



Implementing an effective IP Knowledge Management Solution

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Agenda

- I. Umicore: Mission and Expectation**
- II. Minesoft: Pat-KM**
- III. Implementation & Applied Solution**

Who is Umicore?

A global materials technology and recycling group



One of three global leaders in emission control catalysts for light-duty and heavy-duty vehicles



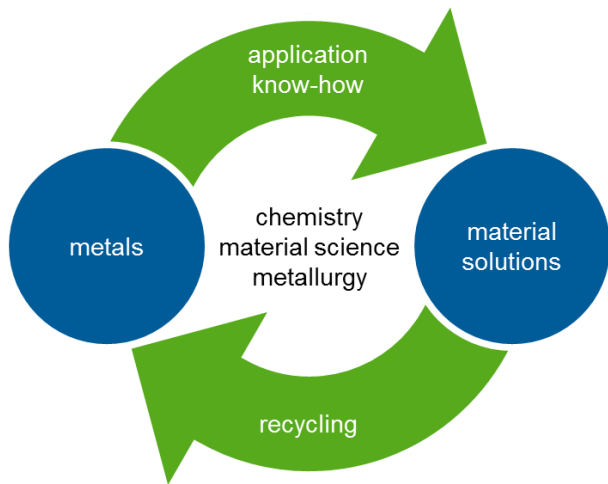
A leading supplier of key materials for rechargeable batteries used in electrified transportation and portable electronics



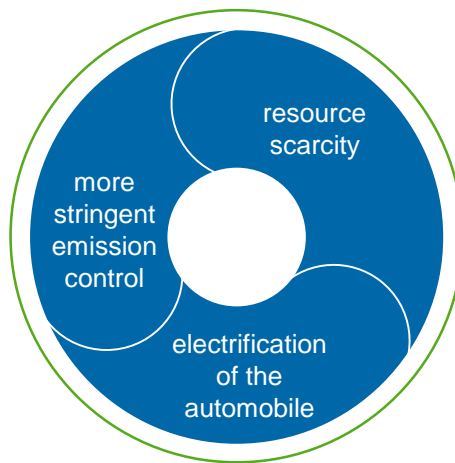
The world's leading recycler of complex waste streams containing precious and other valuable metals

The foundations

Unique business model



Supportive megatrends



Industry leader in sustainability



Global presence:

PEOPLE
9,769

PRODUCTION SITES
51

R&D | TECHNICAL CENTERS
14

North America

858 people
12 production sites
2 R&D technical centres

South America

685 people
5 production sites
1 R&D technical centre

Europe

5,782 people
19 production sites
5 R&D technical centres

Asia / Pacific

2,182 people
14 production sites
6 R&D technical centres

Africa

262 people
1 production site

divers & decentralized
especially also regarding IP

The Mission

To increase IP-awareness & select a suitable tool for (very) different needs



(image: 3dprinter.net)

&



(image: dhgate.com)

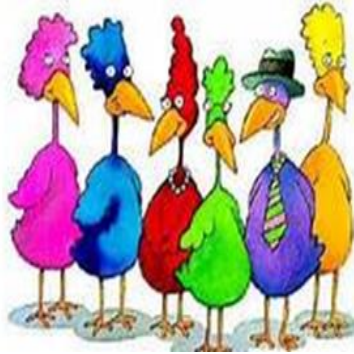
The challenges

Global operations



- Decentralized
- Cross-boarder

Diverse user group



- IP expertise level
- Function
- Background

Different needs



- BU-specific

“One size fits all?”

The challenges



The situation:

Each BU followed own process for IP monitoring and evaluation of patents

- Storing of patent data in different archives
- Evaluation often on Excel-sheets

Existing In-house solution not suitable for all BUs

→ Demand for a common solution

The tasks

A shared central platform for patent information

- Searching and monitoring of patents
- Dynamic workflow for managing new patents
- Classification (BU-specific)
- Search & analysis of archived patents
- User access management



Phase 1: Exploration

External

- Screening of suppliers
- Demonstrations/Presentations
- Trial phase

Internal

- Identifying key contacts/users
- Exploring their specific needs
- Convincing them to join



Minesoft - Specialists in Patent Information





Data Coverage

- 60 Full Text Collections
- 62 Million Families
- 120 Million Publications
- 105 Issuing Authorities



Analytics

- Integrated
- Fast
- Supports large data sets



Legal Status

- Standardised
- Multiple sources
- Added value Groups
- Easy to share



Search

- Single Database
- Complex queries
- Semantic
- Alerts



Knowledge Management

- Data fields
- Workflow
- Search
- Disseminate



Different elements of Pat-KM

Data fields

Add your own data to records



Workflow

Monitor and manage data within your company



Search

Find all the relevant information



Disseminate

Distribute records by automated feed



minesoft
Pat-KM

Different elements of Pat-KM



Data Fields

- Results tagged according to your own categorization
- Customized design of data fields
- Display fields based on user rights (Hide – Read – Write)



Different elements of Pat-KM



Work Flow

- A dynamic workflow for monitoring and managing new patent data
- Initiate workflow via Alerts or on ad-hoc basis from search results
- Allows efficient distribution of information throughout the corporation



Different elements of Pat-KM

Search



- All data dynamically updated daily
- One Interface for PatBase and Pat-KM
- Search global PatBase data with in-house knowledge in combination or separately



Different elements of Pat-KM



Disseminate

- Alerts on any data field can be set up by all user
- Any change in newly tagged data field will be reported to requesting user



Pat-KM Knowledge Management



Implementation process

Phase 2: Setup



- Intense technical discussions
- Definition of all available/needed fields
- Training of admins & key users
- Programming of the first “*classification tree*”

Pilot phase with first user group

Phase 3: Implementation & Roll-out

- Definition and programming of all “*classification trees*”
- Preparation & upload of historic data (“*legacy*”)
- Implementing login procedure: “Single Sign On” (SSO)
- Training for all user groups (Skype or live)
- And then...



Workflow



Alert or individual search in PatBase

- Answer set for inspection
 - Optional: Reviewer splits & re-distributes result
 - Inspectors get results in their inbox
 - Classification to enter patent in Pat-KM

Results	Options
67	View Browse Hits Optimise more...
	Archive Create adhoc inspection Create an archive alert Assign archive fields

Authentication via Single Sign On

PatBase Corporate Access

To login to PatBase using your Corporate Login or **Single Sign On (SSO)** system please enter your full email address

Please enter you email address:

- Fast & secure login with one interface
- Only from inside company-firewall
- Only activated users

- User management in PatKM

Evaluation fields

- Technology Tree
- Unicycles
 - Bicycles
 - without a seat
 - recumbent-type bicycles
 - automatic balancing machines
 - frames
 - tandems
 - specially adapted for disabled riders
 - Cycles with handlebars
 - Freight- or passenger-carrying cycles
 - Children's cycles
 - Motorcycles, engine-assisted cycles or motor scooters with one or two wheels
 - Cycles convertible to, or transformable into, other type of cycle or land vehicle
 - Collapsible or foldable cycles
 - Cycles not otherwise provided for

Keywords



Particle Filter



Area

Selection

 1

Taylor-made classification

- per business unit
- by individual keywords
- in multiple layers

Additional fields available:

Search ID

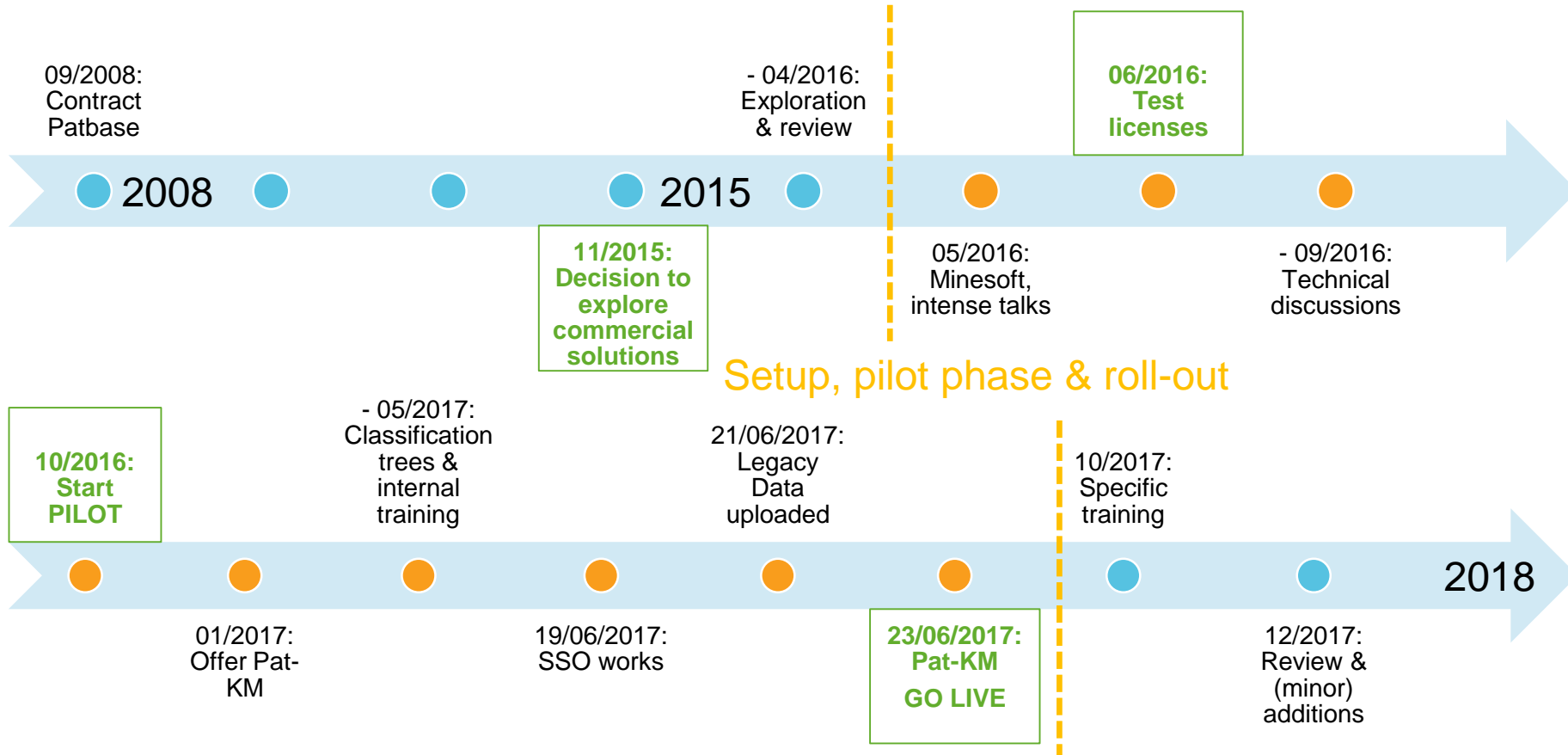
Inspector

Comments

Additional Keywords

...and many more can be created.

Timeline





Thank you for your attention