

# BizInt Smart Charts

## Reference Rows™



VERSION

1.2

# Mini Guide

## New in this release

- Import from VantagePoint - Smart Charts Edition.
- New rule to “Summarize Unique Values” while removing duplicates.

**BizInt Smart Charts Reference Rows™** is a utility you use in conjunction with BizInt Smart Charts for Patents or BizInt Smart Charts for Drug Pipelines to create a “reference row”—a single row representing related records from different databases.

Related source records representing the same drug, patent family, or clinical trial are presented in a single row. Each cell in the reference row is selected based on a database ranking and column rules which you define.

BizInt Smart Charts Reference Rows is included with all BizInt Smart Charts licenses and installed automatically when you install BizInt Smart Charts for Drug Pipelines or BizInt Smart Charts for Patents.

For more info: [www.bizint.com/tips](http://www.bizint.com/tips)

## LOOK INSIDE

to see how you can...

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Spend a few minutes with this Mini Guide to understand the key features of BizInt Smart Reference Rows.

## Preparing your Chart File for Reference Rows

The starting point for Reference Rows is your chart file created in BizInt Smart Charts for Drug Pipelines or BizInt Smart Charts for Patents. Because many customization features are not present in Reference Rows, we recommend you do the following *before* opening your .cht or .chp file in Reference Rows:

- **Generate the grouping column.** Reference rows are based on the grouping column (e.g., Common Drug Name, Common Patent Family, or Common Trial ID column) – all rows with the same values in this column will be summarized by a single reference row.
- **Review and hide rows** that you do not want in your report. You cannot hide rows in Reference Rows.
- **Apply Chart Templates** before opening the chart in Reference Rows. You can change the visible columns in Reference Rows, but you cannot apply and create Chart Templates.
- There is no update feature Reference Rows 1.2, but row/cell shading is preserved.

Pipeline Report - HER2 inhibitors							
Drug	Common Drug Name	Database	Synonyms	Originator	Highest Phase	Mechanism Of Action	Structure
1. AC-480	BMS 599626	<a href="#">1.1 Adis RDI</a>   <a href="#">link</a> <a href="#">1.2 TPharma</a>   <a href="#">link</a> <a href="#">1.3 TR Integ</a>   <a href="#">link</a> <a href="#">1.4 PharmProj</a> <a href="#">1.5 PharmProj</a> <a href="#">1.6 IMS RDF</a>	EGFR kinase inhibitors, Ambit	Bristol-Myers Squibb	Phase I	HER4 (erbB4) Inhibitors EGFR (HER1/erbB1) Inhibitors HER2 (erbB2) Inhibitors	
		<a href="#">1.4 PharmPr</a>	<a href="#">1.4 PharmPr</a>	<a href="#">1.1 Adis RD</a>	<a href="#">1.1 Adis RD</a>	<a href="#">1.3 TR Integ</a>	<a href="#">1.2 TPharma</a>
2. canertinib dihydrochloride	Canertinib dihydrochloride	<a href="#">2.1 TPharma</a>   <a href="#">link</a> <a href="#">2.2 TR Integ</a>   <a href="#">link</a> <a href="#">2.3 PharmProj</a>	CI-1033 PD-9183805 PD-183805	University of Auckland	Phase II	Anticancer Apoptosis stimulator ErbB2 tyrosine kinase receptor inhibitor ErbB3 tyrosine kinase receptor inhibitor ErbB4 tyrosine kinase receptor inhibitor AKT protein kinase inhibitor Angiogenesis inhibitor Epidermal growth factor antagonist	
		<a href="#">2.3 PharmPr</a>	<a href="#">2.3 PharmPr</a>	<a href="#">2.1 TPharma</a>	<a href="#">2.2 TR Integ</a>	<a href="#">2.1 TPharma</a>	<a href="#">2.1 TPharma</a>
3. D-69491	D-69491	<a href="#">3.1 TPharma</a>   <a href="#">link</a> <a href="#">3.2 TR Integ</a>   <a href="#">link</a> <a href="#">3.3 PharmProj</a> <a href="#">3.4 IMS RDF</a>	SU-11464	SUGEN Inc	Preclinical	Anticancer ErbB2 tyrosine kinase receptor inhibitor Epidermal growth factor antagonist	
		<a href="#">3.3 PharmPr</a>	<a href="#">3.3 PharmPr</a>	<a href="#">3.1 TPharma</a>	<a href="#">3.2 TR Integ</a>	<a href="#">3.1 TPharma</a>	<a href="#">3.1 TPharma</a>
4. DXL-702	DXL-702	<a href="#">4.1 Adis RDI</a>   <a href="#">link</a> <a href="#">4.2 TR Integ</a>   <a href="#">link</a> <a href="#">4.3 PharmProj</a> <a href="#">4.4 IMS RDF</a> <a href="#">4.5 IMS RDF</a>		InNexus Biotechnology	Preclinical	biotechnology protein monoclonal antibody	
		<a href="#">4.3 PharmPr</a>		<a href="#">4.1 Adis RD</a>	<a href="#">4.1 Adis RD</a>		<a href="#">4.4 IMS RDF</a>

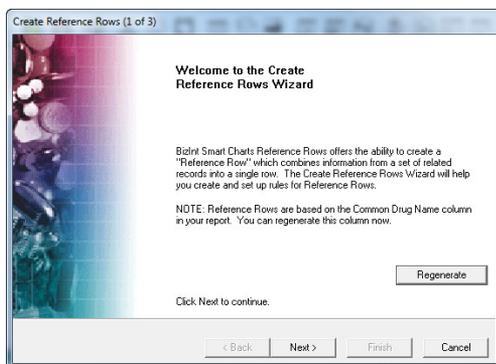
Sample HTML pipeline report exported from BizInt Smart Charts Reference Rows.

## Creating your Reference Rows Report

Save your combined chart in BizInt Smart Charts for Patents or BizInt Smart Charts for Drug Pipelines, and choose **File | Send to Reference Rows**.

Or, launch BizInt Smart Charts Reference Rows and choose **File | Open** to select your .cht or .chp file and launch the Create Reference Rows wizard

In Step 1, you can Regenerate the grouping column if needed. *If you have modified the groupings that were created by BizInt Smart Charts, don't Regenerate... you will lose your changes!*



## Database Ranking

The Database Ranking determines how data is selected for the reference row.

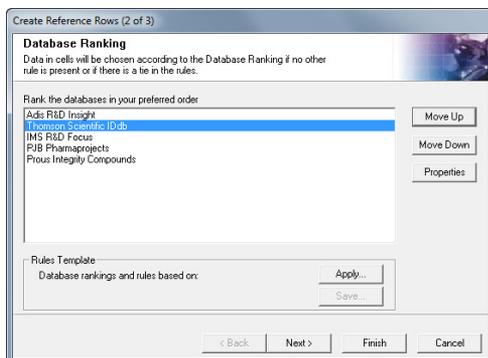
By default, databases are ranked in the order that you specified when you created your combined chart.

If the cell from the highest database is empty, Reference Rows will select the cell from the next highest ranked database.

You can specify a new database ranking in step 2 of the Create Reference Rows wizard.

You can also change the database ranking using the **Reference Rows | Database Ranking** command. To change the database ranking, click on a database and press Move Up or Move Down. Or, drag the databases on the list to rearrange them. Click the "Properties" button to change the database label in the exported Reference Row report.

When you apply the new ranking, the rows in the review chart change order to reflect the new ranking.



BizInt Smart Charts Reference Rows is included in all BizInt Smart Charts licenses and is installed automatically.

## Column Rules



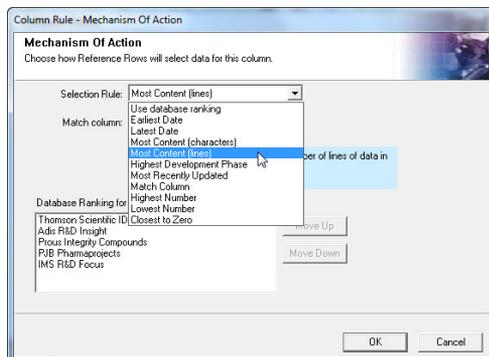
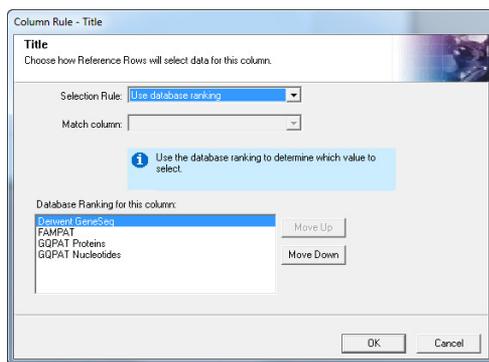
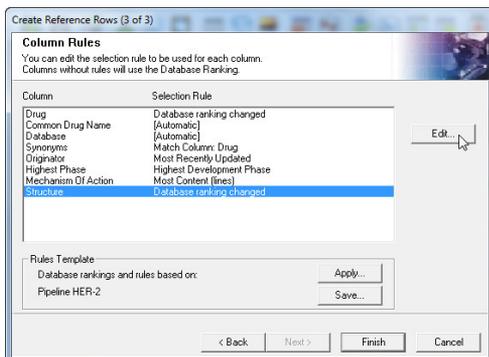
You can override the database ranking by specifying rules for each column. Step 3 of the Create Reference Rows wizard allows you to set rules for each column before creating reference rows. You can also change the Column Rules using the Reference Rows | Column Rules command.

Use the drop-down menu to select a rule for each column.

- **Use Database Ranking:** allows you to specify an alternative database ranking for the selected column at the bottom of the panel.
- **Earliest Date; Latest Date:** applies to columns with dates only.
- **Most Content** (characters or lines)
- **Highest Development Phase:** applies only to drug phase columns.
- **Most Recently Updated:** selects the cell from the record which was most recently updated (not the most recently updated cell.)
- **Match Column:** specify that this column will be populated from the same record as the column selected in the drop-down column menu below.
- **Highest Number, Lowest Number, Closest to Zero:** applies only to columns with numeric values.
- **Summarize All Values:** use in conjunction with the “Create Subtable from Columns” tool to create a summary of all related cells (example at right).
- **Summarize Unique Values:** similar to above, but removes (exact) duplicate items.

### How do Rules work?

A cell with content will always be chosen over an empty cell. The database ranking is used to resolve a tie if multiple cells are selected by a rule.



## Reference Rows “Selection View”

The Reference Rows “Selection View” (see below) lets you preview and customize your exported Reference Rows report. The row numbering (e.g., 1.1, 1.2, 1.3.) reflects each Reference Rows group.

Green check marks show which cells were selected by the database ranking and column rules to appear in the exported report.

	Drug	Common Drug Name	Database	Synonyms	Originator	Highest Phase	Mechanism Of Action	Structure
1.1	BMS 599626	BMS 599626 ✓	Adis R&D Insight	AC 480 AC480 BMS-599626	Bristol-Myers Squibb	Phase I ✓	Epidermal growth factor inhibitors HER2 inhibitors	
2.1	Pan-HER kinase inhibitor, Bristol-Myers Squibb	BMS 599626	IMS R&D Focus	BMS 599626 ✓	Bristol-Myers Squibb (USA)	Phase I	EGF receptor inhibitor	
1.3	AC-480	BMS 599626	PJB Pharmaprojects	EGFR kinase inhibitors, Ambit	Ambit Biosciences (USA)	Preclinical	ErbB-1 ErbB-2 ErbB-4 Epider (GF-ER)	
1.4	BMS-599626	BMS 599626	PJB Pharmaprojects	HER1/2 inhibitors, BMS	Bristol-Myers Squibb (USA)	No Development Reported	ErbB-1 ErbB-2	
1.5	BMS-599626 ✓	BMS 599626	Prous Integrity Compounds	AC-480 (free base)	Bristol-Myers Squibb	Phase I	HER4 EGFR erbB1 HER2	
1.6	AC-480	BMS 599626	Thomson Scientific IDdb	BMS-599626 HER kinase inhibitor, Bristol-Myers Squibb pan-HER kinase inhibitor, BMS pan-HER inhibitor (cancer), Ambit	Bristol-Myers Squibb Co	Discovery ✓	Anticarc EGFR ErbB2 ErbB4 Epider	
2.1	canertinib dihydrochloride	Canertinib dihydrochloride ✓	PJB Pharmaprojects	CI-1033 PD-0183805 PD-183805	Pfizer (USA)	Discontinued	ErbB-2 ErbB-1 ErbB-4 Epider (GF-ER)	
2.2	Canertinib dihydrochloride	Canertinib dihydrochloride ✓	Prous Integrity Compounds	PD-183805 (free base) CI-1033	Pfizer	Phase II ✓	HER4 EGFR erbB1 Inhibitors	

### Manually select cells ✓

To override the rules, select the cell you prefer, hold down the right mouse button, and choose “Select this cell” from the menu. A purple check mark will indicate a manually selected cell. To undo the selection, select the cell again.



## Creating a Summary Subtable

Two new features in BizInt Smart Charts Reference Rows let you create a subtable summarizing related records for columns you select. For example, to create the subtable below summarizing Highest Phase for each Database:

1. Choose **Tools | Create Subtable from Columns** and move the “Database” and “Highest Phase” columns to the Selected Columns panel. Click Apply. A new “Untitled Subtable” column will be created for each row. You can rename this column but not the sub-columns.
2. Change the rule for this column to “Summarize all Values.” A blue symbol will appear to indicate this rule.
3. When the report is exported, the summary subtable will be created as shown at right.

Phase (Hep C) by Database		
Database	Highest Phase (Hepatitis C)	
Thomson Pharma	Phase 2	1.1
Adis R&D Insight	Phase 1	1.2
CiteLine Pipeline	No Development Reported	1.3
IMS R&D Focus	Phase 1	1.4

## Saving your Reference Rows chart



You can save the Reference Rows chart as a .chrr file and re-open it in Reference Rows with all of your rules, edits, and selections saved.

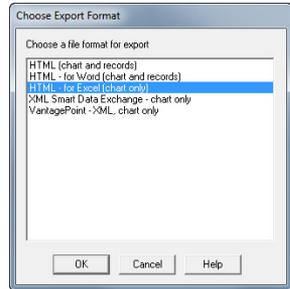
You can also open the .chrr file in Version 3.6 (releases dated 12/21/2011 or later.) The rows will be in the sorted order but no Reference Rows features will be saved.

## Exporting your Reference Rows report



You can view and distribute your Reference Rows reports via one of the export formats. In Version 1.1, you can export to HTML, Word, Excel, XML Smart Data Exchange Format, and VantagePoint XML. The HTML can be opened in Adobe Acrobat.

1. Press the Export icon on the toolbar or use **File | Export** to create your Reference Rows report.
2. Choose your export format and click OK.
3. Select your export options. You can include all of the records, only the first source record for each row, or none of the records. You can also turn off links to Publisher Records on this panel.
4. Provide a file name and your exported file will open in the selected application.  
*See sample exported reports on pages 2 and 7.*



### Features of Reference Rows HTML/Word Reports:

- Each set of related records will be shown as a single row with the selected (checked) cells displayed.
- A colored box at the bottom of each cell indicates the source database and record. The database attribution can be edited using the Properties button on the Database Ranking panel.
- If you chose to include records, they are linked in the Database column from the database attribution for each records. You can retrieve the record on the publisher website from the word "link" in the Database column.

Database	
1.1	Patbase   <a href="#">link</a>
1.2	DWPI   <a href="#">link</a>
1.3	TotalPat   <a href="#">link</a>
1.4	TotalPat   <a href="#">link</a>
1.5	TotalPat   <a href="#">link</a>
1.6	FamPat

### Exporting from Reference Rows to Excel



- Each Reference Rows is represented by a single row in Excel (see example at right.)
- Each source database is represented by a separate column (since Excel cannot display the Database subtable.)
- The link to the record on the publisher website is available for the first record from each database (since Excel can display only one link in a cell)
- Database attribution follows the text for each cell.

## Reference Rows Rules Templates

Rules Templates allow you to save your database ranking and column rules so that you can quickly apply them to a new Reference Rows report.

### Saving a Rules Template

1. You can save a Rules Template in step 3 of the Create Reference Rows wizard, using the **Save...** button at the bottom of the panel.  
Or, after you have created the review chart, select the menu option **Reference Rows | Save Rules Template**.
2. On the Save Reference Rows Rules Template panel, type the name of your template.

### Applying a Rules Template

You can apply a Rules Template in step 2 or 3 of the Create Reference Rows wizard, using the **Apply...** button at the bottom of the panel.

Or, after you have created the review chart, select the menu option **Reference Rows | Apply Rules Template**.

### Show Rules Directory

Rules templates are saved as .DRUG (drug pipeline), .TRIAL (clinical trials) or .PATS (patents) files in the "rules" directory in your roaming profile. You can share these rules template files with other users.

To view your rules templates and to quickly find where your rules templates are located on your PC, select the menu option **Reference Rows | View Rules Directory**.



	A	B	C	D	E	F	G
1	Human Genome Sciences Pipeline (Adis RDI, IMS RDF, TPharma, CP)						
2							
3	<b>Drug</b>	<b>Thomson</b>	<b>Adis R&amp;D</b>	<b>IMS R&amp;D Focus</b>	<b>Citeline</b>	<b>Status</b>	<b>Mechanism of Action</b>
4	1 GSK 628616 (1.1 Adis)		1.1 Adis #800025950	1.2 IMS #2028803		Discontinued 1 (1.1 Adis)	chemoprotectant protein kinase inhibitor (1.2 IMS)
5	2 CTGF-2 gene therapy, TransgeneHGS (2.1 TPharm)	2.1 TPharm #17430		2.2 IMS #2015066		No Development Reported (2.1 TPharm)	Unspecified growth factor receptor modulator Adenovirus based gene therapy Angiogenesis stimulator
6	3 TIMP-4 (restenosis), TransgeneHGS (3.1 TPharm)	3.1 TPharm #30250		3.2 IMS #2015091		No Development Reported (3.1 TPharm)	biotechnology matrix metalloproteinase inhibitor proteinase inhibitor gene therapy
7	4 albiglutide (4.1 TPharm)	4.1 TPharm #39518	4.2 Adis #800017488	4.3 IMS #2023630	4.4 PipeIn #27761	Phase 3 Clinical (4.1 TPharm)	protein GLP-1 agonist hormone recombinant protein fusion protein biotechnology (4.3 IMS)
8	5 aibinterferon alfa-2b (5.1 TPharm)	5.1 TPharm #24885	5.2 Adis #800014819	5.3 IMS #2015416	5.4 PipeIn #23774 5.5 PipeIn #26587 5.6 PipeIn #24341	Discontinued (5.1 TPharm)	fusion protein interferon alfa biotechnology recombinant protein protein interferon (5.3 IMS)
9	6 balagrastim (6.1 TPharm)	6.1 TPharm #39263		6.2 IMS #2020530	6.3 PipeIn #26579	Phase 3 Clinical (6.1 TPharm)	GCSF Receptor agonist GCSF ligand Hematopoietic stimulant Neutrophil stimulator (6.1 TPharm)

Sample Excel report exported from BizInt Smart Charts Reference Rows.

## Using Reference Rows – Overview

Below is a quick overview of the process of creating BizInt Smart Charts Reference Rows reports. Key features are covered in more detail in pages 2-7 of this document.

Before opening your .cht or .chp file in Reference Rows, read the information under **“Preparing your Chart File for Reference Rows.”**

### Creating your Reference Rows report

1. Open your .cht or .chp file in BizInt Smart Charts Reference Rows to launch the Create Reference Rows wizard.
2. In step 1, you can generate or regenerate the Common Patent Family, Common Drug Name, or Common Trial ID column.
3. In step 2, review the **Database Ranking**.
4. In step 3, create **Column Rules**.
5. In step 2 or 3, you can apply or save a **Rules Template**.
6. Click “Finish” and the **Reference Rows Selection View** window will appear.

### Customizing your Reference Rows report

1. To **override the rules**, select the cell you prefer, hold down the right mouse button, and choose “Select this cell” from the menu.
2. **Sort** the chart by clicking the Sort icon on the toolbar. Your report will be sorted based on the selected value for each reference row.
3. You can **save the Selection View** and open it again in the Reference Rows software with all of your rules, edits, and selections saved.

### Exporting your Reference Rows report

1. Use **File | Export** to view and distribute your Reference Rows report.
2. Choose your desired export format and export options.



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- 🌐 [www.bizint.com](http://www.bizint.com)

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