BizInt Smart Charts

Viewer

Mini Guide

What is BizInt Smart Charts Viewer?

BizInt Smart Charts Viewer is Windows software for opening, customizing, printing and exporting files created with:

- **BizInt Smart Charts Drug Development Suite** (.cht and .chc files)
- **BizInt Smart Charts for Patents** (.chp files)
- **BizInt Smart Charts Lite** (formerly Web Charts) Citeline Edition or Adis Insight Edition (.tct or .wct files)

With BizInt Smart Charts Viewer, you can open these files, view backing records and images, change visible columns, hide and move rows, sort, add your own columns, edit data, apply chart templates, specify links, print, and export to other applications for report distribution.

BizInt Smart Charts Viewer provides the same features as other BizInt Smart Charts software, with these exceptions:

- importing search results and report creation (File|New, File|Import)
- combining & updating reports (File|Combine, File|Update)
- tools for identifying common patent families, drug names, and trial IDs
- BizInt Smart Charts Reference Rows utility.

▶ Version 5 of BizInt Smart Charts Viewer is compatible with Windows 7, Windows 8, and Windows 10.
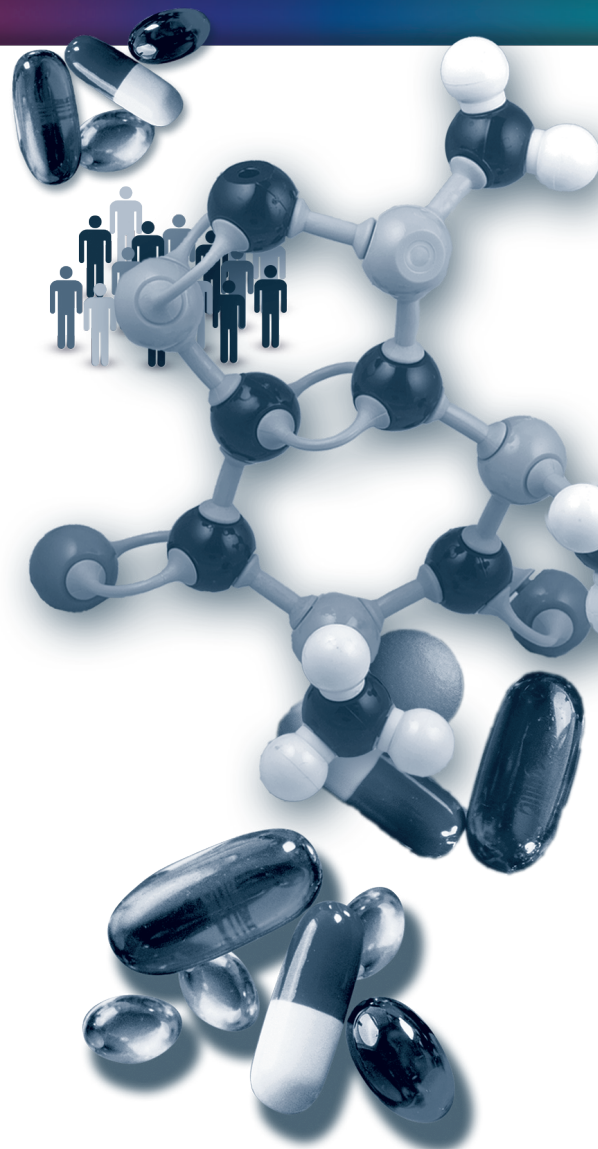
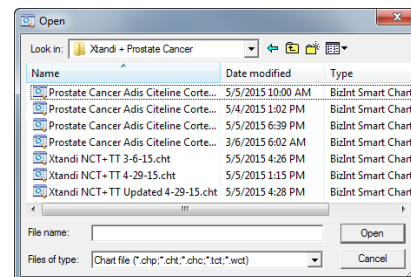## LOOK INSIDE
to see how you can…

Opening chart files

BizInt Smart Charts Viewer can open chart files created with supported BizInt Smart Charts applications (see page 1.)

Opening your chart file

Select **File | Open** from the menu bar.

You can open these file types: .chp, .cht, .chc, .tct and .wct.

Viewing charts, records and images

The chart (table) in BizInt Smart Charts combines 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 or Drug Development 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 3-4.) When you open the chart file, you may see a subset of columns (fields) and rows (records.)
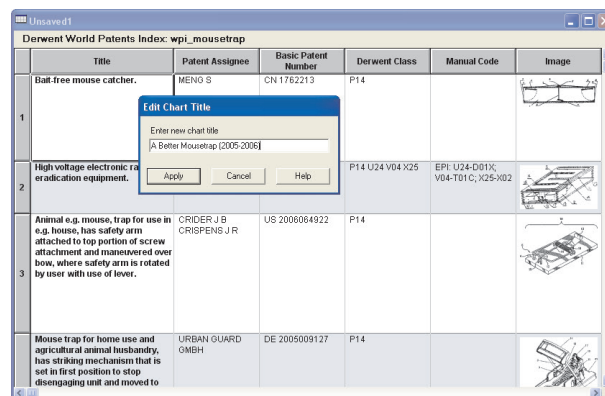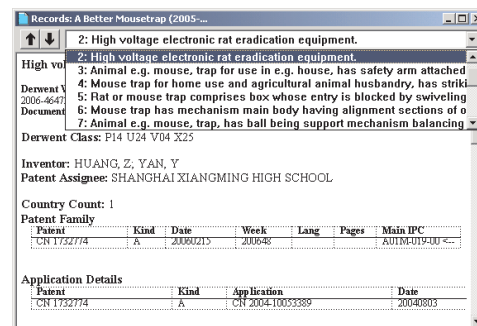
Saving and titling your report

Use **File | Save** or **File | Save As...** to save your report.
Note: Export your report if you want to view it in other applications (see page 5).

You can change the title by double-clicking on the title or using **View | Title**.

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 have the option to view the related record on the publisher 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.
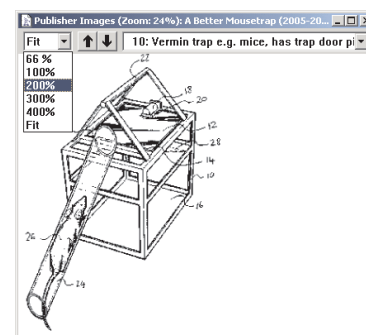
About truncation

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. Truncation behavior can only be modified when the chart is created, but you can see the full content of the field by viewing the record. You can also copy and paste more information into the cell.

Customizing your report

Hiding and Moving Rows

To hide rows, use **Edit | Hide Rows** 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 Rows** 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.
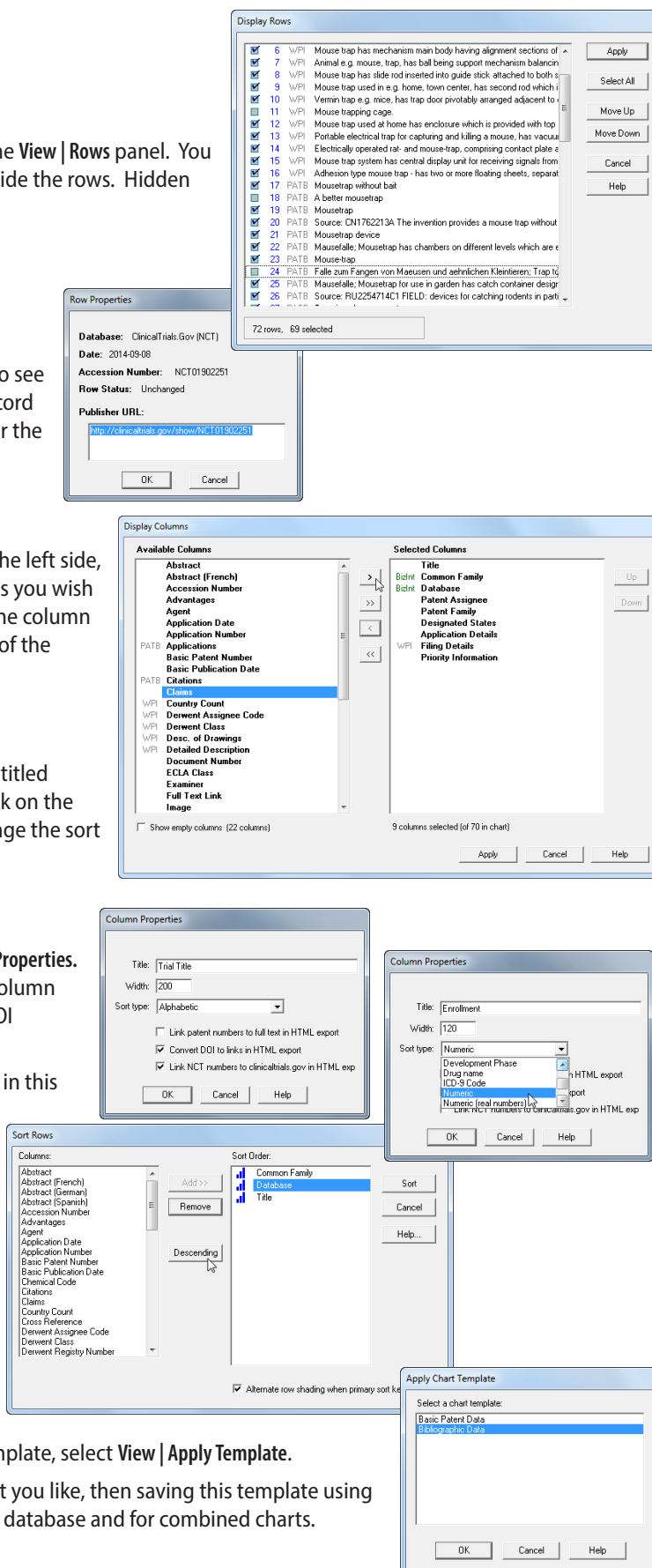
Editing and Highlighting Text

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 **Tools | Statistics** and select a column. Statistics will be saved in a .csv file and can be analyzed in Excel.
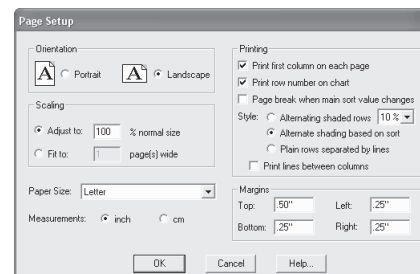
Printing reports

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.

Creating publication numbers to links in exported reports

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

- **patent publication numbers**: patent numbers from supported authorities can go to a variety of public and commercial patent sites.
- **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.

Note that these "full-text links" are different from both the links to records on publisher websites which are associated with each row in the chart and the links from titles to records created by BizInt Smart Charts.

Creating links to full-text patents

1. Under **Options | Full Text Patent Links** select which patent host you wish to use for each supported authority (US, WO, EP, GB, FR, CN). Some hosts (e.g. PatentOrder) require you to configure the links using the Configure button.

2. For each desired column in your chart, check the "Link patent numbers..." option under **View | Column Properties**. This choice can be saved in a chart template.

Creating links from DOI numbers

1. Under **Options | DOI LInks...** enter the base URL for your DOI links.

2. For the column(s) in your chart with DOI numbers, check the "Convert DOI to links..." option under **View | Column Properties**. This choice can be saved in a chart template.
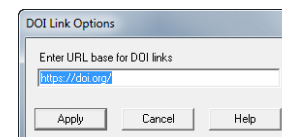
Distributing reports

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. *More information can be found at bizint.com/tips.*
- **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. You can also export in .CSV format for analysis in Excel.
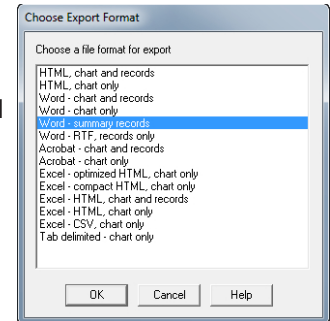
HTML Export Options

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.
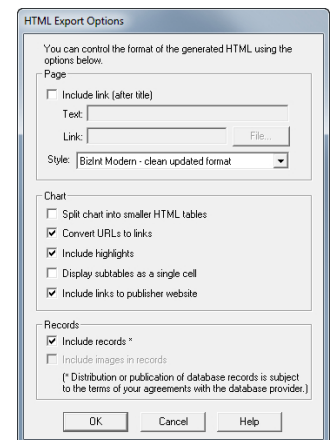
Distributing reports with images

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

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