

# Getting Started in Analytics Success Checklist

This checklist covers everything you need to get started with Analytics.

Need help along the way? Browse the [Help Center](#), watch a [Webinar](#), or contact us at [help@patsnap.com](mailto:help@patsnap.com) or via the Support Chat.

## 1 [Log in & access](#)

← Click titles for helpful guides!

- Log in to Patsnap using link in welcome email
- Open Analytics via 9 grid in top right corner

### Helpful tip:

Email [help@patsnap.com](mailto:help@patsnap.com) if you can't log in

## 2 [Run your first search](#)

- Simple Search: patent number (ex: US12277954B2)
- Field Search: keywords/companies
- Semantic Search: paragraph about your technology

### Helpful tip:

Use an iterative approach by reviewing your results and adjusting your query

## 3 [Apply filters to your results](#)

Apply at least 1 of these filters to your results:

- Legal Status (ex: refine to Granted)
- Authority (ex: refine to US)
- Application year (ex: refine to 2025 and 2026)

## 4 [Save & organize](#)

- Create a New Workspace
- Enable Automatic Updates (not applicable for a semantic search)
- Save results to a folder

### Helpful tip:

To see overlapping results between queries, create a [calculation folder](#)

## 5 [Read your patents](#)

- Review AI Summaries
- Explore the Claims
- Use Smart Image in Dual View

### Helpful tip:

Use the highlighter tool to easily find keywords

## 6 [Collaborate](#)

- Share your Workspace with colleagues
- Add comments or custom fields
- Bonus:** share with someone who does not have Patsnap via the "Public" tab

### Helpful tip:

Customize your view with "Set Field Display"

## 7 [Stay in the know](#)

In the Workspace, set up an email alert for:

- A company portfolio query
- A technology keyword query

Helpful tip: Check icons to identify folder type

 Automatically updating  Static

## 8 [Bonus: charts & graphs](#)

- Launch Custom Analysis
- Generate a Report (premium)
- Generate a Landscape (premium)



Congrats! You've successfully completed your onboarding. Want to learn more? Check out our [Advanced Webinars](#).