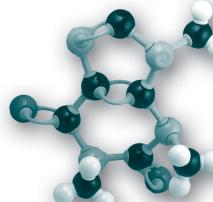
BizInt Smart Charts

version 5.8

for Patents

Mini Guide

BizInt Smart Charts for Patents helps you create, customize and distribute tabular reports integrating data from the leading patents, IP sequence, and non-patent literature databases.



Using BizInt Smart Charts for Patents — Overview

Use this Mini Guide (revised for Version 5.8) to learn about the key features for creating, customizing and distributing your integrated IP report.

Creating your integrated report

- Import your search results and save your .chp file (see page 2)
- Combine charts and identify related patents and publications (see page 3)
- Summarize related records into a single row in your final exported report (see page 4)
- Change database rankings and column rules, override the rules, and create summary tables (see page 8)

Reviewing your report

- View charts, records and images (see page 5)
- Change the visible columns (see page 5)

Customizing your report

 Hide & move rows, add columns, sort, edit text, change truncation, create and apply chart templates, generate statistics and color-code cells (see page 6)

Distributing your report

- Use File | Export to distribute reports in HTML, Word, and Excel, including hit structure reports using the Word - Summary Records export (see page 11)
- Update reports and identify new and changed information (see page 10)
- Create links to full-text patents and other publications (see page 12)

Spend a few minutes with this Mini Guide to understand the key features of BizInt Smart Charts for Patents. You can use the sample files located in the **tour** directory to try many of these features.

Importing data to create a report

The first step in creating your BizInt Smart Charts report is to import the results of your patent, IP sequence, or literature search.

Information about the currently supported databases and platforms can be found at <u>Creating Reports from Databases and Hosts</u> on the Support section of our website. We recommend reviewing this information before exporting search results from a database for the first time, and testing your export format by displaying and importing just a few records.



Importing your search results

Most supported databases offer a BizInt export. If it doesn't open in BizInt Smart Charts automatically, double-click on the downloaded file to start creating your report.

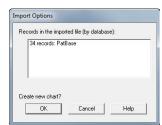
Using File | Import

If you are importing non-BizInt export files (e.g. rtf from STNext) or if BizInt Smart Charts is not automatically invoked when you export your search results, select File | Import—not File | Open—from the menu bar.

From the Import window, find and select the file with your exported search results.

A panel will appear showing the number of records in the file. When you create a chart from multiple databases it is treated as a combined chart (see page 3.)

Import Look in: 1 tour - ← 🗈 💣 📰 + Date modified 10/10/2006 10:45 ... Bi micropat_mousetrap.bpd 3/1/2007 2:43 PM Bi patbase_mousetrap_dec06.bpd Bi patbase_mousetrap_oct07.bpd 10/5/2007 8:27 AM patbase_mousetrap_dec06.bpd Open Files of type: BizInt exports (*.BPD) Cancel



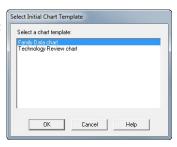
Applying a chart template

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 visible columns later, apply a different template, and even create your own templates (see page 7.)

Saving your report

Use File | Save to save your report as a .chp file.

Note: Export your report if you want to view it in other applications (see page 11.)



BizInt Smart Charts for Patents Version 5 is compatible with Windows 7, Windows 8, and Windows 10.

Creating your integrated report

Combining charts

Use File | Combine to combine charts from different patent and IP sequence databases and sources into a single chart.

In Step 1, choose the key chart from the list of all open chart files. In Step 2, choose the additional charts to combine.

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

Each visible (not hidden) row in the original charts will appear in the combined chart. The Database column indicates the source of each record. Columns with similar content are aligned.

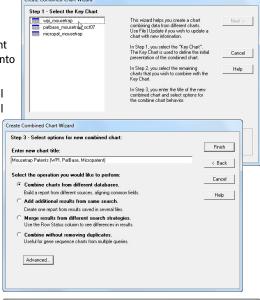
Identifying related records

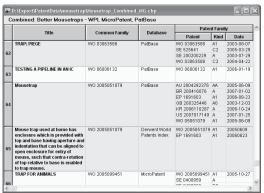
When you combine reports, the **Common Patent Family** column is now automatically created. There is currently no similar tool for nonpatent literature.

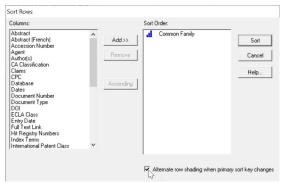
The Identify Common Patent Families tool examines publication numbers and creates a new Common Family column with a single patent number key for each set of related publications.

Sort Related Records in Chart

To group related records together in your report, use the **View | Sort** command on the Common Family column, and check the box for "Alternate row shading when primary sort key changes".







Send to Reference Rows

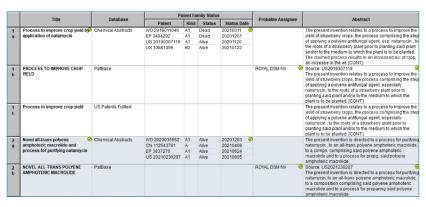
Creating your Reference Rows report

In Reference Rows, records for each set of related publications are integrated into a single Reference Row in your exported report.

1. From your combined chart, select **File** | **Send to Reference Rows**. Starting with Version 5.6, you do not need to save your .chp file.

Reference Rows "Selection View"

Reference Rows opens showing the Selection View (see below) of the combined chart. The Common Patent Family column will be automatically created.



- The Selection View previews which information will be displayed in each integrated row in your exported report.
- Green check marks show which cells have been selected by the database ranking and column rules to appear in the exported report. (See page 8.)
- 2. Click the **Preview** button in the upper right of the window to see how your report will appear when exported.



3. Use File | Export to export your Reference Rows report to Word, Excel, etc. (See page 11.)



Review the rest of the Mini Guide to learn more about using BizInt Smart Charts to create, customize, and distribute your integrated IP report.

Reviewing your report — 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 Patent Family.

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.

Changing visible columns

To select and rearrange columns, select **View** | **Choose Columns.** On the left side, you will see all the available columns for your chart, and on the right, the currently visible columns. Add 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.

Viewing records

To view the 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.

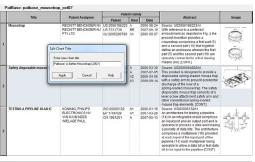
For some sources you can view the related record on the publisher website by selecting **View | Record on Publisher Website**.

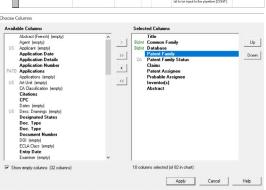
Hit highlights (from supported PatBase, STN, and Orbit formats) are now shown in the records.

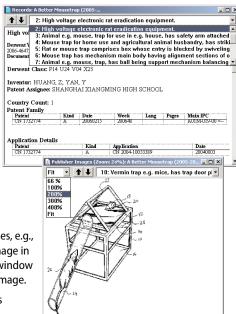
Viewing images

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.







Customizing your report

Hiding and reordering rows

Use View | Rows to hide and reorder rows, and to re-display hidden rows. You can also use Edit | Hide Row or Ctrl-H as a shortcut to hide a single row or selection of rows. Hidden rows will not appear in exported or printed reports. Edit | Move Row lets you move rows to a specific location in the chart.

Version 5.6 introduced similar features for hiding and reordering Reference Rows using the View | Reference Rows and Edit | Hide Reference Row commands.



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 can change properties of columns using **View | Column Properties**.

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.

Editing text

You can edit text in any cell, including subcells. You cannot apply a style (e.g. bold, italics, color) to *individual words or phrases* in the chart or records.



Changing text truncation

If you see [CONT.] at the end of text in a cell, this field was truncated during chart creation. 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.** Truncation settings take effect on chart creation.

Change the truncation settings and reimport your data to see the result.



Customizing your report

Creating and applying chart templates

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

Chart templates are not currently available in Reference Rows.

Creating simple statistics

To create a count of unique values in a column, select **Tools | Statistics** and select a column. Statistics will be automatically opened in Excel. *Learn more at*: <u>Statistics on multi-database reports</u>

In Reference Rows, statistics are calculated for Reference Rows (not individual rows) based on the selected value for the Reference Row.



A	A	В
1	Derwent Class	Count
2	P14	16
3	X25	3
4	U24	1
5	V04	1

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.

Titling your report

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

Color-Coding Cells

You can now color-code cells using eight pre-defined colors.

This feature replaces the yellow highlight feature in earlier versions of the software. Learn more at: Color-Coding Cells

To color-code cells, select the cell (or group of cells) to color-code, then click on the down arrow next to the paint bucket icon on the toolbar to bring up the Color

Cells panel and select your color. Or choose **Text | Color cell** on the menu to color the cell in the most recently selected color.

- Selecting a cell and clicking on the Paint Bucket icon will color the cell in the currently selected color, shown in the rectangular below the paint bucket.
- 2. To remove the color-coding for a cell, select the cell and click on the white box with the blue "X", or choose **Text** | **Clear cell colors**.
- 3. You can choose Text | Clear all cell colors to remove all color-coding.





Reference Rows — Database Ranking and Rules

Cells are selected in Reference Rows automatically based on database rankings and column rules. You can also manually override the rules. And, there are features in Reference Rows to summarize information provided by different databases.

Database Ranking



Data is primarily selected for a Reference Row based on the Database Ranking. By default, databases are ranked in the order in which you created the combined chart.

You can 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. The rows in each group will change order to reflect the new ranking. To change the database label in the exported Reference Row report, select a database and click the "Properties" button.

Columns Rules



You can override the database ranking by specifying rules for each column. Right-click in a column and choose Edit Column Rule from the right-mouse menu. You can also change the Column Rules using the Reference Rows Column Rules command.

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.

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. Column Rule - Patent Family

Patent Family

Choose how Reference Rows will select data for this column

Selection Rule: Use database ranking Match column: Use database ranking Earliest Date Latest Date Most Content (characters)

Database Ranking for Highest Number Chemical Abstracts In Highest Number Chemical Abstracts In Section 1 Linear Parts Fulled Parents Fulled Parents Fulled Summarize Al Values EP Patents Fulled In Section 1 Linear Parents Fulled Chemical Abstracts (in Select New Publications

Least Content (characters

- Earliest Date; Latest Date: applies to columns with dates.
- Most Content; Least 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 on page 9).
- Summarize Unique Values: similar to above, but removes (exact) duplicate items.
- Select New Publications: builds a list of publications which are new to each group. Learn more at: New Publications column tips page.

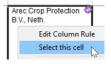


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More features of Reference Rows

Select this Cell (Override the Ranking and Rules)

To select a specific value, overriding the ranking and rules, select the cell you prefer, bring up the right-click pop-up menu, and choose **Select this cell**. A purple check mark will indicate a manually selected cell. To undo the selection, select the cell again. You can also manually edit the text in cells in the Selection View.



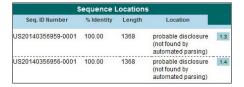
Hide and Rearrange Reference Rows

Use the **Hide Reference Rows** command on the right-mouse menu to hide all the rows in a Reference Row. You can also hide and move Reference Rows, and make them visible again, with the new **View** | **Reference Rows panel**. You cannot currently hide single rows in a Reference Row.

Creating a summary subtable

Two 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:

 Choose Tools | Create Subtable from Columns and move the "Seq ID Number", "% Identity", "Length" and "Location" 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.



Change the rule for this column to "Summarize all Values." A blue symbol will appear to indicate this rule. When the report is exported, the summary subtable (like the one above) will be created.

See the recipe "Summarizing Sequence Locations in a Patent Family" in the <u>Cookbook of Reports & Visualizations</u> for more details.

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.

After you have created database rankings and rules for your chart, select the menu option Reference Rows | Save Rules Template. Use Reference Rows | Apply Rules Template to apply a rules template to your chart.

Saving your Reference Rows chart

Use File | Save to save the Reference Rows chart as a .chrr file, so you can later re-open it in Reference Rows with all of your rules, edits, and selections saved. Use one of the export options (see page 12) to distribute your Reference Rows report.

You can also open the .chrr file in BizInt Smart Charts for Patents. The rows will be in the sorted order but no Reference Rows features will be saved.

Updating reports

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

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

PatBase: PatBase - Mousetraps (updated Oct 07)				
	Title	Row Status	Abstract	
3	PIEGE A SOURIS; Mousetrap has drum with two open ends two heightened inner walls at open ends and adhesive layer applied on inner wall of drum	Added	Source: GB2406257A1 A mouse trap includes a hollow barrel 1 having two open ends. The barrel has two raised inner walls 11 afte two open and an adhesive surface 2 applied on the interior wall of the barrel 1 between the two raised inner walls 11. The inner diameter of each raised inner wall 11 is smaller than the inner diameter of the adhesive surface 2 (CONT1).	
4	Humane animal trap	Unchanged	Source: US2004020103AA An animal trap we do provide Which has an enclosure and in which inside A pivoting member is privatelly put Which plyots down under an animal's foot (CONT)	
5	Mausefalle; Mousetrap for use in garden has catch container designed as bottle and incitiding pivot that is twistably supported on support p	Updated	Source DE102004052292AT The mousetrap had a catch container (1) designed as a bottle and having a laterally diametrical phot (6) in its longitudinal area. The container sweets from a horzontal position to a perpendicular position under the weight of an intruded mouse such that slip opening lies over the mouse. The pivot is wistably supported on a support plate of a supportack ICONTT	

Distributing reports

You have many options for distributing your BizInt Smart Charts report, including exports to popular formats like Word, Excel, and HTML; BizInt Smart Charts Viewer; and printing.

BizInt Smart Charts Viewer

BizInt Smart Charts Viewer is an option for distributing reports to end-users who want customizing, annotating, and exporting capabilities beyond those provided by Word, Excel or other exports. With BizInt Smart Charts Viewer, clients can open .chp files and use all standard BizInt Smart Charts features except: importing, combining, updating, identify common patent family, and Reference Rows.

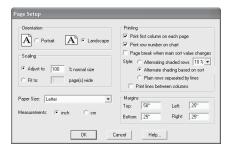


BizInt Smart Charts Viewer is offered at no charge to all BizInt Smart Charts customers. To learn more or to download the Viewer: BizInt Smart Charts Viewer

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.



VantagePoint - Smart Charts Edition (VP-SCE)

VantagePoint - Smart Charts Edition (VP-SCE) provides tools for data cleanup, filtering and visualization.



Use **Export | VantagePoint - Smart Charts Edition** to send visible columns from BizInt Smart Charts for Patents or Reference Rows to VP-SCE for further processing. Cleaned up and filtered data can then be returned to BizInt Smart Charts as new columns or can be used to create visualizations.

To learn more: VantagePoint - Smart Charts Edition (VP-SCE)

Exporting reports

To export your report, use File | Export and choose the appropriate Export Format.

Recommended export formats

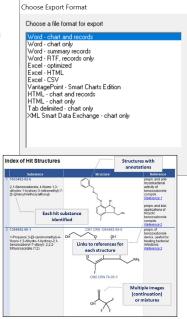
- Word (chart and records, chart only): creates an HTML file
 with the chart (and optionally the records and images) which
 is opened in Microsoft Word. This format is good for reports
 which will be distributed by email.
- Word Summary Records (records only): creates an HTML file for Word with records displaying fields based on those displayed in your chart, including full claims, sequence alignments, and hit structures.

For a Structure-oriented Index of Hit Structures, on the Summary Record Export Options panel, select Include Index of Hit Structures.

To include **hit structures for each record**, on the **Summary Record Export Options** panel, select **Include Hit Structures**.

Learn more: Working With Hit Structures at bizint.com/tips

- Excel optimized (chart only): creates an HTML file which preserves most formatting while creating only one row in Excel for each BizInt Smart Charts row. You can also export in .CSV format.
- HTML (chart and records, chart only): creates an HTML file which can be viewed in a browser.



Export options

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

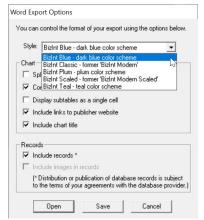
Under "Style", you can select a stylesheet, for both Smart Charts and Reference Rows exports.

Under "Chart" is an option to include a link to the full record on the publisher website; "Link" will appear under the row number in Word and HTML exports.

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

Learn more at: Exporting reports with images, including how to embed images in your exported Word report before distributing it to colleagues.

Choose **Open** to open your file directly, or **Save** to save the export before opening it.



Exporting your Reference Rows report



Select the Export icon on the toolbar or use **File | Export** to view and distribute your Reference Rows reports via one of the supported formats (HTML, Word, Excel, XML Smart Data Exchange Format, and VantagePoint XML.)

Each set of related records is shown as a single row, with the selected (checked) cells displayed for each Reference Row. You can control the display of database attributions (including not displaying them) using Reference Rows | Show cell sources.

Export Options in Reference Rows:

 HTML/Word exports: You can choose to include links to records in both the Database and first column. Links to records on the publisher website are displayed as "link" in the Database column (see right).

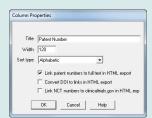


Excel exports: Style sheets are now available for Excel exports. You can choose to display the
links to records on the publisher website in separate columns. Excel can only display one link
in a cell, so multiple links in subtables will always be for the first link. You can choose to not
display the chart title.

Creating links to full patents and other publications

When exporting to HTML, Word, and Excel):

- 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.
- Full text patents: Under Options | Full-text patent links select
 which patent host you wish to use for each supported
 authority. Some hosts (e.g. PatentOrder) require you to
 configure the links using the Configure button.
- 3. **DOI numbers**: use DOI.org to resolve links, or use **Options** | **DOI** links... to enter the base URL for your own link resolver.
- 4. NCT numbers: go to the record on Clinical Trials.gov.







BizInt Solutions, Inc.

1.714.289.1000

www.bizint.com

For more info: www.bizint.com/tips

QUESTIONS OR SUGGESTIONS?

Please contact us at:

support@bizint.com

\$\infty\$ 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.