Customer Service

Thomson Innovation Assistance
If you have general, account, or technical questions about Thomson Innovation, visit ip-science.thomsonreuters.com/support for a listing of support contacts and business hours.

Reference Materials
To browse and download free Thomson Innovation reference materials or access online Help, visit thomsoninnovation.com.

About This Guide
In this guide, the graphics and step-by-step instructions are based on using Thomson Innovation. Because of the evolving nature of this technology, there may be changes to interfaces and functionality that are not reflected in this documentation.
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</tr>
</tbody>
</table>
1 Getting Started

Thomson Innovation provides comprehensive international patent, business, news, and scientific literature coverage and analysis tools.

Signing On to Thomson Innovation
Complete these steps to sign on to Thomson Innovation:

1. Go to www.thomsoninnovation.com. The Thomson Innovation Log In page is displayed (Figure 1-1).

   ![Figure 1-1. Thomson Innovation Log In page](image)

2. Type your email address and password in the appropriate boxes.

3. Click Log In. The Patent Search page is displayed (Figure 1-2).

   ![Figure 1-2. Patent Search page](image)
Signing Off from Thomson Innovation
To sign off from Thomson Innovation, click Logout at the top of any page.

Setting Preferences
You can customize many aspects of your research session using the Preferences pages. For example, you can designate patent authorities, fields, and display options as defaults.

To display the Preferences pages, clickPreferences in the left frame, then click a link under Preferences. For example, click Search to display the Search Preferences page (Figure 1-3). Use the check boxes and lists to specify your preferences, then click Save.

![Figure 1-3. Search Preferences page](image-url)
2  Searching Fundamentals

Creating a Search
To search for patent documents on Thomson Innovation, complete these steps:

1. Click the link next to Review Selected Collections, if desired, to review the collections you want to search. The Collections to Search dialog box is displayed. Select the appropriate collections or click Select All to select all the collections, then click OK. The Patent Search page is redisplayed (Figure 2-1).

2. Click field in the list under Enter Criteria, e.g., Title/Abstract/Claims.

3. Type your query in the box next to the list. To retrieve variations of terms, use the question mark (?) or asterisk (*). Add proximity operators, i.e., adj, near, or same, to specify the distance between terms in your retrieved documents. For example, to retrieve patents relating to toothbrushes, type (toothbrush* or (t??th near4 brush*)), shown outlined in Figure 2-1.
4. Click Search. The Patent Result Set page is displayed (Figure 2-2). To view a patent record, click its publication number.

RESTRICTING YOUR SEARCH
You can use the remaining fields in the Enter Criteria section to restrict your search. Choose a Boolean connector from the second list, then choose a field from the list next to it, and type your terms in the box. Then click Search.

To add a field, click Add Field. To delete a field, click the Delete icon (×) next to the field.

CHOOSING BOOLEAN CONNECTORS
The following chart describes available Boolean connectors:

<table>
<thead>
<tr>
<th>Choose</th>
<th>To search for documents that</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td>contain both terms: coin and vending</td>
</tr>
<tr>
<td>OR</td>
<td>contain either term or both terms: dog or canine</td>
</tr>
<tr>
<td>NOT</td>
<td>exclude terms: aids not hearing</td>
</tr>
</tbody>
</table>

CHOOSING PROXIMITY OPERATORS
To view a list of proximity operators and brief explanations of their function in a search, click Show Operators in the right frame. You can also refer to the following chart:

<table>
<thead>
<tr>
<th>Type</th>
<th>To search for documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>adj</td>
<td>containing terms close to each other and in the same order, e.g., flame adj resistant</td>
</tr>
<tr>
<td>near</td>
<td>containing terms close to each other in any order, e.g., tooth near6 brush</td>
</tr>
<tr>
<td>same</td>
<td>containing terms in the same paragraph, e.g., haptic same phone</td>
</tr>
</tbody>
</table>
USING THE QUESTION MARK
Use the question mark (?) to represent one variable character. You can place the question mark anywhere in a term except at the beginning. For example, to account for differences between American and British English spellings:

<table>
<thead>
<tr>
<th>Type</th>
<th>To retrieve</th>
</tr>
</thead>
<tbody>
<tr>
<td>organi?e</td>
<td>organize</td>
</tr>
<tr>
<td></td>
<td>organise</td>
</tr>
</tbody>
</table>

USING THE UNIVERSAL CHARACTER
Use the asterisk (*) to represent many variable characters. For example:

<table>
<thead>
<tr>
<th>Type</th>
<th>To retrieve</th>
</tr>
</thead>
<tbody>
<tr>
<td>appl*</td>
<td>apply</td>
</tr>
<tr>
<td></td>
<td>applied</td>
</tr>
<tr>
<td></td>
<td>applying</td>
</tr>
<tr>
<td></td>
<td>appliable</td>
</tr>
<tr>
<td></td>
<td>applicable</td>
</tr>
<tr>
<td></td>
<td>applicability</td>
</tr>
<tr>
<td></td>
<td>application</td>
</tr>
</tbody>
</table>

USING THE BROWSE FEATURE
Click Browse next to a field to retrieve additional information about the field. Figure 2-3 shows the fields for which the Browse feature is available.

Figure 2-3. Fields with the Browse feature

Note: The Browse feature for the Japanese (JP) FI Codes, JP F Terms, Derwent World Patents Index (DWPI) Class, DWPI Manual Codes, and Assignee Code–DWPI fields is only available for subscribers of that content.
For example, to search for the International Patent Classification (IPC) code for a toothbrush, complete these steps:

1. **Click Browse next to the Any IPC field.** The International Patent Classification (IPC) Searching dialog box is displayed (Figure 2-4).

   ![Figure 2-4. International Patent Classification dialog box](image)

2. **Type toothbrush* in the Search for Keywords box.**
3. **Click Go.**
4. **A list of IPC codes for toothbrushes is displayed.**
5. **Select the check boxes for the codes you want to add and click Save.**
To browse the IPC, click the plus symbols (+) under Browse IPC, then select the check boxes for the codes you want to search and click Save.

Figure 2-5. Browsing codes
Saving a Search

To save a search, complete these steps:

1. At the Patent Result Set page, click Search Query in the Save list, shown outlined in Figure 2-6. The Save Search and Create Alert dialog box is displayed (Figure 2-7).

   ![Figure 2-6. Save list](image1)

   ![Figure 2-7. Save Search and Create Alert dialog box](image2)

2. Type a name for the search in the Name box, e.g. Toothbrush.
3. Type a description for the search in the Description box, if desired.
4. Click Save.
**Viewing a Saved Search**

To view a saved search, click Saved Work in the left frame, then click Searches and Alerts. The Searches and Alerts page is displayed with a list of saved searches in the right frame (Figure 2-8).

![Figure 2-8. Searches and Alerts page](image)

To run the search again, click the Run icon (\(\text{\(\text{\textbullet}\)}\)) in the Options column, shown outlined in Figure 2-8.
Searching for Assignees

You can easily search for assignees on Thomson Innovation to view

- all patents in your company’s portfolio
- a competitor’s patents
- the patents owned by an entity, including companies it has merged with or acquired

Creating an Assignee Search

To search for an assignee, use the following fields with the OR connector:

- Assignee/Applicant: To search for the company name, variations of that name, and any known subsidiaries, e.g., Netscape or AOL or America Online.
- Assignee/Applicant via Corporate Tree: To see how an assignee name fits into a corporate hierarchy, taking into account mergers and acquisitions. Note that this field can be used for the US and EP grants and EP and PCT (WIPO) applications only. Use the Browse feature to access the corporate tree. For further information, see “Accessing the Corporate Tree” on page 10.
- Attorney-Agent/Correspondent: To search for the person or law firm acting on behalf of the patent applicant. You can use this field to search for the company name, its subsidiaries, or its address, or the name of a person affiliated with the company. You can also use this field to search for unassigned U.S. applications.
- US Reassignment Assignee-Latest: To find the recipient of the transfer of ownership for a patent when the reassignment is reported to the U.S. Patent and Trademark Office (USPTO). You can use this field to search for a company name or its subsidiaries.
- Assignee Code-DWPI (for Derwent subscribers only): To use standard codes for companies and their subsidiaries; also to account for spelling errors. Use the Browse feature to look up the appropriate code.

Figure 3-1 shows suggested fields for the search.

Accessing the Corporate Tree

To access corporate tree information for a company, complete these steps:

1. Click Browse next to the Assignee/Applicant field. The Corporate Tree Searching dialog box is displayed (Figure 3-2).
2. Type the name of the company in the box, e.g., adobe.
3. Click Submit. A list of company names is displayed.
4. Click the plus symbol next to a company name to view the corporate tree.

![Corporate Tree Searching dialog box](image1.png)

Figure 3-2. Corporate Tree Searching dialog box

5. Select the check boxes next to the companies for which you want to search. To search a parent company and its subsidiaries, select check box next to the parent company. All subsidiaries are automatically selected.

6. Click Save. The company name and related codes are displayed in the Assignee/Applicant box (Figure 3-3).

![Assignee search example](image2.png)

Figure 3-3. Assignee search example
Using a Template

You can save commonly used fields or terms as a search template. To save a search as a template, complete these steps:

1. Select the fields you want to save in the template.
2. Click Save as Template in the Save list. The Patent Search Template Properties dialog box is displayed (Figure 3-4).

![Figure 3-4. Patent Search Template Properties dialog box](image)

3. Type a name for the search, e.g., Assignee search–Template, in the Name box.
4. Click Save. The template is saved under Saved Work–Searches and Alerts.

To access a saved template, click Show Template in the Enter Criteria section of a search page and use the Browse feature to find a template.
4 Retrieving Patents Using Publication Numbers

In Thomson Innovation, a Publication Number refers to both published application numbers or granted patent numbers. Thomson Innovation provides several methods to retrieve patent documents using its Publication Number. To search for granted patents or published applications, you can use the Quick Search feature or the Publication Number tab on the Patent Search page.

Using the Quick Search Feature
To quickly retrieve documents using one or more publication numbers, complete these steps:

1. At the top of any page, choose Publication Numbers from the Quick Search list (Figure 4-1).

2. Type the publication numbers with the appropriate country codes in the box.

3. Click Go. The Patent Result Set page is displayed. To view the patent record, click the publication number.

Search Examples

<table>
<thead>
<tr>
<th>Type</th>
<th>To retrieve</th>
</tr>
</thead>
<tbody>
<tr>
<td>ep1876420</td>
<td>all stage filings</td>
</tr>
<tr>
<td>ep1876420A2</td>
<td>a specific filing</td>
</tr>
</tbody>
</table>

Using the Patent Search Page
To search for multiple patents or published applications, complete these steps:

1. Click Patent Search under Search in the left frame, if necessary, to display the Patent Search page.

2. Click the Publication Number tab at the top of the Patent Search page. The Publication Number page is displayed (Figure 4-2).
3. Select an output type, e.g., Result Set, in the Review Output Type section.  
   **Note** If you select Document Copies or File Histories, you can include a maximum of 500 publication numbers in one search.

4. Enter numbers in the Enter Numbers box using one of the following methods:
   - Type the numbers, separated by spaces or commas, in the box.
   - Copy the numbers from a document and paste them in the box. If you paste numbers separated by tabs or paragraph markers, Thomson Innovation will reformat the list for you.
   - Import numbers from a text (.txt) file by clicking Browse/Upload to display the Choose File dialog box. Select the .txt file, then click Open.  
     **Note** You can import up to 30,000 publication numbers from a .txt file if you select the Result Set output type.

5. Click Show Specialized Search to restrict your search, if desired.

6. After making your selections, click Search. The Patent Result Set page is displayed. To view a patent record, click its publication number.

**EDITING OR REMOVING INVALID NUMBERS**
Thomson Innovation automatically validates the publication numbers. If a number is invalid, the Publication Number Discrepancies dialog box is displayed after you click Search at the Patent Search page (Figure 4-3). Edit or remove the disputed numbers, then click Search in the dialog box.

**Note** You can save removed numbers in a .txt file by clicking Remove all disputed numbers from query.

![Publication Number Discrepancies dialog box](image-url)
Every patent has a classification code that groups it with similar inventions. Patent classifications, i.e., IPC codes, US classes, or F1 terms, are applied by patent examiners who are also experts within their technical field. Classifications help to describe the content of the document whether or not those actual words are used in the text of the original document. They can also help you find significant, related art.

Using IPC Codes

IPC codes categorize patents by general subjects. IPC codes are divided into sections A through H, which are subdivided into classes, subclasses, groups, and subgroups. The codes are hierarchical; therefore, the longer the code, the more specific the concept. The following is an example of a hierarchical code:

A61—Medical or Veterinary Science
A61F—Medical devices implantable into the body A61F0002—
  Filters or Devices implantable into blood vessels
A61F000282—Stents

To retrieve patents using an IPC code, at the Patent Search page, click the Any IPC, IPC-Current, or IPC-Original field in the list under Enter Criteria (Figure 5-1).

![Figure 5-1. Any IPC field](image)

You can use one of the following to specify a code:

- Type a code in the box using its original format, e.g., A61F 2/82, or with zero filling, e.g., A61F000282, and click Search.
- Click Browse to find search the codes by keywords or browse through the hierarchy. For further information, see “Using the Browse Feature” on page 5.

For further information on the IPC system, go to [www.wipo.int/classifications/ipc/en/](http://www.wipo.int/classifications/ipc/en/).

Using Cooperative Patent Classification Codes

The Cooperative Patent Classification System (CPC), has been developed by the European Patent Office and the US patent and Trademark Office as a joint set of codes for classifying and searching the European and US Patent systems. It is built on the old European Classification system (ECLA), and is constantly being revised and updated. The ECLA codes were built on top of the IPC system, with more granularity for some technology areas. So the CPC codes in turn shares similarities with IPC. Although CPC is applied to all authorities, it is not present in all records on Thomson Innovation. The general goal of the EPO and USPTO in applying CPC is to ensure that at least one member of each patent family has a CPC classification. CPC codes are divided into sections A through H, which are subdivided into classes, subclasses, groups, and subgroups. There are approximately 250,000 classification entries in CPC.

The following describes the code C07K 14/175:

<table>
<thead>
<tr>
<th>Section</th>
<th>Class</th>
<th>Subclass</th>
<th>Main group</th>
<th>Subgroup</th>
</tr>
</thead>
<tbody>
<tr>
<td>C</td>
<td>07</td>
<td>K</td>
<td>14</td>
<td>175</td>
</tr>
</tbody>
</table>

To retrieve patents using CPC codes, you can use one of the following methods:
At the Patent Search page, click the CPC field in the list under Enter Criteria, then type a code in the box using its original format, e.g., C07K 14/175, or with zero filling, e.g., C07K0014175, and click Search (Figure 5-2).

![Figure 5-2. ECLA field](image)

At the Patent Search page, click the Expert Search tab, type your search terms under Enter Query, and click Search (Figure 5-3). You can use the Standard Fields list to identify fields.

![Figure 5-3. Expert Search page](image)

**NOTE ON CPC VS: ECLA AND US CLASSIFICATION**
The EPO started applying CPC codes and stopped using ECLA on January 1st, 2012. The USPTO will be applying CPC to some documents along with US classification for a transition period until 2015 where they will stop using US classes completely. CPC is included in Thomson Innovation from February 16, 2013, and will initially only have CPC codes for publications classified on or after January 1st 2013. So for comprehensive retrieval CPC should be used in conjunction with ECLA or US Classification. Later in 2013 the backfiles will be reclassified at which point you can use CPC only.

For further information information on CPC, go to [www.cooperativepatentclassification.org](http://www.cooperativepatentclassification.org).

**Using Derwent Classification and Manual Codes**
The Derwent (DWPI) collection categorizes patent documents using two classification systems:

- **DWPI Class**—a broad, simple system using 3-digit codes
- **DWPI Manual Codes**—a detailed system, based on DWPI Classes, using 7- or 8-digit codes

DWPI Manual Codes provide more detailed indexing and searching of DWPI. Approximately 22,000 codes are available, with patent coverage of 47 patenting authorizes worldwide, all available in English. The DWPI Manual Code system is revised annually to incorporate new codes suggested by customers and the DWPI editorial team.

**Note** You must subscribe to Derwent content to access to the Derwent Coding system.
Both DWPI Class and DWPI Manual Codes cover all technologies within 20 subject areas, identified by sections A through X, and are grouped into three broad categories: Chemistry, Engineering, and Electronics.

The sections cover the following technology areas:

- **Chemical CPI Sections A–M**
- **Engineering GMPI Sections P–Q**
- **Electrical and Electronic EPI Sections S–X**

The following is an example of a DWPI code:

**T04** Computer peripheral equipment (Class)

**T04-F** Manual input arrangements for computers and computer controlled equipment (Manual Code First Level)

**T04-F02** Analogue (Manual Code Second Level)

**T04-F02A** Based on absolute position (Manual Code Third Level)

**T04-F02A2** Touch screen (Manual Code Fourth Level)

To retrieve patents using a DWPI code, at the Patent Search page, click the DWPI Class or DWPI Manual Codes field in the list under Enter Criteria (Figure 5-4), then type a code in the box, e.g., T04-F02A2, and click Search. You can also use the Browse feature. For further information, see "Using the Browse Feature" on page 5.

**Using F Terms and FI Codes**

The Japanese Patent Office classifies patents with F Terms and FI codes. F Terms index patents from multiple viewpoints, e.g., purpose of the invention; effect of the invention; components and materials; structure, and use of the invention. FI Codes describe the main inventive feature.
To retrieve Japanese patents, at the Patent Search page, click the JP FI Codes or JP F Terms field in the list under Enter Criteria (Figure 5-5).

If you use the JP F Terms Field, click Browse to display the F Term Searching dialog box, where you can type your search terms and browse the results using the plus symbols.
6 Downloading Patents

You can quickly open the full text of a patent, as it was published by the patent office, in PDF. You can also use the Download feature to download multiple patents or file histories.

Downloading a Single Patent in PDF
To download a single patent in PDF, simply click the PDF icon ( ) next to the title of a patent in a result set (Figure 6-1) or at the top of patent record (Figure 6-2).

![Figure 6-1. PDF icon in result set](image)

**Note** If you do not see PDF icons next to the titles in a result set, click Display and Sort Options at the top of the Patent Result Set page to display the Display and Sort Options dialog box. Select the Patent copy check box under Display Icons and click OK.

![Figure 6-2. PDF icon in patent record](image)
Downloading Multiple Patents

To download multiple patents, complete these steps:

1. At the Patent Result Set page, select the check boxes next to the patents you want to download.

2. Click Patent Documents in the Download list, shown outlined in Figure 6-3. The Document Delivery dialog box is displayed (Figure 6-4)

3. Select the check boxes next to the patents you want to deliver.

4. Click Full Document or Front Page in the Select Type list, shown outlined in Figure 6-4. Your selection is displayed in the Type column.

5. Click Bulk Order (Zip) in the Select Delivery and Format list, shown outlined in Figure 6-5. Your selection is displayed in the Format column.

6. Click Submit Order. The Order Confirmation dialog box is displayed.

Figure 6-3. Download list

Figure 6-4. Document Delivery dialog box

Figure 6-5. Select Delivery and Format list
7. Click OK. The Order Status page is displayed (Figure 6-6).

![Order Status page](image)

Figure 6-6. Order Status page

8. In the Order Item Details section, click Available Now in the Availability column to open or save the ZIP file.

**Note** Click the Refresh icon (-refresh icon-) to refresh the page with current information.
7 Using the Alert Service

The Alert service on Thomson Innovation automatically runs your searches on a regular basis and notifies you when new records are available. You can create alerts for patent, literature, and select business searches.

Creating an Alert
To create an alert to retrieve new publications on the use of complimentary metal oxide semiconductors (CMOS) in cameras, complete these steps:

1. Click Patent Search under Search in the left frame, if necessary, to display the Patent Search page.
2. Click Edit Collections on the toolbar, shown outlined in Figure 7-1. The Collections to Search page is displayed (Figure 7-2).
3. Select the check boxes next to the collections you want to search.
4. Click OK.
5. Under Enter Criteria, click Title/Abstract/Claims in the first list.
6. Type (cmos or complimentary metal oxide semiconduct*) near10 (lens or optic* or camera*) in the box.
7. Click Search. The Patent Result Set page is displayed.
8. Choose Create Alert for this Search from the Alert list, shown outlined in Figure 7-3. The Save Search and Create Alert dialog box is displayed (Figure 7-4).

![Alert list](image)

![Save Search and Create Alert dialog box](image)

9. By default, the Properties tab is displayed. On the Properties tab, you can
   - type a name for the alert in the Name box, e.g., CMOS in cameras.
   - type a description in the Description box, if desired.
   - specify other recipients of the alert.

10. Click the Run Options tab (Figure 7-5).

![Run Options tab](image)

11. In the Alert Run Options section, specify
   - whether the alert is active or inactive
   - how frequently you want the search to be run
   - an expiration date if you do not want the search to run indefinitely
• whether you want to save only the latest result or all accumulated results in the Work Files folder
• whether you want to save a copy of the alert result in a personal or public folder

12. Click the Delivery and Content Options tab (Figure 7-6).

13. In this section, you can specify
   • the format of the alert
   • the information you want included in the alert
   • the fields you want displayed in the alert
   • whether you want to include links to record views, a notification if no result is retrieved when the search is run, and highlighted search terms

14. When you finish making your selections, click Save.
Managing and Editing an Alert
To manage and edit an alert, click Saved Work in the left frame, then click Searches and Alerts. The Searches and Alerts page is displayed with a list of the alerts and searches you have saved in the right frame (Figure 7-7). Click the Edit this saved work item icon (📝) to change the alert options.

Figure 7-7. Searches and Alerts page
8 Using the Watched Records Feature

You can have Thomson Innovation watch specific patents and notify you about changes for the following:

- **INPADOC family**—when a new patent is added to the database that shares at least one common priority with this document; can include continuations and divisions as well as patents for the same invention
- **Legal status**—when changes to the legal status field are made on a record that is recorded with INPADOC; can include documents moving into a national phase, payment of fees, patents lapsing, applications for SPCs, transfer of ownership (in some cases), reexamination requests (US documents only), or patents that are withdrawn (US and EP only)
- **New publication stage**—when an application becomes a granted patent; when an international search report is issued; when re-examined documents and corrected or amended documents are issued
- **Citation changes**—when a document is added that cites the watched record (useful for monitoring citations to your patents)
- **Reassignments**—when the USPTO has been notified of a reassignment; can include changes to address, names, ownership, and security interest
- **DWPI family** (for subscribers only)—when another patent has been added that shares identical priority data with the watched record or has been matched to it by the non-convention equivalents process; all patents should be for the same invention with no continuations or divisions

**Note**

- Watched Records are also available for Literature records than can be tracked for citation changes.
- DWPI family information is available only to subscribers of that content.

**Creating a Watched Record from a Patent Result Set**

To create a watched record from a patent result set, complete these steps:

1. At the Patent Result Set page, select the check boxes next to the patents you want to watch.
2. Click Watch Records in the Alerts list, shown outlined in Figure 8-1. The Watch Records dialog box is displayed (Figure 8-2).

---

Figure 8-1. Alerts list
3. Use the check boxes to specify the properties and permissions for your watched documents.

4. Click Save.

Creating a Watched Record from a Patent Record

To create a watched record from a patent record, click Watch Record at the top of the record (Figure 8-3) to display the Watch Records dialog box, then follow steps 3 and 4 above.
Viewing Watched Records
To view a list of your watched records, click Saved Work in the left frame, then click Watched Records. The Watched Record page is displayed with a list of your watched records in the right frame (Figure 8-4).

![Figure 8-4. Watched Records page](image)

Removing a Watched Record
To removed a watched record at the Watched Records page, select the check box next to the record you want removed. Then click Remove Watched Records in the Manage list, shown outlined in Figure 8-5.

![Figure 8-5. Manage list](image)
The Work Files feature allows you to create repositories of your reviewed work and acts as an online filing cabinet. A work file is a list of selected records that you have saved. You can save some or all of the records in your result set as a work file. You can also add records to an existing work file from the record view.

**Creating a Work File from a Result Set**

To save items from a result set in a work file, complete these steps:

1. In the Save list, click New Work File, shown outlined in Figure 9-1. The Create Work File dialog box is displayed (Figure 9-2).

   ```plaintext
   Figure 9-1. Save list
   ```

   ```plaintext
   Figure 9-2. Create Work File dialog box
   ```

2. Type a name for the work file in the Name box.
3. Type a description in the Description box, if desired.
4. Select the desired check boxes in the Additional Save and Share Options section.
5. Click Save.
Adding a Record to a Work File from the Record View

To add the link for a single record to a work file, complete these steps:

1. From the Record View, click Add to Work File at the top of the record, shown outlined in Figure 9-3. The Add to Existing Work File dialog box is displayed.

![Figure 9-3. Patent record](image)

2. Click Browse. The Add to Existing Work File dialog box is redisplayed.

3. Click the plus symbol next to Work Files to view a list of work files (Figure 9-4).

![Figure 9-4. Add to Existing Work File dialog box](image)

4. Select the work file in which you want to save the record.

5. Click OK.

6. Click Save in the Add to Existing Work File dialog box.
Viewing Work Files

To view your work files, click Saved Work in the left frame, then click Work Files. The Work Files page is displayed with a list of your work files in the right frame (Figure 9-5).

Figure 9-5. Work Files page
10 Saving and Sharing Your Work

Accessing Saved Work

The following types of work are saved in default folders on Thomson Innovation:

• Searches and alerts
• Search histories
• Watched records
• Work files
• Charts
• Work files
• Export templates (Professional-level and Analyst-level subscriptions only)
• Citation maps (Professional-level and Analyst-level subscriptions only)
• ThemeScape maps (Analyst-level subscription only)
• Text clusters (Analyst-level subscription only)

To access your saved work, click Saved Work in the left frame, then click the link for the folder work you want to view (Figure 10-1). A list of all folders and the saved work in the folder you selected are displayed in the right frame.

![Figure 10-1: Saved Work section](image)

**Note** You cannot create a new default folder or rename, copy, move, or delete default folders.

Managing and Sharing Your Work

You can use the inbox or personal and public folders to manage and share your work with others.

**Note** When you share items via the inbox or copy a file to a personal or public folder, you create a reference, or shortcut, to the original file. When you edit or annotate a reference, you also edit and annotate the original file. When you delete a reference, you delete only that reference, not the original file. When you delete the original file, you also delete all of its references.
You can use the inbox and folders for the following purposes:

<table>
<thead>
<tr>
<th>Inbox</th>
<th>to share your work with selected individuals or groups within your company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public folder</td>
<td>to share your work with everyone or selected individuals or groups within your company; you can create subfolders and assign permissions for access to individual items or folders</td>
</tr>
<tr>
<td>Personal folder</td>
<td>to organize your work.</td>
</tr>
</tbody>
</table>

**SHARING ITEMS VIA THE INBOX**
To share items in a result set via the inbox, complete these steps:

1. At a result set page, select the check boxes next to the items you want to share.
2. In the Save list, click New Work File. The Create Work File dialog box is displayed.
3. Type a name for the work file in the Name box.
4. Under Additional Save and Share Options, select the Share via the Saved Work Inbox check box.
5. Click Select Recipients. The Select Recipients dialog box is displayed.
6. Select the individuals or groups with whom you want to share the items.
7. Click Save. The items are displayed in the recipient’s inbox.

**COPYING ITEMS TO A PUBLIC OR PERSONAL FOLDER**
Use the Manage list on a saved work page to copy a saved item to a public or personal folder. For example, to save search to a personal folder, complete these steps:

1. Click Searches and Alerts under Saved Work in the left frame. The Searches and Alerts page is displayed in the right frame.
2. Select the check box next to the item you want to copy to a folder.
3. Click Copy from the Manage list, shown outlined in Figure 10-2. The Make Copy of Saved Work Item dialog box is displayed (Figure 10-3).

![Figure 10-2. Manage list](image)

![Figure 10-3. Make Copy of Saved Work Item dialog box](image)
4. Select Personal Folders. If desired, click New Folder to create a subfolder or click the plus symbol next to Personal Folders to select a subfolder you created previously.

5. Click OK. A message indicating that your item was copied successfully is displayed.

6. Click OK to close the message.

VIEWING ITEMS IN A PERSONAL OR PUBLIC FOLDER
To view items in a folder, click the link for a folder under Saved Work in the left frame. For example, to view an item in a personal folder, complete these steps:

1. Click Personal Folders under Saved Work in the left frame. The Personal Folders page is displayed in the right frame.

2. If your item is in a subfolder, click the plus symbol next to Personal Folders in the center of the page to display a list of subfolders (Figure 10-4).

3. Click the subfolder. Your item is listed in the right frame.

You can create new folders or rename, copy, move, or delete your personal or public folders by using the links above the list of folders, shown outlined in Figure 10-5.
Using the Annotation Tool

You can add annotations and attach files to any saved item. To add an annotation or attachment to an item, complete these steps:

1. Click the Create annotation or attachment for item icon next to the item you want to annotate. The Annotations for [item] dialog box is displayed (Figure 10-6).

![Annotations for CMOS in ca... dialog box](image)

Figure 10-6. Annotations for [item] dialog box

2. Type your text in the Add Annotation box.
3. Click Browse/Upload to attach a file, if desired.
4. Click Save.
5. Click Close. The icon next to the item changes to .

Click to view or edit the annotation.
11 Analyzing Citations

When a patent applicant uses previous patents, the applicant and/or examiner must cite the previous patents, or prior art, in the patent application. Thomson Innovation helps you analyze these citations so you can trace the flow of technology from patent to patent. For example, if your patent is cited in the application of another company, you can determine whether the company:

• is improving your technology
• is extracting a different value from your technology
• is adjusting your technology to fit its needs
• is identifying different solutions to the same problem
• is changing the solution completely so that your solution is no longer relevant
• is infringing on your rights
• may need a license from you

Identifying Highly Cited Patents

You can easily find the most influential patents in any result set by identifying the patents with the highest count of citing patents. This is very useful in technology and portfolio analysis. To analyze the portfolio of an assignee, complete these steps:

1. Enter a search for all citations associated with an assignee. For information on comprehensive assignee searching, see “Searching for Assignees” on page 10. An example of a search for citations for an assignee, e.g., Google Inc., is illustrated in Figure 11-1.
2. Click Search. The Patent Result Set page is displayed. Open the Filters and select ‘Count of Citing Refs-Patents (Figure 11-2).

3. The filter will show the highest counts of citing patents in intervals, allowing you to easily drill down and display the most highly cited patents in the result set (Figure 11-3)
4. After filtering, only the highly cited records in the result set are displayed (Figure 11-4)

5. If you do not see the Count of Citing Refs-Patents field in the result set as above, you can switch it on in the Display and Sort Options, where you can also sort the whole result set by Count of citing patents. (Figure 11-5)
Creating a Citation Report

The fields containing citation information are – like most other fields – available for exporting. There are dedicated predefined reports which includes the citation information. You can create citation reports for any result set by following these steps:

1. On the Result set page, click Exports and Reports in the Download list (Figure 11-6). The Export and Report Options dialog box is displayed (Figure 11-7).

   ![Figure 11-6. Patent Result Set page](image)

   ![Figure 11-7. Export and Report Options dialog box](image)

   2. Choose a file format from the File Format Options list, e.g., Excel 2007 (.xlsx).

   3. In the Available Fields list, click Forward Citation Report, then click the right arrow to add it to the Export Field List box.

      **Note** The Citing Patents, Citing Pat 1st Assignee, and Count of Citing Patents fields are added to the Export Field List box and are helpful for your analysis.

   4. In the Delivery Options section, the name of the file is displayed in the File Name box. Type a different name, if desired.
5. Type an e-mail address in the Share via Email (optional) box, if desired.

6. Clear the check box next to Compress file as .ZIP if you do not want the file delivered to you as a ZIP file.

7. Click Create. The Order Status page is displayed in the right frame (Figure 11-8).

8. Click Available Now in the Availability column. The File Download dialog box is displayed.

9. Click Open or Save to open or save the .zip file.

10. Open the spreadsheet in Excel.

   Note The export is saved for 30 days on Thomson Innovation. To retrieve the report during this time, click My Account in the left frame, then click under Order Status to display the Order Status page.

Creating a Citation Map
Professional and Analyst subscribers can further analyze citation patterns by creating a citation map for any patent or scientific literature article that has backward or forward references. To create a citation map, complete these steps:

1. At the Patent Result Set page, click a patent publication number to display the patent record page.

2. Click Citation Map at the top of the page, shown outlined above. The Citation Mapping Setup for Patent Record: [publication number] dialog box is displayed.

3. Select a display format, direction, and depth for your citation map.

4. Click Create. The Citation Map for Patent Record: [publication number] page is displayed.

To save the citation map in the Citation Maps folder, click Citation Map in the Save list at the top of the page. At the Save Citation Map to Citation Maps Folder dialog box, type a name for citation map in the Name box; select recipients and permissions, if desired; and click Save.