# THOMSON INNOVATION TRAINING MANUAL 2012



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### **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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## 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).

THOMSON INNOVATION	THOMSON REUTERS
FEATURES IN ACTION CUSTOMERS WEBINARS SUPPORT RAINING	BOOKMARK THIS PAGE
	SELECT LANGUAGE: ENGLISH 日本語
LOG INTO THOMSON INNOVATION	NEW TO THOMSON INNOVATION?
	LEARN MORE »
EMAIL: PASSWORD:	
Forgot your password?	WHAT'S NEW ON THOMSON INNOVATION FIND OUT NOW
© 2011 THOMSON REUTERS COPYRIGHT PRIVACY POLICY TERMS OF USE CONTACT US	VISIT IP. THOMSON REUTERS. COM

Figure 1-1. Thomson Innovation Log In page

- 2. Type your email address and password in the appropriate boxes.
- 3. Click Log In. The Patent Search page is displayed (Figure 1-2).

	◆ Patent Search ■ 日本語で表示 Logo
THOMSON INNOVATION	Quick Publication Numbers US5551212 Go ? Tracking: No Active Trail
Welcome Stacy	Patent Search 😗 H
🔍 Search 📥	Fielded Search Publication Number Expert Search
Search All Content  • Patent Search Literature Search	Save V   Create Alert   Edit Collections   Display & Sort Options
Business Search	Review Selected Collections: US Grant, US App, EP Grant, EP App, WO App
Search History	2 Enter Criteria: Show Template Show Template
Marked List	Text Fields (printer AND scanner)
Saved Searches & Alerts	AND Inventor Dale James D
Administration	AND Assignee/Applicant Fanuc Browse
My Account	AND Publication Date From: 2006-01-01 To: YYYY-MM-DD
2 Preferences	Clear All Fields Add Field
Support	Make these my defaults     Search
System Notices: None	
AN CONTRACTOR	Show Query Previewer 😵
THOMSON REUTERS	Copyright 2007-2011 THOMSON REUTERS Privacy   Terms of Use   Feedback   Contact Us   H

Figure 1-2. Patent Search page

### **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, click **Preferences** 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

## **Creating a Search**

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

 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).

	G Patent Search	<b>-</b> 😔	日本語で表示 Logout ›			
THOMSON INNOVATION	Quick Search: Publication Numbers VUS5551212	Go ? Tracking: No Active Trail				
Welcome Stacy	Patent Search		🕐 Help			
🔍 Search 🔶	Fielded Search Publication Number	Expert Search				
Search All Content     • Patent Search       Literature Search     I Create Alert   Edit Collections   Display & Sort Options       1     Review Selected Collections: US Grant, US App, EP Grant, EP App, WO App						
Search History Marked List Saved Searches & Alerts Saved Work Administration	Enter Criteria:     Title/Abstract/Claims     AND Inventor     AND Assignee/Applicant		Show Template S			
My Account System Notices: None	AND     Publication Date       Clear All Fields     Add Field       Make these my defaults	? From: 2006-01-01 To: YYYY-MM-L	Search			
THOMSON REUTERS	Copyright 2007-2011 THOMSON REUTERS	Privacy   Terms of	Use   Feedback   Contact Us   Help			



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



Figure 2-2. Patent Result Set page

#### **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:

Choose	To search for documents that	
AND	contain both terms: coin and vending	
OR	contain either term or both terms: dog or canine	
NOT	exclude terms: aids not hearing	

#### **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:

Туре	To search for documents	
adj	containing terms close to each other and in the same order, e.g., flame adj resistant	
near	containing terms close to each other in any order, e.g., tooth near6 brush	
same	containing terms in the same paragraph, e.g., haptic same phone	

#### 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

Туре	To retrieve
organi?e	organize
	organise

#### USING THE UNIVERSAL CHARACTER

Use the asterisk (\*) to represent many variable characters. For example,

Туре	To retrieve	
appl*	apply	
	applied	
	applying	
	appliable	
	applicable	
	applicability	
	application	

#### 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.

2 Ent	2 Enter Criteria: Show Template 😒				
	Assignee/Applicant	?	Fanuc	Browse	
AND 💌	Any IPC	?	H01M000448 \ H01M 4/48	Browse	X
AND 💌	US Class	?	330254 \ 330/254 \ 348/228.1	Browse	X
AND 💌	JP FI Codes	?	B65H 29/12	Browse	X
AND 💌	JP F Terms	?	5C061BB07	Browse	X
AND 💌	DWPI Class	?	D11	Browse	X
AND 💌	DWPI Manual Codes	?	(A12-V04C OR D08-B09) \ F05-A0	Browse	X
AND 💌	Assignee Code-DWPI	?	FUFA	Browse	X

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

- 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**.

International I	Patent Classification (IPC) Searching 🔗 🖗	lelp
Search IPC		
Search for Keywords	Ge	
Browse IPC		1
	🛨 🗖 A46B000700 Bristle carriers arranged in the brush body (3 child classes)	
	A46B000900 Arrangements of the bristles in the brush body (3 child classes)	
	A468000902 Position or arrangement of bristles in relation to surface of the brush body, e.g. inclined, in rows, in groups (1 child classes)	
	A46B000904 for toothbrushes (0 child classes)	
	🗇 A46B000906 Arrangement of mixed bristles or tufts of bristles, e.g. wire, fibre, rubber (0 child classes)	_
	+ T A46B000908 Supports or guides for bristles (2 child classes)	
	H468001100 Brushes with reservoir or other means for applying substances, e.g. paints, pastes, water(driven brush bodies A468001300; applying liquids or other fluent materials to surfaces by liquid carrying members in general, e.g. by pads, B05C001000, 605000128) (4 dhid classes)	
	Cancel 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).

	<u>Save</u> 🔻	Alert ▼   Mark List ▼   Download ▼   Analyze ▼   Print ▼					
	Search Q	Query		ition Number	Assignee/Applicant		
ł	Add to Work File New Work File		5641	DURET Francois			
			30.	Title: DEVICE FOR TAKING T			

Figure 2-6. Save list

ave Search	& Create Ale	rt		🕜 He
Properties	Run Options	Delivery & Content Options	Tracking	
me:				
scription:				
lionaly				
litional Save and	Share Options			
Save to persona	l folder Browse			
Share via public	folder Browse			
Share via the Sa	wed Work Inbox	elect Recipients		

Figure 2-7. Save Search and Create Alert dialog box

- 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

To run the search again, click the **Run** icon (🕑) in the Options column, shown outlined in Figure 2-8.

## 3 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: 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.

2	Ente	er Criteria:		Show Template 😂
		Assignee/Applicant	?	Fanuc Browse
OR	•	Assignee/Applicant	?	Fanuc Browse 🔀
OR	•	Attorney-Agent/Correspondent	?	Andover IP Law
OR	•	US Reassignment Assignee	?	Hitachi
OR	•	Assignee Code-DWPI	?	FUFA Browse

Figure 3-1. Assignee search fields

#### 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.



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).

2	Enter Criteria:			Show Template	8
	Assignee/Applicant	•	?	"ADOBE" OR "OMNITURE" Browse	
OR	Assignee/Applicant	•	?	Fanuc Browse	×
OR	Attorney-Agent/Correspondent	•	?	Andover IP Law	×
OR	Assignee Code-DWPI	•	?	FUFA Browse	×
OR	US Reassignment Assignee	•	?	Hitachi	×
Cl	ear All Fields Add Field				

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).

Patent Search Ter	nplate Properties	🕜 Help
Properties		
Name:		
Description:		
Additional Save and Share	Options	
	Destures	
Save to personal folder	Browse	
<ul> <li>Save to personal folder</li> <li>Share via public folder</li> </ul>	Browse	

Figure 3-4. Patent Search Template Properties dialog box

- 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).

Quick	Publication Numbers 🔻	US5551212	Go
Search:	All Content		
Date	Patents		
Pate	Publication Numbers		
	Literature		
Fie	Business	blication Number	

Figure 4-1. Quick Search list

- 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

Туре	To retrieve
ep1876420	all stage filings
ep1876420A2	a specific filing

### 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).

atent Search					<b>2</b> H
Fielded Search	Publication Number	Expert Search			
splay & Sort Options					
Review Output Ty	pe:    Result Set C Worl	c File C Document	Copies C File	e Histories	
Enter Numbers:	56258784 JP2001156625A W	02002002098A2			
		01001001030/12			
Unload Publication	n Numbers (ontional)				
	txt file only			Browse/Upload	
				Show Specialized Se	earch 🤝

Figure 4-2. Publication Number page

- 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.

	ssing Country Code:
20	090240C16A1
•	Select a single Country Code for all numbers shown
	United States
C	Edit or remove individual numbers above (numbers not recognized by our database will not appear in your result set)
C	Remove all disputed numbers from query
	valid format:
•	Edit or remove individual numbers above (numbers not recognized by our database will not appear in your result set) Remove all disputed numbers from query
C Du	t of range:
C	t of range:
C Du	t of range: Edit or remove individual numbers above (numbers not recognized by our database will not appear in your result set)



## 5 Retrieving Patents Using Classification Codes

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).

2 Ent	er Criteria:		Show Template 😵
	Any IPC	A61F 2/82	Browse

Figure 5-1. Any IPC field

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 <a href="https://www.wipo.int/classifications/ipc/en/">www.wipo.int/classifications/ipc/en/</a>.

### **Using European Patent Office Classification Codes**

The European Classification System ( ECLA), was developed by the European Patent Office for searching the European Patent system. It is built on top of the IPC system and is constantly being revised and updated. Although ECLA is applied to all authorities, it is not present in all records on Thomson Innovation. The general goal of the EPO in applying ECLA is to ensure that at least one member of each patent family has an ECLA classification. ECLA codes are divided into sections A through H, which are subdivided into classes, subclasses, groups, and subgroups. There are approximately 135,000 classification entries in ECLA.

The following describes the code CO7K 14/175:

Section	Class	Subclass	Main group	Subgroup
С	07	К	14	175

To retrieve patents using ECLA codes, you can use one of the following methods:

At the Patent Search page, click the ECLA 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).

2 En	ter Criteria:	Show Template 😵	3
	ECLA ? C07K 14/175		

Figure 5-2. ECLA field

• 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.

Patent Search	<b>2</b> H
Fielded Search Publication Numbe	er Expert Search
ave Search   Create Alert   Edit Collections	Resources 🔻   Display & Sort Options
Review Selected Collections: US Grant, o	CA Grant, US App, CA Apps, WO App, FR App
Enter Query:	Show Operators 😒
	Standard Fields
C=(C07K0014175)	Fields   Tags
	DWPI Manual Codes MC
	DWPI Related Accession Number CAN
	Designated States DS
	ECLA EC
	EPO Procedural Status PRS
	EPO Procedural Status-Event PRSE
	Examiner EX
	Test Syntax
Make these my defaults	Search

Figure 5-3. Expert Search page

#### USING IN COMPUTER ONLY CODES

In Computer Only (ICO) is an indexing scheme that the European Patent Office search examiners developed for their internal use to cover minor aspects of the invention. Although based on ECLA classification symbols, the initial letters are different to distinguish them from ECLA.

Search for the ICO codes using the ECLA (EC) field. They are displayed in the ECLA field on the record view.

For further information information on ECLA, go to <u>www.epo.org/searching/essentials/classification/</u> <u>ecla.html</u>.

#### **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 Patents Index (CPI), Sections A to M, from	1970
A Polymers & plastics	General & Mechanical Engineering Patents Index (GMPI), Sections P and Q, from 1974
B Pharmaceuticals	• P Miscellaneous
C Agrochemicals	• Q Mechanical engineering
• D Food, detergents, water treatment, biotechnology	
E General chemicals	Electrical & Electronic Patents Index (EPI), S to X, from 1974
F Textiles & paper	• S Instrumentation; Measuring and testing
G Printing, coating & photographic	T Computing and Control
• H Petroleum	U Semiconductors and electronic circuitry
J Chemical Engineering	• V Electronic components
• K Nucleonics, explosives & protection	• W Communications
• L Refractories, glass, ceramics, electro(in)organics	• X Electric power engineering
M Metallurgy	

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.

2 Enter Criteria:		Show Template 😵
DWPI Manual Codes	7 T04-F02A2	Browse



## Using F Terms and FI Codes

The Japanese Patent Office classifies patents with 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).

2 Enter Criteria:		Show Template 😂
JP FI Codes	B65H 29/12	Browse
AND JP F Terms	<b>?</b> 5C061BB07	Browse

Figure 5-5. JP FI Codes and JP F Terms fields

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.

rch I	F Terms	
S	earch B	rowse
earch	n for keyword, o	ode, or code fragment optical fiber Go
	2F013BD03	. Instruments that use optical fiber cable(s)G01F23/30@D;23/32@A;23/40@A;23/48@A;23/56@A;23/64@A No translation available
	2F073FH01	. Optical guides and fiber optics G08C15/00@K;15/06@K;19/36;23/00@A;23/00@B;25/00@K No translation available
	2F076BD06	Optical fiber sensorsG01D21/00;21/00@A;21/00@B;21/00@C;21/00@D;21/00@G;21/00@K;21/00@M;21/00@N;21/00@Q;21/00@Z;21/00@Z;21/00 translation available
	2F105DD01	. Optical fiber typesG01C19/64-19/72@Z No translation available
	2G086BB00	TRANSMISSION CHARACTERISTICS OF OPTICAL FIBERG01M11/00@Q No translation available
5	2H036MA14	Preliminary heating G02B6/24;6/36;6/38;6/40 Preliminary heating This term refers to steps before performing main h for fusion splicing, and preprocessing steps for performing shaping of end surfaces and removing scratches, coating layer residual articles, dust, or the like on end part side surfaces by heating <b>objeci</b> fiber connection end surfaces and end part surfaces. As heating means, irradiation of optical heat is also included. Preprocessing of end parts not depen on residual heat is classified into KA004, ANG surface processing after fusion splicing is classified into KA004; ANG under a fusion after fusion splicing is classified into KA016.
	2H036NA06	Piezoelectric elements G02B6/24;6/36;6/38;6/40 Piezoelectric elements Deforming and moving optical fiber holders fine strains of piezoelectric elements
	2H036QA21	Coupling of ferrules and fibers G02B6/24;6/36;6/38;6/40 Coupling of ferrules and fibers Methods and devices for connecting ferrules to <b>optical fiber</b> end parts are classified. Broadly, they are classified into forming ferrules as single bodie then coupling with optical fibers (QA22-QA24), and integrally forming optical fibers and ferrules by resin forming or the like (QA27).
	2H036QA25	Centering of ferrules G02B6/24;6/36;6/38;6/40 Centering of ferrules Positioning optical fiber ends at centers of fer Including polishing of ferrule side surfaces (Figure a), methods of forming double ferrules (Figure b) or the like. (To be distinguished from means for a Janing and the surface bits (Bhore with each other (MAI) Image 32).
_		

Figure 5-6. F Term Searching dialog box

## 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

**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**.

Patent Record View - US20110304194A1		Close Record View
Record View: Patent US20110304194A1		🕜 Help
Add to Work File   Mark Record   Watch Record   Download 🔻   Translate 🔻	Citation Map   Highlight   Print	
Full View Jump to: Bibliography Abstract Classes/Indexing Legal Status Fam	ily Claims Description Citations Other	Quick View
Bibliography	Images	2
Original Title ?	Image 1/13	Zoom (+)
BRUSH BODY AND TOOTHBRUSH INCLUDING BRUSH BODY		

Figure 6-2. PDF icon in patent record

### **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)



Figure 6-3. Download list

D	ocument Delivery					(	Help
Ì	Patent File Histories (0)	Patent Documents (3)					
Se	elect Type 🔻   Select Delivery & Forr	nat 🔻   Remove Records			_		
F	ull Document	Title	Page Count	Туре	Format	Availability	Price
5	US20110304194A1 (ordered as US20110304194A1)	BRUSH BODY AND TOOTHBRUSH INCLUDING BRUSH BODY	1	Front Page	PDF	Available Now	\$0.00
2	US20110303569A1 (ordered as US20110303569A1)	CASE FOR BATTERY POWERED TOOTHBRUSH SYSTEM	1	Front Page	PDF	Available Now	\$0.00
<b>v</b>	US20110302736A1 (ordered as US20110302736A1)	Miswak Toothbrush	1	Front Page	PDF	Available Now	\$0.00

Figure 6-4. Document Delivery dialog box

- 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.

D	ocument	Delivery					6	🗿 Help
ſ	Patent Fi	le Histories (0)	Patent Documents (3)					
Se	lect Type 🔻	Select Delivery & Fo	mat 🔻 I Remove Records					
Г	Pub. Numb	PDF	ti <mark>e</mark>	Page Count	Туре	Format	Availability	Price
5	US201103 (ordered as	Email PDF	USH BODY AND TOOTHBRUSH INCLUDING BRUSH BODY	1	Front Page	Bulk Order (Zip)	Available Now	\$0.00
2	US201103 (ordered as	Email TIFF Bulk Order (Zip)	SE FOR BATTERY POWERED TOOTHBRUSH SYSTEM	1	Front Page	Bulk Order (Zip)	Available Now	\$0.00
P	US201103 (ordered as	02736A1 US20110302736A1)	Miswak Toothbrush	1	Front Page	Bulk Order (Zip)	Available Now	\$0.00

Figure 6-5. Select Delivery and Format list

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

7. Click OK. The Order Status page is displayed (Figure 6-6).

Order Sta	itus						Help
Ordered	Order ID	Ord	ler Type	Number Ordered	Availability	Order Tota	il 👘
2011-12-18	3908515	Doc	ument	3	See details	\$0.00	
2011-12-16	3905631	Doc	ument	1	See details	\$0.00	
2011-12-07	3836797	Exp	ort	6	Available no	w N/A	
2011-12-05	3816008	Exp	ort	502	Available no	w N/A	
2011-12-01	3790897	Exp	ort	32	Available no	w N/A	
2011-11-21	3705794	Exp	ort	10	Available no	w N/A	
1 - 9 of 9						Disp	ay 10
Pub. Number	ients ordere	Title	Page Count	Туре	Format	Availability	Price
3 Patent docum	ients		0	Full Document	Bulk Order (Zip)	Available now	\$0.00
					Patent docume	nts Urder: <b>\$</b> (Plus applica	0.0 able taxes
						- Direct	10 -
Displaying 1 - 1 of	1					Displ Reco	ay 10 💌
Displaying 1 - 1 of Shipping Infor	1 mation					Displ Reco Order Grand To	ay 10 rds per page

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 (<sup>(C)</sup>) 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).

🔍 Search	Fielded Search	Publication Number	Expert Search
Search All Content			
Patent Search	Save 🔻   Create Alert	Edit Collections Display & S	Sort Options

Figure 7-1. Edit Collections on toolbar

<b>Collections to Search</b>	h 🕜 Collecti	on Descriptions   Collection Schedule
C Enhanced Patent Data - DW	PI	
Patent Collections by Author	rity	
Full Text		
🗵 US Granted	WIPO Applications	French Applications
US Applications	British Applications	🗖 German Utility Models
🖻 European Granted	🗖 Canadian Granted	🗖 German Granted
European Applications	🗖 Canadian Applications	German Applications
Bibliographic		
Japanese Applications	🗖 Korean Granted/Examined	Korean Applications
Other Authorities		
		<u>Select All</u>   <u>Clear All</u>
Also search DWPI fields for se	elected collections	
		Cancel

Figure 7-2. Collections to Search box

- 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).

Sav	ve 🔻	Alert 🔻	Mark List 🔻   Downl	oad 🔻   Analyze 🔻   Print 👻
	(+)	Watch R	ecords	Assignee/Applicant
-	-	Create A	lert for this Search	DUDET Francis

Figure 7-3. Alert list

Properties	Run Options	Delivery & Content Options	Tracking	
ame: CMOS	in cameras			
escription:				
Additional Save an	d Share Options			
Additional Save an	d Share Options al folder Browse			
Additional Save an	d Share Options al folder Browse folder Browse			
Additional Save an	d Share Options al folder Browse folder Browse aved Work Inbox Select	Recipients		

Figure 7-4. Save Search and Create Alert dialog box

- 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).

Save Sea	rch & Create Ale	rt		🕜 Help
Propertie	Run Options	Delivery & Content Options	Tracking	
Status:	ර 🎽 Active 🔿 💩 ා	nactive		
Frequency:	<ul> <li>Weekly Select day of</li> <li>Monthly Select day of</li> <li>Upon collection update</li> <li>Every I B DWPI Up</li> </ul>	week: Sunday  month: 01  w e (Recommended for RSS) date(s)		
Expiration:	C YYYY-MM-DD 📊 🤇	Never		
Save results:	Last results only     C     Last results only     C     New work file for each     All results into a single     T     Select work file to	Accumulate all results run work file save results to Browse		
	Optionally, also save res	lts to Personal or Public folder Bro	wse	

Figure 7-5. Run Options tab

- 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).

Properties	Run Options	Delivery & Content Optic	ns Tracking	
elect Format Type:	In email bod	·		
clude In Alert	hoose options th	at will help you take appropriate act	on on your alert	
ame:	• Yes C	No Updates Covered:		
escription:	€ Yes C	No Date Range of Run:		
earch Strategy/Quer	/: • Yes C	No Owner Name:	€ Yes C No	
lections Covered:	€ Yes C	No		
nail contents: C Lir	ik to results only : ⊙ Yes C	C All records  © Limit reco	ds to 10	
nail contents: C Lir nclude DWPI fields Patent wailable Fields	ik to results only :	C All records C Limit reco	ds to 10 hosen Fields	
nail contents: C Lin hclude DWPI fields Patent wailable Fields Field Sets Biblio + Original Abstr Biblio + Original Abstr Brief (DWPI) DWPI Alert Individual Fields	ik to results only : • Yes • O nt) ct act+Claims	C All records C Limit reco	ds to 10 hosen Fields Jubication Number Title Assignee	
nail contents: C Lir include DWPI fields Patent ivailable Fields Field Sets Brief (1st level conte Biblio-Author Abstra Biblio-Author Abstra Biblio-Author Abstra Biblio-Author Abstra Biblio-Author Abstra Biblio-Author Abstra Individual Fields include:	nk to results only c Yes C nt) ct act+Claims	C All records C Limit reco	ds to 10 hosen Fields vublication Number fite sssignee	

Figure 7-6. Delivery and Content Options tab

- 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.

	Saved Work - Searches & Alerts					日本語で表示	: Logout∳
THOMSON INNOVATION	Quick Search: Publication Numbers 🔽 US5551212		Go ? Tracking: No Act	tive Tra	i 00	Time: 00:00:0	New Trail
Welcome Stacy	Saved Work 🛛 🔇	s	earches & Alerts				Help
Q Search	Search: Common Text Fields	Se	earch: Common Text Fields	-		Go 🖵 Include /	Annotations
Saved Work	<u>Go</u>	0	items selected Created:	2011-10	-10	Modified: 2011-1	0-10
Inbox	⊨ +   New   Manage Folders ▼   Import	Ma	anage 🔻   Alerts 🔻				
Searches & Alerts	- 🛅 Inbox	Г	Name	Туре	Alert	Date Modified *	Options
Search Histories	- Searches & Alerts		CMOS in cameras	Q	1 🐞	2011-12-18	2
Watched Records	Watched Records	-	Teethbrugh	101		2011 12 16	
Work Files	Work Files	1	Toochbrush	2		2011-12-16	
Citation Maps	Charts		thermoelectric and d	Q	1 🎽	2011-12-01	🔁 📃
Charts	Export Templates	-	natent numbers - tem	100		2011-11-07	
Export Templates	ThemeScape Maps		pateric numbers - cent			2011-11-07	
ThemeScape Maps	Personal Folders	Г	expired patents - te	Q)		2011-11-07	
Text Clusters	🖻 🛅 Public Folders		9 of 9			Display: 10	a per page
Personal Folders	- Deleted Items	Ma	rea two ar mara coardhad ar al	orto to c	conto n	Dispidy: 10	per page
Deleted Items	Merge selected searches/alerts using OR VNOT Select V Go						
Administration	-	Q	CMOS in cameras				
My Account		De	scription:				2
🧏 Preferences		Ov	vner: Stacy Olkowski	D	ate Cre	ated: 2011-12-18	
Ø Support		La	st Modified By: Stacy Olkows	ki D	ate Mo	dified: 2011-12-1	3

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 citatations 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 only available for patents.
- 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).

Save 🔻	Alert 🔻   Mark List 🔻   Down	load 🔻   Analyze 🔻   Print 👻
	Watch Records	Assignee/Applicant
	Create Alert for this Search	DURET François
	DWPI Drawing:	Title: DEVICE FOR TAKING THRE IMPRINTS IN COLOUR
		DWPI Title: -

Figure 8-1. Alerts list

Watched Record Details       Tracking         scription:	
scription:	
Standard Trigger Events	
Standard Trigger Events         IPADOC Family Changes         Legal Status Changes         Citation Changes         New Publication Stages         Reassignment         Select All   Clear.r         Iditional Save and Share Options         Save to personal folder         Browse	
INPADOC Family Changes       DWPI Family Changes         Legal Status Changes       Citation Changes         New Publication Stages       Reassignment         Select All   Clear         Iditional Save and Share Options         Save to personal folder         Browse         Share via public folder	
Legal Status Changes  Citation Changes  New Publication Stages  Reassignment  Select All   Clear  Iditional Save and Share Options Save to personal folder Browse Share via public folder Browse	
New Publication Stages Reassignment Select All   Clear.  Iditional Save and Share Options Save to personal folder Browse Share via public folder Browse	
Select All   Clear. Iditional Save and Share Options Save to personal folder Browse Share via public folder Browse	
Iditional Save and Share Options Save to personal folder Browse Share via public folder Browse	<b>H</b>
Save to personal folder Browse Share via public folder Browse	
Share via public folder Browse	
Share via the Saved Work Inbox Select Recipients	
Share via email Select Recipients	
vner: stacy.olkowski@thomsonreuters.com	
Cancel	

Figure 8-2. Watch Records dialog box

- 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.

	Patent Record View - W	O2011154656A1		se Record View
l	Record View: Pate	nt WO20111	54656A1	🕐 Help
	Add to Work File   Mark Reco	rd Watch Record	Download 🔻   Translate 🔻   Citation Map   Highlight   Print	
	📙 Full View Jump to: Bil	liography Abstract (	lasses/Indexing Legal Status Family Claims Description Citations Other	Quick View
	Bibliography		- Images	×
	Original Title 🤉		Image 1/1	Zoom (+) 📤
	DEVICE FOR TAKING THREE-D	IMENSIONAL AND	EMPORAL OPTICAL IMPRINTS	
I	IN COLOUR			

Figure 8-3. Patent record

## **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).

Welcome Stacy	Saved Work 😵 😵	Watched Records 🛛 😗 🕫
Q Search	Search: Common Text Fields	Search: Common Text Fields 💌 🛛 🕞 🗖 Include Annotatio
Saved Work	Go	0 items selected Created: 2011-10-10 Modified: 2011-10-10
Inbox	⊨ +   New   Manage Folders ▼   Import	Manage 🔻
Searches & Alerts	- Contraction Index	Pub. Number & Publication Title Date Modified * Type Option
Search Histories	- 🛅 Searches & Alerts - 🎦 Search Histories	🔽 落 CN100594794C Method f 2011-11-14 Patent 💽
Watched Records	- Carlos Watched Records	🗆 🔯 US5507430A Shipping c 2011-11-10 Patent 💽
Work Files	Citation Maps	
Citation Maps	- Charts	
Charts	- 🛅 Export Templates	
Export Templates	- Carl ThemeScape Maps	
ThemeScape Maps	Text Clusters	
Text Clusters	tt 🚰 Personal Folders	
Personal Folders	Deleted Items	
Public Folders		
Deleted Items		1 - 2 of 2 Display: 10 💌 per pa
🤌 Administration	-	CN100594794C Method fo
K My Account	-	Description:
🌿 Preferences		Owner: Stacy Olkowski Date Created: 2011-11-14

Figure 8-4. Watched Records page

#### **Removing a Watched Report**

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.

Welcome Stacy 🛛 🔇	Saved Work 🛛 🔇	Watched Records				2		
Search	Search: Common Text Fields	Search:         Common Text Fields         Go         □         Include Anno           0         1 items selected         Created: 2011-10-10         Modified: 2011-10-11					otations .0	
Inbox	⊨   New   Manage Folders ▼   Import	Manage 🔻						
Searches & Alerts	- 🛅 Inbox	Edit	ition Title	Date Modified *	Туре	Opti	ions	
Search Histories	- Carches & Alerts - Carches & Alerts	Open/Run/Execute	un/Execute of f 2011-11-14 Pat			2		
Watched Records     Work Files	- Carlos Watched Records	Save As Copy	c	2011-11-10	Patent	٢		
Citation Maps	Citation Maps	Share						
Charts	- Export Templates	Remove Watched Records						
Export Templates	- Carlanda		-					

Figure 8-5. Manage list

## 9 Creating Work Files

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).

Save 🔻	Alert ▼   Mark List ▼   Download ▼   Analyze ▼   Print ▼					
Search Query Add to Work File New Work File		ition Number	Assignee/Applicant			
		56A1	DURET François			
			Title: DEVICE FOR TAKING I			

Figure 9-1. Save list

<b>Create Work File</b>		🕜 Help
Properties		
Name: Description (Optional):		
Additional Save and Share	Options Browse	
<ul> <li>Share via public folder</li> <li>Share via the Saved Wo</li> </ul>	Browse rk Inbox Select Recipients	
		Cancel

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

- 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).

Add t	o Existing Work File	🕜 Help
3 🔁 w	ork Files	-
- 19	Marked List	
	thermoelectric and diamonds_2011-12-04	
	thermoelectric and diamonds_2011-12-11	
- 12	Toto Portfolio_2011-10-16	
L. 🔑	Wrigley portfolio	
	Capad	014
	Cancer	UK

Figure 9-4. Add to Existing Work File dialog box

- 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).

Welcome Stacy	Saved Work 😵	Work Files	😗 Help
Q Search	Search: Common Text Fields	Search: Common Text Fields 💌	Go 🖵 Include Annotations
Saved Work	Go	0 items selected Created: 201	1-10-10 Modified: 2011-10-10
Inbox	E +   New   Manage Folders ▼   Import	Manage ▼   Analyze ▼   Exports	& Reports
Searches & Alerts	- inbox	Name	Date Modified * #Records Options
Search Histories	- Searches & Alerts - Constant Search Histories	🗖 🆆 Marked List	2011-11-14 5 💽
Watched Records	- Watched Records	🗖 🖆 thermoelectric and di	2011-12-11 1 💽 📒
Citation Maps	Citation Maps	🗖 덀 Toto Portfolio_2011-1	2011-12-04 176 💽 📑
Charts	- Export Templates	🗖 덀 thermoelectric and di	2011-12-04 0
Export Templates ThemeScape Maps	- Canal ThemeScape Maps - Canal Text Clusters	🗆 ሬ Wrigley portfolio	2011-11-17 2437 💽 🗾
Text Clusters	Personal Folders     Public Folders	1 - 5 of 5	Display: 10 Per page
Personal Folders Public Folders	Deleted Items	Merge two or more work files to creat	te a new one
Deleted Items		Merge selected work files using OR	💌 NOT Select a Work File 💌 😡
Administration		Marked List	
X My Account		Description: Marked List	These sec

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.

	S Patent Search	日本語で表示 Logout >
THOMSON INNOVATION	Quick Search: Publication Numbers VUS5551212 Go ? Tracking: No Active Trail	Time: 00:00:00 New Trail
Welcome Stacy	Patent Search	😮 Help
Marked List Saved Searches & Alerts	Fielded Search Publication Number Expert Search	
🐁 Saved Work	Save 🔻   Create Alert   Edit Collections   Display & Sort Options	
Inbox Searches & Alerts Search Histories Watched Records Work Files	Review Selected Collections: US Grant, CA Grant, US App. CA Apps, WO App. FR Ar     Enter Criteria:     I.Title/Abstract/Claims     I((printer AND scanner) NOT inkjet)	Show Template 🔇
Citation Maps	AND Inventor I Dale James D	×
Charts Export Templates ThemeScape Maps Text Clusters Personal Folders Public Folders	AND I Assignee/Applicant     ?     Fanuc       AND I Publication Date     ?     From: 2006-01-01 To: YYYY-MM-DU       Clear All Fields     Add Field       Make these my defaults	Browse 🗶

Figure 10-1. Saved Work section

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:

Inbox	to share your work with selected individuals or groups within your company
Public folder	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
Personal folder	to organize your work.

#### 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).

Welcome Stacy	Saved Work 😵 😵	Searches & Ale	erts			Help
Q Search	Search: Common Text Fields	Search: Common Text	Fields 💌		Go 🔽 Include 4	Annotations
Saved Work	Go	1 items selected Cre	eated: 2011-10	-10	Modified: 2011-1	0-10
Inbox	E +   New   Manage Folders ▼   Import	Manage 🔻   Alerts 🔻				
Searches & Alerts	- Dinbox	Edit	Туре	Alert	Date Modified *	Options 🔺
Search Histories	- Searches & Alerts - Search Histories	Open/Run/Execute		1 😹	2011-12-18	🔁 🔳
Watched Records Work Files	- 🖾 Watched Records - 🛅 Work Files	Rename	Q		2011-12-16	🔁 📃
Citation Maps	- Citation Maps - Charts	Copy	i 🔯	1 🐞	2011-12-01	<b>C</b>
Charts Export Templates	- Export Templates ThemeScape Maps	Delete Share	۰ 🖸	100	2011-11-07	🔁 🔲

Figure 10-2. Mana	ge list	
-------------------	---------	--

Make Copy of Saved Work Item	
🕀 🛅 Personal Folders 🕀 🛅 Public Folders	
Cancel New Folder OK	

Figure 10-3. Make Copy of Saved Work Item dialog box

- 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).

Welcome Stacy	Save	d Work	8	b	usiness me	thod	patent	s		2+	
Q Search	Search:	Common Text Fields		Se	arch: Common Te	ext Fields	5 💌	Go 🖵 Ir	nclude Anr	otati	ons
Saved Work			Go	0	tems selected	Created	d: 2011-10	10 Modified:	2011-10-1	.0	
Inbox	🕒+ I N	ew   Manage Folders 🔻	Import	Ma	anage 🔻   Analyze	e 🔻 I Ex	ports & Re	ports			
Searches & Alerts	- 🛅 Inb	ox		Г	Name	Туре	Owner	Date Modified *	# Items	Opti	ions
Search Histories Watched Records	- C Sea	rches & Alerts rch Histories tched Records			CMOS in ca	Q	Stacy Olkowski	2011-12-18		2	
Work Files Citation Maps	- 🔓 Wo - 🎦 Cita - 🎦 Cha	k Files tion Maps irts									
Export Templates ThemeScape Maps	- C Exp - C The - C Tex	ort Templates meScape Maps t Clusters									
Text Clusters	E-B Per	sonal Folders business method patents		-	1150 200			and to be only			
Personal Folders	🕀 🛅 Pub	lic Folders	-	1 -	1 of 1			Display:	10 💌	per p	age
Public Folders	Del	ated Items		Mer	ge two or more wo	rk files to	o create a n	ew one			

Figure 10-4. Viewing personal folders

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.



Figure 10-5. Managing folders

## 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).

Add annotation:			Save
Upload new attachment: Brows	e/Upload		☐ Mark Priv
Attachment/Note	Author	Created On 🔺	Action
Attachment/Note	Author	Created On A	Action

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  $\blacksquare$ .

Click 🕑 to view or edit the annotation.

## 11 Analyzing Citations

When a patent applicant uses previous patents, the applicant 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

#### **Creating a Citation Report**

To create a citation report for the portfolio of an assignee, complete these steps:

1. Enter a search for all citations associated with an assignee. For information on searching for assignees, 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.

Fielded Search       Publication Number       Expert Search         Save ▼   Create Alert   Edit Collections   Display & Sort Options         1       Review Selected Collections: All         2       Enter Criteria:	
Save ▼   Create Alert   Edit Collections   Display & Sort Options    Review Selected Collections: All    Parter Criteria:	
Review Selected Collections: All     Enter Criteria:	
2 Enter Criteria:	
	Show Template 😵
Assignee/Applicant	Browse
OR 🗾 Assignee/Applicant 🗾 🤋 "GOOGLE" OR "ITASOFTWARE"	Browse
OR 🔄 Attorney-Agent/Correspondent 💽 👔 google	×
OR 🗾US Reassignment Assignee 🗾 🤉 google	X



2. Click Search. The Patent Result Set page is displayed (Figure 11-2).

3. Click **Exports and Reports** in the Download list, shown outlined in Figure 11-2. The Export and Report Options dialog box is displayed (Figure 11-3).

Save 🔻   Alert 🔻   Mark List 🔻	Download ¥   Analyze	🔻   Print 🔻
Publication Number	Patent Documents	ant
□ <u>WO2011156532A2</u>	File Histories G	
DWPI Drawing:	View Order	ERSION RATE

Figure 11-2. Patent Result Set page

xport & Report Options	😮 Hel
ave as Template   Create Chart   Samples	
Use selected records (0) C Use all records (7,688) Format:	
Excel 2007(.xisx)	Show Template 💟
Fields:	
Available Fields         Biblio+Abstract         Family Member Report         Family Member Report         Sasignee Report         Backward Citation Report         Backward Citation Report         Complete IPC Report         Field options vary by format type — names in blue text in selection box represent groups of fields	Export Field List         IPC - Current         IPC - Current - DWP1         ECLA         Ching Patents         Count of China Patents         Create duplicate records for one multi-value field         Select field
Delivery Options:	
File name:       excel2011-12-18-12-42-34         Image: Compress file as .ZIP       Image: Compress file as .ZIP         Share via email (optional):	File extension will be added automatically Add/Edit
Make these my defaults	Cancel

Figure 11-3. Export and Report Options dialog box

- 4. Choose a file format from the File Format Options list, e.g., Excel 2007 (.xlsx).
- 5. 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.

- 6. In the Delivery Options section, the name of the file is displayed in the File Name box. Type a different name, if desired.
- 7. Type an e-mail address in the Share via Email (optional) box, if desired.
- 8. Clear the check box next to Compress file as .ZIP if you do not want the file delivered to you as a ZIP file.

9. Click Create. The Order Status page is displayed in the right frame (Figure 11-4).

Welcome Stacy	Order Status						
Q Search	Ordered	Order ID	Order Type	Number Ord	ered Av	ailability	Order Total
Saved Work	2011-12-18	3908989	Export	10008	1	Available now	N/A
9 Administration	2011-12-18	3908515	Document	3		See details	\$0.00
Automisu auon	2011-12-16	3905631	Document	1		See details	\$0.00
My Account	2011-12-07	3836797	Export	6		Available now	N/A
View Order	2011-12-05	3816008	Export	502		Available now	N/A
Order Status	2011-12-01	3790897	Export	32		Available now	N/A
General & Privacy         1 - 10 of 10           Reset Password         Order Item Details							Display 10
						e	
Shipping Info Tracking Tracking Reports	-12-18 Order cel2011-12-1 rts						
2 Preferences	Content Ty	rpe Nu	Imber Ordered	Format	Availability	Add E	mail Recipients
Support	Patent		10008	XLSX	Available now		

Figure 11-4. Order Status page

- 10. Click Available Now in the Availability column. The File Download dialog box is displayed.
- 11. Click Open or Save to open or save the .zip file.
- 12. Open the spreadsheet in Excel.
- 13. Sort the data in the Count of Citing Patents column to display the most cited documents at the beginning of the report.
- **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.

Patent Record View - US8089542B2		
Record View: Patent US8089542B2		
Add to Work File   Mark Record   Watch Record   Download 🔻   Translate 🔻	Citation Map	Highlight   Print
B Full View Jump to: Bibliography Abstract Classes/Indexing Legal Status Fan	nily Claims Des	scription Citations Other
Bibliography	Images	
Original Title 🤉	Image 1/	1

Figure 11-5. 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**.

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