

Use File | Combine or File | Update to:

- **Combine records from different databases and searches** into a single report — and then use the Generate Common Drug Names, Generate Common Trial IDs or Identify Common Patent Family tools to identify related records across databases.
- **Update an prior report with new data**, using the Row Status column and update color coding features to identify new and updated information.
- **Combine reports from different users or from different searches** — and merge data in user columns to show differences.
- **Merge results from different search strategies** — and use the “Row Status” column to identify records contained in one or both strategies.
- **Merge large sets of search results** from sites where records must be downloaded in batches.

One of the key features of BizInt Smart Charts for Patents and BizInt Smart Charts for Drug Pipelines is the ability to intelligently combine reports from different databases and searches into a new report.

BizInt Smart Charts 3.5 contains special features to allow you to create combined and updated reports from:

- drug pipeline databases
- clinical trials databases
- patent databases
- gene sequence databases.

This document describes how to use the File | Update and File | Combine features in BizInt Smart Charts 3.5.

Combined Report: Mousetrap Patents (2005 to 2012) - PatBase + Innovation/DWPI									
	Title	Database	Common Family	Pub. Number	Patent Family			Patent Assignee	
					Patent	Kind	Date		
3	Method and apparatus for capacitively sensing pests	PatBase	US 20030184442	US 2003184442	US 2003184442	A	2003-10-02	SKAFF STEPHEN X LUND KRAIG S HOLZMAN LOUIS MARK GARDNER JAMES P ECOLAB INC DEMATTIA DAVID N	
					US 2003213161	A	2003-11-20		
					US 2003218543	A	2003-11-27		
					US 6937156	BB	2005-08-30		
					US 7071829	BB	2006-07-04		
					US 7509770	BB	2009-03-31		
					US 2009192763	A	2009-07-30		
					WO 03084321	A1	2003-10-16		
					WO 03084320	A1	2003-10-16		
					WO 03084319	A1	2003-10-16		
					EP 1489904	A1	2004-12-29		
					EP 1489904	B1	2006-03-15		
					DE 60304049	D1	2006-05-11		
DE 60304049	T2	2006-10-26							
4	Reporting system for collecting, communicating and analyzing information of pest trap e.g. wind up style mouse trap, has receiver	Thomson Innovation + DWPI	US 20030184442	US 20090192763	US 20090192763	A1	2009-07-30	ECOLAB INC	

Updated Report: Hepatitis C Pipeline - RDI - Feb 2012 updated in May 2012							
	Drug	Row Status	Originator	Highest Phase	Therapeutic Class (EphMRA)	Indications	Assigned To
1	MK 8325	Added	Merck & Co (Originator)	Preclinical	Viral hepatitis products (J5B1)	Hepatitis C	R&D
2	Research programme: hepatitis C therapies - Ligand	Added	Ligand Pharmaceuticals (Originator)	Preclinical	Antivirals for Systemic Use (J5)	Hepatitis C	R&D
3	Research programme: antiviral enzyme inhibitors - Astex Therapeutics	Added	Astex Therapeutics (Originator)	Preclinical	Antivirals, others (J5B9)	Hepatitis C	R&D
4	MK 8742	Added	Merck & Co (Originator)	Phase I	Antivirals for Systemic Use (J5)	Hepatitis C	Clinical
5	MBL HCV1	Added	MassBiologics (Originator)	Phase II	Antivirals for Systemic Use (J5)	Hepatitis C	Clinical
6	Research programme: hepatitis C virus inhibitors - Progenics	Updated	Progenics Pharmaceuticals (Originator)	Discontinued Research	Antivirals for Systemic Use (J5)	Hepatitis C	Not Active /Also/ R&D
7	JTK 853	Updated	Japan Tobacco (Originator)	Discontinued I	Viral hepatitis products (J5B1)	Hepatitis C (In volunteers)	Not Active /Also/ Clinical
8	IMO 2125	Updated	Idera Pharmaceuticals (Originator)	Discontinued I	Viral hepatitis products (J5B1)	Hepatitis C (Combination therapy Treatment naive patients) Hepatitis C (Monotherapy Treatment-experienced patients)	Not Active /Also/ Clinical
9	ME 3738	Updated	Meiji Seika Kaisha (Originator)	Discontinued II	Antivirals, excluding anti-HIV products (J5B), Hepatic Protectors, Lipotropics (A5B)	Hepatitis C	Not Active /Also/ Clinical
10	IDX 375	Updated	Idenix Pharmaceuticals (Originator) University of Cagliari (Originator)	Discontinued II	Viral hepatitis products (J5B1)	Hepatitis C	Not Active /Also/ Clinical



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Creating Combined Reports

Follow these steps to create reports combining charts from different databases or searches.

Step 1 - Select the Key Chart

The first step is to decide which chart is the “Key Chart”. The Key Chart defines the initial appearance of a combined chart in several ways – the initial column order, width, and titles; chart title; and page setup are all taken from the Key Chart. In BizInt Smart Charts Reference Rows, data will be selected from the Key Chart unless overridden by your Database Ranking and Rules.

In general, if you have an existing report that has already been formatted for presentation, that should be your Key Chart.

Step 2 - Select Additional Charts

Once you have selected your Key Chart, the next step is to choose the charts containing additional records to add to the Key Chart. The order in which you add charts will determine your default Database Ranking in BizInt Smart Charts Reference Rows.

We suggest that you select no more than seven charts to combine at one time.

Step 3 - Select Options for the New Combined Chart

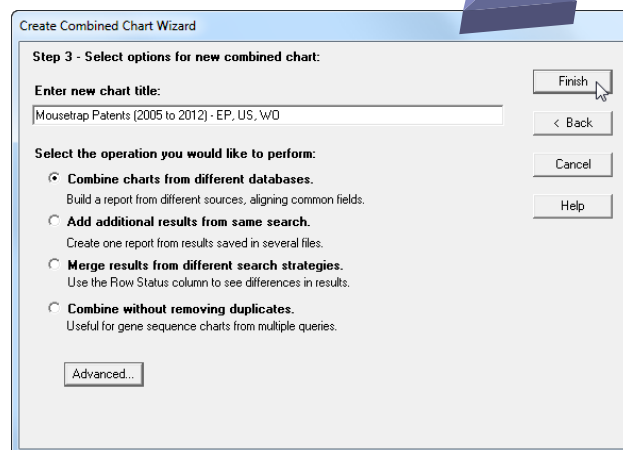
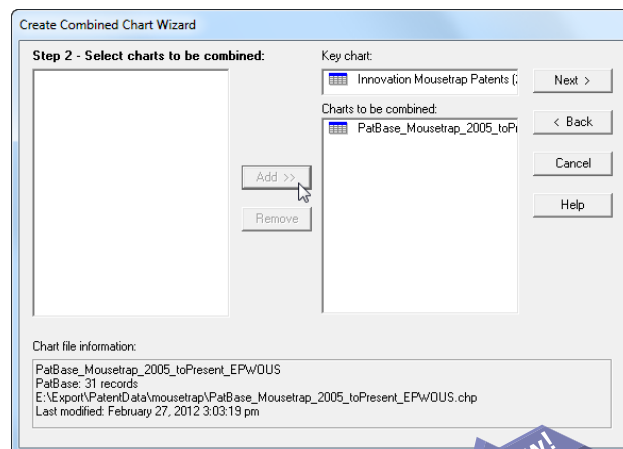
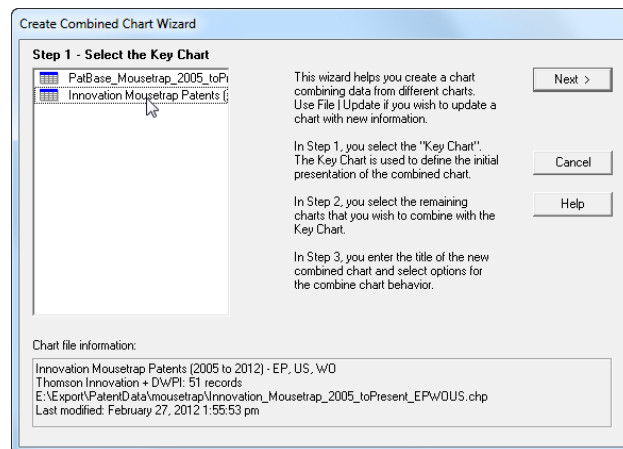
The first option in Step 3 is the title for the chart to be created. The default title is that of the Key Chart.

Next, you select what type of combine operation you wish to perform:

- **Combine charts from different databases:** This is the default option for combined charts. While designed for combining data from multiple sources, it also works with charts from the same database.
- **Add additional results from same search:** Use this option to combine sets of records from the same search (e.g., when a website only allows you to download 100 records at a time.)
- **Merge results from different search strategies:** With this option, the Row Status column is displayed so that you can see which rows were “added” to the results from the Key Charts.
- **Combine with removing duplicates:** Records with the same accession number from the same database usually are treated as duplicates and only one record appears in the combined chart. However, a gene sequence may be retrieved by several queries; this option allows you to keep all the records.

When you select “Finish” a new chart will be created containing all the records from the charts you chose to combine. All of the fields from all of the charts will be present, and similar fields will be aligned in the same column.

See page 4 for information on how hidden and duplicate rows are handled, and how you can use BizInt Smart Charts tools to identify and display related records across databases.



Updating Reports

Follow these steps to update a report by combining an new chart with an older chart and comparing the information.

Step 1 - Select the Older Chart

In Step 1, select the older chart -- the one you wish to update. This chart serves as the Key Chart in updated reports.

Step 2 - Select Additional Charts

In Step 2, select the newer chart(s) with the updated data.

Step 3 - Select Options for Updated Chart

The first option in Step 3 is the title for the new updated chart to be created. The default title is that of the older chart (the Key Chart.)

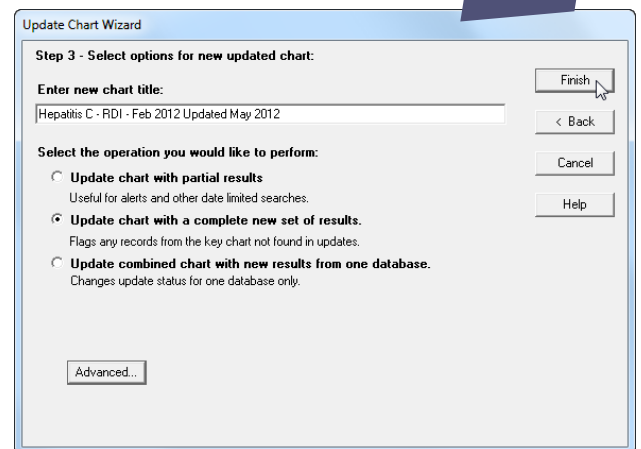
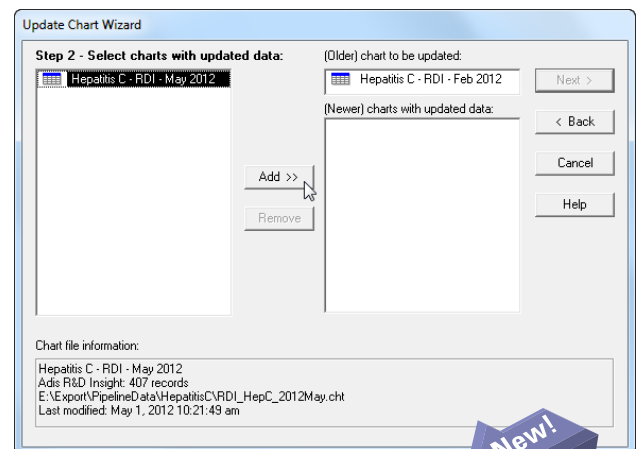
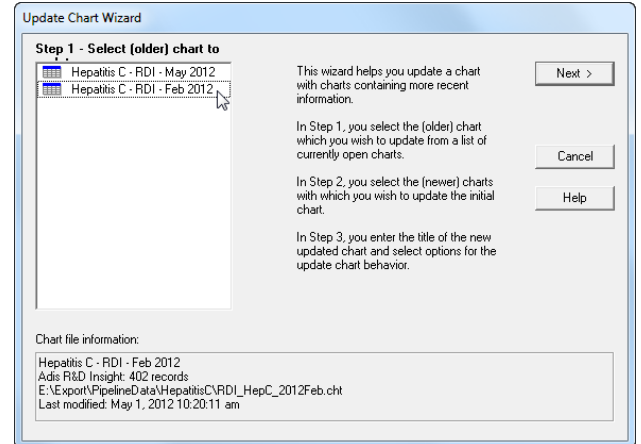
Next, you select what type of update operation you wish to perform:

- **Update chart with partial results:** *If you can't decide which option to choose, choose this option.* This is the best choice when updating a chart with records from an alert or SDI. It is also valuable when your search strategy is limited to records modified or added since the last analysis.
- **Update chart with a complete new set of results:** This option will flag all rows in the older chart which are not present in the original chart as "Not in Added Results". This helps you find rows which no longer match your search criteria. This option should only be used when you want to updating with the exact same search strategy across the exact same databases.
- **Update combined chart with new results from one database:** This option is useful when you are updating records from only one database in a chart. You could also use the "Update chart with partial results" option in this situation with almost exactly the same results.

When you select "Finish" a new chart will be created containing all the records from the old and new charts. A new "Row Status" is created, showing which records are Added, Updated, Unchanged or Not in Added Results (see page 4 for more details.)

Updating charts with hidden rows

If you hide a row because it is not of interest, then update with a set of data that contains this record again, the software treats this record as new and makes it visible, labeled as Added. A workaround is to add a column, and tag the unwanted records in that column with a common value (e.g. "irrelevant".) In your updated record, you can sort on this column so that you can quickly hide these records again.



How do I use Row Status and Color Coding?

The Row Status column is created primarily for Updated charts, but can also be useful for Combined charts.

You can select View | Color Code Changed Cells to turn the color coding of rows and cells on or off.

- **Unchanged** - The row came from the Key Chart without being modified. These rows remain **White** when color coding is turned on.
- **Updated** - The row was present in the Key Chart but was replaced by a more recent version from the Additional Charts. The row number button is colored **Blue** and updated cells are color coded **Blue**. Updated cells are those where the cell text in the older record is different from the cell text in the new record.

If you want to see what the previous value was for updated cells, go back to the older chart. If you don't sort the updated chart, the rows in the older chart will have the same row number as the updated chart.
- **Added** - The row was not present in the Key Chart, and was added from one of the Additional Charts. The row number button is colored **Green** and all cells in the row are color coded **Green**.
- **User Data Changed** - The row came from the Key Chart with no changes aside from data in user-added columns. The row number button is colored **Purple** and the updated user added cells are color coded **Purple**.
- **Not in Added Results** - The row was present in the Key Chart, but not in any of the Additional Charts. This special value for Row Status appears when the "Flag rows in key chart that are not in updates" option is enabled. The row number button is colored **Red** and all cells in the row are color coded **Red**.

Questions or suggestions?

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What Happens to Hidden Rows?

Any rows that are hidden in your original charts will not be present in either combined or updated charts. This allows you to "clean up" your data before combining charts from different databases.

This behavior can cause difficulties during updates -- see page 3.

What happens to Duplicate Rows?

BizInt Smart Charts considers two rows to be duplicates if they come from the *same database* and have the *same accession number*. Records from different databases referring to the same drug or patent are not considered duplicates – see "How do I identify Related Records" below.

If you combine two charts which contain duplicate rows only one copy of the row will appear in the new chart. If update dates are present, the most recently updated record will be selected. If the update dates are the same, the row is taken from the first chart in which it appears, from the Key Chart first, then the Additional Charts.

When a duplicate row is replaced, all the columns derived from publisher data are overwritten with the values in the selected row. Values in user-added columns (using Edit | Add Column) are preserved when a chart is updated or combined.

How do I identify Related Records in my report?

Under the Tools menu, you will find the following tools to help you identify related records in your report:

- **Generate Common Drug Names:** this tool examines the drug names and synonyms in your drug pipeline report and creates a network of related products. A "Common Drug Name" column is created containing one of the drug names from each set of related records.
- **Generate Common Trial IDs:** this tool matches clinical trial IDs between records and creates a "Common Trial ID" column. If an NCT ID is present, that will be chosen as the Common Trial ID.
- **Identify Common Patent Family:** this tool matches publication numbers in the Patent Family between records and creates a "Common Patent Family" column.

Use the View | Sort command on these columns and check the "Alternate row shading when primary sort key changes" box to group related records together in your report.

Use **BizInt Smart Charts Reference Rows** to create a single row summarizing related records linked by one of these tools.