



Derwent

Derwent Innovation User Guide for Express Users

Clarivate Analytics IP and Standards User Assistance Team

Date of issue: 2017-07-30

Derwent
Powering IP Innovation

 **Clarivate**
Analytics

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Chapter 1 Log In

Log In with Quick Launch (IP Authentication)

This login method is only valid for the limited number of clients who subscribe to the Quick Launch (IP Authentication) feature. If you do not see a Quick Launch button on your login screen, you are not subscribed to IP Authentication.

When your account has Quick Launch, you can log in with the click of a button, without entering a user ID or password, as long as you access Derwent Innovation from an Internet Protocol (IP) address provided to your Derwent Innovation account team.

1. Go to <http://www.derwentinnovation.com/login>
2. Click the **Quick Launch** button

The Patent Fielded search form (which is the default start page) displays.

Log in with a User ID and Password

1. Go to <http://www.derwentinnovation.com/login>
2. Enter your login **email address** and **password**
3. Click **Log In** to access Derwent Innovation

Two popup windows may display, depending on your system preferences and the settings applied by your account administrator.

Popup Window	Description
Retain Search History & Marked List	<p>Derwent Innovation automatically keeps a record of every search you perform. This is called your Default Search History. After you run a search, you can mark or tag records as you encounter them and set them aside for later review. Your Marked List is a running list of the records you have marked.</p> <p>When you log in to Derwent Innovation, a popup window lets you chose to retain or clear the search history and/or marked list from your previous work session.</p> <p>If you chose to retain your Search History and/or Marked List, you will keep all the searches from your previous work session in your Default Search History and all the records you previously selected in your Marked List. If you choose to clear your Search History and/or Marked List, your Default Search history and/or Marked List will be empty.</p> <p>The selections you make on this screen only affect the searches Derwent Innovation saves automatically and/or the records in your Marked List. Your selections do not affect any searches or records you specifically choose to save to a saved search history or work file.</p> <p>You can optionally choose to save your selections and use those options every time you log in. (You can change those choices later in Preferences.)</p>
Mandatory Tracking	<p>Your account administrator can require you to select enter a client reference number when you log into Derwent Innovation.</p> <p>You may be allowed to create your own client references, depending on how your administrator configured the account. If so, you can select a recent client references or set a new one. Administrators can allow users to create all three segments of a client reference or only portions of it (for example, only project and subproject segments). Because of this, the options available will vary.</p> <p>If your administrator does not allow users to create any portion of the client reference, the popup will only allow you to select from existing client references.</p>

Chapter 2 Search

Quickly Find Patents

You quickly find patents from the Dashboard using Smart Search, or you can search for a specific patent publication number.

These options are also available as Quick Search in the left navigation panel.

Quickly Find Patents with Smart Search

Use Quick Search on the Dashboard to quickly find patents using a few technologically relevant terms.

1. Click the dropdown and select **Smart Search**
2. In the text box, enter text that describes an invention, either from an existing document such as a patent or technology disclosure or your own keywords
3. Click **Go**

A result set displays with patent records relevant to your interests.

Quickly Locate a Specific Patent

If you have a patent's publication number, you can use Quick Search and the Publication Numbers field to quickly find that exact patent. This is useful when you need to download a specific patent.

1. Click the **Search** dropdown and select **Publication Numbers**
2. Enter the patent's publication number in the text box
3. Click **Go**

A result set displays with the patent that matches the publication number. If you need to download that patent, click the PDF icon on the result set.

Quick Search Fundamentals

- If you set specific patent collections in your preferences, Quick Search results only include patent records from those collections; otherwise, your results will include patents from US Granted Patents and Applications, WIPO Patent Applications, and European (EP) Granted Patents and Applications
- The date range searched is twenty years back starting on the first day of the current year
- Native Japanese Patents are never included (even when you have the appropriate entitlements)
- Publication Numbers only searches the Publication Number field, not Application Number or DWPI Accession Number

Search Results

Results for your search display below the search form. Learn more about result sets with these topics:

- [Review Your Results](#)
- [Refine Your Results](#)
- [Next Steps for Your Results](#)

Find Documents Based on Key Words or Dates

1. For patent and literature searches, review the selected collections and choose the ones you want to search
2. Use the dropdown boxes to select fields you want to search
Note: If your organization set up Custom Fields for patents, they are listed beneath the standard fields
Tip: Use the find tool at the top of the list to quickly locate specific fields. Just enter all or part a field name to see matching fields. Then, click the field you want to use to select it.
3. Enter search terms for those fields in the text boxes
4. Click **Search** to search for the terms you entered in the fields you selected and view matching documents as a result set

The fields displayed in the dropdown list as well as the fields selected when the search form initially displays can be controlled via Preferences.

Preview/Edit Query

Users with Pro and Analyst subscriptions can preview the exact query to be submitted in the **Preview/edit query** box (the query previewer). This helps you review your query to make sure you are searching for what you intended.

You can edit your query directly in the previewer. Note that further editing the query using the dropdown boxes and other tools will overwrite any edits made directly in the previewer. Edits made in the previewer are not reflected in the fields.

Click the test syntax button (check mark) to check the syntax of your search before submitting it (so you can make changes if needed).

Quick Tips for Patent Searches

The following tips are specific to fielded patent searches.

- Use **Smart Search** field to search with text from existing documents such as patent claims or technology disclosures
Learn more: [Smart Search](#)
- Make sure you click the **Change Collections** link to see which patent sources you are subscribed to and which of those sources will be included in your search
- If you do not want to limit your search by Publication Date, remove the default From and To dates
- You can use Quick Search on the Dashboard to quickly search for a single patent publication number

- To search for a list of patent publication numbers, use the Publication Number search form
- If you use the Publication Number field on the fielded search form, make sure that:
 - You select to search the appropriate patent collections for the publication number (e.g., the German patent collections for a German publication number)
 - You remove the Publication Date field so that you can search all records in that collection, not just records in a specific date range

Quick Tips for All Searches

Use the following tips to help get the results you want from your search. You can find additional details about Derwent Innovation search in the Search Fundamentals topic.

- **AND** means all of the terms must be present, which narrows your search; AND is the default operator between each field
- **OR** means only one of the specified terms must be present; this broadens your search
- **NOT** means the term following cannot be present; this narrows your search
- **ADJ** is the assumed operator for keywords within fields (ADJ searches for terms within one word of each other (adjacent), in the order specified); this means that searching for human transporter in the Title/Abstract/Claims field will be treated as a search for human ADJ transporter
- If you use AND operators between each field in your search, any date fields (e.g., publication date) will apply to the whole search
- If you don't want to use a field (including the Publication Date field), leave that text entry box blank
- To limit your search to a specific date, use that same date in both the From and To fields
- To have your search be through "today" (whatever date that might be), leave the To date blank
- Words that contain hyphens are treated as two separate words. To find hyphenated terms, use the ADJ operator. (ADJ is the default between terms.)
- Queries are not case sensitive; you can enter them in upper, lower, or mixed case
- Stopwords and reserved words are applied to literature searches
- Both the * and ? wildcards are available for use when searching
- Be aware using the * operator may produce too many results to display if you do not include enough characters with the wildcard

Fielded Search Form Quick Reference

Use the...	To...
Review selected collections link	Choose the collections you want to search. When searching patents, the currently selected collections display as a link that opens the Collections to Search window.
Search field dropdown boxes	Choose the fields that you want to search. Click the question mark icon beside any field to see a detailed description of the field.
Search field text box	Enter terms or dates you want to search in the related field. Italic text inside each search field text boxes provides examples of valid terms for that field.
Browse button	Display a search aid that helps you discover and select codes, names, or other terms for that field which you may want to include in your search.
Include blank fields checkbox	Find records that do not have data in that field; these records are in addition to any terms that you enter in the field.
Operator dropdown box	Select AND, OR, or NOT to join two fields in your search. This lets you expand or narrow your search as you wish. The default is AND, but you can change this in your preferences.
Plus (+) and Minus (-) Signs	Add or remove fields from the search. New fields are added beneath the field whose plus sign you clicked.
Preview/Edit Query (Analyst and Pro users only)	Preview the exact query to be submitted and make edits to it using semi-command line interface. Learn more: Preview/Edit Query
Templates (Patents Only)	Apply a patent search template, or save the current search settings (including collections, field selections, and search text) as a patent search template.
Make these my defaults checkbox	Save the current field and collection selections (but not text) as your preferences after clicking Search. This means the fields, collections, and options you selected are used as the defaults when you load the Fielded search screen.
Clear All Fields button	Remove all entries from all fields but leave the current field selections the same.

Reset button	Undo all changes made to your search. Reset functions slightly differently before and after running a search: <ul style="list-style-type: none">• Before you run a search, Reset displays your default fields and collections• After you run a search, Reset displays the last search you ran (including fields, collections, and keywords)
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Find a List of Patent Publications

1. Select the **Number type** for the publication numbers you want to find
Note: You cannot use both patent Publication Numbers and DWPI Accession Numbers in the same search; you must have DWPI entitlements to use the DWPI Accession Number search
2. Select the **Output Type** you want
3. If you select Result Set or Work File as your Output type, optionally select any Specialized Search options.
4. Enter your publication numbers or DWPI Accession Numbers in the text box, or click the **Browse** button (...) to upload text file with a list of numbers

Learn about the patent publication number formats used in Derwent Innovation:

[Patent Publication Number Format Tables](#) | [Patent Publication Number Overview](#)

Note: *If you paste a list of numbers separated by semicolons, tabs, or line breaks from another source, you do not need to reformat the list; the Publication Number search automatically formats the list for you*

5. Optionally, select the Make these my defaults checkbox to save the current output type as your default preferences
6. Click **Search**

After you click the Search button, Derwent Innovation validates your publication numbers and displays any invalid numbers in the Discrepancies panel.

Publication Number Search Results Sort Order

The default sort order for Publication Number search results depends on the type of publication number search:

Search Type	Default Sort Order
Patent Publication Number	<p>The order in which you enter the publication numbers. This order is maintained when you export your results, save the results to a work file, retrieve family members for your results, or rerun the search from search history.</p> <p>If you change the sort order for a Publication Number result set, open Display and Sort Options and select the Default sort order to return to the "as entered" order.</p>
DWPI Accession Number	<p>The order in which you enter the accession numbers.</p> <p>Searches by accession number retrieve the entire DWPI family. The results display collapsed by DWPI family, with the DWPI Basic record as the default preferred document.</p>

Publication Number Limits by Output Type

The number of records you can enter or upload and what happens after you click Search depends on your output type.

Output Type	Publication Number Limit	What Happens
Result Set	60,000 (Analyst users) 30,000 (Pro and Express users)	Your search results display under the search form.
Work File	60,000 (Analyst users) 30,000 (Pro and Express users)	<p>A popup window displays so that you can add the documents to an existing work file or create a new work file with the documents.</p> <p>Learn more: Work Files</p>
Document Copies	500	The Document Delivery screen displays so that you can select options for how you want to download the documents.
File Histories	25	The Document Delivery screen displays lets you select options for the file histories you want to order.

Guidelines for Publication Numbers

- You can use spaces, semicolons, or tabs to separate patent numbers in Publication Number searches
- If you paste a list of numbers separated by semicolons, tabs, or line breaks from another source, you do not need to reformat the list; the Publication Number search automatically formats the list for you
- You can include dashes in patent numbers in Publication Number searches
- The search is not case sensitive
- Some countries re-use core publication numbers for different inventions and rely on the Kind Code to establish the uniqueness of the number; because of this, it is always better to include the Kind Code in your search criteria (if known)
- Countries/authorities who currently do not re-use core publication numbers are: AT, AU, BE, BG, CA, CH, CU, DD, DE, EP, ES, FR, GB, IL, NZ, SE, SU, TN, US, WO, and YU.
- DWPI Accession Numbers must follow one of the following patterns (YYYY is a four-digit year from 1966 onwards, and CCCCCC is a sequence of six alpha-numeric characters)
 - YYYY-CCCCCC
 - YYYYCCCCCC
- Publication Number searches do not let you choose collections
- If you run a Publication Number search that includes patents in a collection to which you do not have entitlements for full-text data, your result set will still display bibliographic information from INPADOC (DocDB) for those records (and DWPI data, if you have entitlements)
- You must have DWPI entitlements to see and use DWPI Accession Number search

Chapter 3 Smart Search

Smart Search makes it easy to find patents relevant to a particular technology, even if you are not an expert on that technology.

Simply enter text (of any length) and let Smart Search analyze that text for key terms. Then, Smart Search replicates the processes a skilled patent searcher uses to retrieve precise, complete results based on the key terms extracted from your text.

Smart Search lets you:

- Leverage the power of DWPI to enhance the accuracy and comprehensiveness of your results
- Effortlessly find patents relevant to a technological field, even as a new or infrequent user
- Quickly find results that matter with results initially focused on the top 1,000 records
- Easily conduct freedom to operate and prior art searches
- Search with text from existing documents – patents, invention disclosures, scientific papers, other technology descriptions – or search for familiar, technologically descriptive terms
- Automatically analyze text to find key terms about the technology the text describes

Quick Tips for Smarter Searches

- Paste in text from an existing patent (include the title, abstract, and claims), drafted patent claims, or an invention disclosure to easily conduct freedom to operate and prior art searches
- Text with distinct terms that describe the unique characteristics or benefits of an invention helps Smart Search provide you the best possible results
Tip: The editorially enhanced DWPI Title and DWPI Abstract are highlight the main use and advantages of the technology in a patent, which makes that text particularly useful with Smart Search
- Let Smart Search analyze your technologically descriptive text (in English) for key terms that summarize an invention
- If needed, you can edit the key terms Smart Search extracted from your text after you run the search to focus the search on specific aspects of a technology

Smart Search Puts the Power of DWPI at Your Fingertips

Smart Search leverages the power of Derwent World Patents Index (DWPI) to enhance the accuracy of its results. DWPI editors rewrite text (in English) for each invention in the DWPI database so that the patent text uses industry-standard terms. DWPI editors also expand that text to more accurately reflect the invention described by the patent. Using this enhanced content helps Smart Search find the patents most relevant to your interests.

Smart Search uses DWPI content as part of its background search algorithm, even if you do not normally have access to DWPI data. You still must have access to DWPI data to see that data on result sets and record views (which you could then use as input text) or search specific DWPI fields.

How to Use Smart Search

Smart Search lets you find patents related to a particular technology without complex queries, even if you are not an expert on that technology. With Smart Search, you have two easy ways to find patents:

- [With Technologically Descriptive Text](#)
- [With Specific Key Terms](#)

Find Patents with Technologically Descriptive Text

Enter text (in English) of any length that describes an invention, such as a patent's title, abstract, and claims or an invention disclosure.

Smart Search analyzes that text, extracts key terms, and expands those extracted key terms to include synonyms, English translations (for non-English terms), spelling variations, and relevant classification codes and cited patents. Then, Smart Search uses the expanded search terms to find patents relevant to the technology in all the Derwent Innovation patent databases, including DWPI, and shows you the most relevant records.

Find Patents with Specific Key Terms

Enter key terms that describe an invention. You can enter as many key terms as you want. Do not enter operators (AND, OR, ADJ, NEAR) between the terms.

Smart Search will expand those key terms to include synonyms, English translations (for non-English terms), spelling variations, and relevant classification codes and cited patents. Then, Smart Search uses the expanded search terms to find patents relevant to the technology in all the Derwent Innovation patent databases, including DWPI, and shows you the most relevant records.

You may use quotation marks to group specific key terms you enter together and force Smart Search to consider them as a single term.

Smart Search Understands Key Terms in Many Languages

Smart Search accepts single word key terms in any language indexed in the Derwent Innovation patent database. Currently, these languages include English, European languages that use the Latin alphabet (including, but not limited to, French, German, Spanish, and Portuguese), and Japanese. However, Smart Search only extracts key words from English text.

Smart Search processes Latin characters with diacritical marks (e.g., accents and umlauts) as expected. Smart Search accepts Greek characters used as scientific or mathematical symbols, but it does not accept full search terms in Greek.

Enter Key Terms on the Expert Search Form

Enter specific key terms as normal on the Expert search form. You do not need to enter any special characters. Do not enter any search operators.

You can include quotation marks to force Smart Search to consider groups of words as a single phrase.

How Patent Collections and Additional Search Fields affect Smart Search

Smart Search uses information from our entire patent database, including DWPI data, to find results that relate to your text. Smart Search works independently from and is not limited by the collections you select or the other patent fields you include in your search. All the collections are included so that Smart Search can fully analyze the key terms and return the most relevant results.

However, the collections and additional fields you select when you run your Smart Search limit the results that display. For example, if you select only US Granted patents, Smart Search will still examine our entire patent database, but your results will only display patent documents from the US Granted collection. If you include a Publication Date field, your results will only show documents for the dates you specify.

Smart Search and Search History

Search history saves every query you run for later use and review, including Smart Search queries. Smart Search works differently than traditional Boolean searches, so search history includes some special features specifically for Smart Search:

- Search History and only retains key terms extracted from your text; blocks of text are never saved and cannot be retrieved from the Derwent Innovation servers
- A flag icon next to the results count in search history indicates the initial 1,000 top results from a Smart Search
- The Retrieve all Smart Search Results option creates a new entry in Smart Search

Smart Search Results

Smart Search result sets employ some unique features to help you quickly see the patents most relevant to your search text. Smart Search result sets:

- Display by default the 1,000 most relevant records found by default, with the option to load the full result set as needed
- Sort results by relevancy, which indicates how closely a particular document matches the technology described by your search text (relative to the other records found by Smart Search)
- Include any documents relevant to your search text, even if those documents do not contain the key terms Smart Search extracted from your text (or the key terms you entered)
- Account for selected collections and additional search after Smart Search runs

Smart Search Shows the Best 1,000 Results

Smart Search is designed to find every patent relevant to the technology described by your search text. Because of this design, Smart Search produces result sets that may be much larger (but less focused) than result sets from traditional search methods.

To help you focus on the most relevant information, Smart Search result sets initially display the records that best match the technology described by your search. Up to the 1,000 highest scoring records (as determined by relevancy) display in these initial results.

You can quickly access your full Smart Search results: Click the **tools (gear)** icon and select **Retrieve all Smart Search** results. These full results are potentially larger (but less focused) than traditional search results, but they are still sorted by Relevancy so that you see the best results first. Use Relevancy to help determine a point in your results where the documents no longer match your search intentions.

Smart Search Sorts Results by Relevancy

Smart Search sorts your results by relevancy, a score applied by the Smart Search algorithm to each document in your results.

Relevancy indicates a relative measure of how closely a particular document in your results matches the technology described by your search text. Documents that best represent the technology show a relevancy score of 100; documents that represent that technology less closely receive lower scores.

The progression of Relevancy scores from 100-1 is not linear, so you may see many documents that received similar scores cluster around certain numbers.

The relevancy score for a particular record is relative to other documents found by that particular search. If the result set changes, such as when you expand the result set by family, the relevancy scores will be replaced by dashes.

Relevancy scores in Smart Search result sets are inherently different from the relevancy scores you can optionally display in traditional searches.

Smart Search Results Include Any Relevant Documents

Smart Search algorithms take the text you enter, extract relevant key terms, and expand the search to include related terms, classification codes, and cited patents. This means that patent records in Smart Search results may not include the exact terms extracted from your text.

Additionally, Smart Search sometimes excludes patents that do include the extracted key terms, because those patents are only tangentially related to your subject (even though they contain terms from your text).

Additional Search Criteria Apply after Smart Search Runs

Smart Search uses all the information available in Derwent Innovation - including the powerful, editorially enhanced data in DWPI - to find all the patents relevant to your search text. Smart Search works independently and is not limited by the collections you select or the other patent fields you include in your search. All the collections are included so that Smart Search can fully analyze the key terms and return the most relevant results.

Additional criteria in your search (collections, additional search fields, etc.) can either add to or limit those results. Additional criteria apply after Smart Search runs.

You will always see up to the 1,000 most relevant records in your search, regardless of the collections or fields you select. The initial 1,000-record limit applies after all other search criteria. When you retrieve all Smart Search results, the retrieved results account any additional fields or selected collections.

You can work with a Smart Search result set just like any other patent result sets in Derwent Innovation. You have all the same options to sort, filter, perform subsearches, collapse by family, or perform further actions like analysis or export.

Chapter 4 Predictive Data

Predictive data provides critical answers to essential questions about patents. Intelligent algorithms combine machine learning with editorially enhanced information from the Derwent World Patents Index (DWPI) to provide highly accurate, actionable intelligence on a patent's:

- Status as alive, dead, or indeterminate, plus the status of the related DWPI family
- Expiration dates and remaining life for the patent

With predictive data, you can easily:

- Determine your freedom to operate in a technology space, as determined by current active (alive) patents in the area
- Anticipate patent expirations and enter the market with generic versions
- Use remaining life to critically assess licensing terms

Where to See and Interact with Predictive Data

- In the [Key Summary Information](#) panel on the patent record Full View
- For display in your result set via [Display and Sort Options](#)
- In your [Results Dashboard](#) and [text filters](#)
- In ThemeScape maps
- In [Exports& Reports](#), which can include expiration date factors

How We Derive Our Predictive Data

Predictive Data starts with the most accurate patent data available, including the editorially reviewed and standardized information in DWPI. Data experts with extensive intellectual property backgrounds apply algorithms that examine key factors in that data and calculate answers to critical patent questions. Machine learning techniques train those algorithms to ensure you receive the most accurate intelligence possible.

Learn more about the factors and calculations behind each piece of Predictive Data:

- [Patent and Family Status \(Dead or Alive\)](#)
- [Expiration Date and Remaining Life](#)

Patent and DWPI Family Status (Dead or Alive)

Patent and family status (dead or alive) quickly shows you whether a patent or DWPI family is currently enforceable. Patent status uses a machine-learning algorithm to examine crucial patent data to determine the vitality status of a single patent or a patent family. The factors considered to predict patent status include:

Factor	How the factor affects patent status
Expiration Date	<p>A patent that passes the end of its term is considered dead.</p> <p>A patent within its term will be predicted as alive if no other factors affect the status.</p>
Legal Status Data	<p>The latest legal status data for a patent may include negative, terminal events, e.g., the failure to pay maintenance fees after any applicable grace period. A patent with a terminal event as its latest legal status data is considered dead.</p> <p>A patent with no terminal legal status events will be predicted as alive if no other factors affect the status.</p>
Inherited Status	<p>The status for a patent application matches the status of its associated granted patent.</p>

Note: If a record does not have an expiration date, filing date, and/or relevant legal status data, its status may be classified as Indeterminate.

Family Status

An INPADOC or DWPI Family remains alive as long as the family contains at least one record with an Alive status.

Expiration Date and Remaining Life

Predictive Data provides an expiration date for an individual patent. A machine-learning algorithm examines all available data, including editorially enhanced data from the Derwent World Patents Index (DWPI), to accurately predict a patent's expiration date. The factors considered to predict expiration date and remaining life include:

- Application filing data
- Extensive related application rules, including continuity information (domestic benefits) for continuations, continuations in parts, and divisionals
- Applicable laws for individual authorities
- Legal status events that extend or shorten the patent term
- Legal status events that definitively, prematurely end the patent term

Tip: You can click the **View Factors** link in the Key Summary Data panel on the record view to see the actual factors considered for an individual record's expiration date. You can also include these factors in exports for further analysis.

Remaining Life

We derive Remaining Life from the calculated expiration date. The current date is subtracted from the expiration date to provide you with an accurate remaining lifespan, displayed in both years and months/days.

Predictive Data Availability, Coverage and Processing Time

Predictive Data Availability

Predictive data is available:

- In the [Key Summary Information](#) panel on the patent record Full View
- For display in your result set via [Display and Sort Options](#)
- In your [Results Dashboard](#) and [text filters](#)
- In ThemeScape maps
- In [Exports& Reports](#), which can include expiration date factors

Predictive Data Coverage

Predictive data is available for patents in the Core, Asian, and Latin American patent collections.

Predictive data is not available for scientific literature content or the Native Japanese patent collection. However, users with access to Native Japanese patent content can toggle between Native Japanese and English record views to view the relevant predictive data.

Processing Time

Predictive Data relies on information from patent authorities. As such, the data can take up to one week (7 days) to process after we receive data from patent authorities.

Additionally, DWPI family status relies on enhanced patent data from DWPI. As such, DWPI family status can take an additional one week (7 days) to process after the enhanced patent data becomes available.

See the patent [Collection Coverage & Update schedule](#) for information on the most recent and next scheduled updates to individual patent collections, including Predictive Data, on Derwent Innovation.

Chapter 5 Results Dashboard

The Results Dashboard helps you quickly understand the story told by your patent search results. Four easy-to-read visuals summarize the data in the patent records found by your search. You can select data points in these visuals to quickly focus your research on the most important results.

The Results Dashboard displays automatically every time you run a search. You can control the fields and types of visuals that display or optionally turn the Results Dashboard off in your Patent Result Set Preferences.

How to Use the Results Dashboard

The visuals on the Results Dashboard summarize the data in patent records displayed in your search results. These visuals also act as filters so that you can quickly focus your results on actionable information.

See Summaries of Your Results

The Results Dashboard displays four visuals that summarize the results found by your search. These visuals show the top items found by your search in specific fields (e.g., the top 20 assignees). Hover your cursor over the data points in the visual to see more information about that data point.

You can choose which fields you want to see visualized, the type of graphic that provides the visualization, and how many data points you want to see (top 20 or top 10).

Learn more: [Results Dashboard Options](#)

Tip: Use the find tool at the top of the list to quickly locate specific fields. Just enter all or part a field name to see matching fields. Then, click the field you want to use to select it.

Click the  icon to see an enlarged view of a visual. The enlarged view shows information about each data on the visual itself (instead of only when you hover your cursor over the data point). You can also customize a title for the visual and download a snapshot of the chart for use outside Derwent Innovation.

Learn more: [Results Dashboard Expanded View Options](#)

Combine Data Points in Your Results Dashboard Visuals

Click and drag a data point on a visual into another data to merge them into a single data point. This condenses similar or related data points together, which simplifies your chart for cleaner reports and easier analysis.

You can combine data points on Bar, Line, and Bubble charts.

Tip: On bar and line charts, you can click and drag either the data point itself or the line that displays through the data point. This is helpful if a text box covers the data point.

After you combine two data points, the visual updates to display the next top data point for the selected field (if available).

Hover your mouse over a combined data point to see the individual data points that comprise the combined point:

- The data point that you dragged other data points onto displays at the bottom of the list and determines the initial name for the combined data point
- Click the  icon next to the combined data point's name to rename the group

- Click the **X** next to a data point in the list to remove it from the combined data point; you cannot remove the initial data point you dragged the other data points onto

You can filter your results with combined data points to see all records that match any of the information in the combined data point.

Combined data points are temporary. Your combinations are not saved when you create a work file and are not retained in your search history.

Quickly Focus Your Results

You can use any data point in a visual as a filter for your results. This helps you focus your results on specific information, such as a specific assignee.

To use the visuals to filter your results, select the **data points** that you want and click **Filter Results**. You can select as many data points from as many visuals as you need

Your results update to show records with the selected data points. The Results Dashboard updates to reflect the focused results so that you can review information specific to your focus and analyze any changes in the visuals.

You can use the updated Results Dashboard to apply additional filters, as needed. Click **Reset** to return to original results.

Note: *You can freely switch between the visual filters and the text-based filters. Selections you make in the visual filters are reflected in the text-based filters (but selections made in text-based filters are not reflected in the visual filters).*

Results Dashboard Options

The Results Dashboard visualizes your results so you can quickly understand the story within your data. The following tools help you efficiently review your patent search results.

Tool	Description
Visual	<p>Each visual displays the top items in the selected field. Hover your cursor over a point in the visual to see more information about that data point.</p> <p>You can click and drag data points into each other to form a single combined data point in your bar, bubble, and line charts. Learn more: Combine Data Points on Your Results Dashboard</p> <p>Each bar, bubble, country, or point on the chart can be used to create a filter for your results:</p> <ol style="list-style-type: none"> 1. Select the data points for items you want to filter on Note: You can select as many data points from as many visuals as needed 2. Click the Filter Results button <p>The result set displays records that match at least one selected item from each visual. If no items are selected in a visual, that field will not be filtered.</p>
Field dropdown menu	<p>Choose the field that you want to visualize from the dropdown menu in the upper left of each visual.</p> <p>You can control the fields display by default in your Patent Result Set Preferences.</p>
Show Top	<p>Show the top 10 or top 20 most populated items. The selected option displays in orange. The default is the top 20.</p>
Enlarge Chart 	<p>See a larger view of a visual with additional details (such as axis labels). From here, you can download a snapshot of your chart. This hides the other visuals, but your selections on those visuals remain active.</p> <p>Learn more: Expanded Visual Filter Options</p>
Chart Options 	<p>Change the type of visual.</p> <p>You can control the types of visuals that display by default for each field in your Patent Result Set Preferences.</p>

Results Dashboard Expanded Chart Options

The Results Dashboard visualizes your results so you can quickly understand the story within your data. You can expand a visualization to focus on details or download a snapshot of your visual.

The following tools help you efficiently review, refine, customize, and share your patent search results.

Tool	Description
Visual (chart)	<p>Each visual displays the top data points in a selected field. Hover your cursor over a point in the visual to see more information about that data point.</p> <p>You can click and drag data points into each other to form a single combined data point in your bar, bubble, and line charts. Learn more: Combine Data Points on Your Results Dashboard</p> <p>Each bar, bubble, country, or point on the visual can be used to create a filter:</p> <ol style="list-style-type: none"> 1. Select the data points for items you want to filter on Note: You can select as many data points from as many visuals as needed. 2. Click the Filter Results button <p>The result set displays records that match at least one selected item from each visual. If no items are selected in a visual, that field will not be filtered.</p>
Title	Click the title on the visual to edit it (up to 64 characters). The expanded view automatically generates a title for you, and titles are automatically included on downloaded snapshots.
Field dropdown menu	Choose which field you want to visualize. This menu is located in the upper left of each visual. You can control the fields that display by default in your Patent Result Set Preferences.
Show Top	Show the top 10 or top 20 most populated items. The default is the top 20.
Reduce Chart 	Return to the standard view. Any selections made on the expanded chart remain active. Learn more: Results Dashboard Options
Download Chart 	Download a snapshot of your visual as a .PNG file. The title (default or edited) for all visuals is included in the snapshot. Snapshots of maps include the legend.
Chart Options 	Change the type of visual. You can control the types of visuals that display by default for each field in your Patent Result Set Preferences.

Chapter 6 Results

Result sets let you see records in a compact, easy to scan, easy to customize display. The result set displays publication numbers (patents) or titles (literature) plus fields that you choose to display. The publication number or title is a hyperlink to full details about that record.

You will see a result set after you run a search, access a work file (or your marked list), or click some hyperlinks and buttons on record views. All result sets are almost identical in their functions and options and so are discussed together. Where there is a difference, it is called out in the text.

From the result set, you can:

- Flip through the pages of the result set to see the records
- Click hyperlinked publication numbers or titles to open records
- Use tools to save, analyze, or take other action on all or selected records

Review Your Results

Results sets always include the publication number (patents) or title (literature records) for each record. The search results can also show summary information about the records. Patent search results can also include Custom Fields (if they are enabled in your company).

Publication Number search results display in the order that you enter the publication numbers (or accession numbers) in the search form or the uploaded document. This order is maintained when you export your results, save the results to a work file, retrieve family members for your results, or rerun the search from search history.

To review your search results, scroll through the results and use the summary information. If your result set contains multiple pages, use the pagination tools at the top or the bottom of the result set to flip between pages.

Tools to Help You Review Your Results

Feature	Description
Results Dashboard	<p>Quickly understand the story within your data. Four visuals display when you run a search. You can choose which fields those visuals display and expand them for a closer look.</p> <p>Learn more: Visualize Your Results</p>
Display Fields	<p>Search results can display up to 8 fields that summarize the information on each record.</p> <p>To change the fields that display:</p> <ol style="list-style-type: none"> 1. Click the tool (gear) icon and select Display & Sort Options 2. Select up to 8 fields you want displayed 3. Click OK <p>Learn more: Display and Sort Options</p> <p>Custom Fields can be displayed on a result set just like standard patent fields, but you need to select them for display via your preferences or Display & Sort Options.</p>
Highlighting	<p>Highlighting emphasizes your search terms (or other terms of interest) to make them stand out from the surrounding text helping you find key terms, saving time while presenting the terms in context and establishing relevance.</p>
Number of Records Found and Displayed	<p>The header above your search results shows you the number of records found, the number of records searched, and the display limit for your results. If the number of records found by your search exceeds the number of records that can be displayed, you will only see the number of records allowed by the display limit (1,000,000 records).</p> <p>If your search criteria are so broad that you are unable to display all of the results, you may want to narrow your search so that you can see all your results. You can also run multiple searches that find subsets of the records found by the full search (e.g., run the same search for different publication years).</p>
Hyperlinks to Record Details	<p>The publication number or title for each record is a hyperlink to full details about that record (the record view). The record view opens in a separate window so that you can review more details about the record. Your result set stays open while you view record details.</p>
Patent Search Result Numbering	<p>Patent search results also include numbering for your search results. This numbering is sequential and not tied to a particular record; sorting or filtering the result set changes a record's number.</p> <p>Collapsed patent search results display two numbers separated by a period. The first number indicates the parent record, and the second number indicates the child record.</p>

PDF Icon A PDF icon displays under the select record checkbox in patent and literature search results. For patent records, click this icon to see the associated patent PDF/image. For literature records, click this icon to order the full text of the article. (You can use the Order option to obtain multiple patent PDFs/images or the Literature Articles option to obtain multiple articles.)

Display and Sort Options

Use the Display and Sort Options panel to configure your result set display to best suit the way you work, simplifying your screen to display only the fields and tools you need.

You can access the Display and Sort Options screen from the gear icon above the result set. You can do this before or after running a search. More extensive customization of your results set display can be done via Preferences.

Option	Description
Standard Fields / Custom Fields	<p>Select which fields display on the result set. Up to eight total fields can be displayed at one time.</p> <p>Note: For patents, field choices are specific to the data set you are searching (Patent Collections by Authority or Enhanced Patent Data - DWPI and DPCI only).</p>
Display icons	<p>Select which icons display on the result set:</p> <ul style="list-style-type: none"> • PDF icon: Link to download the PDF copy of the original document; this is available for patent and literature result sets • Notes icon: On work file result sets, click this to make record-level annotations • Clarivate Analytics (TR) Links: Display links to see full-text versions of the literature articles; this is available for literature result sets only • Check for full text of article: Display the document delivery screen to order the full text version of the article; this is available for literature result sets only <p>For patent result sets, you can also optionally select to show result set numbers.</p>

Sort by Choose the field you (initially) want the result set sorted by and whether you want the records sorted in ascending or descending order. You can click column headers on the result set to re-sort on-the-fly.

On patent text search result sets, the default sort order of the record display in your result set is by collection. (See the sort order for collections.) Within each collection, the records are presented in the order in which they were most recently touched (inserted or modified) which is not necessarily always the Publication Date.

For patent Publication Number searches (including Native Japanese), the default order of the record display in your result set is the order in which you enter the publication numbers (or accession numbers) in the search form or the uploaded document. This order is maintained when you export your results, save the results to a work file, retrieve family members for your results, or rerun the search from search history. If you change the sort order for Publication Number search results, select Default to return to the "as entered" order.

Display Select the number of records to display per page.

Drawing size Select the drawing size (in pixels) used when you display the Drawing field.

Collapse by (patents only) Derwent Innovation can render your patent result set with certain data collapsed (hidden) so that it is easier to take in at a glance. A collapsed group can be expanded with one click, then collapsed again with one click.

Select a value from the dropdown list to specify the type of collapse you want. (See details about the collapse by options.)

If you have chosen to collapse by INPADOC or DWPI family or by Application Number, the Preferred Document selector becomes active letting you specify which record you want displayed for the specified family. (See details about the preferred document options.)

If you choose **Rank by Authority and Type** as your Preferred Document, the Authority and Type selector becomes active. This list lets you prioritize which documents you prefer to see based on patenting authority and document type. If a document does not exist for the authority/type with the highest priority, the document for the next highest prioritized authority/type that does exist in the family displays.

To prioritize authorities/types, select them in the list and use the arrows to set their order. Only authorities in your available collections display in the list. You must have access to a collection to include authorities in that collection in your sort order (e.g., you must have access to the Asian Patent Collections to include Chinese patents in your sort order).

Note: *The Rank by Authority and Type list only determines which document displays as the preferred document. Other documents in a family still display in the current sort order, not in the order you set in the list.*

Make these my default preferences Save your selections and apply them every time you use Derwent Innovation.

Apply to current search results Apply your selections to the current search results. Deselect this checkbox to make changes that affect future searches instead of the current search.

Refine Your Results

Search strategies often involve using very wide searches and then narrowing the results. The following tools help you efficiently manage and refine large result sets.

Tools to Refine Your Results

Tool	Description
Search Forms above Your Results	When you access result sets by running searches, you can refine and rerun your original query and immediately see the results of that refinement. Note that this runs a new search on the entire database, not just your current results.
Results Dashboard Filters	<p>The visuals in the Results Dashboard let you create a new result set based on the top-ranking results in your current result set. The Results Dashboard displays automatically so you can easily see the top items in selected fields. You can set your default visuals in Patent Result Set Preferences.</p> <p>Any bar, bubble, country, or point on a visual can be used to create a filter for your results:</p> <ol style="list-style-type: none"> 1. Select the data points for items you want to filter on Note: You can select as many data points from as many visuals as you want 2. Click the Filter Results button <p>The result set displays records that match at least one selected item from each visual. If no items are selected in a visual, that field will not be filtered.</p> <p>Custom Fields can be displayed in the Results Dashboard and used as filters if your account administrator (who creates your Custom Fields) set them up that way when they were created.</p> <p>To clear your filters, click the Reset button.</p> <p>Learn more: Results Dashboard</p>

Text-based Filters

Filters let you create a new result set based on the top-ranking results in your current result set.

To apply filters:

1. Click the **filter icon**
2. Click the dropdown boxes to select the fields on which you want to filter

Learn more: List of Filter Fields

***Tip:** Use the find tool at the top of the list to quickly locate specific fields. Just enter all or part a field name to see matching fields. Then, click the field you want to use to select it.*

3. Select the check boxes for the items you want to filter on

Note: Up to the top 100 items display

4. Click **Filter Results**

Custom Fields can be filtered on if your account administrator (who creates your Custom Fields) set them up that way when they were created.

To clear your filters, click the Reset button.

Subsearch Results

Subsearch lets you run a single-field search within your result set.

To subsearch your results:

1. Click the **filter icon**
2. Select the field you want to search on and enter your search criteria
3. Click **Subsearch**

To go back to your original result set, click the Reset button.

Sort

Result set records can be re-sorted on the fly by clicking hyperlinked fields on the header row (the row that names the fields). You can also sort records by using the Display and Sort Options panel. The default sort order can also be customized via Preferences.

On patent result sets, the default sort order of the record display in your result set is by collection. (See the sort order for collections.) Within each collection, the records are presented in the order in which they were most recently touched (inserted or modified) which is not necessarily always the Publication Date.

For patent result sets, you can both display and sort by Custom Fields (if they are enabled in your company) with the exception of text type Custom Fields which can be displayed but not sorted on.

From Preferences or the Display and Sort Options panel, you can choose to sort by any field classified as a sortable field, even if you do not choose to display that field on the result set.

Collapse Patent Results to View Related Records

Collapsing patent results focuses your view on one record per invention or Application Number so that you can more effectively analyze your results.

Collapsing (and subsequent expanding) only impacts records found by your current query. In other words, the family members already in that result set are grouped together but, if other family members exist (that were not found by your query and therefore are not in this result set), they are not included.

Note: *Collapsing your result set is not the same as retrieving family members for the result set (although they are similar).*

Collapse Your Results

1. Click the **gear icon** and select **Display & Sort Options**
2. Click the **Collapse by** dropdown and select how you want your results collapsed (see the Collapse by options)
3. Optionally, click the **Preferred document** dropdown and select the document you want as the "parent" document that displays when a group is collapsed (see the Preferred document options)
4. Click **OK**

A new result set displays with the records in your original result set grouped according to your Collapse by option.

Work with Collapsed Results

Collapsed result sets initially display with all groups collapsed. This means that the records you see in the result set are the records you chose to display as the Preferred document.

To see related documents for a group, click the expand (+) button next to the preferred document. To hide related documents, click the collapse (-) button.

Note: *A collapse button that is greyed-out and not clickable indicates that only one record for that group is in this result set.*

Use the global expand/collapse button at the top of the result set to expand or collapse all groups in the result set. This affects all groups in the result set, not just the groups currently visible.

Next Steps for Your Results

After finding the results you need, you can perform many other actions on those results. This topic summarizes the actions you have available.

Select Records

Select all is the implicit default for actions taken from a result set (with the exception of creating Watched Records). You can also use checkboxes in each row of your results to select (or deselect) items for further action on a record-by-record basis.

Note: *The header row of the result set also contains a "select all" checkbox. The value in explicitly selecting all (via the select-all checkbox) is that you can easily de-select (and omit) records on a one-by-one basis which, with larger result sets, is quicker than selecting them one-by-one.*

Tools Available to Work with Your Results

Tool	Description
Add To	<p>Add all or selected records to a work file or marked list.</p> <p>A work file is a saved list of links to one or more records.</p> <p>Marked lists are a way to mark or tag records as you encounter them and set them aside for later review. The records you mark display a yellow highlight around their checkboxes in your results.</p>
Charts (Express users)	<p>Charts provide a visual representation of your data, helping you see things like how a patenting landscape changes over time, a snapshot of the top players in a field, or how the top names change over the years..</p>
Order (Patents Only)	<p>Order patent document copies (PDFs/images) or file histories.</p> <p>Quick Order Patent Documents orders the selected records (or, if no records are selected, the first 500 records in the result set) using the delivery options selected in your Preferences. Any special order patents are skipped (not ordered).</p> <p>Patent Documents orders the selected patent documents (or, if no records are selected, the first 500 records in the result set) and displays the Document Delivery screen so that you can select delivery options.</p> <p>File Histories orders up-to-date accounts of the prosecution history for published or granted patent cases for the selected records (or, if no records are selected, the first 25 records in the result set). The Document Delivery screen displays so that you can select delivery options.</p> <p>You can retrieve documents you order from the Order Status screen.</p>
Edit Custom Fields	<p>Edit the values for any Custom Fields on the selected records.</p>
Literature Articles (Literature Only)	<p>Orders copies of the selected literature articles (or, if no records are selected, the first 500 records in the result set) and displays the Document Delivery screen so that you can select delivery options.</p> <p>You can retrieve articles you order from the Order Status screen.</p>
Watch Records (Patents and Literature Only)	<p>Watch for changes to specific fields on up to 300 selected records.</p>

Export Export data from all or selected records in a variety of formats and field combinations. You can retrieve exports from the Order Status screen.

Delete (Work Files Only) Deletes the selected items from your work file.
Warning: Records deleted from a work file do not appear in your Saved work Deleted Items folder and cannot be recouped.

Print Generate a printer friendly version the entire result set listing or a listing of selected records (just the listing, not any individual records referenced by the result list).
The query used to generate the result set will be included above the result. This query information will include all details about how the result set was generated, including the type of search, any filters applied to the result set, any stacked or combined searches, etc.
When printing, filters applied to the result set are indicated by a colon followed by the fields on which the result set was filtered.
Note: To print highlighting, highlighting for printing must be enabled via Preferences. Also, **Print background colors and images** must be enabled in your browser preferences in order for highlighting to print (see your browser documentation for details on browser options).

Chapter 7 Patent Record View

View Record Details in Quick or Full View

The patent record view displays detailed information about a patent record, such as bibliographic information, claims, images, and codes.

The information on a record view often does not come from a single source. We often construct a record display from multiple sources to give you as much information as possible. Click the question mark next to any field to see detailed information about that field.

Some data on the record view has hyperlinks that open referenced records or related records in a new result set, launch an email to hyperlinked addresses, or open a websites. Just click a link on the record view to perform the relevant action.

Quick View and Full View

Patent record views can be displayed in either Quick View or Full View. You can switch between Full View and Quick View at any time during your session, and the choice will "stick" until you log out or change the view again.

Differences Between Quick and Full View

Quick View	Full View
Displays key fields in a compact and provides rapid navigation from record to record.	Displays all the available details about a record.
Allows rapid navigation from record to record.	Slower navigation from record to record.
Quickly flip between records for easy review.	Open multiple records in a separate window for detailed review.
Default view for patent records.	Can be selected as default view in your Patent Result Set Preferences.
Fields are not grouped into sections, as all key information displays.	Related information grouped together into sections.
Jump To links are not needed, as all key information displays in a compact view.	Jump To links help you go directly to a particular section.
Custom Fields do not display.	Custom Fields display at bottom of record.
Highlighting panel does not display, as all key information displays in a compact view.	Highlighting panel helps you quickly jump through a record to see highlighted terms in context.

See Patent Drawings/Images

All drawings/images associated with the patent record are available in the Images panel. The number of drawings/images is displayed in the upper left corner of the Images panel. The number of images in a patent record view can be one greater than the number shown on the PDF/image because, when a DWPI clip is available, it is shown as the first image in the record view in addition to the other images. Note that a single image may contain more than one figure.

Review Key Summary Information

Key Summary Information provides you with crucial patent and family status data to further aid you in your research. Enter a record's Full View in order to see Key Summary data at the top of the page. The Key Summary Panel contains the following fields:

Field	Description
Patent	<p>Indicates whether a patent is currently in force (alive), no longer in force (dead), or if there is not enough information to determine the patent's status (indeterminate).</p> <p>For patent applications with related granted patents, the application's current status as granted also displays, along with a link to the granted patent.</p> <p>Learn more: Patent and Family Status</p>
DWPI Family	<p>Indicates whether the patent's DWPI family is dead, alive, or indeterminate. If a family contains at least one record with an Alive status, the family is considered to be alive.</p> <p>Learn more: Patent and Family Status</p>
Original Assignee	<p>The original assignee name provided by the patent authority.</p>
Publication Date	<p>Original publication date of the patent.</p>
Expiration Date	<p>The date on which the patent is predicted to expire. The date is estimated unless a legal status event definitively establishes a confirmed date on which the patent expires.</p> <p>When a legal status event prematurely ends the predicted term, the date of that event was published becomes the end date of the predicted patent term.</p> <p>The <i>View Factors</i> link next to the expiration date opens a new tab or window with the factors used to predict the expiration date</p> <p>Learn more: Expiration date and remaining life</p>
Remaining Life	<p>The remaining lifespan of the patent, as calculated from the expiration date and the current date.</p> <p>Learn more: Remaining Life and Expiration date</p>

Compare Multiple Records

The patent record view displays critical details about patent records. You may need to compare details between two (or more) records simultaneously.

Click the new window icon () on the full record view to open the current record in a comparison record view window.

Comparison record view windows have a gray Comparison Record View title bar. Comparison record views do not allow navigation to other records in the result set, the record count always shows Record 1 of 1, and comparison record views do not contain a new window icon. All other record view features are available.

The main (primary) record view remains available so that you can navigate (flip) to other records in your result set.

Quickly Close all Comparison Record Views

After you open at least one comparison record view, the main (primary) record view window displays a Close all comparison record view windows link. Click the link to close any open comparison record view windows.

Note: If you close all comparison record view windows manually, the link will still display until you refresh the main (primary) record view (navigate to a different record, change highlighting options, etc.).

Navigate to Other Records in Your Results

You do not need to return to the result set to view a different record. You can navigate to other records in the result set using the pagination tools at the bottom of the record view.

Text on the left displays which record you are viewing and the total number of records in the result set.

Click a number in the center to jump to that record, or click a single arrow to flip to the previous or next record in the result set (respectively). Click the double arrows to jump to the first or last record in the result set (respectively).

In Full View, use the Go to Page tool to jump to a specific record. Enter the page number into the text box, then click the Go button to jump to that record. The Go to Page tool is not available in Quick View.

Keyboard Shortcuts

You can use keyboard shortcuts to move between records. The left and right arrow keys flip back or forward one record, respectively. Shift-left and shift-right jump to the first or last record, respectively. Space bar marks (or unmarks) the current record and moves you to the next record. Keyboard shortcuts are only available in the patent record view.

Navigation for Result Sets Collapsed by Family

If you access the record view from a result set collapsed by families, application numbers, or citations, the **Navigate** dropdown becomes active. This dropdown lets you select how you want to flip through your records:

- **Preferred Documents:** Navigation only flips through the preferred documents on the result set (the documents with the plus/minus signs next to them); the numbering reflects the number of preferred documents
- **All Documents:** Navigation flips through every record in your result set; the numbering reflects the numbers on the result set (e.g., 1.1 represents the first record in a family, 2.2F represents the second forward citation of the second record in the result set, etc.)

Download PDF/Image or File Histories for a Record

You can quickly download the PDF/image or order a complete file history for a record. These options are available in both Quick View and Full View.

Download PDF/Image

You have two options to see the original PDF/image for the current patent, application, or utility model.

Option	Description
PDF Icon	<p>Click the PDF icon below the toolbar to immediately view the PDF/image for the current record.</p> <p>In Full View (only), you can hover your mouse over the icon to see the number of pages in the PDF and the PDF icon will be grayed out if the PDF/image is not available for that particular record.</p>
Download, Order Patent Document	<p>Click Download, Order Patent Document to submit a document delivery order for this record. When you order the patent with document delivery, you can optionally choose to include any related documents in your order (additions, corrections, grants, etc.).</p>

Order File History

You can order the complete file history for the current record from the record view. Click **Download, Order File History**.

Translate Record on Demand

For many patent records, you have the ability to create a Translation on Demand. This means that the record you are looking at can be instantly translated into one of several other languages. You must be on the Full View record view to use the Translation on Demand feature.

Click **Translate** on the toolbar to translate the current record. Only translation options for the current record display. The translation opens in a new window in a printable format. Only one level of translation is available; the Translate function is not available on the new window that displays.

These machine translations are done by a state-of-the-art translation engine designed to handle scientific content.

Only one level of translation is available. That is, if a record is translated from English to French, it cannot then be translated from French to another language.

Chapter 8 Download (Order) Patent Documents

You can order (download) the original PDF/image for patents from result sets, work files, the Quick Order screen, and the Publication Number search form. You can also instantly retrieve PDF copies of patent documents one-by-one from a patent result set, work file, or record view by clicking the orange PDF icon.

Download the PDF/Image for a Single Patent Document

You can quickly find and download patents right from the Dashboard if you have that patent's publication number.

1. On the Dashboard, click the dropdown menu and select **Publication Numbers**
2. Enter the patent's publication number and click **Search**
3. On the result set that displays, click the **PDF** icon next to the patent
4. Save the PDF/image to your computer:
 - If your browser displays the PDF/image in a new window, use that window to save the PDF/image
 - If your browser displays a Save File dialog, use that dialog to save the PDF/image

Download PDFs/Images from a List of Patent Documents

The Quick Order screen provides the quickest, easiest way to order patent documents from a list of patent publication numbers. You may order up to 500 inventions (patent documents and their related publications) at a time, and you may place as many orders as you wish.

Quick Order is not available for Patent File Histories or Literature Full Text Articles.

1. On the Dashboard, click the **Download Center** tile and click **Quick Order**
2. Select whether you want the **Full Document** or **Front Page** only; the front page provides only the first page of the patent documents, which includes bibliographic information
3. Enter up to 500 **Publication Numbers**; you can enter the publication numbers by hand, copy/paste the publication numbers into the text box, or upload a TXT file with the publication numbers
4. Click **Order Documents**
5. The **Order Status** screen displays

Note: *Quick Order only delivers patent documents that do not have a charge. It will not deliver any "special order" patent documents; any publication numbers that require a special order display as "Special Order –Skipped" in the Order Status details for that Quick Order. Quick Order does not deliver file histories.*

Quickly Download PDFs/Images from Result Sets and Work Files

After you run a patent search, you can use Quick Order Patent Documents to download (order) all or selected documents from the result set. You may order up to 500 inventions (patent documents and their related publications) at a time, and you may place as many orders as you wish.

You can also use these steps to download patent documents from a work file.

1. From a result set, select **the documents** you want to download and click **Order, Quick Order Patent Documents**
2. Click **OK** on any dialogs that display
3. Access the Order Status screen from the Order Center tile on the Dashboard
4. Use links on the Order Status screen to download your order

The Order Status screen is discussed in detail later in this guide.

Chapter 9 Export Data from Patent Records

Exports let you download selected fields (with their data) from records for use outside Derwent Innovation. What data you can download varies by the content type and format you select.

You can create exports from result sets/work files and some saved work items. You can also create exports from charts.

Export Data from Records

You can create exports using all or selected records from result sets and work files. You can also create exports from charts and some Saved Work folders.

1. Select the records or saved work item(s) you want in the export; in result sets and work files, not selecting individual records includes all records from the result set or work file in the export
2. Open the Export & Report Options screen:
 - From result sets or work files, click the **Exports** button
 - From charts or Saved Work, click the **Exports & Reports** link in the toolbar
3. Select your file **Format**
4. Use the arrows to select the field sets included in your export and the order in which fields appear; for some formats, you can also optionally select additional export options (e.g., Create duplicate records or Expand by family)
5. Optionally select your **Delivery** options
6. Click **Create** to start the export process

After you click Create, the Order Status screen displays.

Records to Export Options

Option	Description
Use selected records	Includes only the selected records in your export. This option is only available if you select records from a result set or work file
Use all records	Uses all records in the result set, work file, or ThemeScape map. This is the only option available from an item that does not allow individual records, when you do not select any records, or when you create an export from charts or a saved work item.
Exclude Basics from search Equivalents	Removes any DWPI Basic records that were not part of your original search from the export, which lets you focus on just the records you searched and their citations. This is only available when you use the DPCI Citations specialized search. Learn more: Specialized Search

Additional Export Options

Option	Description
Create duplicate records for one multi-value field	Some fields have multiple values all in the same/one field (e.g., Assignee/Applicant). Your export can display duplicate records for one multi-value field that you select. Learn more: Export Fields - Multi-Value Fields
Printer friendly format	Omits hyperlinks and PDF icons that link to patent documents to improve the appearance of printed documents.
Expand by family (PDF only)	Include both the patent record(s) you selected and their INPADOC family members. The records will be grouped by family in the PDF. Within each family, patents are grouped by application number to show all stages of a patent's life in a single entry. This option is selected automatically if you select the Family Expanded Legal Status Report field set.

Delivery Options

Option	Description
File name	The name for the file that you will download. Whether you accept the default or enter a new file name, the system will automatically add the correct file extension (e.g., .csv, .pdf) based on the format option you selected.
Compress file as .ZIP	Compresses the download file as a ZIP. This allows bundling multiple files together when One file per record is selected. This option is session "sticky".
One file per record	For TXT and XML files, you can optionally create a separate file for each record. The option is only available when you compress the file as a ZIP.
Share via email	Optionally send the export to additional recipients via email. You can either enter the recipients' email addresses in the box or click Add/Edit to select email addresses from a directory.

Retrieve Your Exports

Retrieve your exports from the Order Status screen. This screen displays automatically after you click Create on the Export & Report options screen. You can also access the Order Status screen at any time from the Order Center tile on the Dashboard.

To retrieve an export, select the export you want to retrieve and click the **Available Now** link. When you click the link, you will see the standard browser prompt asking whether you want to open or save your file.

Exports remain available on your Order Status screen for 30 days after creation.

Chapter 10 Order Status

The Order Status screen lets you download your document orders and exports. It also lets you view details of previous orders and exports.

Access the Order Status screen from the Order Center tile on the Dashboard.

Documents orders and exports remain available on your Order Status screen for 60 days after creation.

Retrieve an Export or Document Order

To retrieve an export or document order, select it in the order list and click the **Available Now** link in the order details. When you click the link, you will see the standard prompt for your browser asking whether you want to open or save your file. Document orders that contain multiple document types (e.g., patent documents and literature articles) have separate tabs for each document type above the order details section.

For patent document orders that contain multiple items, each item has its own Available Now link in the order details. You can download the items individually, or you can click **Zip Download** to download all the patent documents for that order in a single ZIP file.

Document Order and Export Statuses

After you submit a document order or click Create on the Export & Report Options screen, your order begins processing immediately. In many cases, export or document order will be completed and "Available now" when the Order Status screen initially displays. However, your document order or export may still be "Pending" or "Processing" when the Order Status screen displays, depending on the size and complexity of the document order or export.

Status	Description
Pending	Your request has been submitted and is waiting to be processed.
Processing	Data for your document order or export is being collected and formatted. A progress bar displays the status.

If your document order or export shows as Pending or Processing, you do not need to wait on the Order Status screen for the document order or export to finish. You are free to order additional documents, request additional exports, or move on to other tasks. You can return to the Order Status screen later to download the documents or export.

Chapter 11 Alerts

Alerts are notifications that a search you created has been run for you, at the time you specified, and the results of that search are available for you to review. They are typically set to run at intervals that coincide with updates to the collections, so that whenever there are new records available, you are alerted about them right away.

An email lets you know that your alert was run and if it found new records. New records found by your search are saved to a work file.

Alerts are not available to users who access Derwent Innovation using IP Authentication (Quick Launch).

Create an Alert

You can create alerts for all collections in all content types (patents, literature).

You can create alerts from search forms, search history, saved searches, and result sets. The method for doing so is mostly the same, with the exception that you must enter a query on a search form to create an alert from it.

***Tip:** Create alerts from the result set after you have reviewed the results for your query and verified that it finds kind records you want.*

1. Access the **Save Search & Create Alert** screen:
 - From search forms and standalone result sets, click the Alert button
 - From the Saved Search screen, click **Alert, Set**
2. Enter a **Name** and (optionally) a **Description** for the alert
3. Optionally, select Additional Save and Share Options
4. Optionally, click the **Run Options** tab to adjust when and how your alert runs
5. Optionally, click the **Delivery & Content Options** tab to choose what information your alert will contain
6. Click **Save**

Alert Creation Fundamentals

- Alerts set for searches that include date ranges will not deliver results for records outside the date range
- You cannot create alerts from searches that include Custom Fields, stacked searches, or searches that include DPCI fields
- The language of the alert email does not indicate the language of the records contained in or referenced by the alert
- The language setting of the interface at the time an alert is created determines the language of the text in the resultant emails; any subsequent change to another language version of Derwent Innovation will not change the language

What Triggers an Alert?

Your alerts run at intervals you specify. This may be weekly, monthly, or when one of the collections in your search is updated.

For a record to be included in an alert it must:

- Be newly added to Derwent Innovation
- Have not been found by the search the last time the alert ran
- Match your search criteria

When you create an alert, you can optionally choose to not receive alerts for searches that do not find results.

Several factors can have a large effect on the contents of your alerts, including:

- The query you entered, especially if it includes date ranges or searches DWPI data
- Content updates coinciding with your weekly/monthly scheduled alerts

Chapter 12 Charts

Charts provide a visual analysis of your data, letting you see things like how the landscape changes over time, how the top names change over the years, or a simple snapshot of the top players in a field. Charts help you:

- Analyze large result sets by providing a visual representation of significant data
- Take your research out of Derwent Innovation and present it for at-a-glance understanding

You can create charts using all or selected records from result sets and work files; you can also create charts using all the records in saved work items.

Create a Chart from a Template

Creating charts means selecting a data set, picking the best graphical representation for that data, and determining what information you want to show. Chart templates provide quick access to the most common visualizations.

You can use one of the many predefined chart templates or use your own chart templates by creating a custom chart and saving it as a template.

1. Select the records or saved work item(s) you want analyzed on the chart; in result sets and work files, not selecting individual records includes all records from the result set or work file in the export
2. Click **Analyze, Charts**
3. Click a **chart template** to apply it to your data and display the chart

Work with Charts

Working with Charts

After creating a chart, you can use the visualization to analyze the records it represents and, if necessary, change its settings to fit your needs. To help with your analysis, you can click a chart segment (bar, pie slice, count on a list, etc.) to create result sets with the data that segment represents.

If a legend is displayed on the chart, you can click a label on the legend to display a change color window. This lets you choose which color is used for the corresponding segment on the chart.

When you are satisfied with the chart, you can save it for further use in Derwent Innovation or take the chart outside Derwent Innovation by saving it as an image, printing it, or exporting data from the records used to create the chart.

Save the Chart for Later Use

You can save charts for further use in Derwent Innovation. You can save the chart itself, the chart's settings for use as a template, or the records used to create the chart as a work file.

To save a chart, click **Save** on an open chart and select one of the following options:

Save Option	Description
Chart	<p>Saves your chart in the default folder in Saved Work for future use. The saved chart retains a link to the data used to create it.</p> <p>When saving the chart, you can enter a Name and Description and you can elect to also save it to a personal folder, a public folder, or share it using the Saved Work Inbox.</p>
Data as work file	<p>Creates a new Work File containing the result set used to create your chart.</p> <p>When saving the work file, you can enter a Name and Description and you can elect to also save it to a personal folder, a public folder, or share it using the Saved Work Inbox.</p>

Chapter 13 Work Files

A work file is a saved list of records. You can save records to a new or existing work file from any result set or record view. Additionally, you can configure your alerts to automatically save any results to work files.

Note: *Technically, work files (like result sets) contain links to records and not the records themselves, but we commonly speak about "the records in your work file."*

Work Files are Result Sets

A work file looks and behaves like a result set, including options to filter and subsearch. However, work files only display records (instead of both records and a search form), do not have Save and Alert buttons, and include a Delete button so that you can remove selected records from the work file.

Work Files are Saved Work Items

Derwent Innovation automatically saves all your work files in the Work Files folder in Saved Work. You can also optionally save copies of your work files to your personal folders or share work files with others via public folders.

To open a saved work file, find the work file in Saved Work and click the **Open**  icon. From saved work, you can merge multiple work files into a single work file, analyze the contents of a work file with charts, ThemeScape, and Text Clusters, or manage the work file like any other saved work item (e.g., share the work file or export the data).

Add Records to a New or Existing Work File

You can add records to new work files from a result set. You can also add records to existing work files from the result or the record view.

When working with a result set, you can add all or selected records. If you do not select any records, you will add all records from the result set by default.

Add Records to a New Work File

1. On the result set, optionally select the records you want to add to the new work file; if you do not select any records, all records in the results will be added
2. Click **Add To, New Work File** (on a record view, click **Add to Work File, New Work File**)
3. Enter a **Name** and (optionally) a **Description** for the work file
4. Optionally, select Additional Save and Share Options
5. Click **Save**

Add Records to an Existing Work File

1. On the result set, optionally select the records you want to add to the new work file; if you do not select any records, all records in the results will be added
2. Click **Add To, Existing Work File** (on a record view, click **Add to Work File, Existing Work File**)
3. Select the work file where you want the records added

Chapter 14 Saved Work

The Saved Work area contains all you saved work items, such as work files, saved searches and alerts, charts, and ThemeScape maps. Every item you save is automatically stored in a folder specific to the item type (e.g., all your work files are stored in the Work Files folder).

Additionally, the Saved Work area contains personal and public folders, additional locations where you can optionally store your saved work items or share them with others. You can create additional folders inside the personal or public folders to help organize your work, e.g., by project, business unit, or client.

The automatically created folders can only contain that specific type of saved work item (e.g., the Work Files folder only contains work files). Personal and public folders can contain

To access Saved Work, click the **Saved Work** tile on the dashboard and then click the tile for the saved work items you want to view.

You can select any saved work item to view additional details about that item (description, owner, last modified date, etc.).

Find and Open Your Saved Work Items

Open Saved Work Items

To open a saved work item, click the Open () icon next to the item you want to open, or select the item and click the hyperlinked name of the saved work item.

Depending on the saved work item's type, they may open in the main window or a new window. For example, opening a saved search (or alert) shows the search form and results for that search in the main window, but opening a saved chart shows that chart in a new window.

Find Saved Work Items

Browse Saved Work Folders

Every item/file that you save is automatically stored in a system-generated folder of a specific type of item (work files, charts, etc.). Only items of a specific type are stored in a given system-generated folder.

Public and personal folders can contain multiple any type of saved work item. However, items are not saved to these folders automatically; you must explicitly choose to save your work to personal and/or public folders.

You can create subfolders in public and personal folders. This helps you organize your work based on specific criteria (e.g., all work related to a specific project).

Tip: Click the expand all icon () to quickly open (expand) all subfolders.

To see the saved work items in a folder, click the folder in the folder panel. The contents of that folder display in the main window. By default, only ten items in a folder display per page, but you can optionally select to view more items per page.

Search All Folders

Use the search tool above the folders panel to search all your saved work items for specific keywords. You can choose to search for content in any folder or in a specific system-generated folder.

Enter the keywords exactly as they are used on the saved work items. Stemming and wild cards are not available, and the search is case-sensitive.

You can only search data in a saved work item's properties (file name, description, owner, etc.). You cannot search for text in records, because saved work items only contain links to records (not the records themselves).

Search the Current Folder

Use the search tool above the contents and description area to search for saved work items in the current folder with specific keywords. You can search for keywords in all text fields, or you can search for keywords in a specific field (file name, description, owner, etc.).

Enter the keywords exactly as they are used on the saved work items. Stemming and wild cards are not available, and the search is case-sensitive.

You can only search data in a saved work item's properties (file name, description, owner, etc.). You cannot search for text in records, because saved work items only contain links to records (not the records themselves).

Manage Saved Work Items and Folders

From Saved Work, you can edit, rename, copy, delete, and share saved work items. You can also create new folders in your personal or public folders; or rename, copy, move, or delete existing folders.

Manage Saved Work Items

The following are the basic steps to manage any saved work item. The table after the steps provides additional details about each action.

1. Locate the saved work item you want to manage
2. Select the checkbox(es) for the item(s) you want to manage
3. Click **Manage** and select the action you want to perform
4. Complete any screens that display and click **Save**

Add or Review Annotations on Saved Work Items

You can annotate any saved work item to save notes or attachments.

To add or view annotations for a saved work item, locate the item in your Saved Work area and click the annotation icon next to that record. An Annotations screen displays with tools to add, and view annotations:

Tool	Description
Add annotation	Enter a note and click Save to add your note as an annotation to the document. The note will be saved to record along with your name, the date on which you created the annotation, and any attachments that you upload.
Upload new attachment	Optionally include a document attachment with your annotation. You must enter a note with the document. Annotation attachments can be up to 2 MB.
Mark Private	Optionally make this annotation visible to only you. Other users with access to the work file (e.g., in a public folder or with whom the work file is shared) will not see the annotation.
Annotation list	Shows all the annotations on this record, who created the annotation, and the date on which the annotation was created. A paperclip icon indicates an attachment; click the paper clip to download the attachment. Click buttons in the Actions column to edit or delete an annotation: <ul style="list-style-type: none"> • Edit: Edit the text, attachment, or privacy settings of the annotation • Delete: Remove the annotation from the record
Export Annotations	Export all annotations on the current record, including any attachments.

Chapter 15 About the Express Subscription

Derwent Innovation Express users see a highly focused (and reduced) set of fields and features to help them get their work completed quickly and efficiently. Using Derwent Innovation as an Express user works much same as for Pro and Analyst users, but there are some differences.

How do I Know if I am an Express User?

To see your subscription level, click the My Account tile on the **Dashboard** and click the **General & Privacy** tile. Your subscription level as well as other information about your subscription will be shown.

Express Compared to Other Subscriptions

	Similarities	Differences
Search, Results, and Records	<ul style="list-style-type: none"> Same collections available Same robust search engine Same handy Quick Search feature Same ability to add or remove fields from the Fielded search form using the Add Field and the X (delete field) buttons Same ability to customize your working environment via options in Preferences Same configurable result set, including the ability to collapse result sets by DWPI Family, INPADOC Family, or Application Number Same full-featured record view Same ability to highlight search results Same ability to translate the record view Same ability to use Custom Fields Same ability to create and save search history 	<ul style="list-style-type: none"> Limited number of fields available for searching in patents and literature Field-level search form preferences can only be established for patents Query Previewer not available on search forms Patent search templates are not available Expert (command line) search style not available Retrieve DWPI Family and Retrieve INPADOC Family tools on the result set are not available Highlighting is limited to searched terms Queries cannot be combined in Search History

Alerts and Saved Work

Same ability to save searches, create alerts, and watch records

Only predefined fields available in alerts

Same ability to create work files and marked lists and share saved work items with colleagues

Same ability to create marked lists

Same ability to create Personal and Public folders

Downloads and Analysis

Same ability to create exports and reports

Export is limited to 1,000 records and you can only export pre-defined sets of fields (although individual fields can be removed from those sets)

Same ability to create charts

Export templates are not available

Same ability to order patent documents and file histories

Only predefined templates available in charts

Text Clustering, ThemeScape, and Citation Mapping are not available directly to Express users. Express users can, however, interact with text clusters, ThemeScape maps, or citation maps shared with them by Pro or Analyst users.

Who we are

Clarivate Analytics accelerates the pace of innovation by providing trusted insights and analytics to customers around the world, enabling them to discover, protect and commercialize new ideas, faster. Formerly the Intellectual Property and Science business of Thomson Reuters, we own and operate a collection of leading subscription-based businesses focused on scientific and academic research, patent analytics and regulatory standards, pharmaceutical and biotech intelligence, trademark protection, domain brand protection and intellectual property management. *Clarivate Analytics* is now an independent company with over 4,000 employees, operating in more than 100 countries and owns well-known brands that include *Web of Science*, *Cortellis*, *Derwent Innovation*, *Derwent World Patents Index*, *CompuMark*, *MarkMonitor* and *Techstreet*, among others.

Derwent Innovation is built to provide answers that you need to make your business succeed— with the most comprehensive content and the best tools for finding it. It's your most complete source on earth for global patent data and scientific literature all in one platform.

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