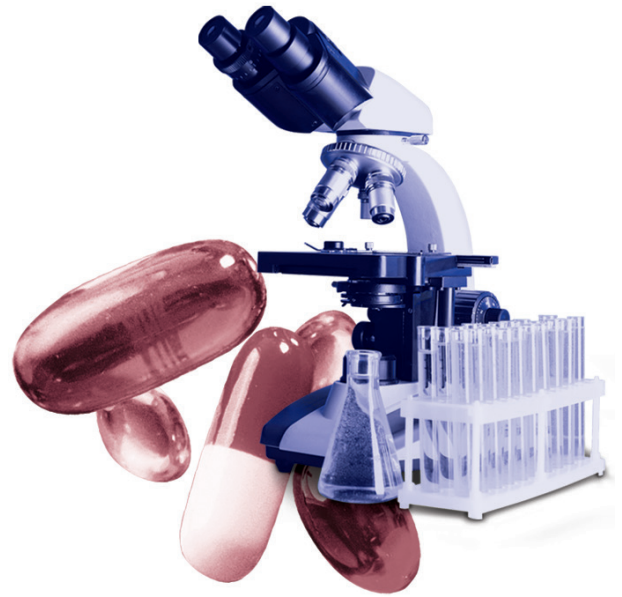# BizInt Smart Charts Lite

Citeline Edition

Mini Guide

BizInt Smart Charts Lite - Citeline Edition is a Citeline-only version of BizInt Smart Charts Drug Development Suite to help you create, customize and distribute tabular reports from Citeline Pharmaprojects and Trialtrove.

Using BizInt Smart Charts Lite

Below is a quick overview of creating reports with BizInt Smart Charts Lite - Citeline Edition. Key features are covered in more detail in pages 2-7.

Creating and customizing your report

- Import your search results and save your .tct file *(page 2)*
- View charts, records and images, and change truncation *(page 3)*
- Customize your report – hide & move rows, change and add columns, sort, edit text, create and apply chart templates and statistics *(pages 4-5)*
- Create links to trials, patents and related publications *(page 5)*

Combine and update reports

- Combine charts *(page 5)*
- Update reports and identify new and changed information *(page 6)*

Distributing your report

- Printing reports *(page 5)*
- Use **File | Export** to distribute reports in HTML, Word, Excel and Acrobat *(page 6)*
- Try the new Summary Records export *(page 7)*

Citeline
Pharma intelligence | informa

Spend a few minutes with this Mini Guide to understand the key features of
BizInt Smart Charts Lite - Citeline Edition.

Installing BizInt Smart Charts Lite – Citeline Edition

BizInt Smart Charts Lite - Citeline Edition is Windows software which needs to be installed on your computer. You can download the software at: http://www.bizint.com/product/citeline/

BizInt Smart Charts Lite - Citeline Edition is compatible with Windows 7, Windows 8 and Windows 10.

Creating your report

The first step in creating your BizInt Smart Charts report is to import the results of your Pharmaprojects or Trialtrove search.

You can find more information about BizInt Smart Charts support for Citeline at **"Creating Reports from Databases and Hosts" on the Support section** of our website.
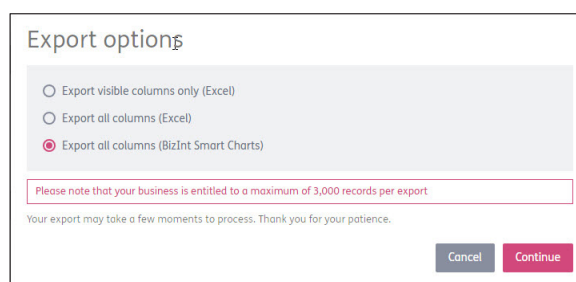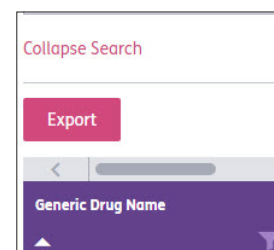Go to: http://www.bizint.com/support/create/citeline.php for more details.

To export your Citeline search results, click on the Export button (on the left above the results table.)

On the Export options panel, select the "Export all columns (BizInt Smart Charts) option and click Continue.

Your download will start. Your browser may ask whether you want to save or open the file. We generally recommend that you save the file (it will have a .ttcd file extension) so you can re-import it at a later date if necessary.

If you choose to open the file, the BizInt Smart Charts Lite - Citeline Edition software should start and open the file. You can also import the file using the instructions below.

Importing your search results

Start the BizInt Smart Charts Lite - Citeline Edition software.

Select **File | Import** (not **File | Open)** from the menu bar. Or, you can drag and drop your .ttcd file into the BizInt Smart Charts window.

From the Import window, find and select the transcript file that you want to use to create a chart.

A panel will appear showing the number of records in the transcript.
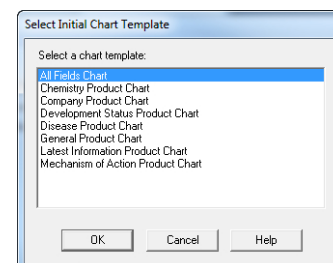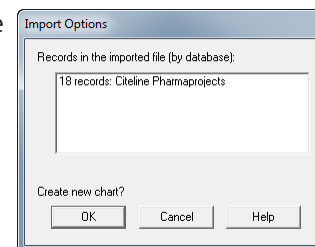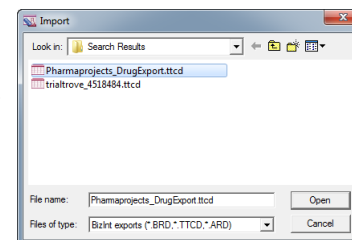
Applying a chart template

After clicking OK you will be asked to select a chart template. Chart templates define the initial presentation of the report including visible columns. You can change this later, apply a different template, and even create your own templates (see page 5.)

Saving your report

Use **File | Save** to save your report as a .tct file. We recommend that you save your report before you start editing.
Note: Export your report if you want to view it in other applications (see page 11.)

Viewing charts, records and images

Charts (tables) in BizInt Smart Charts combine the functionality of a spreadsheet and a table. Each database record is represented by a row in the chart. A column represents a field (or elements of a field) from each record.

BizInt Smart Charts supports columns containing images and "subtables" – tables within cells, such as Disease Status.

All of the records and fields imported to create the report are contained in the chart file, and can be displayed or hidden at any time *(see Customizing reports on page 4-5.)*

Titling your report

The initial chart title is based on the name of the file you imported (e.g. Pharmaproject_DrugExport). You can change the title by double-clicking on the title or using **View | Title**.

Viewing records

To view the complete record associated with a row, double-click on the row number button, or select the row and **View | Records.** You can use the arrow buttons or drop-down menu to move between records. Close the Record Viewer or select **View | Chart** to return to the chart.

You can also move between the chart, record and image windows using the icons on the toolbar.

You can view the related record on the Citeline website by selecting **View | Record on Publisher Website**.

Viewing images

Follow the same basic steps to view associated images, e.g., select **View | Publisher Images** or double-click on the image in the chart. Images will automatically scale to fit the window and you can use the drop down menu to zoom the image.

You can paste an image into a cell from the Windows clipboard, including from structure-drawing tools.

About truncation

If you see text like [CONT.] at the end of text in a cell, this indicates that this field was truncated during chart creation. Truncation happens when the text is too large to be effectively displayed in the chart.

You can see the full content of the field by viewing the record.

You can change the text truncation behavior (indicated by [CONT.]) using **Options | Text Truncation in cells.** Changes to these options affect new charts, but not existing charts, so you will need to re-import your search results to see the new truncation behavior.

We do not recommend that you select "Never truncate", as this could create very tall rows in your report.

Customizing your report

Hiding and moving rows

To hide rows, use **Edit | Hide Row** or de-select the rows on the **View | Rows** panel. You can select a range of rows and use Ctrl-H as a shortcut to hide the rows. Hidden rows will not appear in exported or printed reports.

Use **View | Rows** to rearrange rows or **Edit | Move Row** to move rows in the chart.

Row Properties

Select a row or cell and then select View | Row Properties to see information about that row, including source database, record date, accession number, row update status, and the URL for the Publisher Record (which can be edited.)

Changing columns

To select and rearrange columns, select **View | Columns**. On the left side, you will see all the columns in your chart. Add the columns you wish to display to the "Selected Columns" panel at right. Drag the column name or use the Up/Down buttons to rearrange the order of the columns.

Adding User Columns

To add your own column, select **Edit | Add Column**. A new untitled column appears on the right side of the chart. Double-click on the column title to change the title. You may also want to change the sort type using **View | Column Properties.**

Column Properties

You can change properties of columns using **View | Column Properties.** On this panel, you can change the column name, specify column width in pixels, and turn on/off links to full text patents, DOI numbers and NCT numbers *(see page 5 for more details)*.

The **Sort type** drop-down menu lets you specify how values in this column should be sorted. For example, you can change the sorting from Alphabetic to Numberic or Development Phase.
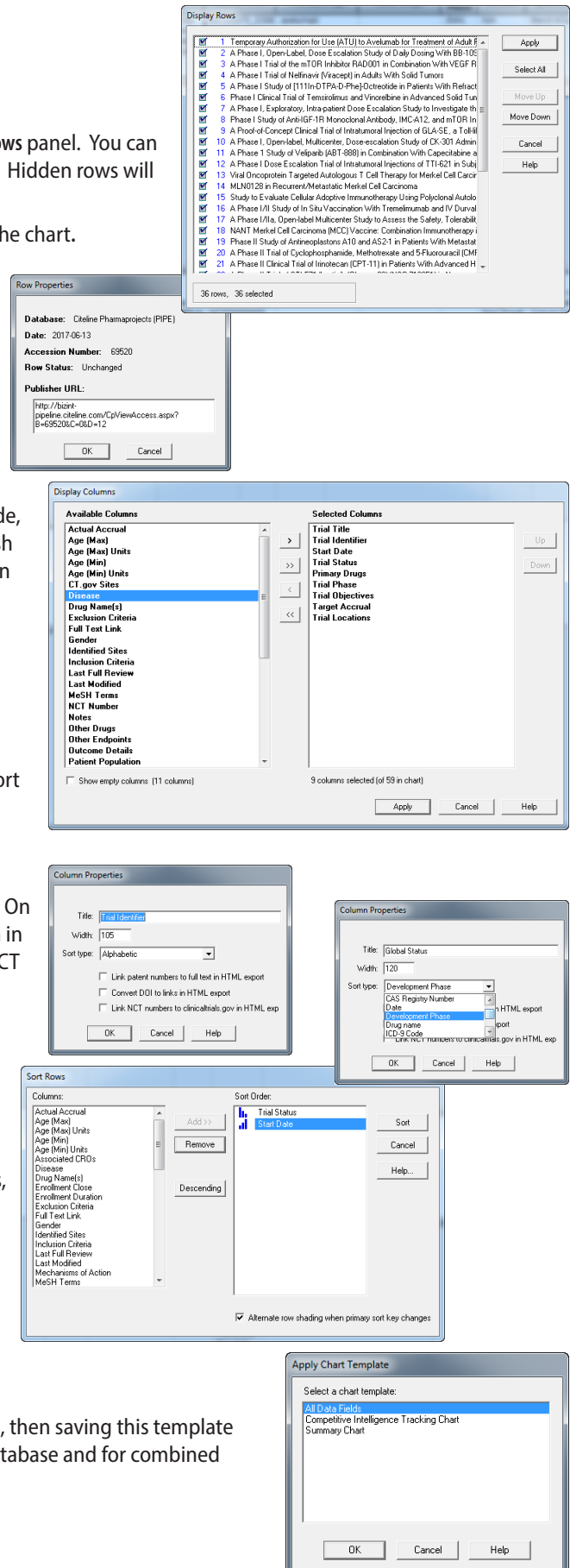
Sorting rows

To sort the rows, select **View | Sort**. You can sort on multiple columns, in ascending or descending order. Use the check box to control row shading.

Creating and Applying Chart Templates

Chart templates define the initial presentation of the report including visible columns. To apply a new chart template, select **View | Apply Template**.

You can create your own chart template by creating a chart you like, then saving this template using **File | Save as Template**. There are separate templates for each database and for combined charts.

Editing and highlighting text

You can edit text in any cell, including subcells, by double-clicking in the cell and typing. You can also paste in text on the Windows clipboard. If you do a lot of cell text editing, we recommend that you use File | Save as... and save your table with a new name.

Use the **Text** menu to change the font of *cells, rows or columns*, or to change the style to bold, italics, etc. You cannot apply a style (e.g. bold, italics, color) to *individual words or phrases* in the chart or records.

To apply a yellow highlight to cells or rows, use **Text | Highlight Cells** or **Text | Highlight Rows**. Turn highlighting on and off using **View | Enable Highlights.** You cannot highlight individual words.

Find and Replace

Use **Edit | Find...** to find instances of text in the visible columns of your chart. The cell containing the text will be selected. Use **Edit | Replace...** to find and replace text in all visible columns in your chart.
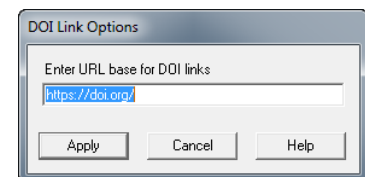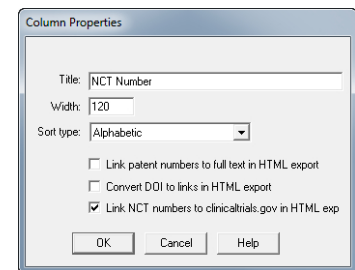
Creating Simple Statistics

To create a count of unique values in a column, select **View | Statistics** and select a column. Statistics will be saved in a .csv file and can be analyzed in Excel.

	A	B
1	Trial Status	Count
2	Open	13
3	Completed	9
4	Closed	5
5	Terminated	5
6	Planned	4

Creating links to trials and other publications

You can convert NCT numbers, DOI numbers and patent publication numbers in your chart into full-text links when you export to HTML-based formats (HTML, Word, PDF and Excel):

- **NCT numbers**: go to the corresponding record on ClinicalTrials.gov.
- **DOI numbers**: use DOI.org to resolve the link or specify your own link resolver.
- **patent publication numbers**: patent numbers from supported authorities (US, WO, EP, GB, FR, CN) can go to a variety of public and commercial patent sites.

1. For each desired column in your chart, check the appropriate link option under **View | Column Properties**. This choice will be saved in a chart template.

2. Under **Options | DOI links...** enter the base URL for your DOI links.
   Under **Options | Full-text patent links** select which patent host you wish to use for each authority. Some hosts (e.g. PatentOrder) require you to configure the links using the Configure button.
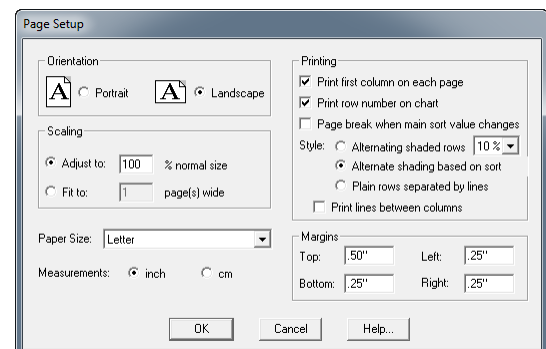
Printing reports

You can change the print settings under **File | Page Setup**. Under scaling, you can specify that the chart fits on a specified number of pages in width.

Use **File | Print** to print the chart, records, and images. You can print the current record, all records, or a range of records.

Use **File | Print Preview** to preview the appearance of a printed chart.

Combining charts

Use **File | Combine** to combine charts from different Pharmaprojects *or* Trialtrove searches into a single chart. You cannot combine Pharmaprojects *and* Trialtrove searches into a combined chart.

1. In Step 1, choose the key chart from the list of all open chart files.

2. In Step 2, choose the additional charts to combine.

3. In Step 3, edit the new chart title and select your combine option. Select "Finish" to create your combined chart.

Each visible (not hidden) row in the original charts will appear in the combined chart.

Updating reports

Use **File | Update** to update reports and identify new and updated records and cells.

1. In Step 1, you select the "older" chart to be updated

2. in Step 2, select the chart with new information. A Row Status column appears in the updated chart. New rows are colored in green and changed cells in updated rows are highlighted in blue.

For more information – "Combining & Updating Reports" at www.bizint.com/Tips.
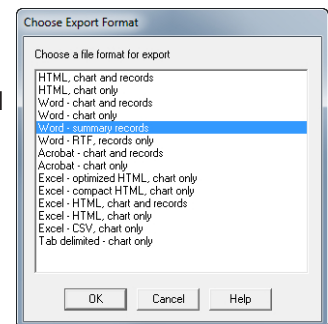
Distributing reports

To distribute your report, use **File | Export** and choose the appropriate Export Format. Detailed information on export formats is available at:
www.bizint.com/Tips – "Distributing Reports"

Recommended Export Formats

- **HTML** (chart and records, chart only): creates an HTML file which can be viewed in a browser.
- **Word** (chart and records, chart only): creates an HTML file with the chart (and optionally the records and images) which is opened in Microsoft Word. This format is good for reports which will be distributed by email. You can also export the records only as an RTF file.
- **Word - Summary Records** (records only): creates a HTML file for Word with records displaying fields based on those displayed in your chart. *See page 7 for more details.*
- **Acrobat** (chart and records, chart only): creates an HTML file which is opened in Adobe Acrobat and can be saved as a PDF. This format is ideal for reports containing images and for printing.
- **Excel - optimized HTML** (chart only): creates an HTML file which preserves most formatting while creating only one row in Excel for each BizInt Smart Charts row. This format is recommended for distribution of the tabular report in Excel. Linked records and images are not supported.
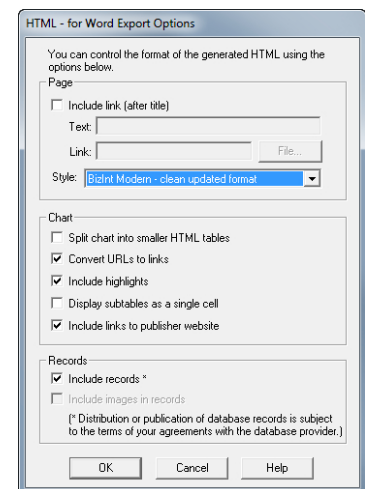- **Excel - compact HTML** (chart only):

HTML Export Options

You can specify the appearance of your exported HTML using the HTML Export Options panel.

Under "Style", you can select a stylesheet. The "BizInt Modern Scaled" stylesheet will attempt to scale your report to fit the width of the browser window.

One option under "Chart" is to include a link to the full record on the publisher website; "Link" will appear under the row number in the exported HTML.

Under "Records" you can choose to include the records (which will be linked to the record title) and images in the records.
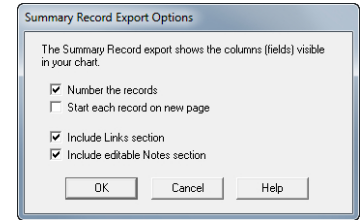

Other Export Formats

- **Word - RTF, records only**: creates an RTF file with the records which is opened in Microsoft Word.
- **Excel - HTML (chart and records, chart only)**: creates an HTML file which preserves the formatting - but not the structure - of the table and can include records formatted as Excel rows.
- **Excel - CSV, chart only and Tab Delimited, chart only**: these options are provided exporting to Excel for statistical analysis or integration with another platform

Word - Summary Records Export

The Summary Records export creates a Word document with selected fields from the chart and the full contents of larger fields. Information is structured so that you can add a Table of Contents in Word. It is designed for creating custom record displays or delivering succinct records as an alternative to tables.

1. Under **File | Export,** select **Word - Summary Records.**

2. On the Export Options panel, you can choose to number the records and if you want each record to start on a new page. You can also choose to include links (in the blue area) and a editable Notes section (grey area.)

3. Click OK and you will be prompted to provide a file name. Your Summary Records report will open in Word.

More about the Summary Record Export

The fields in the top (yellow) section are the columns visible in your chart. You can use **View | Columns** to change visible columns before exporting. You can include Citeline fields as well as user-created columns.

The Links (blue) section contains a link to the record on Citeline.

Below the links section is an editable Notes (grey) section, designed for writing notes and comments or pasting in related information.

The Links, editable Notes, and bottom sections are optional and can be selected on the options panel.

Currently you cannot include the table in the Summary Records export.

Distributing reports with images

We recommend that you use the Word or Acrobat export formats to deliver reports with images, since the images in HTML exports are in a directory of linked .jpg files.

When exporting a report with images to Word, you will see a hint panel reminding you to embed the images in Word and save the document as a Word file before distributing the report.
More information can be found at bizint.com/wordimages.

▶ For more info: www.bizint.com/tips

Software for
Business Intelligence
BizInt Smart Charts
www.bizint.com

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QUESTIONS OR SUGGESTIONS?

Please contact us at:

✉ support@bizint.com

📞 1.714.289.1000 (8 am - 5 pm Pacific Time)

🌐 www.bizint.com

We are always pleased to hear from you
and will do our best to address your issues.