Product Review of Questel ORBIT IP

In-depth, independent review of the product, plus links to related resources

“...the company is now firmly focused on offering solutions to problems, and its latest evaluation modules put the power that was previously just in the hands of Questel's consultants with the subscriber...”

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Questel was established in 1978. It is the provider of a global patent search database, and a growing suite of patent business solutions. The company is present in more than 30 countries with offices in Paris, London, Bonn, Washington, Sao Paulo, Tokyo and Shanghai.

Questel's key patent search product is ORBIT IP. It integrates Questel's unique global patent family database with powerful search and review tools.

ORBIT IP is just one of a suite of online tools from Questel that allows competitive technological intelligence and prior-art searching. These include:

- ORBIT IP Business Intelligence which gives the ORBIT Prior Art search module a powerful suite of patent analysis visualisations, designed to give answers to key business questions
- Questel Inventor Portal, which provides a form based process driven patent invention workflow for organisations
- Questel Innovation Capture, a database to help organisations capture ideas. It also publishes Research Disclosure, the industry standard defensive publication service.

The company is now firmly focused on offering solutions to problems, and its latest evaluation modules put the power that was previously just in the hands of Questel's consultants with the subscriber.

It recently extended its IP focus with the acquisition of Intellixir, a pioneer in the statistical analysis applied to scientific publications and patents and a recognised worldwide leader in IP business intelligence solutions (Jinfo review coming soon). The acquisition should allow for further integration of the company’s IP tools and allow them to further blend patent and scientific data and offer users another unique analytical experience.

**Audience**

According to its website Questel claims to have over 5,000 customers and 100,000 users of its products. Its clients and audience include some of the largest companies in the world. However, like most large patent database producers, the audience it is targeting is anyone with a serious interest in patents:

- Research scientists
- Design engineers
- R&D managers
- Business analysts
- Marketing professionals
- Information professionals
- And, of course, lawyers.
Quick Take on Key Advantages

Based on our testing of the product, Jinfo offers these as the key advantages offered by Questel ORBIT IP:

- It is a fast and effective tool for conducting basic and more complex patent research
- The Key Content section of results is timesaving as it allows you to include and exclude results quickly and effectively, by being able to hone in on the main content and concepts of a patent, without the need to read too much information
- The Evaluation modules provide a unique means of analysing patent data as part of any internal or external SWOT analysis
- The prevalence of in-context help such as the use of speech bubbles and the presence of the question mark icon across the product make it very easy to understand the functionality and purpose of each aspect of the product, and allow you to get comfortable using the product quickly.

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Sources

The ORBIT IP database is split into three patent collections:

- **FamPat**: World patents (full text & biblio) grouped by invention-based families
- **PlusPlat**: World patents (biblio only) displayed by individual country
- **The Full Text Collection**: Collection of full-text patents.

The FamPat Collection

This offers comprehensive family coverage of worldwide patent publications published by more than 100 patent authorities. In FamPat, a single family record combines together all publication stages of each family member.

Questel has developed a family definition which incorporates the European Patent Office’s (EPO) strict family rule with additional rules to take into account the links between European Patent (EP) and Patent Cooperation Treaty (PCT) publications and links between US provisional applications and US published applications. FamPat’s family definitions also incorporate different patenting authorities' definitions of an invention, particularly useful with Japanese publication searching.

The records contain:

- First page information: Patent and published application numbers and publication dates, application numbers and filing dates, priority numbers and priority dates, the assignee(s), inventor(s), EPO classification codes (CPC, ECLA, ICO,) and International Patent Classification (IPC) as well as US and Japanese classifications, titles, abstracts and drawings.
- Search reports with patent and/or non-patent literature citations for WIPO, EPO, US, EAPO, ARIPO, AU, BE, BG, CH, CN, DE, DK, ES, FR, GB, GR, JP, LU, NL, SG, KR, RU, AT, IT, NO, FI, TW, HR, CY, MY, RO, and TR publications
- The full text of the description and claims for publications from 21 patent offices (WIPO, EPO, US, AT, BE, BR, CA, CH, CN, DE, ES, FR, GB, JP, RU, DK, FI, SE, IN, TW and KR). Bibliographic data are complete with claims and description.
- FamPat includes legal status information for approximately 50 countries.

Coverage: This varies depending on the country.

Language: English (official or machine translation), French, German, Spanish, other languages for the bibliographic information. English and the original language for the description and claims.
The PlusPat Collection

The database provides comprehensive coverage of worldwide patents published by more than 100 patent authorities as well as 6 regional offices (EPO, WIPO, OAPI, AR!PO, EAPO and CGC). Utility models are available for 33 countries. Geographic coverage for PlusPat is the same as for FamPat.

A single record combines all publication stages of the invention, from an unexamined publication to an examined document to a granted patent and contains:

- First page information: Patent and published application numbers and publication dates, application numbers and filing dates, priority numbers and priority dates, the assignee(s), inventor(s), EPO classification codes (CPC, ECLA, ICO), and International Patent Classification (IPC) as well as US and Japanese classifications, titles, abstracts and drawings.

- Search reports with patent and non-patent literature citations for WIPO, EPO, US, EAPO, AR!PO, AU, BE, BG, CH, CN, CZ, DE, DK, ES, FR, GB, GR, JP, LU, NL, SG and TR publications. For CT&REF, same as for FamPat: Also add KR, RU, AT, IT, NO, FI, TW, HR, CY, MY, RO.

- Abstracts in official English are available for more than 32 million records. This coverage is completed with abstracts in French, German, Spanish, etc., and by machine-translated English abstracts for French, German, Japanese, Chinese, Korean, Russian, Vietnamese, Thai and Taiwanese publications which are replaced by the official English data when available.


Coverage: This varies depending on the country.

Language: English (official or machine translation), French, German, Spanish, other languages for the bibliographic information. English and the original language for the description and claims.

The Full Text Collection

The Full Text database contains the full text of patent publications from 21 patent offices (WIPO, US, EPO, AT, BE, BR, CA, CH, CN, DE, ES, FR, GB, JP, RU, DK, FI, SE, IN, TW and KR). Bibliographic data are complete with claims and description.

Coverage: This varies by patent office.

Language: English (official or machine translation), French, German, Spanish, Chinese, other languages.

Accessing Content

On log-in a user is presented with a handy “Click Here to Start” speech bubble which explains to you that you use the orange ORBIT.com menu if you want to navigate between the different ORBIT modules.
What you see when you click on here will depend on which level of subscription you have. In my trial of the product these were:

- **Patents Expert**: This includes Easy Search, Advanced Search, Semantic Search, Assignee and Number Search, plus access to session search history, and search results; past session search history, saved searches and saved project lists.

- **Patents Xpress**: This includes Easy Search, Advanced Search, Semantic Search and Number Search, plus access to session search results.

- **Navigation**: When you are in either search module there is additional navigation help from Menu and Explorer Tabs. The Menu lists the module options available to you, whilst the Explorer tab is a means of accessing any saved Workfiles and lists.

- **Workfiles**: This module helps you store and organise your search data and patent information. Here you can create lists and folders to store saved data including the full text and PDF copies of the original publications. You can share documents from here and launch straight into whatever data analysis and evaluations tools you have access to.

- **Patent Copies**: This is a download area for PDF copies of original patent documents. You can save items here from any search by selecting any item(s) and clicking on the PDF icon on the toolbar. Alternatively you can paste in a patent number or a group of patent numbers in the “download patent” search box under this module, which gives you a further option to name the order, specify whether you want the whole document or just the first page or drawings mosaic, and what your preferred delivery option is: portfolio update only or email documents and updated portfolio.

**Analysis**: If you are a platinum subscriber you will then see two out of four Evaluation modules:

- Innovation [Technology Scouting & M&A Licensing In]
- Risk assessment [Business Case Assessment & Legal Risk Assessment]
- Portfolio Management [Ability to Exclude & Portfolio Pruning]
- Licensing [Licensable Art & Licensing Out].

I took a very brief look at three of these: Ability to Exclude; Legal Risk Assessment and Licensable Art

Each operates in a similar way, in that, they take you through a set of predefined steps to reach a conclusion.

**Ability to Exclude**: For a given portfolio of patents in a specific technology area this evaluation module helps users identify the relative strength of their portfolio against competitors' portfolios, to help them determine whether their portfolio is likely to have the ability to exclude or dissuade others from entering the market. It helps provide:

1. An overview of the situational strength of the portfolio
2. An overview of the competitors’ portfolios
3. Visualisations of the various strengths and weaknesses of all players in this technology space
4. A tabular view of the strongest individual patents in this technology area.
Legal Risk Assessment: This evaluation module lets you assess the specific legal risks of a technological environment. It helps give an understanding of the IP risk environment within which a new product might be launched. The outputs include:

1. **An environment assessment.** Does this environment appear to be inherently risky?
2. **Key entity assessment.** Who are the key players that are capable of presenting an IP risk?
3. **Self-assessment.** How well prepared am I to deal with IP risks within this technical area?

Licensable Art: This new evaluation module, currently in beta and launching soon, analyses a given portfolio of patents to give insight into its overall licensing potential and helps identify small groups of patents upon which licensing efforts can be focused. The outputs include:

1. **Overall assessment.** Does this portfolio have licensing potential?
2. **Technology focus.** Which technology areas should be withheld or released for licensing?
3. **Geography focus.** Is there licensing potential outside of our key markets?
4. **Buyer focus.** Should there be a focus on particular potential buyers?

Jinfo’s View: Sources

| ✓ Good full-text coverage | ✓ Good automated key content summaries |
| ✓ Good Asian patent coverage | ✓ Integrated US litigation data. |
Technology

With the release of the latest version of its product (version 1.9.5) ORBIT opens up with the default Easy Search page. This is a clean, uncluttered, Google-search like page. It is coupled with the first of a number of pop-up speech bubbles providing information about navigation and output options meaning that it is hard to get too confused or too lost using ORBIT. As a result I found it to be quite intuitive and enjoyable to use.

From this opening screen there are also clear and obvious links to coverage details and help guides and tutorials. Indeed, throughout the product there are clear question mark icons. Clicking on any of these launches contextual help to explain content and functionality.

Also, wherever you are in the system you can always use the orange ORBIT.com menu and the module menus to find where you are.

Despite this general good usability, there was one area of frustration, for me. In the main search function there seems to be a lack of an integral back link/button. There is one if you are in the Analysis module, and need to return to your raw data, but within the main search options this is absent.

Whilst using the browser’s back button is not the end of the world, the addition of such an internal back option would be useful.

Search

ORBIT now provides five standard search options: Easy, Advanced, Semantic, Assignee and Number.

Easy Search

No clutter, no confusion, just a simple Google-like search box. Type in your search term(s) and hit return.

Figure 1: Easy Search
Advanced Search

The advanced search screen allows you to conduct a Field Search. Fielded searches let you build a query to search for records based on key terms, codes, dates, etc in specific fields. You can use as few or as many as you need or have data for.

With Advanced search what data the Keywords Text Box allows you to search within depends on which Collection you are in.

- Title [FamPat, PlusPat, FullText]
- Abstract [FamPat, PlusPat, FullText]
- Claims [FamPat, FullText]
- Description [FamPat, FullText]
- Object of the Invention [FamPat]
- Advantages of the Invention Over Previous Art [FamPat]
- Independent Claims [FamPat]
- Concepts [FamPat]
- Fulltext [FamPat, FullText].

By using the Keywords search you can start to build a search to answer your question. A useful search aid here is the keyword search wizard, which can be accessed via the ellipse icon. This takes your keyword and gives you a linked relevant concept tree and (in case needed) a multilingual (French/English/German) dictionary.

Perhaps you’re a company that has developed some sort of heat sensor and are wondering if there are Internet of Things/Everything applications for it, or if a competitor has already developed something in this field. You could construct a search to see what types of things have already been patented or have applied for patent protection, such as: (“Internet of things” OR IoT) AND (Heat sw Sensor) (see Figure 2).

![Advanced Search Example: IoT JPG](image)

As you would expect ORBIT supports Boolean operators AND, OR, NOT, a wide selection of proximity operators, and wildcard truncation.
Semantic Search

This offers a totally different means of finding patents. This option allows you to write or paste in a paragraph of text, which the product then analyses for concepts.

It provides you with a pop-up box with concepts it has identified with some suggestions pre-ticked. However, you can choose to keep as many of these as you wish as well as adding your own from the un-ticked items before letting the product further enhance your result set.
From here, you are asked to further target your semantic search, by selecting the patent records you think are most relevant to what you are interested in. The final step is that it takes those selected patents and runs a “similar patents” search against them.

It’s an interesting way of searching, perhaps most of use when you are unsure of what exactly you are looking for, or looking for a way to identify appropriate classification codes.

**Assignee Search**

Who owns a patent is often important information and the Assignee search allows you to discover what people or companies have patented or what patents they have applied for.

You can simply type in a name and search or you can make use of the corporate tree to ensure you include or exclude all the relevant companies and subsidiaries.

So, for example, if you were interested in what patents the phone company HTC owned, you might end up with a search like the following:

![Assignee Search String](image)

**Number Search**

If you already know the number of the patent you’re looking for, or alternatively, have a batch list of numbers you want to search for, this is where to search. A drop down menu allows you to search for: Publication number, Application number, Priority number, Application or priority number, or Any patent number.

So, if we had been given the following three patent numbers: GB071461, GB071462 and WO2009013508 and wanted to know what patents they referred to, and who they were assigned to, here would be the best place for us to start.

There are also additional options here to:

- **Detect and display the patent numbers** (Publication Number search only): This allows you not to worry about the use of spaces, commas or slashes in numbers.
- **Display extended family table**: This option helps you see if the patent has been filed in other jurisdictions and retrieves all the documents that share at least one priority number (earliest application). The results also include divisionals, continuations, and continuations-in-part. If you choose this option there is also the additional, connected, option to display the information graphically with “Display Graph”.

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- Search similar patents: The similarity search uses the CPC code(s) assigned to a publication to find all publications classified under the same code(s). It also uses the IPC codes, US PCL codes, citations (shared citations, cited and citing), the extended family (shared priority numbers) and concepts if available. The patents that are located, sorted automatically by relevance, will share at least one of these criteria.

Once you have your search results, how do you view them, and what can you do with them? The first thing you may wish to consider is your display options. ORBIT gives you six options:

- Compact: Title, publication number, oldest application date and assignee/owner.
- Abstracts: Title, publication number, oldest application number, assignee/owner, abstract and first page design.
- KWIC: Title, publication number, oldest application number, assignee/owner, abstract and first page design, and KWIC (Key Words In Context): The fields in which you have carried out your search and contained your keywords are displayed. The keywords are displayed in their context.
- First page drawing: First page design page, title.
- Drawings: Title, publication number, oldest application date and assignee/owner and all the designs.
- Custom: Allows you to display the fields you have selected in the Edit the content button.

Whilst you are doing this you may also decide to choose what to do with the right-hand preview pane. This is enabled by default in each option but can be collapsed if you wish. This has two default tabs: Preview and Drawing.

But you are not just limited to seeing preview/drawing of a record. The plus icon allows you to add additional tabs into this view for: Citations, Claims, Concepts, Description, Full Text, Key Content, KWIC, Legal status and Timeline.

Using this preview pane is a good way of reviewing records without having to open each record in full on an individual basis.

I found the preview tab particularly useful for quickly seeing a full list of publication numbers to see which jurisdictions a patent has been filed or granted in.

From within this list you also have additional options to: Add PDF to portfolio; Compare with another document; Graph citations; Access original patent office register; and Order file history. I like how the product is set up to allow you to access key functionalities from multiple points, allowing you to maintain context.

I did find the icons for these options grouped a bit too close together. They looked a little cramped and it was easy to click on the wrong option.

The Key Content tab was also useful for quickly getting an idea of the main purpose of a patent. This automatically generated summary is extracted from the full text of the patent using ORBIT’s linguistic technologies and reflects the patent’s semantic content.

Filtering

The next thing you might want to do with your results is refine them a little by filtering. By default, three options are provided in the Filter display panel: Legal Status; First application year; and Assignee. However under filter options you can also choose to add further options of Publication Country / Patent Office; CPC Classification; IPC Classification; US PCL Classification; and US Litigation.
The filtering option is a very useful way of narrowing down your search results. Unfortunately it is not an option for any search generating more that 50,000 results in the FamPat collection; results grouped by extended patent families in the FamPat collection or Pluspatand individual Fulltext collections. This seemed rather odd to me. For me, the larger my set of initial results, the more use filtering is likely to be in honing in on exactly the content and results I want to see, not less.

At this point you might also be thinking of refining your search further and maybe searching within your search. This is another area where ORBIT let me down. Despite how good a job it does generally of helping the user and guiding them to functionality, here it fails to do so. If you have used any kind of database search before you will be at a loss to locate the ability to search within your results or indeed find alternative methods to filter if the filtering option is not available.

This filtering functionality is there though it is just not especially logical or intuitive. It involves using the actions tool bar.

To enable these functions you need to choose (a) record(s). Once again a pop-up speech bubble will appear to inform you of this fact.

Your options are then:

- **Move or Duplicate**: This places your results in a Work Folder where it can be accessed later. What I liked about this is that it auto updates the search when you reopen it from a folder.
- **Export**: Export selection as a results list [PDF and Excel formats are offered as well as TXT, RTF, CSV, XML. Additionally export to selected third part products are supported such as BizInt, Vantage Point, RiS and Intellixer].
- **Email**: This allows you to email your results list with permalinks to each record.
- **Patent Copies**: From here you can download the original patent copies of each record - you can save records to download from here at a later point.
- **More Like This**: This is an opportunity to refine your results by finding similar patents. You have two options: to just search for similar patents to your chosen patents or you can restrict your search to similar patents.
- **Citations**: This gives you the option to list cited/citing patents.
- **Top Rank**: Rank top assignees and classification codes.

It is in this Top Rank option where you get a real opportunity for additional filtering or narrowing of your search, as this allows you to rank current results by patents codes, assignees, concepts and terms. You can then use this analysis to refine your search. For example, if you choose CPC Code as your ranking tool.

You can now choose to limit or expand your search to these codes. (To find out what the code numbers mean you just click on the hyperlink which takes you to the description.)

Once you have made your choice the product re-opens the advanced search screen with your original search terms plus the new code information (or assignee, concept, etc.).

From here you can then also add information in the other fields to refine your search further. Whilst this all works fine - for example, in the search below, it allowed me to get from 366,548 hits to just one by starting the search with assignee; then narrowing with the top CPC codes; and then finally adding a couple of keywords - I would still have preferred a simple “refine search” button when my original results were displayed.
Figures 6 and 7: further Refined Search example and Refined Search results
I should note here that there is an additional option to modify and refine a search if you navigate to a search from within your search history list.

Combining Searches
If you want to combine any searches you have run, you can do so within your search history folder. You can combine as few or as many previous steps as you like using any Boolean operator.

This is also possible from the search box at the top of the screen, where a drop-down menu displays previous search steps.

Added Value
The final option from the actions tool bar is:

Analyse
The Analyse function is certainly one area where Questel, like other players in the market, have identified the power of visualising data. This is the IP Business Intelligence Module. ORBIT has included a set of default chart types for users: these are listed in the My Charts tab.

You need to be a Silver, Gold or Platinum subscriber to access this function. The subscription levels control the maximum number of patent families you can analyse, as well as whether you can: filter, browse selected documents, use drill down analysis, highlight terms, save and export data, or indeed access certain map types: Cloud, Concept, and Landscape Mapping at all.

The default chart types are:

Top technology players; Players dead & alive patents; Technology investment trend; R&D location; Markets & competitors location; Top players investment trend; Players dependency by citations; Players collaborative work; Most cited players; Players IP portfolio size & age; Technology positioning by player; Technology segmentation; Key technology concepts; Technology trends over time (IPC); Technologies & applications; Landscape by technology clusters (available only in the Platinum version); Technology’s most cited art (available in saved analysis only); Most prolific inventors; Key inventors cited (available for saved analysis only) and Technology overview.

There is plenty of editing ability within each aspect of the charting and analysing module. For example, if we take search results looking for patents related to the Internet of Things and select a Top Technology Players chart, we can quickly see who the top patenting companies are. But we can also change what data is displayed in our graph via the axis feed drop down covering several name, date, location, technology or legal status options.
Additionally, you can add extra filters into your graph. For example, you could identify the particular technology being invested in by identifying certain CPC Codes covered by the top companies.

Some functionality is only freed up if you’ve already saved your analysis - such as the data rules function. This lets you filter your results again by: Inventors, Representatives, Concepts, various codes or Assignee. The last of these is additionally interesting as ORBIT lets you group companies together or trust it to suggest groupings based on textual similarity and shared patent ownership.
Evaluation

If you have access to the evaluation modules you can then really drill down into your data and find out which of your patents you can sell or licence or, indeed, which patents from competitors to target.

I could probably have written a review just on these modules alone. For the purpose of this review I will just look at one - Legal Risk Assessment - as this and the other two modules I had access to work in a similar way by taking the user through a controlled step process.

The purpose of this module is to give you an idea of the environment you plan to launch a new product in and, more importantly, the IP risk: does it appear safe or risky? Who are the competitors who could make life difficult for you?

![Figure 10: Legal Review - Search for Patents](image)

You begin by selecting a group of patents that are most applicable to the process or product you plan to launch (you can do this by conducting an advanced search; number search; or uploading an existing saved list of patents). I once again chose the “Internet of Things”. The system will compute the metric data for the patents you have selected (This step can take from 5 to 45 minutes).

You are then presented with a list of the top assignees. The occurrences count includes those patents which cite the selected patents, as well as the specific records that were selected in the previous steps. These results can then be filtered, in case you wish to exclude some assignees, and you can also try to simplify matters by grouping assignees. You can do this manually or click on the suggested groupings button for options.

The module then creates a visual dashboard covering Legal action; Players; and Investment. The purpose of these is to show: whether competitors have been actively enforcing or opposing IP rights in this industry; what level of investment (based on patent registration) is occurring; and what percentage of the technological art is owned by those likely to be friendly.
Figure 11: Environment Assessment Stage

What is useful here is that you can use tags to identify yourself, competitors, suppliers, customers, education institutions, etc., to gain a clearer picture.

Next up, the module creates an overview table of the 20 highest-ranking assignees. Here you see at a glance who has invested in or acquired patents, and whether or not they are considered a shark in this market (defined as number of patent families where this assignee owns more than 30% of the forward citations). It also displays the number of patent families in an assignee's portfolio that are under US litigation; or those who have at least one family member that has survived an opposition process or to have been involved in re-examination or a re-issue event; as well as the number of patent families assigned to other entities which have cited at least one patent family owned by this assignee.

The next stage gives you a bar chart option of looking in deeper detail at the information from the previous table to help you visualise the investment and impact of the key entities in this industry.

Figure 12: Key Metrics of Top Players
Finally, a self-assessment hitlist graph tries to help you understand the strength of your portfolio within the industry being assessed, in comparison with the other players. The blue line shows the value of your portfolio and a yellow shaded area shows the +2 standard deviation value for the other assignees in the environment portfolio. According to ORBIT “When the blue line exceeds the yellow shaded area this indicates that your portfolio scores particularly well for this measure. These features of your portfolio could well be useful in helping to mitigate future IP risks.”

![Image of Hitlist Graph - Self-Assessment stage](image)

**Figure 13: Hitlist Graph - Self-Assessment stage**

**Search Trail**

You can see your search history by going to “My Session” in the menu bar. What you see here will depend on your access.

In the Past Sessions folder you can see your search history for the past 12 months. In both search history folders you can re-run a search, save the search or combine searches by using an optional command line field.

In the current session results there are also the options to modify your original search, and save or delete the search.

**Alerts/Saved Searches**

Clicking on the floppy disc icon in the results toolbar enables you to save a search. This brings up a saved search box, with the search string displayed and the ability to name your search. Saved searches can then be accessed via the “My Searches” part of the menu.
You can also use this function to turn a search into an alert. This can also be achieved from your saved search and recent search folders.

Alerts can be set up to monitor new publications assigned to a particular assignee, inventor, with particular classification codes, priority numbers or keywords. Once created, you choose to receive a weekly or monthly file containing the bibliographic details of all new patent publications (Fulltext records are available for the new publications), including abstracts and drawings, if available, that meet your Alert criteria.

You can then access your full list of alerts from your “My Alerts” folder.

**Jinfo’s View - Technology**

- Seamless integration of modules
- Good in-product help and support aids
- Excellent Charting and Graphs functionality
- Lack of Back Button in main search products
- Lack of simple means to get to revise search or search within search.
Research & Technical Assistance

Customer support is provided via phone and/or email based on business hours in Europe and USA. You can submit an online issue ticket 24 hours a day.

**Questel ORBIT** has help links - in the form of a question mark - throughout the product, which do an excellent job of explaining what a particular field or function does. You can also access some FAQs via the Helpdesk link in the Orange ORBIT.com menu.

If something goes wrong whilst you are using the service there is the option to email ORBIT directly by clicking on the email icon next to the logout link. This launches a pre-populated email from your email client that also usefully includes automated incident time, ORBIT version, and browser information.

Training

ORBIt has links to a number of training videos and PDF guides, covering various aspects of using the product, available via a Guides & tutorials link on the main banner. This covers topics such as search and analysis, and also offers some help for those with administrator access rights. At the time of writing some of the video tutorials do not have live links.

Due to the fact that the product has gone through a number of upgrades in the past couple of years a few of these PDF guides and video tutorials could do with refreshing to reflect all the changes to the ORBIT product.

Thankfully, the teams at Questel are currently in the process of updating the website and with this all the tutorials and videos linked to the use of ORBIT. They also plan to add to the guidance and videos and have just added a video about the Tech Scouting and Licencing In; Ability to Exclude; and Legal Risk Assessment modules.

The company also offers additional case study based hands-on training, which can be tailored to an organisation’s specific needs. These training sessions can take place at Questel’s Paris office, or your own office (additional travel costs for trainers will be incurred). Training can also be offered via Webex.

Purchasing & Competitor Landscape

The patent database field is a highly competitive one, and competitors include PatSeer (Jinfo review coming soon), Thomson Innovation, CPA Global Discovery, LexisNexis TotalPatent and Innography Advanced Analysis.

Recent Developments

At the time of writing Questel ORBIT version 1.9.5 is just about to be released [It is the version I used for this review]. This includes the new Easy Search page; and improvements to the workfiles, where users can now assign customised values for stars, notes and user fields to more than one patent at a time. This release also updates the underlying architectural platform to allow for future developments so that clients can manage their users.
Pricing
There are four main pricing levels in ORBIT ranging from entry level to advanced, with subscriptions based on an annual fee, and priced per seat. As with most large database products, the relative cost per seat decreases as subscriber numbers increase.

**Bronze:** This is the entry level option with no access to Analysis or any of the Evaluation modules.

**Silver:** This level provides advanced search options, and access to the ability to analyse patent families (up to 100,000 families’ records per search), but with no access to any of the Evaluation modules.

**Gold:** This level provides advanced search options, and access to the ability to Analyse patent families and technical concepts (up to 300,000 families’ records per search), but with no access to any of the Evaluation modules.

**Platinum:** This level provides advanced search options, and access to all Analysis features (up to 2,000,000 families’ records per search), and also has a choice of two of eight Evaluation modules.

- Innovation [Technology Scouting & M&A Licensing In]
- Risk Assessment [Business Case Assessment & Legal Risk Assessment]
- Portfolio Management [Ability to Exclude & Portfolio Pruning]
- Licensing [Licensable Art & Licensing Out].

Future Plans
The Licensable Art and Business Case Assessment Evaluation modules are both currently in beta testing and are expected to go live by the end of 2015, start of 2016.

Jinfo’s View
ORBIT IP is a powerful, easy to use patents product that meets the needs of a variety of user groups.

It is a fast and effective tool for conducting fundamental basic or advanced patent searching, and for doing quick and easy analysis of your search data. It is helped by its very good full-text patent coverage and the addition of added value from its automated key content sections and from the inclusion of US litigation information and links.

Based on the knowledge and drive of being in the market for over 30 years Questel knows its patents. It also recognises that just finding patents is no longer enough for many organisations, they also need the ability to analyse those patents, be they from their own portfolio or from those of competitors.

To this end, the development of the eight products that make up their Evaluation modules looks set to keep them in a position as one of the go-to patent databases. It is certainly one that would have to be considered if your business was serious about its intellectual property.
### Jinfo’s View: Value

<table>
<thead>
<tr>
<th>✓ Strong patent source coverage</th>
<th>✓ Relatively intuitive to use with good in-product help assistance</th>
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<tr>
<td>✓ Good integrated analysis modules</td>
<td>✓ Dedicated to further enhancing the analysis modules/tools.</td>
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This Jinfo Report (ISBN 978-1-78123-267-5) was published by Jinfo Limited in February 2016 and was accurate as of that date.

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