. The user will receive an email with the new password and be prompted to change that password upon his or her first login.

Note: New passwords cannot match any of the last four passwords.

Chapter 7 Export Users

To see a list of all users, start on the User Management screen and select **Comma-Separated (.CSV)** from the Export Users dropdown.

A download window displays and asks you to save the file to your computer.

The file contains registration, profile, group, and transaction access information for all your users.

Chapter 8 Contract Defaults, Profiles, and Groups

Contract defaults are privacy, transaction access, and operating preferences set by the administrator on a contract by contract basis. Contract defaults are the overall set of options available for setting profiles.

Profiles are sets of user preferences defined by you, the administrator, for the purpose of providing your users with a working environment that you have customized to be relevant to and efficient for their needs.

Groups are aggregates or communities of users who share some common sets of attributes. The idea of groups is free form and you can create groups based on any criteria you want. Groups can span contracts.

Note: Explicit permissions given to users always supersede permissions from group and contract settings. Permissions obey the following hierarchy: User permissions > Group permissions > Contract permissions. If two groups' permissions conflict, the least restrictive permissions apply.

Contract Defaults

Contract Defaults allow administrators to assign privacy, transaction, and operating preferences settings across a selected contract. These defaults determine what is available when user profiles are set.

To establish defaults, click the Administration tile on the Dashboard, then click the Contract Defaults tile. Select the contract you want to work with from the **Contract** dropdown. Navigate through the tabs and screens to create default settings. Click **Save** to save your choices on each screen.

Profiles

Profiles and preference selections made under contract defaults are similar because they are both about customizing the working environment for users. Contract defaults, however, apply across an entire contract. While a single profile could apply to an entire contract, profiles allow you to customize individual settings for many smaller groups.

Access the User Management screen and select the users you want to make changes for. Click the Profiles link on the toolbar to display the Manage Profiles screen. Click **Create** to begin creating a Profile, click **Save** to save your choices.

Groups

Groups are free form aggregates of users who share some common sets of attributes. Groups can span contracts. Users can share saved work items within the groups you (as the administrator) create.

To set up a group, give it a name and that is technically all that is required. You can then, optionally, specify transaction access permissions and a profile, and then assign users to it.

Chapter 9 Custom Fields

The Custom Fields feature allows companies to create their own company-specific fields and add them to the Derwent Innovation database for search, display, reporting, analysis, and collaboration in conjunction with patent data.

Create Date, Numeric, Text, URL, and Year Type Fields

1. Starting on the **Create Custom Field** screen, enter field name, field type, and establish other field properties.
2. Optionally choose:
 - Allow sorting on this field
 - Allow field as a filter
 - Apply Custom Field to all DWPI Family Members
3. Enter a one to four alpha-numeric character tag for this field.
4. Set user permissions.
5. **Save** your input.

The field now appears on all records in the patent data base but with no values applied to it. The field also now appears on search forms but, since it has yet to have values applied for it to any specific records, searching for it will always yield zero results.

On the Create Custom Field screen, upload values (for this field) to specific records or wait for users to manually apply values as they proceed with their workflows. Once field values are associated with specific patent records, records with those values can be found through searching or discovered when browsing.

Create Single and Multi-Select Type Fields

1. Starting on the **Create Custom Field** screen, enter field name, field type, and establish other field properties.
2. Add values for the field (individually or via import).
3. Optionally choose:
 - Allow sorting on this field
 - Allow field as a filter
 - Apply Custom Field to all DWPI Family Members
4. Enter a one to four alpha-numeric character tag for this field.
5. Set user permissions.
6. **Save** your input.

The field now appears on all records in the patent data base but with no values applied to it. The field also now appears on search forms but, since it has yet to be associated to any specific records, searching for it will always yield zero results.

On the Create Custom Field screen, upload values (for this field) to specific records or wait for users to manually apply values as they proceed with their workflows. Once field values are associated with specific patent records, records with those values can be found through searching or discovered when browsing.

Appendix 1 User Data Tables

US State Values

(US) Alabama	(US) Kentucky	(US) Ohio
(US) Alaska	(US) Louisiana	(US) Oklahoma
(US) American Samoa	(US) Maine	(US) Oregon
(US) Arizona	(US) Maryland	(US) Pennsylvania
(US) Arkansas	(US) Massachusetts	(US) Puerto Rico
(US) California	(US) Michigan	(US) Rhode Island
(US) Colorado	(US) Minnesota	(US) South Carolina
(US) Connecticut	(US) Mississippi	(US) South Dakota
(US) Delaware	(US) Missouri	(US) Tennessee
(US) District of Columbia	(US) Montana	(US) Texas
(US) Florida	(US) Nebraska	(US) U.S. Minor Outlying Islands
(US) Georgia	(US) Nevada	(US) Utah
(US) Guam	(US) New Hampshire	(US) Vermont
(US) Hawaii	(US) New Jersey	(US) Virgin Islands of the U.S.
(US) Idaho	(US) New Mexico	(US) Virginia
(US) Illinois	(US) New York	(US) Washington
(US) Indiana	(US) North Carolina	(US) West Virginia
(US) Iowa	(US) North Dakota	(US) Wisconsin
(US) Kansas	(US) Northern Mariana Islands	(US) Wyoming

Canadian Province Values

(CA) Alberta	(CA) Northwest Territories	(CA) Prince Edward Island
(CA) British Columbia	(CA) Nova Scotia	(CA) Quebec
(CA) Manitoba	(CA) Nunavut	(CA) Saskatchewan
(CA) New Brunswick	(CA) Ontario	(CA) Yukon Territory
(CA) Newfoundland and Labrador		

Country Values (alphabetical by country name)

(AF) AFGHANISTAN	(DJ) DJIBOUTI	(LI) LIECHTENSTEIN	(KN) SAINT KITTS AND NEVIS
(AL) ALBANIA	(DO) DOMINICAN REPUBLIC	(LT) LITHUANIA	(LC) SAINT LUCIA
(DZ) ALGERIA	(EC) ECUADOR	(LU) LUXEMBOURG	(SM) SAN MARINO
(AS) AM SAMOA	(EG) EGYPT	(MO) MACAU	(VC) SAINT VINCENT ISLANDS
(AD) ANDORRA	(IE) EIRE	(MK) MACEDONIA	(ST) SAO TOME AND PRINCIPE
(AO) ANGOLA	(SV) EL SALVADOR	(MG) MADAGASCAR	(SA) SAUDI ARABIA
(AI) ANGUILLA	(EK) EQUATORIAL GUINEA	(MW) MALAWI	(SN) SENEGAL
(AQ) ANTARCTICA	(ER) ERITREA	(MY) MALAYSIA	(CS) SERBIA & MONTENEGRO
(AG) ANTIGUA AND BARBUDA	(EE) ESTONIA	(MV) MALDIVES	(SL) SIERRA LEONE
(AR) ARGENTINA	(ET) ETHIOPIA	(ML) MALI	(SG) SINGAPORE
(AM) ARMENIA	(FK) FALKLAND ISLANDS	(MT) MALTA	(SK) SLOVAKIA
(AW) ARUBA	(FJ) FIJI	(MH) MARSHALL ISLANDS	(SI) SLOVENIA
(AT) AUSTRIA	(FI) FINLAND	(MQ) MARTINIQUE	(SB) SOLOMON ISLANDS
(AU) AUSTRALIA	(FO) FAROE ISLANDS	(MR) MAURITANIA	(SO) SOMALIA
(AZ) AZERBAIJAN	(FR) FRANCE	(MU) MAURITIUS	(GS) SOUTH GEORGIA AND THE SOUTH SANDWICH ISLANDS
(BD) BANGLADESH	(GF) FRENCH GUIANA	(YT) MAYOTTE	(KR) SOUTH KOREA
(BS) BAHAMAS	(PF) FRENCH POLYNESIA	(MX) MEXICO	(ES) SPAIN
(BH) BAHRAIN	(GA) GABON	(FM) MICRONESIA, FEDERATED STATES OF	(LK) SRI LANKA
(FQ) BAKER ISLAND	(GM) GAMBIA	(MD) MOLDAVIA	(SD) SUDAN
(BB) BARBADOS	(PS) GAZA STRIP	(MC) MONACO	(NS) SURINAME
(BE) BELGIUM	(GE) GEORGIA	(MN) MONGOLIA	(SZ) SWAZILAND
(BY) BELARUS	(DE) GERMANY	(MA) MORROCO	(SE) SWEDEN
(BZ) BELIZE	(GH) GHANA	(MS) MONTSERRAT	(CH) SWITZERLAND
(BJ) BENIN	(GI) GIBRALTAR	(MZ) MOZAMBIQUE	(SY) SYRIA
(BM) BERMUDA	(GR) GREECE	(MM) MYANMAR	(TC) TURKS AND CAICOS ISLANDS
(BT) BHUTAN		(NA) NAMIBIA	
(BO) BOLIVIA			

Country Values (alphabetical by country name)

(BA) BOSNIA & HERZEGOVINA	(GL) GREENLAND	(NR) NAURU	(TE) TROMELIN ISLAND
(BV) BOUVET ISLAND	(GD) GRENADA	(NP) NEPAL	(TF) FRENCH SOUTHERN AND ARCTIC LANDS
(BW) BOTSWANA	(GP) GUADELOUPE	(AN) NETHERLANDS ANTILLES	(TG) TOGO
(BR) BRAZIL	(GN) GUINEA	(NL) THE NETHERLANDS	(TH) THAILAND
(IO) BRITISH INDIAN OCEAN TERRITORY	(GT) GUATEMALA	(NC) NEW CALEDONIA	(TJ) TAJIKISTAN
(VG) BRITISH VIRGIN ISLANDS	(GU) GUAM	(NZ) NEW ZEALAND	(TK) TOKELAU
(BN) BRUNEI	(GW) GUINEA-BISSAU	(NI) NICARAGUA	(TM) TURKMENISTAN
(BG) BULGARIA	(GY) GUYANA	(NE) NIGER	(TN) TUNISIA
(BF) BURKINA FASO	(HT) HAITI	(NG) NIGERIA	(TR) TURKEY
(BI) BURUNDI	(HM) HEARD AND MCDONALD ISLANDS	(NF) NORFOLK ISLAND	(TT) TRINIDAD
(KH) CAMBODIA - KAMPUCHEA	(HN) HONDURAS	(MP) NORTHERN MARIANA ISLS	(TV) TUVALU
(CM) CAMEROON	(HK) HONG KONG	(NO) NORWAY	(TW) TAIWAN
(CA) CANADA	(HU) HUNGARY	(OM) OMAN	(TZ) TANZANIA
(CV) CAPE VERDE	(IS) ICELAND	(PW) PALAU	(UG) UGANDA
(KY) CAYMAN ISLANDS	(IN) INDIA	(PA) PANAMA	(UA) UKRAINE
(CF) CENTRAL AFRICAN REPUBLIC	(ID) INDONESIA	(PG) PAPUA NEW GUINEA	(AE) UNITED ARAB EMIRATES
(TD) CHAD	(IR) IRAN	(PK) Pakistan	(GB) UNITED KINGDOM
(CL) CHILE	(IQ) IRAQ	(PY) PARAGUAY	(US) UNITED STATES OF AMERICA
(CN) CHINA, PEOPLES REPUBLIC OF	(IL) ISRAEL	(PE) PERU	(UY) URUGUAY
(CX) CHRISTMAS ISLAND	(IT) ITALY	(PH) PHILIPPINES	(UZ) UZBEKISTAN
(CO) COLOMBIA	(CI) IVORY COAST	(PC) PITCAIRN ISLAND	(VE) VENEZUELA
(CD) CONGO, DEMOCRATIC REPUBLIC OF THE	(JM) JAMAICA	(PL) POLAND	(VI) VIRGIN ISLANDS (U.S.)
(CK) COOK ISLANDS	(JP) JAPAN	(PT) PORTUGAL	(VN) VIETNAM
	(JO) JORDAN	(RQ) PUERTO RICO	(VU) VANATUA
	(KZ) KAZAKHSTAN	(QA) QATAR	(WF) WALLIS AND FUTUNA ISLANDS
	(KE) KENYA	(RE) REUNION	(EH) WESTERN SAHARA
	(KG) KIRGHIZSTAN		(YE) YEMEN
	(KW) KUWAIT		

Country Values (alphabetical by country name)

(CR) COSTA RICA	(LA) LAOS	(CG) REP CONGO	(YU) YUGOSLAVIA
(HR) CROATIA	(LV) LATVIA	(RO) ROMANIA	(ZA) SOUTH AFRICA
(CU) CUBA	(LB) LEBANON	(RU) RUSSIA	(ZM) ZAMBIA
(CY) CYPRUS	(LY) LIBYA	(RW) RWANDA	(ZR) ZAIRE DEMREP CONGO
(CZ) CZECH REPUBLIC		(SH) SAINT HELENA	(ZW) ZIMBABWE
(KP) DEM PEOPLES REP KOREA			
(DK) DENMARK			

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