



Questel



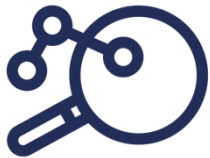
Orbit Intelligence

How to efficiently collaborate through Orbit Intelligence's Workfiles system

Tips & Tricks

Agenda

“How to efficiently collaborate through Orbit Intelligence's Workfiles system”



1. Why use the Workfiles system?

- Differences with Lists
- Manual or automatic content addition

2. Adding metadata:

- Notes and Stars
- Attachments
- User fields

3. Searching

- Filter and Dedicated search form
- Highlighting

4. Collaborating:

- With whom and how to share WF folders ?
- Sharing Workfiles
- Sharing User fields

Bonus:

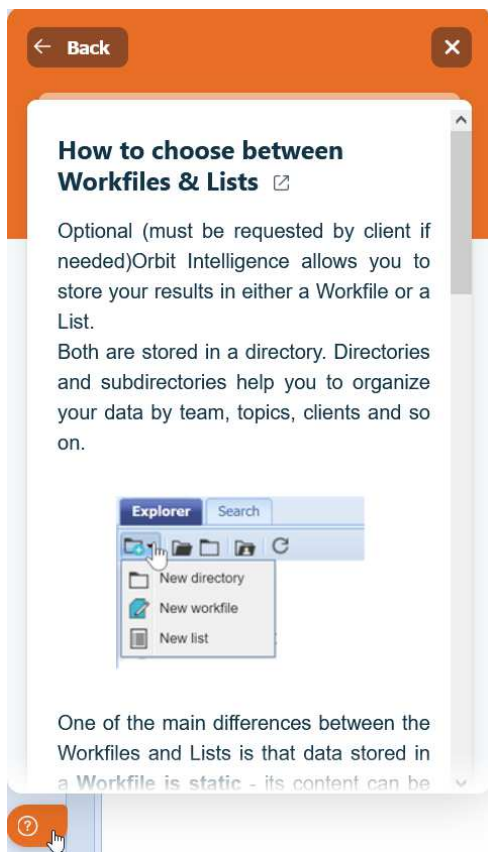
Analyze & Autoclassify your Workfiles content!

Automatize your watch process



Why use the Workfiles system?

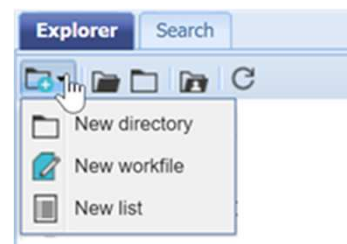
Why use the Workfiles system?



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Differences with Lists

Orbit Intelligence allows you to **store your results** in either a Workfile or a List. Both are stored in a directory.



One of the main differences between the Workfiles and Lists is that **data stored in a Workfile is static**.

Its content can be updated **using an alert or manually**.

Lists are updated automatically when displayed, so if a patent has lapsed since the last time you opened the List, its legal status will be updated accordingly.

Data stored in a List is always updated when you open it.

Another main difference between lists and Workfiles is that **Workfiles are designed to allow collaboration**.

We will study how to create and use **custom fields, ranking and comments**.

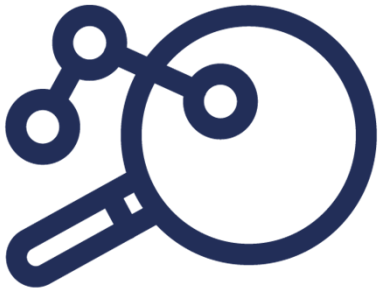
Workfiles are thus convenient when you want to add metadata for patent scoring, categorization, and comments and share this list of documents and metadata with other users.

Why use the Workfiles system?

Manual or automatic content addition

Workfiles can be fed manually, or automatically via alerts.

In our example, we will be following this use case:



- 1 > **run a search** on Lidar vehicles
- 2 > **manually store the results** for the watching team
- 3 > **share the results**
- 4 > **add metadata**: Notes, User fields etc to **collaborate**

Our sample search is:

((LIDAR? OR LASER RADAR OR REMOTE SENS+ OR LASER SCANNER?)/TI/AB/CLMS AND ((AUTONOMOUS OR UNMANNED OR DRIVERLESS) 2D (VEHICLE? OR DRIV+ OR AUTOMOBILE? OR CAR?))/TI/AB/CLMS)

Why use the Workfiles system?

Manual or automatic content addition

1. Select the records to save

2. Click on "Move or duplicate"

3. Create and name a new directory and Workfile

| # | Title | Move or duplicate |
|---|---|-------------------------------------|
| 1 | Vehicle with multiple lig and ranging devices (lic | <input checked="" type="checkbox"/> |
| 2 | Lidar localization using for temporal smoothnes autonomous driving v | <input checked="" type="checkbox"/> |
| 3 | Lidar amr autonomous using lidar | <input checked="" type="checkbox"/> |
| 4 | Control of autonomous on environmental object determined using phase data | <input checked="" type="checkbox"/> |
| 5 | Deep learning-based fe extraction for lidar local autonomous driving v | <input checked="" type="checkbox"/> |

Portfolio wizard

Portfolio

Please select a workfile or a list.

Duplicate

New directory

New workfile

New list

Portfolio wizard

Portfolio

Selection of the target resource

Duplicate

Inbox - Hoyos Daniela (0/6/89)

1 AI CLASSIFIER (3/2/0)

1 DRONE FOLDER (2/6/0)

ADHESIVE LAYER (0/1/0)

AEROGEL (3/0/0)

ALERT TEST (0/2/0)

AUTONOMOUS + LIDAR (1/0/0)

LIDAR TECHNOLOGY

BLOCKCHAIN (0/0/0)

FAURECIA (0/0/0)

Faurecia (0/0/0)

Genmills (0/0/0)

Kinase inhibitors (0/2/1)

portfolio.comparison (0/2/0)

Ok

Cancel

5. Click "OK"

Why use the Workfiles system?

Manual or automatic content addition

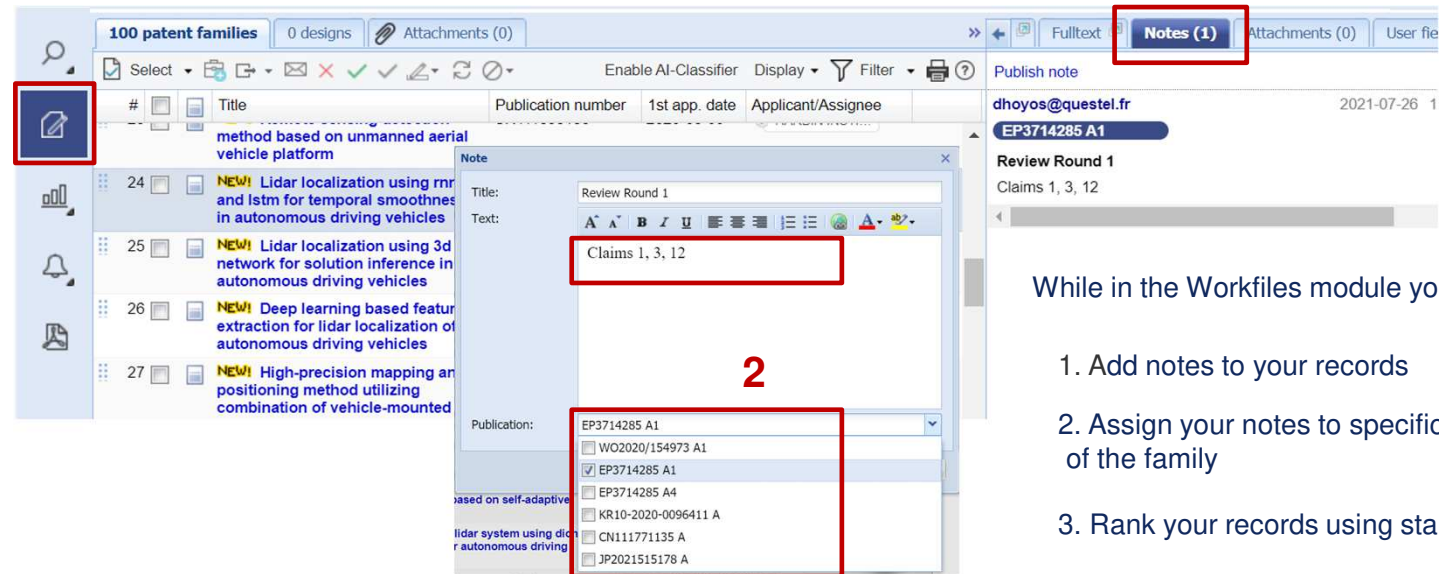
The screenshot displays the Questel Workfiles interface. On the left, the 'Explorer' pane shows a folder structure with 'LIDAR TECHNOLOGY (5000)' selected. The main area shows a table of patent families, with one entry highlighted: 'Unmanned tracking driving method and terminal based on laser radar and ans' (Publication number: CN113296512, 1st app. date: 2021-05-24, Applicant/Assignee: FUJIAN SHENGHAI INTELLIGENT TECHNOLOGY). A red box highlights the 'Import' button in the top right corner. A dropdown menu is open from 'Import', showing options: 'Enter numbers' and 'Select a file'. A red box also highlights the 'Workfile' option under 'Results delivery format' in the 'My alerts' section, with the text 'Browse My Alerts/LIDAR TECHNOLOGY' and 'Workfile link included in email notification' below it.

Alerts can also feed the Workfiles automatically:
See article ['Setting up alerts'](#)

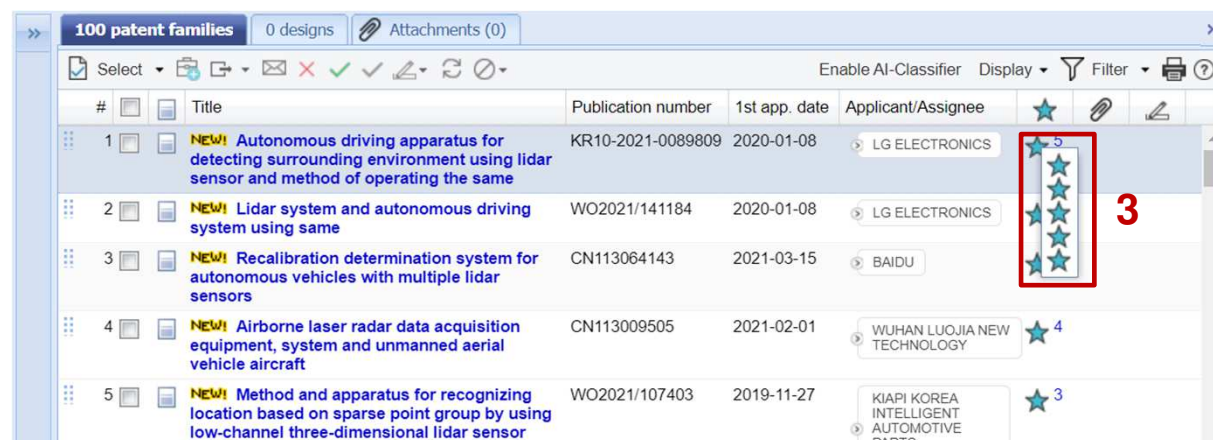
Adding metadata

- Notes and Stars
- Attachments
- User fields

Select results and right-click to access the option



1. Add notes to your records
2. Assign your notes to specific members of the family
3. Rank your records using stars (1-5)



Adding metadata

Notes and Stars
Attachments
User fields

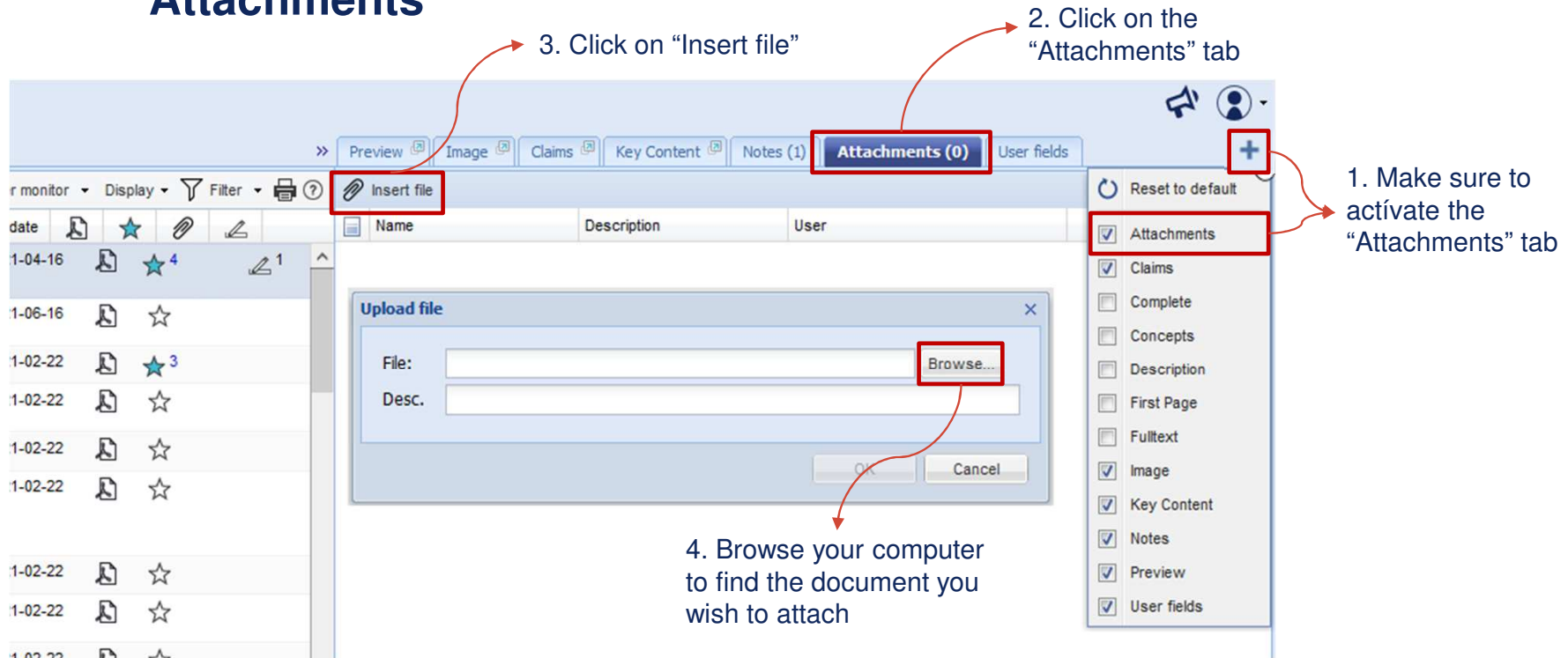
Attachments

3. Click on "Insert file"

2. Click on the "Attachments" tab

1. Make sure to activate the "Attachments" tab

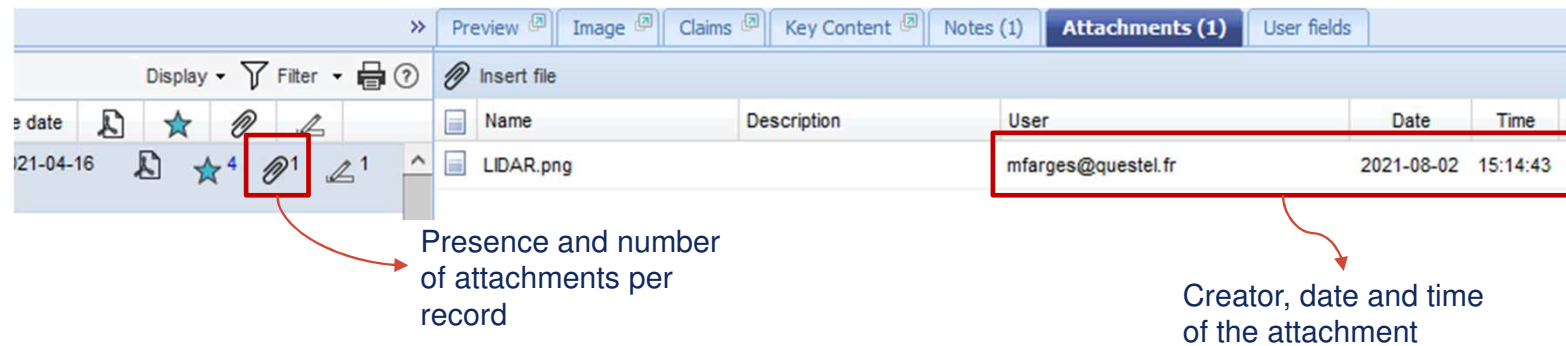
4. Browse your computer to find the document you wish to attach



>> Attachments can also be added at the Workfile level (not only at the individual record level)

Presence and number of attachments per record

Creator, date and time of the attachment

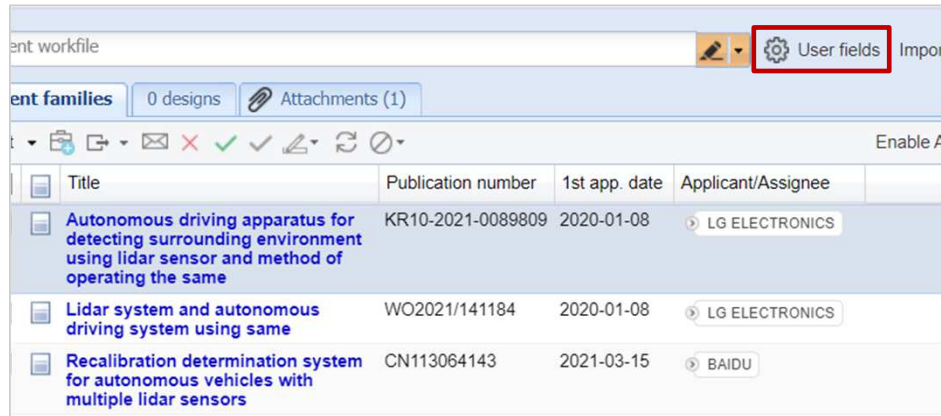


| Name | Description | User | Date | Time |
|-----------|-------------|--------------------|------------|----------|
| LIDAR.png | | mfarges@questel.fr | 2021-08-02 | 15:14:43 |

Adding
metadata

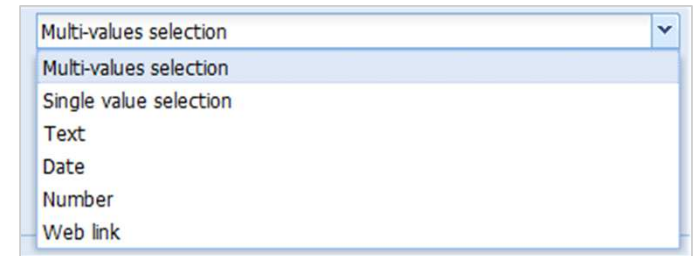
Notes and Stars
Attachments
User fields

User fields creation

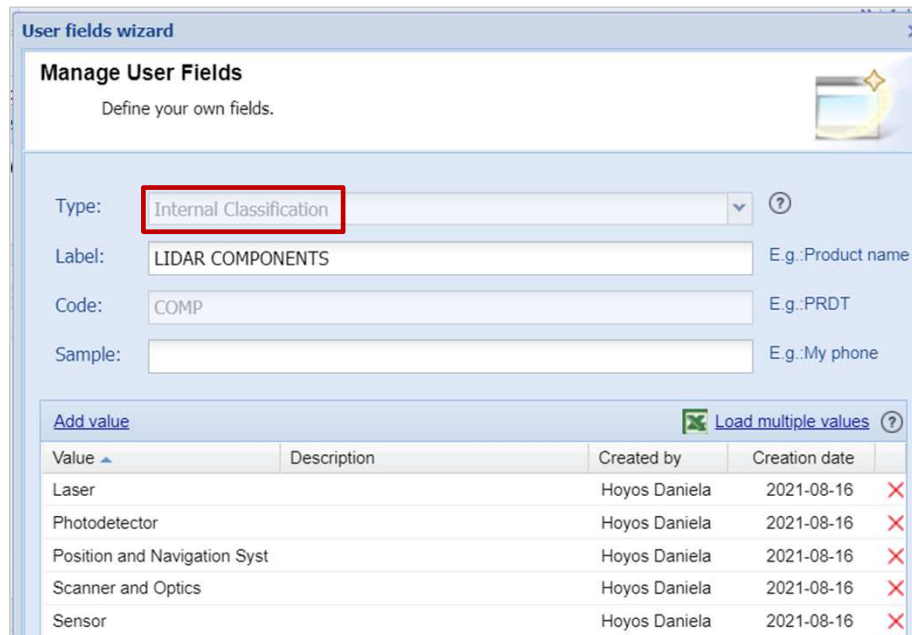


| Title | Publication number | 1st app. date | Applicant/Assignee |
|--|--------------------|---------------|--------------------|
| Autonomous driving apparatus for detecting surrounding environment using lidar sensor and method of operating the same | KR10-2021-0089809 | 2020-01-08 | LG ELECTRONICS |
| Lidar system and autonomous driving system using same | WO2021/141184 | 2020-01-08 | LG ELECTRONICS |
| Recalibration determination system for autonomous vehicles with multiple lidar sensors | CN113064143 | 2021-03-15 | BAIDU |

The types available are:



- Multi-values selection
- Multi-values selection
- Single value selection
- Text
- Date
- Number
- Web link



Manage User Fields
Define your own fields.

Type: **Internal Classification** (dropdown menu)
Label: LIDAR COMPONENTS
Code: COMP
Sample: (empty field)

[Add value](#) [Load multiple values](#)

| Value | Description | Created by | Creation date | |
|------------------------------|-------------|---------------|---------------|---|
| Laser | | Hoyos Daniela | 2021-08-16 | X |
| Photodetector | | Hoyos Daniela | 2021-08-16 | X |
| Position and Navigation Syst | | Hoyos Daniela | 2021-08-16 | X |
| Scanner and Optics | | Hoyos Daniela | 2021-08-16 | X |
| Sensor | | Hoyos Daniela | 2021-08-16 | X |

>> The user field called '**Internal classification**' is a multi-values selection field.
Only 1 "Internal Classification field" can be created by a pool of users (= a company).

It should be your 'main' user field, as it will be available in the Workfiles **filter** + **tree counter**.

> See article '[Creating User fields](#)'

Searching inside Workfiles

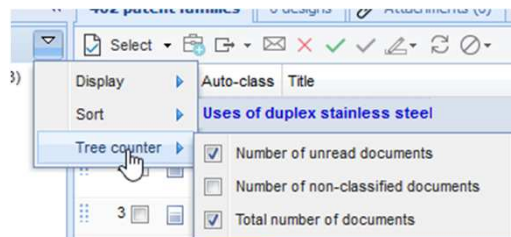
Searching

The **Tree counter** allows you to easily spot the n° of:

- unread documents

- non-classified documents ('Internal Classification' user field only)

- Total n° of documents



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Filter

Internal classification

It is the **only User Field** available in the filter

You can filter by presence/absence of value, or by a specific value

AutoClassification score - See next slides on the AI Auto-Classfier function

Since FamPat week - Week of addition in the database

New Documents

Patent families added during the last 7 days:

| # | Title | Publication number |
|---|--|--------------------|
| 1 | NEW! Lidar localization using rnn and lstm for temporal smoothness in autonomous driving vehicles | EP3714285 |

Update date = Archive update date

Date on which the family has been archived again in the Workfile

Read - Patent families that were clicked on to access content are considered 'Read' (this can be activated in the tree counter)

User notes - Filter by presence of Notes

Searching

Dedicated search form

Title, Abstract, Claims,
Description, Full Text

Search using the assigned
user fields

IPC, CPC, Locarno
(designs), Technology
domains, etc.

Assignee/owner,
Inventor/creator, Numbers,
Publication country

Notes, Attachment names

Date added to the database
Date archived into the
Workfile

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Form

Keywords

Claims

User Fields

Classification

and Technology domain

Others

Assignee or owner:

Inventor or creator:

Publication number

Publication country:

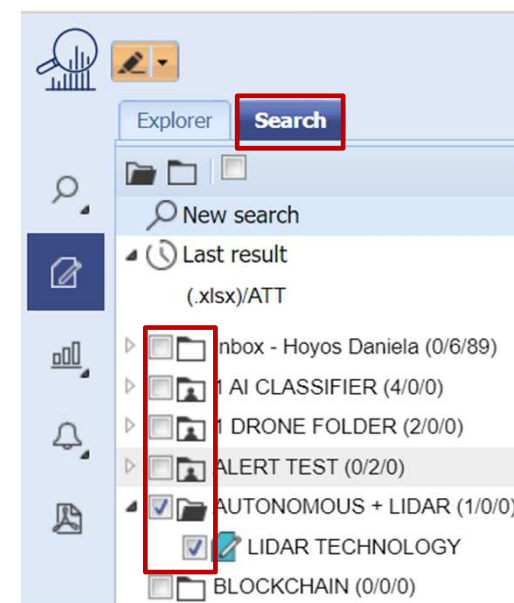
Metadata

Dates

No Restriction

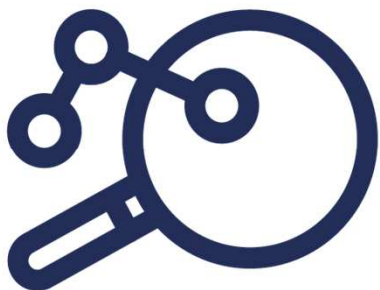
Date added to FAMPAT:

Date added to workfiles:



>> Run your search in your
entire library or on a specific
directory/Workfile

Searching



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Highlight

You can create, define, name and save highlighting profiles to be used in the Workfiles module

The screenshot shows the Questel software interface with a 'Highlight Wizard' dialog box open. The background window displays a list of patent families and a detailed view of a patent document with highlighted terms like 'lidar' and 'autonomous driving'. The 'Highlight Wizard' dialog has a title bar with a 'Highlight Wizard' label and a close button. Inside, it says 'Fill in the form to highlight specific terms.' Below this, there's a section 'My profiles:' with a dropdown menu showing 'LIDAR' and a 'New' button. A red box highlights this section. Below the dropdown, there are two rows of highlight profiles, each with a color swatch, a text input field, and a checkbox. The first row has a yellow swatch, the text 'lidar?, laser radar, remote sens+, laser scanner?', and a checked checkbox. The second row has a pink swatch, the text 'autonomous, unmanned, driverless, vehicle?, driv+, automobile?', and a checked checkbox. A red box highlights these two rows. Below the rows is a link 'Add another highlight color'. At the bottom of the dialog, there's a checkbox 'Make above highlighting persistent' which is checked. At the very bottom, there are buttons: 'Clear', 'Apply' (highlighted with a red box), 'Ok', and 'Close', along with a help icon.

Collaborating

Collaborating

Sharing folders

1. Click the
“Share” button

Search in current workfile

Explorer Search

Share your directories

Sharing management

All changes are immediatly applied

1 - Select directory

Portfolio

- 1 AI CLASSIFIER (4/0/0)
- 1 DRONE FOLDER (2/0/0)
- ALERT TEST (0/2/0)
- AUTONOMOUS + LIDAR (1/0/0)**
- BLOCKCHAIN (0/0/0)

2 - Edit group(s) or user(s)

dhoyos@questel.fr

Read only

Read only

Read/Add

Read/Write

Read/Write/Share

4. Decide the level of Access you want to provide to guests

3. Search for your colleagues email addresses or group names

dhoyos@questel.fr for a group or a user to share with

Replace sharings of all sub-directories

Done

Filter

Collaborating

Sharing rights, licenses specificities, alerts and export

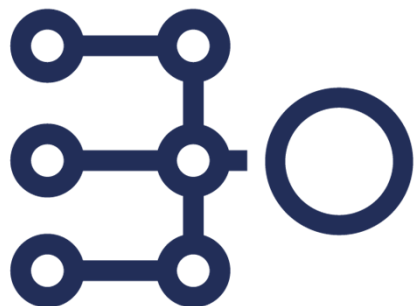
Rights

Read only > add notes and stars - not allowed to add or delete content

Read/Add > will additionally allow to add patents

Read/Write > will additionally allow to also delete some content

Read/Write/Share > will additionally allow to share with other users



Licenses specificities

- **Orbit Intelligence expert user** > no limitation

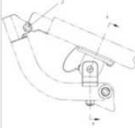
- **Orbit Express user** > cannot Share content (*NB: has access to Lists too*)

- **Intelligence Workfile Reader** > read-only user (*access to Workfiles only*)

Alerts

Objet : [Orbit Intelligence Workfiles](#): ALERTS/TRUDELL - 2 [families](#)

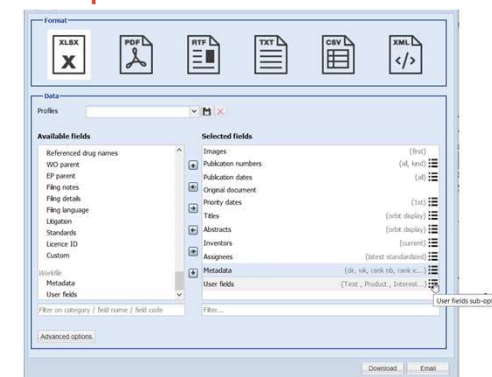
2 families have been added or updated in the [workfile ALERTS/TRUDELL](#)

| # | Title | Publication number | 1st application date | Publication date | 1st priority date | Assignee | Archive date | Image |
|---|--|--------------------|----------------------|------------------|-------------------|----------|--------------|---|
| 1 | NEW! Buckling mechanism for wheelchair Update: 2020-29 | CN210991265U | 2019-05-10 | 2020-07-14 | 2019-05-10 | YUWELL | 2020-07-20 |  |

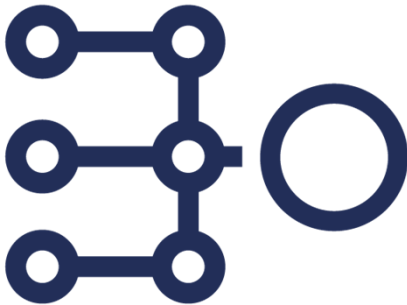
Abstract : (CN210991265)
The utility model discloses a lock mechanism for wheelchair car, the lower positioning seat on the frame side frame sets up the slot under the wheelchair car, the last positioning seat on the tubulose side frame of wheelchair backrest sets up the picture peg, wear the dress elastic pin in the slot pinhole, elastic pin afterbody connection spanner, the spanner anterior segment stretches into to the pinhole in, the pinhole back end is provided with back spacing step, the elastic pin anterior segment is provided with preceding spacing step, back spacing step, spacing pressure equipment spacing spring between the preceding spacing step, stimulate the elastic pin back-and-forth movement through the spanner, perhaps loosen the frame with spacing locking, prevent the transport, the wheelchair car is not hard up to scatter during the removal, or be convenient for the revolving frame opens the wheelchair car, moreover, the steam generator is simple in structure, and is compact, and convenient for operation, the mechanism is nimble, spacing.

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Export



Administrators only: Sharing User fields via Orbit Admin



DashboardUsersGroups

Name description

New Group

Displaying 20 of 21 groups

ORBIT SYSTEM GROUPS

Administrators
Members allowed to manage groups and users

1 Users

Orphans Users
Members have no Orbit service

1 Users

MY COMPANY GROUPS

Orbit Intelligence Review

1 User

Edit

Privileges

2 Services

Settings

Delete

Premium MAX

2 Users

Edit

Privileges

21 Services

Settings

Delete

Privileges for Premium MAX

Fields

Please select fields and corresponding permissions the users of this group will have access to

Label, code, creator

Display only shared fields

| TYPE | LABEL | CODE | SAMPLE | CREATED BY | CREATION DATE | PERMISSION |
|-------------------------|---|------|--------|--------------------|---------------|------------|
| Text | Text | TXT | | mfarges@questel.fr | 21/05/2019 | No access |
| Multi-value selection | Product | PRD | | mfarges@questel.fr | 06/06/2019 | No access |
| Single value selection | Interest | SUIV | | mfarges@questel.fr | 06/06/2019 | Read only |
| | | | | | | Read write |
| Date | Date | DATE | | mfarges@questel.fr | 06/06/2019 | No access |
| Number | Number id | NUM | 123 | mfarges@questel.fr | 06/06/2019 | No access |
| Web link | hyperlink | LIEN | | mfarges@questel.fr | 06/06/2019 | No access |
| Internal Classification | Internal classification - multiple values | INT | | mfarges@questel.fr | 06/06/2019 | No access |
| Multi-value selection | TECHNO | TEK | | silver@questel.com | 18/11/2019 | No access |

Folders

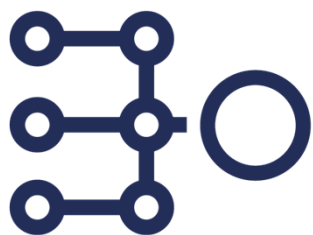
Cancel

Apply

> See our Knowledge Base article [“Administrator - Sharing User fields”](#)

Bonus

AI Auto-Classifier: Save time and gain efficiency



100 patent families 0 designs Attachments (1)

Select: 3 AI-Classifier monitor Display Filter

| # | Auto-class | Title | Publication number | 1st app. date | Applicant/Assignee |
|----|------------|--|--------------------|---------------|--------------------|
| 23 | 67% | Remote sensing detection method based on unmanned aerial vehicle platform | CN111638185 | 2020-05-09 | HARBIN I |
| 24 | 72% | Lidar localization using rnn and lstm for temporal smoothness in autonomous driving vehicles | WO2020/154973 | 2019-01-30 | BAIDU |
| 25 | 65% | Lidar localization using 3d cnn network for solution inference in autonomous driving vehicles | WO2020/154972 | 2019-01-30 | BAIDU |
| 26 | 71% | Deep learning based feature extraction for lidar localization of autonomous driving vehicles | WO2020/154970 | 2019-01-30 | BAIDU |
| 27 | 76% | High-precision mapping and positioning method utilizing combination of vehicle-mounted lidar and unmanned aerial vehicle | CN111457930 | 2020-04-02 | WUHAN H |
| 28 | 81% | Four-degree-of-freedom three-dimensional laser radar sensing device for unmanned driving | CN210941580 | 2019-11-25 | EAST CH |
| 29 | 63% | 3 d lidar pitch control device and method for safe take-off and landing of unmanned aerial vehicle | KR10-2116031 | 2019-11-19 | M AUTON |
| 30 | 75% | Light detection and range (lidar) device with a single spinning mirror for autonomous driving vehicles | US20200166615 | 2018-11-27 | BAIDU |

Auto-classification score 75% relevant switch or approve proposal

Edit Preview Translate

Light detection and range (lidar) device with a single spinning mirror for autonomous driving vehicles

Save time

Get your Workfile documents automatically classified

Machine learning

Train the system and get better results every time

Share only relevant information

The AI Classifier identifies Relevant / Not Relevant records

Review and validate

Switch or approve and re-run the classifier for better results

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> See our Knowledge Base article [“Sort out relevant documents with an AI-Classifier”](#)

Bonus Analysis

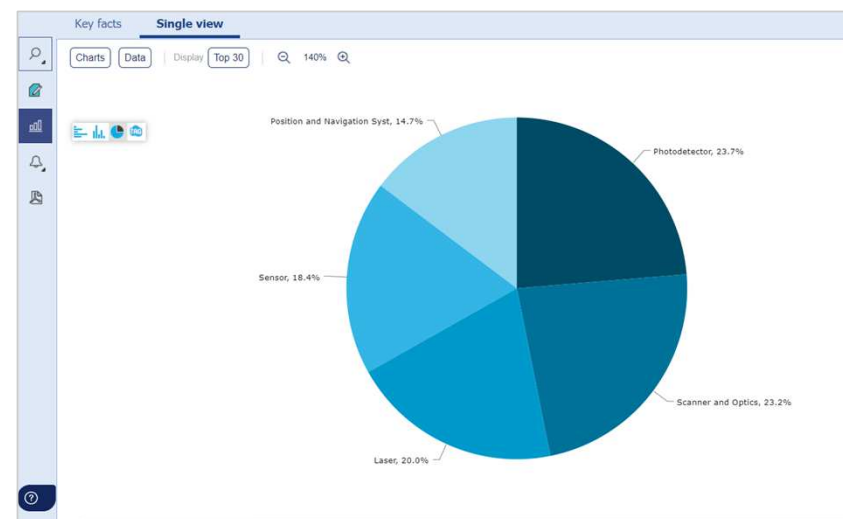
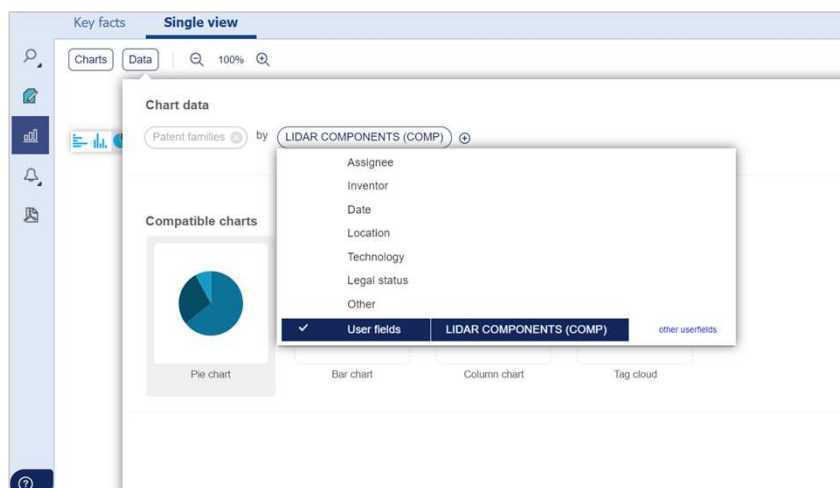
Analyze Workfiles / User fields

All levels:

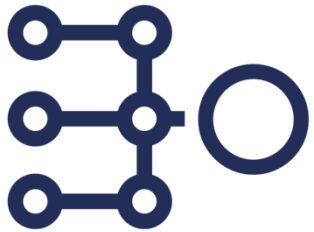
- > Launch an analysis on Workfiles content
- > **Graph axis choice**: use a User field in Axis

Advanced / Premium:

- > **Customization**: split graphs by presence in a Workfile (or List)



Bonus Orbit Review



Automatize the watch process with **Orbit Review** to gain time

Select a workflow on the left to configure email recipients.
Notifications will be sent at defined frequency at 1:00 AM CET.

Explorer - Orbit Intelligence

Show all Hide all

Orbit Review

- Alerts WF
- Categorize WF

Initial date of surveillance

Scan frequency

Configuration User Fields History

NOTIFICATIONS FOR NEW / UPDATED DOCUMENTS
Workflow: Categorize WF

NOTIFICATIONS FOR USER FIELD VALUE CHANGES
Workflow: Categorize WF

User field: Category

Start date 12/12/2019

Scan frequency Daily

Select user field for notification

Notify on "change of value" or on a "trigger value"

Trigger value OS2

Email recipients
Do not forget to share this workflow with recipients

fcapelle@questel.com
ftexas@questel.com

Recipients emails

Save notification

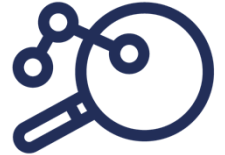
Update Cancel

> See our Knowledge Base article ["Orbit Review: Setting up email notifications"](#)

Conclusions

“How to efficiently collaborate through Orbit Intelligence's Workfiles system”

- ✓ Why and how to use Workfiles
- ✓ How to add metadata: Notes, stars, attachments etc
- ✓ How to search inside Workfiles



- ✓ How to collaborate through sharing



- ✓ **BONUS:**

- ✓ New feature: AutoClassifier
- ✓ How to get the most out of Workfiles in the analysis
- ✓ how to automatize your watch process with Orbit Review

Thank you

Questions & Answers

Contact us

help@questel.com

Visit our website

www.questel.com

Access additional webinars and content

www.questel.com/resources/

Don't forget the knowledge base!

<https://intelligence.help.questel.com>

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