Creating IP Sequence Reports from Multiple Collections using BizInt Smart Charts for Patents

Software for Business Intelligence

BizInt Smart Charts

Creating Reports from Multiple Sources

- Supported databases and hosts: **www.bizint.com/support/create**
- New – CAS Biosequences on GenomeQuest (v. 5.3.2)
- PatBase enhancements
- Combining results from multiple queries
- Identify Common Patent Family

Integrated Reports with Reference Rows

- **Hands on!** See the back of this handout and get the sample data at: **bizint.com/piugbio**
- Sending your chart to Reference Rows
- Creating a summary table of sequence hits
- HTML export
- Selecting specific cells (override rules)
- Summary Records export

Sequence Summary

Seq. Identifier	Query ID	S %Id	
WO2018071345-0006	LCDR1	100.00	10.2
WO2018071345-0003	HCDR1	100.00	10.3
WO2018071345-0005	HCDR3	100.00	10.4
WO2018071345-0007	LCDR2	100.00	10.5
WO2018071345-0008	LCDR3	100.00	10.6
WO2018071345-0001	HCDR3	14.84	10.7
WO2018071345-0001	HCDR2	13.28	10.8
WO2018071345-0001	HC-Ebola	100.00	10.9
WO2018071345-0002	LC-Ebola	100.00	10.10
WO2018071345-0002	LCDR3	8.49	10.11
WO2018071345-0004	HCDR2	100.00	10.12

Updating reports

- **www.bizint.com/support/use/new_publications.php**
- how update works
- "New Publications" column
- update in reference rows
- use cases for update

Questions / Requests?

For more information, see the back of handout
or visit www.bizint.com/tips

THE JOURNEY CONTINUES...

Hands-on: Summarizing Sequence Locations in a Patent Family

The sample_chart.chp file used in this example contains a few selected families from a sequence search from CAS Biosequences and PatBase records for corresponding families. You can download the sample_chart.chp file at: bizint.com/piugbio

The CAS Biosequences and PatBase charts have been combined using the File | Combine tool to create a single combined chart, and the Identify Common Patent Families tool was run to create the Common Family column. View | Columns was used to select the visible columns, including those used in the sequence summary subtable, and the column titles have been edited to fit better in the subtable.

BizInt Smart Charts for Patents

1. Use File | Open to open the sample_chart.chp file.

2. **Sort by Common Patent Family:** Hold down the right-mouse button in the Common Family column and click Sort. (Or, use View | Sort and select the Common Patent Family.)

3. Using File | Save, save the .chp file.

4. **Send to Reference Rows:** Send the chart to Reference Rows using the toolbar icon (or File | Send to Reference Rows).

BizInt Smart Charts Reference Rows

5. In Step 1 of the Create Reference Rows wizard, click Next.

6. In Step 2, PatBase should be the top-ranked database. *This will cause the Patbase families, titles, normalized assignee, etc. to be preferred in the final report.*

7. Click Finish, and you will see the Selection View.

8. Select Tools | Create Subtable from Columns, and select the Seq. Identifier, Query ID, and S %ID columns in this order (double click the column name, or select and click the > button to move them from the Available Columns to the Selected Columns panel) and press Apply. A new subtable column will be created at the far right side of the table.

9. Double click on the column header to rename the new subtable column from Untitled Subtable to "Sequence Summary".

10. Use View | Columns to hide the original Seq. Identifier, Query ID, and S %ID columns.

11. Right click on the Sequence Summary column and select Edit Column Rule (or use use Reference Rows | Column Rules...) to select the Summarize All Values rule for the Sequence Summary column. Click OK.

12. **Export the report to HTML:** Use File | Export to export the report to HTML - chart and records to see the rule selections and see the subtable column summarizing the sequence data.

13. **Make some edits to customize your presentation:** If you want to change any of the selected cells, right click on the desired cell and choose Select this cell. *A purple check mark will show that you have overriden the rules to select this cell.*

14. Use View | Columns to hide the Alignment column. *We don't need this column visible in chart for the Summary Records export.*

15. **Export the report to Word:** Use File | Export and choose the Word - summary records export. On the options panel, check the Include Claims and Include Alignment boxes, give the file a name, and the report will open in Word.

Download the Software

- **Customer downloads:** *bizint.com/downloads/*
- **Trial downloads:** *bizint.com/try*
  We encourage you to evaluate BizInt Smart Charts using your own data!

Keep up with the Latest Releases

- **"What's New" - BizInt Smart Charts for Patents:** *bizint.com/pdfs/PatsWhatsNew_V5.pdf*
- **Latest release information web page**: *bizint.com/product/patents/latest_release.php*
- **Subscribe to release announcements** by email or RSS feeds. *bizint.com/support/SubscribeReleases.php*

Exporting from databases/hosts to BizInt Smart Charts

- **Creating Reports from Databases and Hosts web page**: follow the links on the left side of the web page for step by step instructions for each database/host. *bizint.com/support/create/*