LexisNexis® PatentOptimizer™ Quick Reference Card

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Contents

How do I activate the LexisNexis® PatentOptimizer™ Service?

You must activate the LexisNexis® PatentOptimizer™ service before using the service for the first time or subsequent to service deactivation. You must have an active Internet connection to activate the service.

1. Open the Microsoft® Word, Internet Explorer, Adobe Acrobat®, or Adobe Reader® program as you normally would. The applicable program opens, displaying the LexisNexis PatentOptimizer in the upper portion of the program window.

   Note:
   The first time you open the Microsoft Word application after installing the LexisNexis PatentOptimizer service, you may receive a warning message asking whether you want to enable related macros.

   \ use the two applications in conjunction with each other, select the **Always trust macros from this source** check box, then click the **Enable Macros** button. This installs the LexisNexis PatentOptimizer toolbar in the Microsoft Word software.

   For more information on how to handle macro security, consult your Microsoft Word documentation.

2. On the LexisNexis PatentOptimizer toolbar, click any button other than Options ( ) or Help ( ). The Lexis User ID and Password dialog box opens.

   Note:
   For a list of toolbar buttons, see How do I access service features?.

3. Enter your LexisNexis® User ID and Password.

4. Click **OK**. The dialog box closes and the LexisNexis PatentOptimizer service launches the feature you selected at 2.

   Note:
   If you subsequently want to use the service on a different computer, you must first deactivate it on the current computer (see How do I deactivate the Service?) then install and activate it on the other computer.

How do I access service features?

You can access the LexisNexis® PatentOptimizer™ features in several ways, specifically using the toolbar, using the Tools>LexisNexis PatentOptimizer menu, or using the right-click menu.

- To access service features using the toolbar, click the applicable button.

Tip:
The LexisNexis PatentOptimizer toolbar is available in Microsoft® Word, Internet Explorer, Adobe Acrobat®, and Adobe Reader®, although a few buttons are only available in Microsoft Word. To view a description of any toolbar button within the application, rest your pointer on the button for several seconds.

Button	Command
	PatentOptimizer™ Summary Report
	Check References
	Check Terms
	Mark Terms
	Check Measurements
	Check Parts
	Check Claims
	Compare Docs
	PatentOptimizer™ Analytics (available in Word and Internet Explorer only)
	LexisNexis® Patent Research
	Web Search
	Dictionary
	Thesaurus
	Patent Citation (available in Word only)
	Mark Claims Wizard (available in Word only)
	Update Claim References (available in Word only)
	Remove Markup (available in Word only)

Button	Command
	Options
	Assign Applicable Client Matter ID
	Feedback - see How do I submit feedback? for information on using this new feature.
	Import Data (available in Adobe Acrobat® and Adobe Reader® only)
	Help

Tip:
Most program features are also available from the Tools>LexisNexis PatentOptimizer menu, and some are available using the right-click menu (as described in the following procedure). The Remove Markup feature, however, is only available from the toolbar.

- To access service features using the menu:

Tip:
Certain program features are only available in Microsoft Word and only from the menu, with the Mark Claim Number ( ) and Mark Claim Reference ( ) features being available from both the Tools>LexisNexis PatentOptimizer menu and the right-click menu and the Term Variants feature ( ) being available only from the right-click menu. Access to program features using the menu is not available in the Internet Explorer program.

  - From the Tools menu in the Microsoft Word, or Acrobat, or Reader program, choose LexisNexis PatentOptimizer followed by the applicable feature (see How do I launch LexisNexis® PatentOptimizer™ features using the toolbar?).

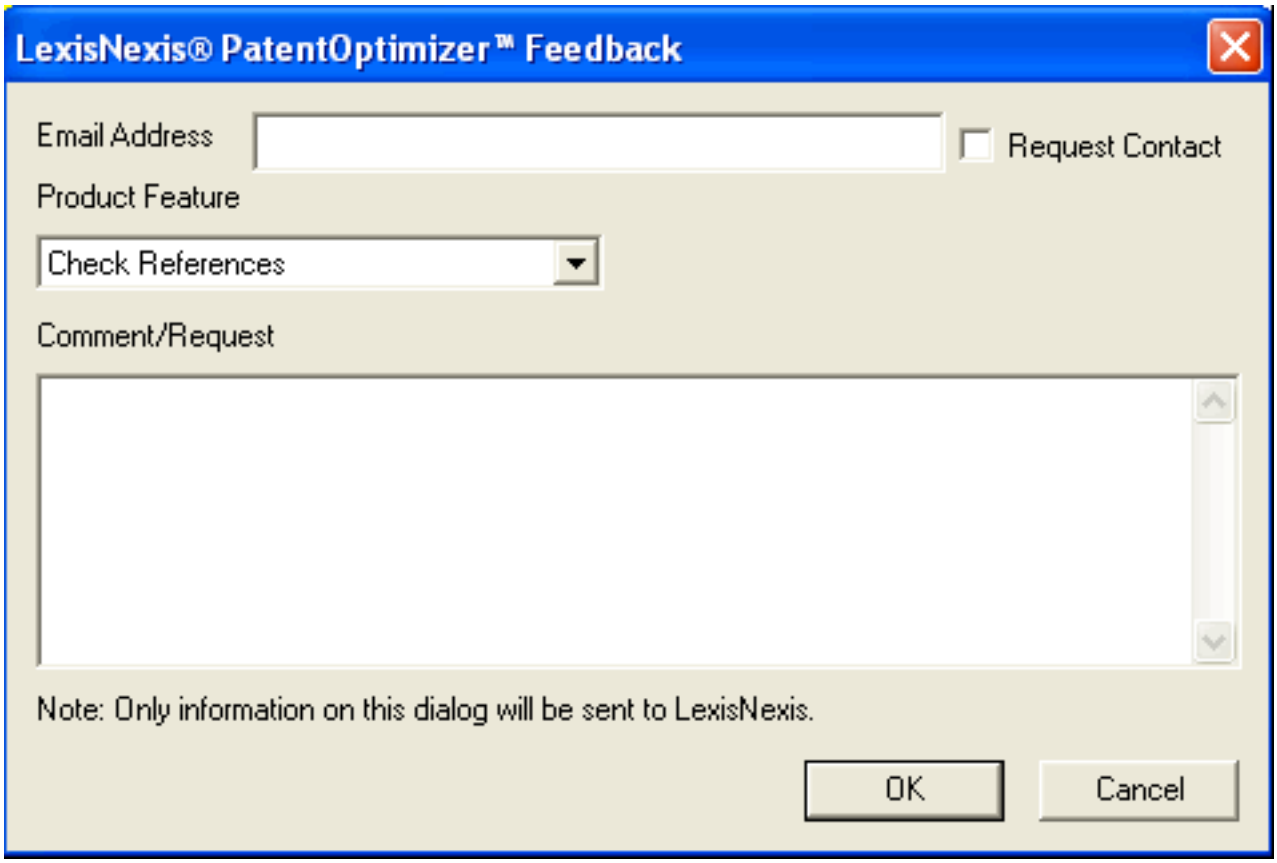
    Note:
    The Tools>LexisNexis PatentOptimizer menu varies slightly between programs, with the version in the Adobe Acrobat® and Adobe Reader® programs containing a subset of the features offered using the Microsoft Word version.

  - Right-click anywhere within a Microsoft Word document, then from the displayed menu, choose LexisNexis PatentOptimizer followed by the applicable feature (see How do I launch LexisNexis® PatentOptimizer™ features using the right-click menu?).

    Note:
    The right-click menu contains a subset of the features offered in the Tools>LexisNexis PatentOptimizer menu and is not available in the Acrobat and Reader programs.

How do I submit feedback?

1. On the LexisNexis® PatentOptimizer™ toolbar, click the **Feedback** button ( ). The LexisNexis® PatentOptimizer™ Feedback dialog box opens (as shown below).



2. Enter your **Email Address**.
3. Select **Request Contact** if you want a LexisNexis representative to contact you.
4. Select a **Product Feature** from the drop-down list.

   Tip: If you are unsure of the product feature, choose **Other**.

5. Enter your **Comment/Request**.
6. Click **OK** to submit only the information you provided on this form to LexisNexis.

Thank you for taking the time to provide us with your feedback.

How do I find out more about a selected term?

1. In your patent document, select the words to be searched.

   Tip:
   For a single word, you can just be pointing to the word you want to search. You can also double-click on a word to select the entire word at a time, or triple-click to select an entire paragraph.

2. Click the applicable toolbar button to perform these task:

To...	Click this button
Find a definition	Dictionary
Find a synonym	Thesaurus
Search the Web for terms	Web Search

   Tip:
   You can also initiate these tasks using the Tools>LexisNexis® PatentOptimizer™ menu or the right-click menu.

3. Select a dictionary, thesaurus, or search engine from the list to the right.

   Tip:
   To block pop-up windows when using these features, select **Block Pop-ups**.

   Tip:
   To navigate among multiple results, click **Back** or **Forward**.

How do I replace a word with a synonym?

Important:
This task can only be performed in a Microsoft® Word document.

Tip:
To replace a word using only LexisNexis PatentOptmizer sources, use the Term Variants feature available from the right-click menu.

1. Select **Thesaurus** ( ) from a LexisNexis® PatentOptimizer™ menu or toolbar.
2. Highlight the synonym that you want to use instead of the word currently selected in your document.
3. Click **Replace**. The word you have selected is passed to the Microsoft Word Find and Replace feature, where you may proceed as you normally would when finding and replacing text in that program.

How do I highlight terms used in a patent document?

1. Select **Mark Terms** ( ) from a LexisNexis® PatentOptimizer™ menu, toolbar, or right-click menu.
2. Set the options as desired.
3. Click **OK** to proceed with marking the terms in your document.

Tip:
To unmark the document, repeat step 1 of this procedure.

How do I view identified terminology and reference sources?

1. Select **Check Terms** ( ) from a LexisNexis® PatentOptimizer™ menu, toolbar, or right-click menu.
2. Choose which tab you want to use:
   - Use the **Search Terms** tab to view identified terms and phrases one at a time.
   - Use the **All Terms** tab to view a table of all identified terms and phrases.

   Tip:
   To navigate to the location of an identified term or phrase in your patent document from the **All Terms** tab, click the term or phrase in the displayed table.
3. View reference information for identified terminology and perform additional related actions, as follows:
   - Click the blue patent numbers in the **Prior Usage** tab to access existing patents containing the identified term or phrase.
   - Click the reference link in the **Case Refs** tab to view the full text of cases referencing the identified term or phrase.
   - View custom definitions from user-created dictionaries using the **Definitions** tab.
   - Select a term in the **Alternate Terms** tab and click **Replace** (located on the **Search Terms** tab) to replace the original term.
   - Designate terms and phrases for inclusion in a report by either double-clicking the term (if working on the **All Terms** tab) or selecting the **Add to Report** check box (if working on either tab).

How do I search the LexisNexis® Total Research System for patents containing identified terminology?

1. Select **Check Terms** ( ) from a LexisNexis® PatentOptimizer™ menu, toolbar, or right-click menu.
2. Select the desired term or phrase

By...	If working on this tab
Navigating to it	**Search Terms**
Clicking it	**All Terms**

3. (Optional) Filter results by a U.S. patent classification number by entering that number in the Class field.
4. Click the appropriate button for the type of information you're searching for:

To search...	Click this button
Complete patent content regardless of granting date	**General**
Only claims sections of patents granted in the past 6 months	**Recent Claims**

How do I check Title and Abstract length?

1. Select **Check Terms** ( ) from a LexisNexis® PatentOptimizer™ menu, toolbar, or right-click menu.
2. Click the **Text Format** tab. The tab displays the character and word counts for the title and abstract sections, beside which are listed the maximum allowable counts as determined by the USPTO, and below which is shown the actual text of the currently selected analyzed section (i.e., abstract or title), with any material extending beyond the maximum allowable length highlighted in red.

How do I manage ignored terms?

1. Select the **Options** ( ) toolbar button.

   Tip:

   Or select **Check Terms** ( ) from a LexisNexis® PatentOptimizer™ menu, toolbar, or right-click menu and then click the **Options** button in the Check Terms dialog box.

2. Click the **Ignored Terms** tab.
3. Perform the desired maintenance activity, as follows:
   - To put a new word on the ignored terms list, type the word in the entry box, then click **Add**.
   - To clear a word from the ignored terms list, click the word within the list, then click **Remove**.
   - To clear all words from the ignored terms list, click **Remove All**.
4. Click **OK** to save your input and close the dialog box.

How do I use the PatentOptimizer™ Analytics feature?

Before You Begin:
You must have access to this dialog box to perform this task. If you do not have access to this feature, a pop-up window will be displayed when you click the button, informing you of this fact. Contact your Customer Support representative if you would like to activate the Analytics feature.

Use the PatentOptimizer™ Analytics feature to run an analytics profile for U.S. utility patents and PCT applications meeting your specific criteria (the cite list you've searched for, predetermined patent citations, or local documents you've imported). Once you click the **Profile** tab, you can interact with the subsequent filter (those across the top of the dialog box) and view (those across the bottom) tabs to refine what you're seeing, and then run a **Report**, **Claim Chart**, or **Check Refs** on your results.

Note:
On occasion the LexisNexis® PatentOptimizer™ tool will not be able to process or parse some patents. When this occurs, a pop-up window will appear just after all processing has completed, listing all of the patents that were not processed.

1. Open a patent document.
2. Click the **Analytics** button ( ) on the LexisNexis PatentOptimizer toolbar of Microsoft® Word or Internet Explorer.
3. Determine which patents you want to analyze:

You can...	By...
Enter patent citations directly in the **Patents** area	Click directly into the Patents box, then type or paste a previously copied list of patents into the box.
Search for patents using the **Search** tab	Enter one or more filter criteria onto the Search form, then click the **Search** button. For example, if you wanted to find 25 patents associated with Google, you would: a. Select "25" from the **Max Docs** drop-down list b. Enter "Google" in the **Assignee** box c. Click **Search** Refer to the PatentOptimizer™ Analytics dialog box for descriptions of each search option.
Import documents using the **My Documents** tab	Follow these steps: a. Click the **My Documents** tab b. Select the number of maximum documents you'd like from the **Max Docs** drop-down list c. Click the **Import** button d. Use your operating system's folder selection tool to select the folder where your patent documents are stored e. Click the **OK** button
Open a set of previously saved patents	Click the **Open** button and choose the set you want to use.
Save the patents you're viewing for future use	Click the **Save** button.

4. Remove any items you do not want to analyze from the **Patents** box by selecting and deleting them.

5. Click the **Run Analytics Profile** button when you are ready to analyze the listed Patents. A performance warning message displays to alert you that all parts, claim elements, terms, phrases and citations found in only one patent will not be shown. Click **OK** to continue.

   Tip:
   To increase performance speed and performance, and disable this warning message, reduce the number of patents to be analyzed, or navigate to the **Options** tab and adjust the **Optimize Results** setting.

6. Click the **Profile** tab.

7. Use the filter tabs (those across the top of the dialog box) and their check boxes displayed to select different items to filter your results.

   Example:
   For instance, if you want to see only those patents that have a specific Assignee, Part, and Thesaurus Term/Phrase, you would:

   a. Select the appropriate **Assignee** check box on the **People & Org** filter tab
   b. Select the **Specification** filter tab
   c. Select the check box for the **Part** you're interested in
   d. Select the **Thesaurus** filter tab
   e. Select the check box associated with the **Term/Phrase** you're interested in, then select any **Term/Phrase Variants** that are appropriate

   Notes:

   - Click the **Selection Summary** filter tab to see all of the different selections you've made
   - Click the **Clear All** button to clear all of the selections you've made and start again
   - Click a column heading to sort that column's contents, then type a letter to find that letter within the sorted column.

     Tip:
     Clicking once sorts in ascending order (A-Z or 1-10); clicking a second time sorts in descending order (Z-A or 10-1).

   - Filters selected in multiple filter tabs are ANDed together; within each filter, selections are ORed
   - Use the **Select All** and **Deselect All** buttons at the bottom of the dialog box to select or clear all of the items currently displayed in the view tabs (those across the bottom of the dialog box)
   - Select the **Filter Counts Only** check box to display only the number of items available with the filters applied, not the total number of items available

8. Choose your next action:

If you want to...	Then...
Run a PatentOptimizer™ Analytics Report...	a. Click the **Report** button b. Select **Analytics Report** c. Select which type of items you want to include: All Items; Filtered Subsets; Selected Items Only; Selected Pubs/Docs d. Use the check boxes to select which worksheets you want to include in your report e. Click **OK**
Run a Claim Chart report...	a. Click the **Claim Chart** button

If you want to...	Then...
	b. Use the options and check boxes to specify how you want your report to be generated c. Click **OK**
Check references for the items you've selected...	Click the **Check Refs** button, and continue with one of the tasks available for that page, as shown in the **How Do I...?** box within the help system.

9. Click the **Close** button when you are finished using this dialog box.

PatentOptimizer™ Analytics

Use the PatentOptimizer™ Analytics feature to run an analytics profile for U.S. utility patents and PCT applications meeting your specific criteria (the cite list you've searched for, predetermined patent citations, or local documents you've imported). Once you click the **Profile** tab, you can interact with the subsequent filter (those across the top of the dialog box) and view (those across the bottom) tabs to refine what you're seeing, and then run a **Report**, **Claim Chart**, or **Check Refs** on your results.

You can launch the PatentOptimizer™ Analytics feature by clicking the **Analytics** button ( ) on the LexisNexis PatentOptimizer toolbar of Microsoft® Word or Internet Explorer.

Note:
If you do not have access to this feature, a pop-up window will be displayed when you click the button, informing you of this fact. Contact your Account Representative if you would like to activate the Analytics feature.

Common Buttons and UI Elements

The common buttons appear at the bottom of the dialog box.

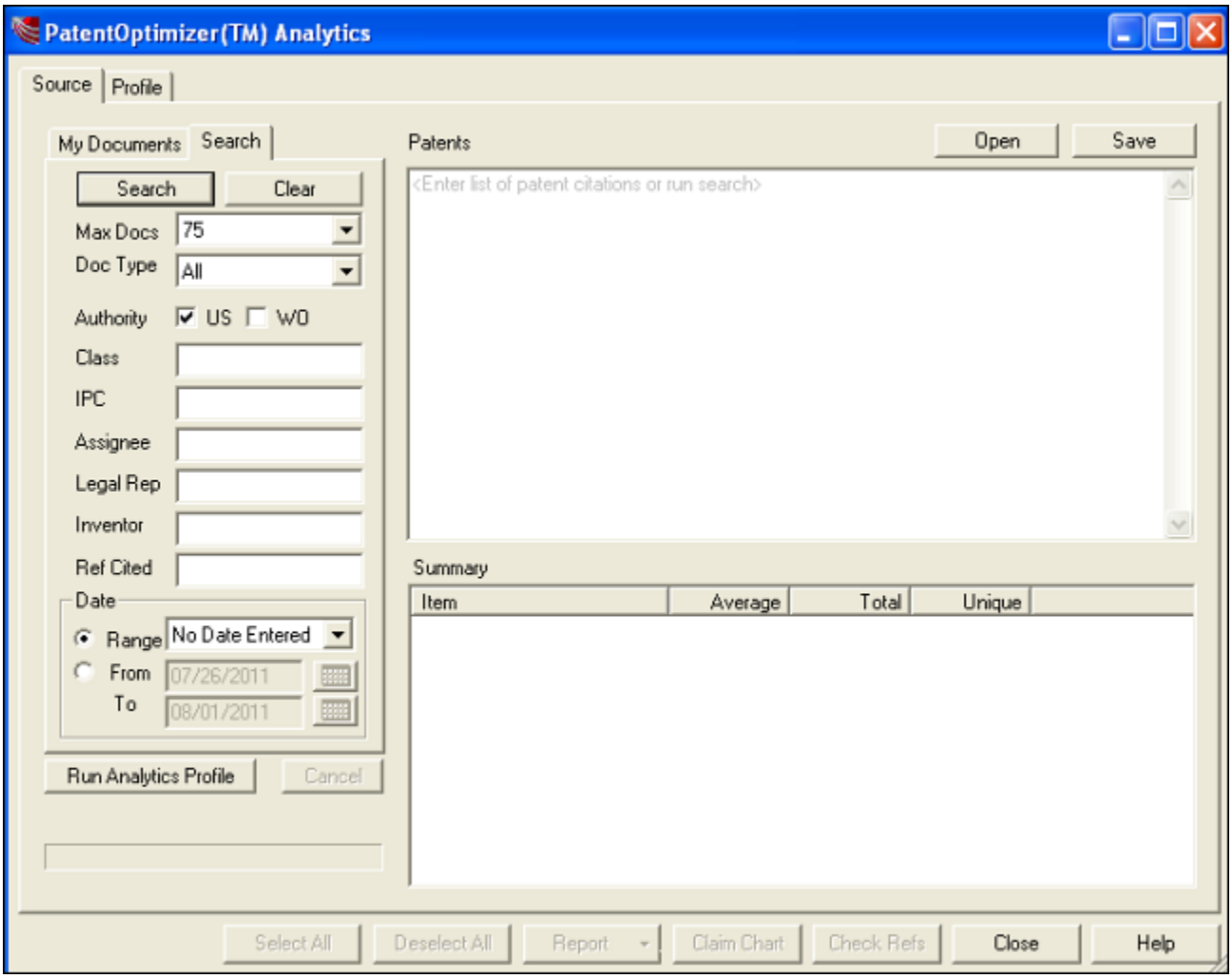
Tip:
You can combine at least 2 items in any category of information (e.g., People & Org > Assignee, or Inventor, or Legal Rep) to make the display less cluttered. To combine them, select at least 2 check boxes, then right-click and select **Combine Selected** from the resulting menu. Then choose the label you want to use for these combined items and how long you want this substitution to remain in effect ("This Session Only" or "Permanent"). To undo the combination, click the **Options** subtab for **Analytics**, then either click the **Remove All** button to remove all combinations, or select one combination then click the **Remove** button to remove it.

Value	Description
Select All	Click this button to select all of the items listed in the selection table at the bottom of the **Profile** tab.
Deselect All	Click this button to clear all of the check marks from the items listed in the view tabs at the bottom of the **Profile** tab.
Report	Select **Analytics Report** to open the **PatentOptimizer™ Analytics Reports** dialog box, or select **Pub/Doc Summary** to open the **PatentOptimizer™ Analytics Summary Report**. Select the items that you want in the report, and select any filters to be used in creating your report in a new Microsoft® Excel or Microsoft Word window.
Claim Chart	Click to open the **Claim Chart** dialog box, then select which options you'd like to include in this report in a new Microsoft Excel or Microsoft Word window.
Check Refs	Click to open the **Check References** dialog box. **Tip:** if you haven't selected any patents, then all patents will be analyzed.
Close	Click to close this dialog box.
Help	Click to view help specific to this feature.

Source tab

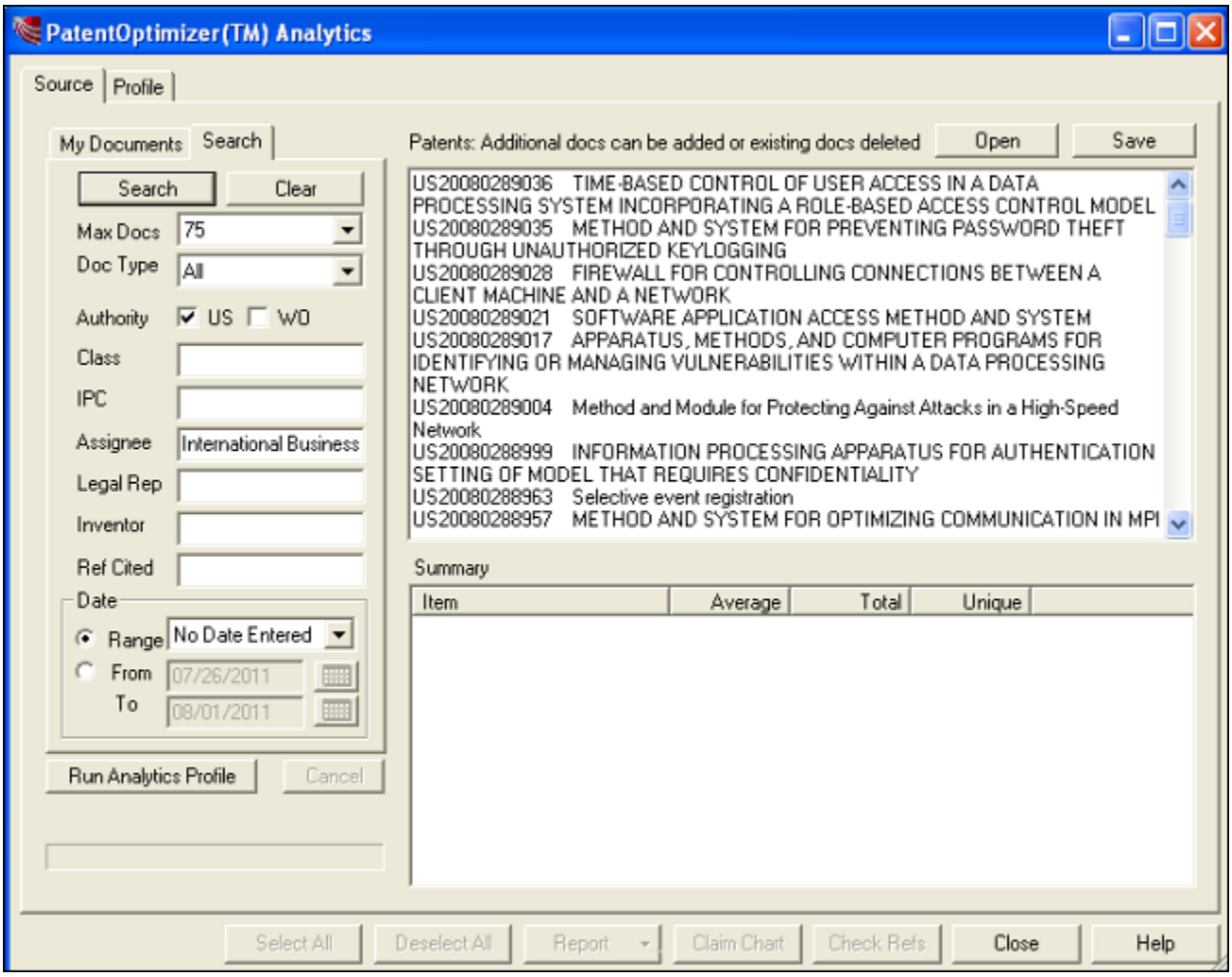
The source tab identifies sources for patent data to be analyzed. You can provide your own list of patents (with or without titles), specify a file folder for patents, or run a search based on criteria you enter.

The following image shows the Analytics dialog box displaying the Source tab **before a search** has been run.



Once you enter the values you want to search on and click the **Run Analytics Profile** tab, the Patents that match your search criteria are displayed.

The following image shows the Analytics dialog box displaying the Source tab **after a search** has been run.



Value	Description
My Documents tab	This tab allows you to import up to 1,000 Microsoft® Word documents to be analyzed.
Open	Click to retrieve a list of sources you've previously saved.
Save	Click to save the sources listed, so you can open them and work with them again later.
Import	Click to Browse for a folder that contains the patents you'd like to analyze, then click **OK** to complete the import. **Tip:** Once you have imported the documents, you can select and delete individual documents before you click the **Run Analytics Profile** button.
Search tab	This tab allows you to enter search criteria to find patents whose profiles you want to view.
Open	Click to retrieve a list of sources you've previously saved.
Save	Click to save the sources listed, so you can open them and work with them again later.
Search	Click to search for patents that meet all of the criteria you've entered. You must click this button before clicking the **Run Analytics Profile** button.
Clear	Click to clear all of the criteria you've entered.

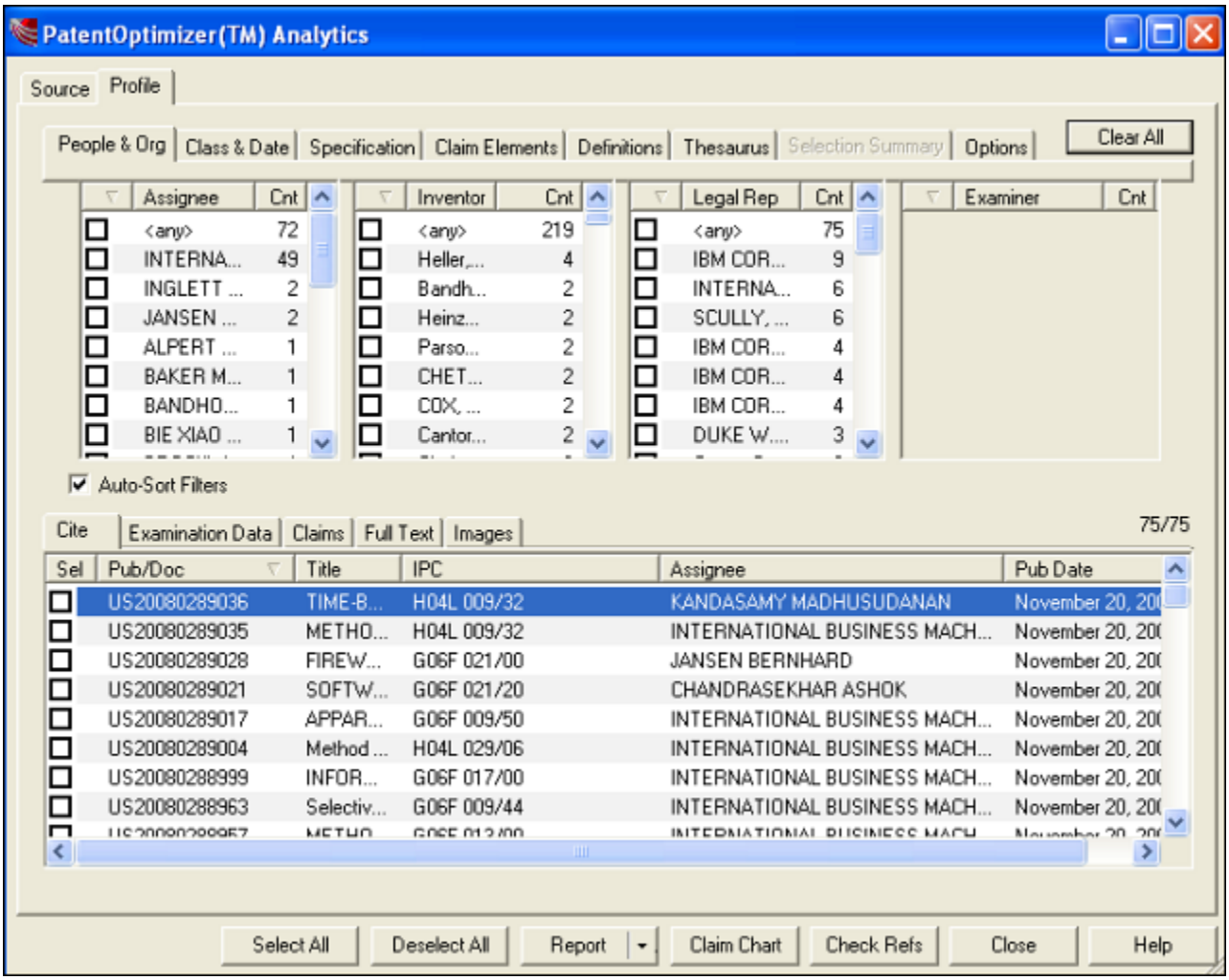
Max Docs	Select a value from the drop-down list. The fewer documents you analyze, the faster the analysis will be run. Choosing a larger number may result in an error message being displayed when you click the **Run Analytics Profile** button to warn you that some items may not be shown in the results.
Doc Type	Select a value from the drop-down list: ■ All ■ Granted ■ Applications
Authority	Select either or both of these options: ■ US - United States ■ WO - World Intellectual Property Organization (WIPO)
Class	Enter the main U.S. patent classification number in this box to limit the range of your search to a particular class/subclass of patents. **Tip:** Identify subclass with a # sign. **Example:** 229#112
IPC	Enter the International Patent Classification number. **Tip:** Identify subclass with a # sign. **Example:** B65D 043#14
Assignee	Enter a person or company name for the assignee at issue.
Legal Rep	Enter the name of the legal representative (individual or company name).
Inventor	Enter the name of an inventor.
Ref Cited	Enter the citing reference you want to find.
Date Range	Select a predefined date restriction from this drop-down list: ■ No Date Entered ■ Previous Week ■ Previous Month ■ Previous 3 Months ■ Previous 6 Months ■ Previous Year ■ Previous 2 Years ■ Previous 5 Years ■ Previous 10 Years
Date From	Select the option for From date, then choose the date you want to use by either: ■ Entering the date in the box in MM/DD/YY format

	■ Clicking the corresponding calendar button ( ) and selecting a date
Date To	Select the option for From date, then choose the To date you want to use by either: ■ Entering the date in the box in MM/DD/YY format ■ Clicking the corresponding calendar button ( ) and selecting a date
Run Analytics Profile	Click to analyze the displayed **Patents**. ■ A performance warning message may display to alert you that all parts, claim elements, terms, phrases and citations found in only one patent will not be shown ■ Click **OK** to continue. **Important:** The analysis takes about 1 second per patent. **Tip:** To increase performance speed and performance, and disable this warning message, reduce the number of patents to be analyzed, or navigate to the **Options** tab and adjust the **Optimize Results** setting.
Cancel	Click to cancel a **Run Analytics Profile** command.
Patents	Lists the patents you entered, that were found when you clicked the **Search** button on the Search tab, or that you Imported on the My Documents tab. **Tip:** When you enter patent numbers directly into this box, they must be entered on separate lines to be correctly detected by the tool. **Important:** Review the patent citations listed in this box, then select and delete any items you do not want to include in your analysis.
Summary	Reflects totals and averages of the analyzed data: ■ Item - Lists the type of item that was analyzed (e.g., Claims, Inventors, Examiners) ■ Average - Lists the average number for each item ■ Total - Lists the total number for each item ■ Unique - Lists the number of unique instances for each item

Profile Tab

The profile tab contains the patent analysis results.

The following image shows the Analytics dialog box displaying the Profile tab.



Value	Description
Clear All	Click this to clear all selections made across all of the Profile filter tabs.

Filter Tabs

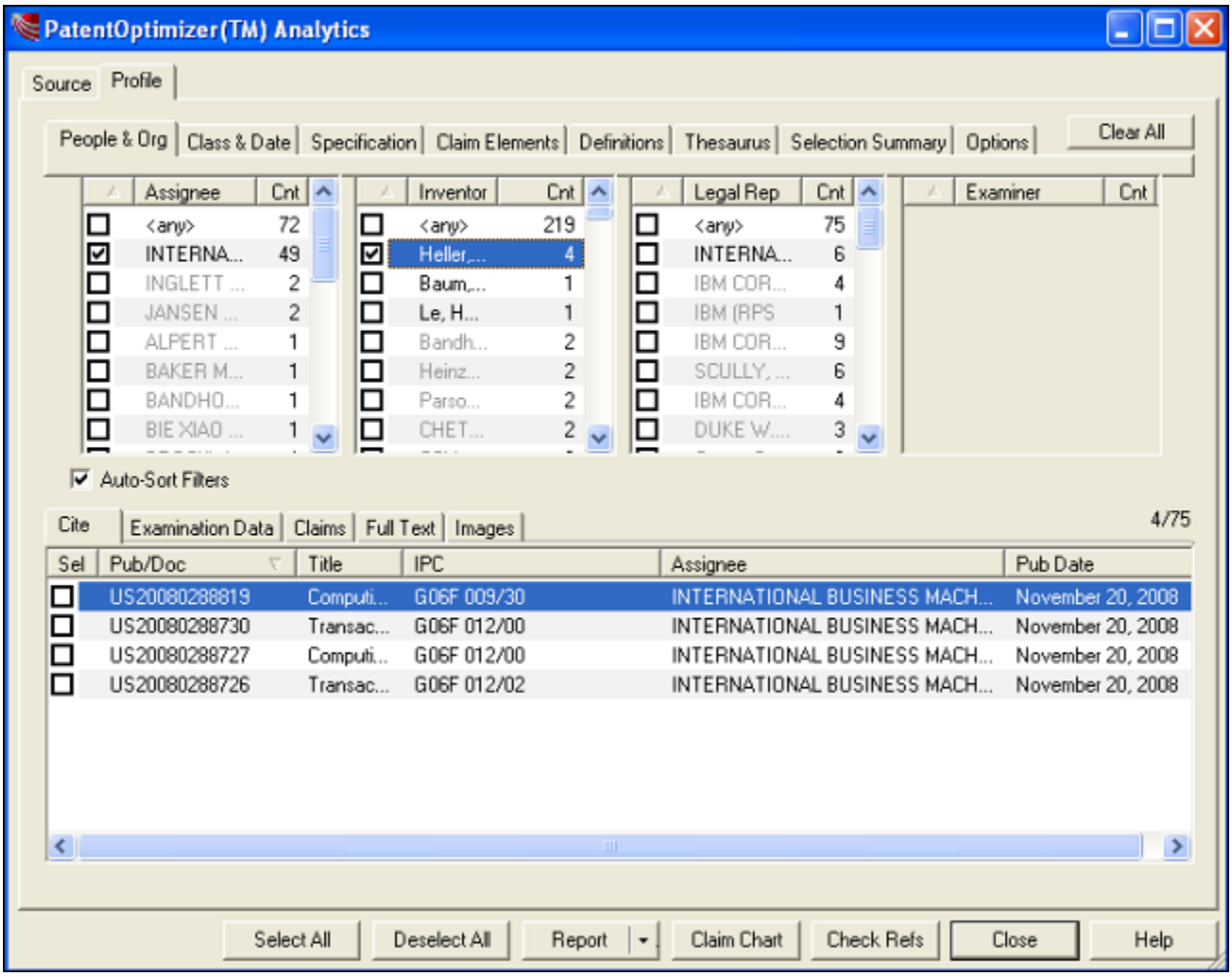
The filter tabs across the top are joined together with Boolean AND logic; within each filter, selections are ordered. All hits are identified with total counts, in rank order (highest to lowest). Selecting a value results in filtering of data in the bottom half of the display. The filter data not contained in an answer set in the filter tabs is grayed out.

Tip:

To apply "AND" logic within each filter tab as well as across filter tabs, select the **Apply "AND" Logic** check box in the Options filter tab.

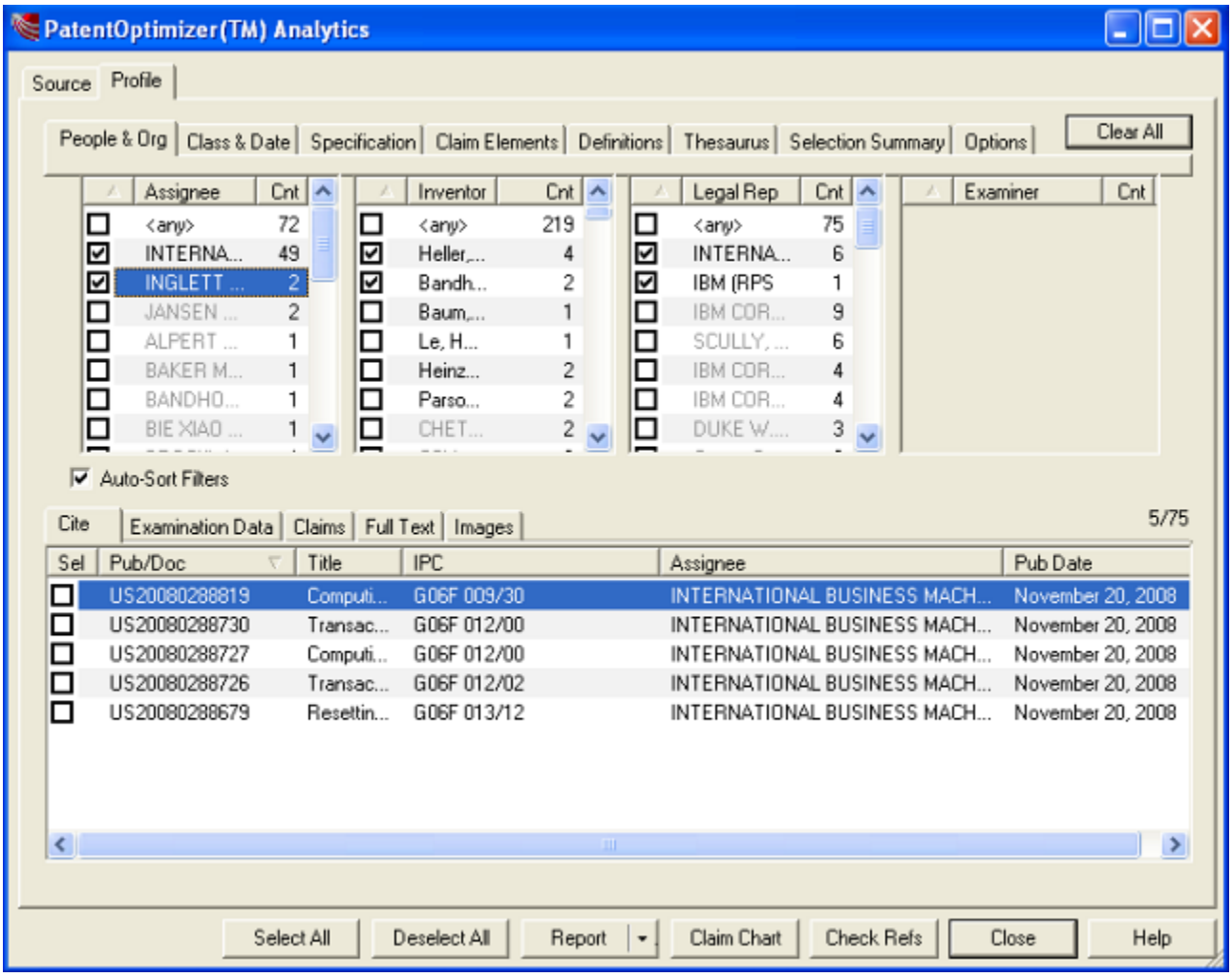
For example, selecting options from the different filters across the top treats each additional selection as a Boolean AND.

New! Auto sorting now takes place after you select a check box. That is, when you select a check box from anywhere in the list, it automatically moves to the top of the list.



Example:

Selecting multiple check boxes within a single filter treats each additional selection as a Boolean OR.



Value	Description
People & Org	Displays check boxes and Count [Cnt] columns as applicable for the patents being analyzed. For example: ■ Assignee ■ Inventor ■ Legal Rep ■ Examiner ■ Auto-Sort Filters
Class & Date	Displays check boxes and Count [Cnt] columns as applicable for the patents being analyzed. **Tip:** If you rest your pointer over a value in the **US Class** column, the description for that class (and subclass) will be displayed. To control whether both the class and subclass or just the class is displayed, click the **Options** tab and select your desired display option under **US Class Display**. ■ US Class ■ IPC ■ Filed Date

	■ Pub Date ■ Auto-Sort Filters
Specification	Displays check boxes and Count [Cnt] columns as applicable for the patents being analyzed. For example: ■ Parts ■ Terms ■ Phrases ■ Citations ■ Auto-Sort Filters
Claim Elements	Displays check boxes and Count [Cnt] columns for aggregate claim elements across all of the profiled documents. For example: ■ Claim Elements, with Variants (which are algorithmically derived from your selected portfolio of patents) **Tip:** If you select a Claim Element that has Variants, the table to the right lets you select any **Element Variants** you wish. Use these options at the right to further filter your results, if desired. ■ Limit Element Variants to Doc Claim Language ■ Locate and Display within o All Claims - identifies documents when selected elements appear anywhere in the claim set o Independent Claims - identifies documents when selected elements appear anywhere in a single independent claim o Auto-Sort Filters - automatically sorts results, placing the most relevant results at the top of the list
Definitions	Displays check boxes and Count [Cnt] columns for **Term** and **Definition** columns. The Definitions provided here are mined from express glossaries contained in various patents. These glossaries typically have a heading (such as GLOSSARY :) followed by a series of terms with definitions. Auto-Sort Filters - automatically sorts results, placing the most relevant results at the top of the list
Thesaurus	Displays check boxes and Count [Cnt] columns as derived from parts data located in your selected patent portfolio. For example: ■ Term/Phrase, with Variants **Tip:** If you select a Term/Phrase that has Variants, the table to the right lets you select any **Term/Phrase Variants** you wish. ■ Auto-Sort Filters - automatically sorts results, placing the most relevant results at the top of the list Thesaurus items are determined by identifying parts having name variants for the same part number as across multiple patents.

Selection Summary	Displays summary check boxes for viewing selections and overriding individual filters. For example: ■ Selection ■ Attribute ■ Auto-Sort Filters When you select or clear one or more of the **Sel** check boxes, a dialog box appears when you try to leave this tab, asking you if you want to "Update filters with selection changes?". Click **Yes** to save the changes you've made.
Options	Select from the following options, as desired: **Filters** ■ Counts | Filter Counts Only - Select to reflect counts that identify the subset defined by your filter selections ■ Specifications > Terms | Ignore Common - Select to ignore common terms appearing in terms filter ■ Standardization | Enable - Select to enable entity standardization across filters ■ US Class Display | Class or Class/Sub-Class - Select to enable US class display filters or display class/subclass filters ■ Apply "AND" Logic - Select one or more check boxes for the type of filter (List) to which you would like to have AND logic applied, instead of the typical OR logic within each filter tab ■ Combined Entities **Caution:** The changes you make will be reflected in your next session - not in the current Profile results o <Add> - Select to add a new combined entity o Edit - Select an item in the list, then click to modify that combined entity. The Combine Entities dialog box has these options: - <Add> - Select to add a new combined entity - OK - Click this button to save the changes you've made and exit this dialog box - Cancel - Click this button to cancel the changes you've made and exit this dialog box - Edit - Click this button to modify the name of the item you selected - Delete - Click this button to remove the item you selected from the list of combined entities - Duration - Select either **Permanent** or **This Session Only** o Delete - Select an item in the list, then click to delete that item **Global** Optimize Results - Select one of these options from the drop-down list: ■ Optimize Results option ■ Maximum Documents value can be applied to: o None o >0 - 24

	○ Ignore Single Count ○ 25 - 249 ○ Ignore 2 or Less ○ 250 - 499 ○ Ignore 3 or Less ○ Ignore 4 or Less ○ 1000-1500 ○ Ignore 5 or Less ○ 1500-2000 ■ Cache Offline - Click the checkbox to cache from your local disk drive, instead of caching records from a server ■ Clear Cache - Click the checkbox to remove all saved patent data from the Analytics feature ■ Views ○ Independent Only - select the Independent Only check box to view independent claims only in the Claims view tab ○ Add Part Nos. to Claims **Tip:** Since data will accumulate on your disk drive, you should clear the cache periodically to increase performance speed and decrease disk space usage.

View Tabs

The view tabs show the results you get once you have applied filters using the filter tabs at the top of the dialog box.

Select one or more check boxes in the view tabs that you want to run a **Report**, **Claim Chart**, or **Check References** on.

Value	Description
Cite	Select one or more items based on the columns displayed: ■ Pub Number - Publication Number ■ Title ■ IPC ■ Assignee ■ Granted Date The documents displayed are subject to your selections in the filter tabs.
Examination Data	Select one or more items based on: ■ Pub Number - Publication Number ■ Title ■ US Class ■ Legal Rep - Legal Representative ■ Inventor

	■ Examiner ■ Ind Clms - Independent Claims ■ Claims
Claims	Select one or more publication numbers, then use the Claim Tree and Claim Text boxes to the right to navigate and view the associated claim hierarchy and text.
Full Text	Select one or more publication numbers, then use the box to the right to review the full plain text for your selections.

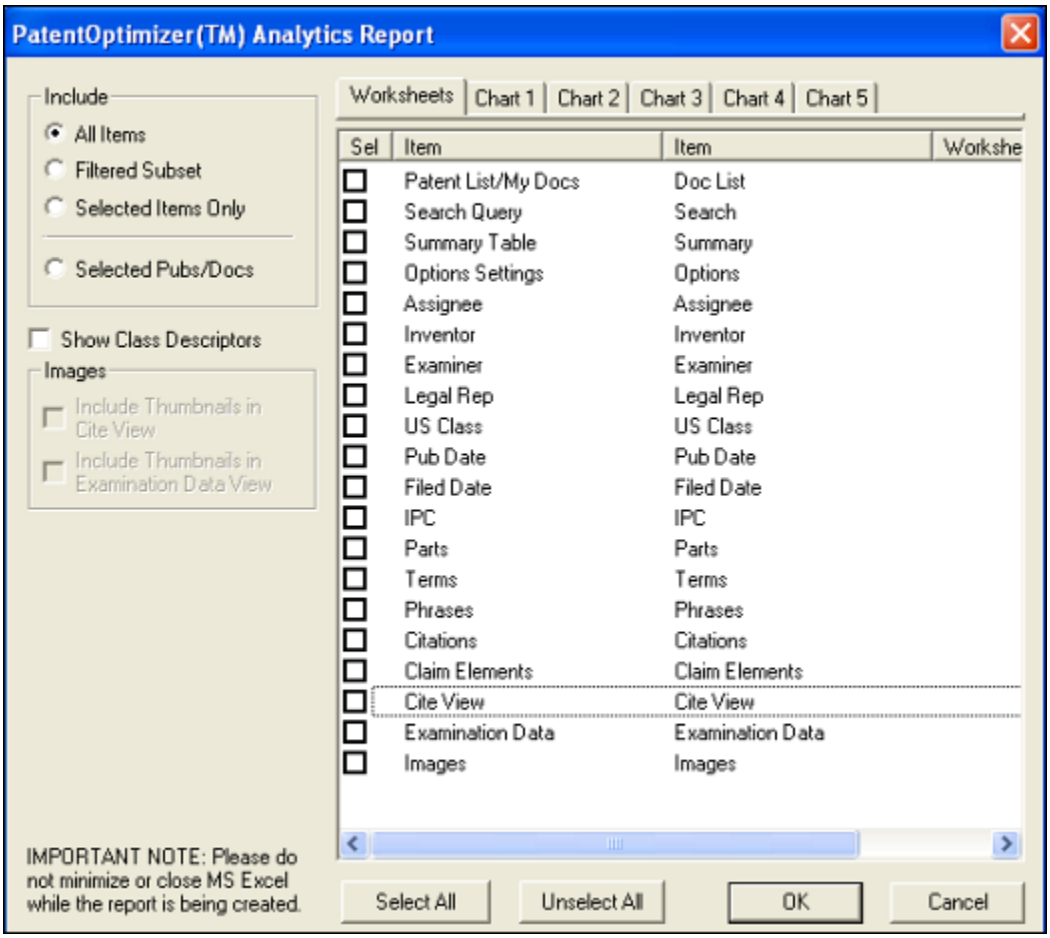
Images	■ View and manipulate thumbnail images that are available within the selected patent documents:
	  ° US documents have thumbnail and drawing sheets available
	  ° PCT documents have thumbnail images available
	■ Analytics Reports - click the Images worksheet checkbox to report selected patent images into an Excel worksheet (up to 200 patent documents)
	■ Cite View and Examination Data View - click the checkboxes under the images section to include images in these views

PatentOptimizer™ Analytics Report

Select the options you would like to use in generating a new Microsoft® Excel or Microsoft® Word report.

You can launch the PatentOptimizer™ Analytics Report feature by clicking the **Report** button on the PatentOptimizer™ Analytics dialog box.

The following image shows the Analytics Report dialog box.

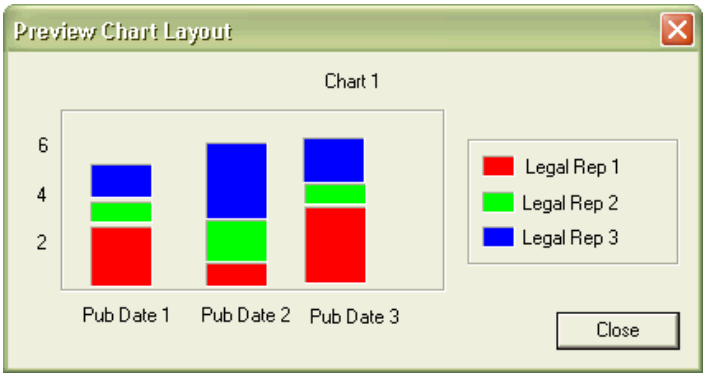


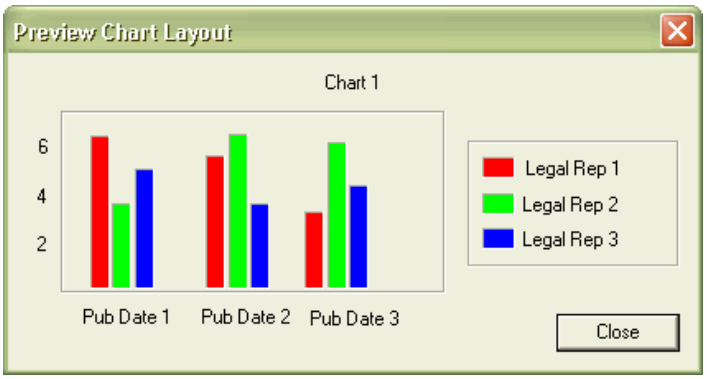
Value	Description
Include	Select one of these options: **Filter Tabs Area (top portion of the dialog box)** ■ All Items - All items that were retrieved are included in the report ■ Filtered Subset - The items that are interrelated by the currently selected filter(s) are included in the report ■ Selected Items Only - Only the filter items that are selected are included in the report, not the interrelated items. That is, if you have selected one **Claim Element** and one item under **People & Org**, only those two items will appear in your report **View Tabs Area (lower portion of the dialog box)** ■ Selected Pubs/Docs - Each of the publications/documents you selected is included in the report
Show Class Descriptors	Select to show class descriptors in the report.

Worksheets tab

Value	Description
Sel	Select the check box(es) that correspond to the other columns in this table.
Item	Lists the different options available for you to select.
Worksheet Name	Click to enter a custom name.
Select All	Click to select all of the check boxes in the **Sel** column.
Deselect All	Click to clear all of the check boxes in the **Sel** column.
OK	Click to generate a Microsoft® Excel spreadsheet report.
Cancel	Click to close the dialog box without saving any changes.

Chart 1 through 5 tabs

Value	Description
Categories Only	Select this option if you only want categories (not Categories Plus Values) to be displayed in your report. Then use the **Sel** check boxes to pick the listed category you'd like to include.
Categories Plus Values	Select this option if you want to include values in your report. Then use the **Sel** check boxes to pick the listed category you'd like to include.
Include "Other"	Select to include a summary "Other" value in your report.
Chart Name	Enter the name of your chart.
Chart Type	Select whether you'd like the chart to be **Stacked** or **Clustered**. The following is an example preview of a report with a Stacked chart type:  The following is an example preview of a report with a Clustered chart type:

	
Max Categories	Select a value from 10 to 50 from the drop-down list.
Max Values	Select a value of 5, 10, 15, or 20 from the drop-down list.
Preview Layout	Click for a preview of how the data will be displayed on the chart.
OK	Click to generate a Microsoft® Excel spreadsheet report.
Cancel	Click to close the dialog box without saving any changes.

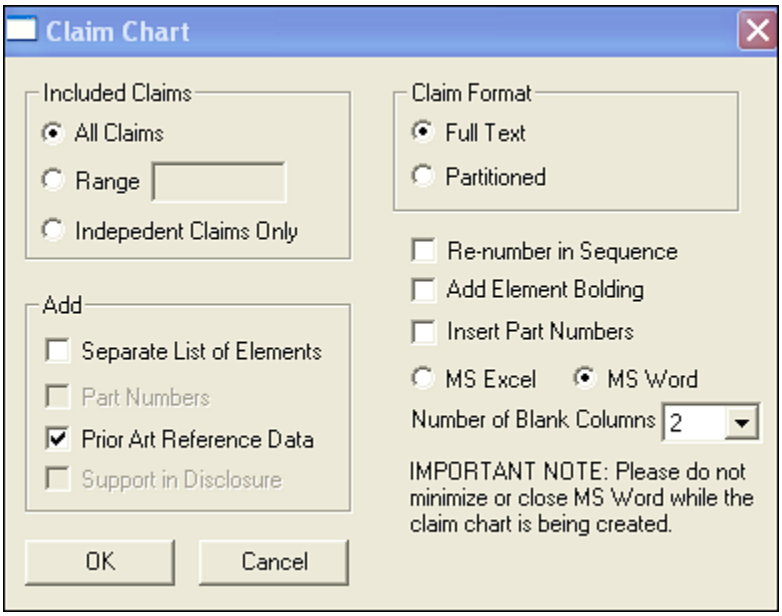
Claim Chart

Use the Claim Chart dialog box to select which options you'd like to include in a Claim Chart report that will be generated in a new Microsoft Excel or Microsoft Word window.

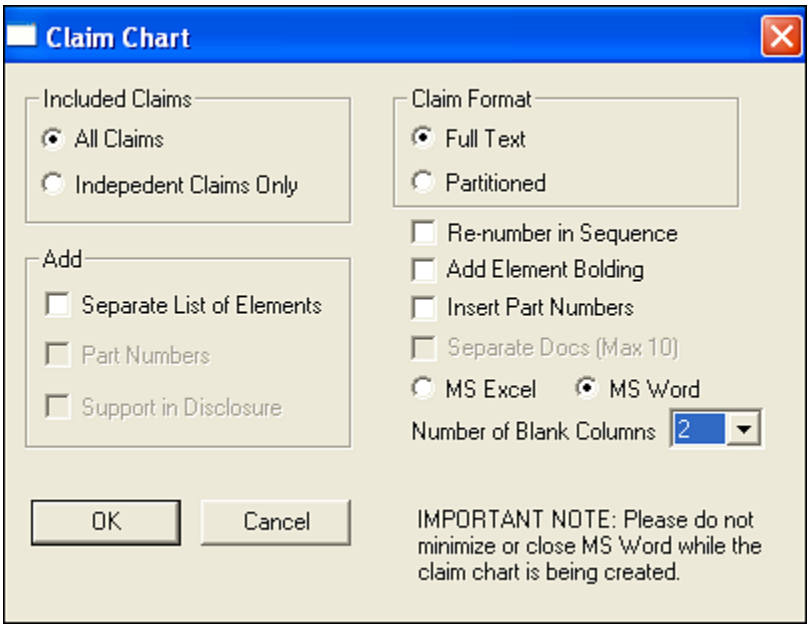
You can launch the Claim Chart dialog box by clicking the **Claim Chart** button on the Check Claims or PatentOptimizer™ Analytics dialog boxes.

The following images show the Claims Chart dialog box when launched from the Check Claims and Analytics dialog boxes, respectively.

Claims Chart dialog box launched from the Check Claims dialog box



Claims Chart dialog box launched from the Analytics dialog box



Value	Description
Included Claims	Select one of these options:

	■ All Claims ■ Range - Available only when the **Claim Chart** button is clicked from the Check Claims dialog box. Enter the range of claims you want to create a report for, separating discontinuous numbers with either a comma or a semicolon. For example: 2-3;5 ■ Independent Claims Only
Add	Select any of these options to add columns to the report: ■ Separate List of Elements - Lists out claim elements in series of rows located in new column next to related claim ■ Part Numbers - Includes part numbers of elements in separate column, next to claim/elements. The part numbers appear in their own column, immediately next to their related claim elements. ■ Prior Art Reference Data - Available only when the **Claim Chart** button is clicked from the Check Claims dialog box. Includes information from Reference Tabs of Check Claims. This data will be included in the same row as the claim, with text first, followed by Biblio data, just as it currently appears in the check claims report. If a prior art reference is related to an element, the element will be called out in the report. ■ Support in Disclosure - Available only when **Separate list of Elements** is selected on the Check Claims dialog box - displays the context and location of the claim element in the specification.
Claim Format	Select one of these options to customize your claim text: ■ Full Text - Selecting this will display the full claim text will appear in the Claim Text column of your report ■ Partitioned - Selecting this will break out claims into separate rows based on semicolon separations
Other Options	Select any of these other options: ■ Re-number in Sequence - Numbers all claims in numerical sequence. For example, if you have selected Independent Claims only and these are claim 1, claim 4, claim 8, when you select this option will they be called claim 1, claim 2 and claim 3 in the report. ■ Add Element Bolding - Bolds elements appearing in the claims ■ Insert Part Numbers - Inserts part numbers directly into text of the claims
OK	Click to save your changes and close this dialog box.
Cancel	Click to close the dialog box without saving any changes.

PatentOptimizer™ Analytics

Use the PatentOptimizer™ Analytics feature to run an analytics profile for U.S. utility patents and PCT applications meeting your specific criteria (the cite list you've searched for, predetermined patent citations, or local documents you've imported). Once you click the **Profile** tab, you can interact with the subsequent filter (those across the top of the dialog box) and view (those across the bottom) tabs to refine what you're seeing, and then run a **Report**, **Claim Chart**, or **Check Refs** on your results.

You can launch the PatentOptimizer™ Analytics feature by clicking the **Analytics** button ( ) on the LexisNexis PatentOptimizer toolbar of Microsoft® Word or Internet Explorer.

Note:
If you do not have access to this feature, a pop-up window will be displayed when you click the button, informing you of this fact. Contact your Account Representative if you would like to activate the Analytics feature.

Common Buttons and UI Elements

The common buttons appear at the bottom of the dialog box.

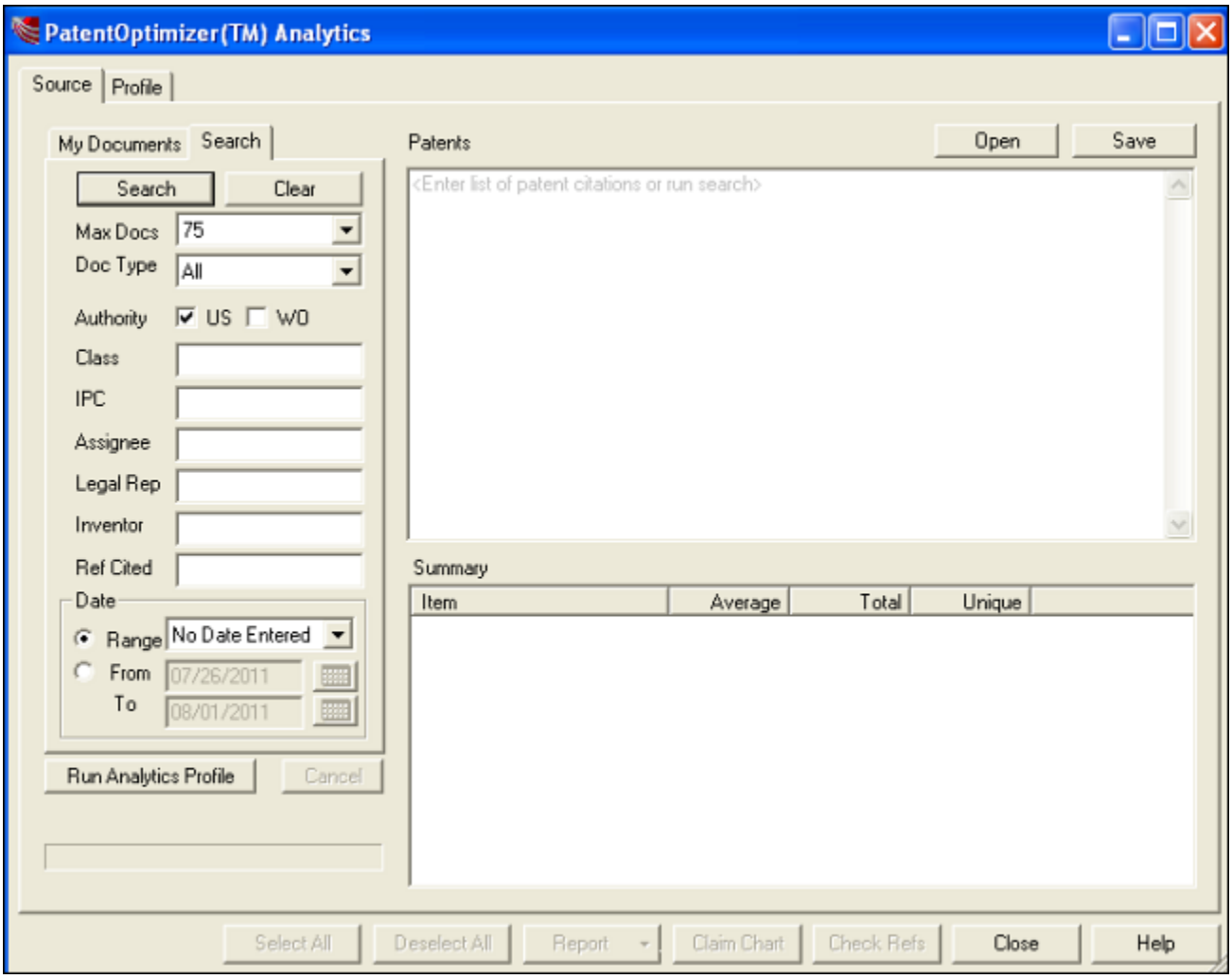
Tip:
You can combine at least 2 items in any category of information (e.g., People & Org > Assignee, or Inventor, or Legal Rep) to make the display less cluttered. To combine them, select at least 2 check boxes, then right-click and select **Combine Selected** from the resulting menu. Then choose the label you want to use for these combined items and how long you want this substitution to remain in effect ("This Session Only" or "Permanent"). To undo the combination, click the **Options** subtab for **Analytics**, then either click the **Remove All** button to remove all combinations, or select one combination then click the **Remove** button to remove it.

Value	Description
Select All	Click this button to select all of the items listed in the selection table at the bottom of the **Profile** tab.
Deselect All	Click this button to clear all of the check marks from the items listed in the view tabs at the bottom of the **Profile** tab.
Report	Select **Analytics Report** to open the **PatentOptimizer™ Analytics Reports** dialog box, or select **Pub/Doc Summary** to open the **PatentOptimizer™ Analytics Summary Report**. Select the items that you want in the report, and select any filters to be used in creating your report in a new Microsoft® Excel or Microsoft Word window.
Claim Chart	Click to open the **Claim Chart** dialog box, then select which options you'd like to include in this report in a new Microsoft Excel or Microsoft Word window.
Check Refs	Click to open the **Check References** dialog box. **Tip:** if you haven't selected any patents, then all patents will be analyzed.
Close	Click to close this dialog box.
Help	Click to view help specific to this feature.

Source tab

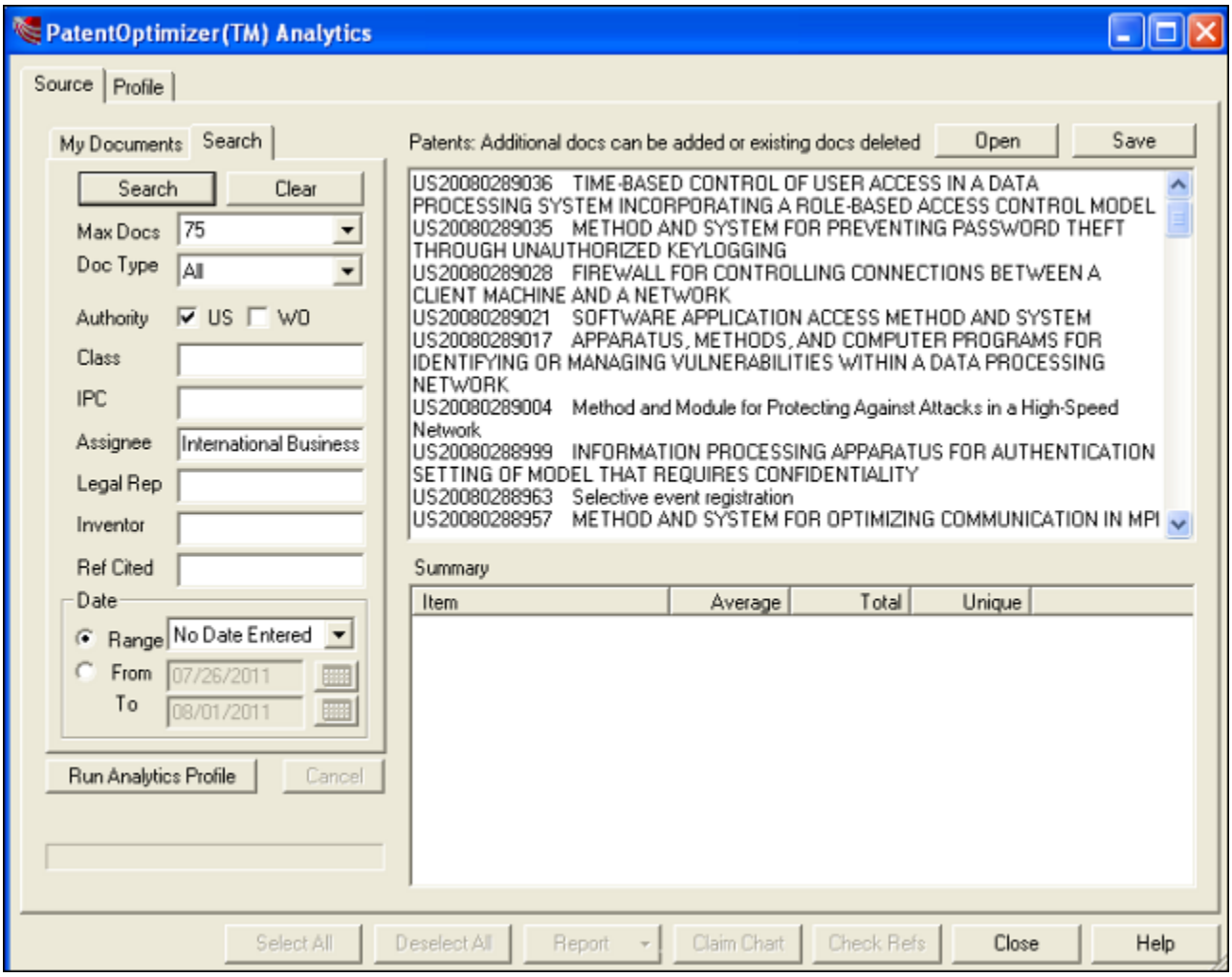
The source tab identifies sources for patent data to be analyzed. You can provide your own list of patents (with or without titles), specify a file folder for patents, or run a search based on criteria you enter.

The following image shows the Analytics dialog box displaying the Source tab **before a search** has been run.



Once you enter the values you want to search on and click the **Run Analytics Profile** tab, the Patents that match your search criteria are displayed.

The following image shows the Analytics dialog box displaying the Source tab **after a search** has been run.



Value	Description
My Documents tab	This tab allows you to import up to 1,000 Microsoft® Word documents to be analyzed.
Open	Click to retrieve a list of sources you've previously saved.
Save	Click to save the sources listed, so you can open them and work with them again later.
Import	Click to Browse for a folder that contains the patents you'd like to analyze, then click **OK** to complete the import. **Tip:** Once you have imported the documents, you can select and delete individual documents before you click the **Run Analytics Profile** button.
Search tab	This tab allows you to enter search criteria to find patents whose profiles you want to view.
Open	Click to retrieve a list of sources you've previously saved.
Save	Click to save the sources listed, so you can open them and work with them again later.
Search	Click to search for patents that meet all of the criteria you've entered. You must click this button before clicking the **Run Analytics Profile** button.
Clear	Click to clear all of the criteria you've entered.

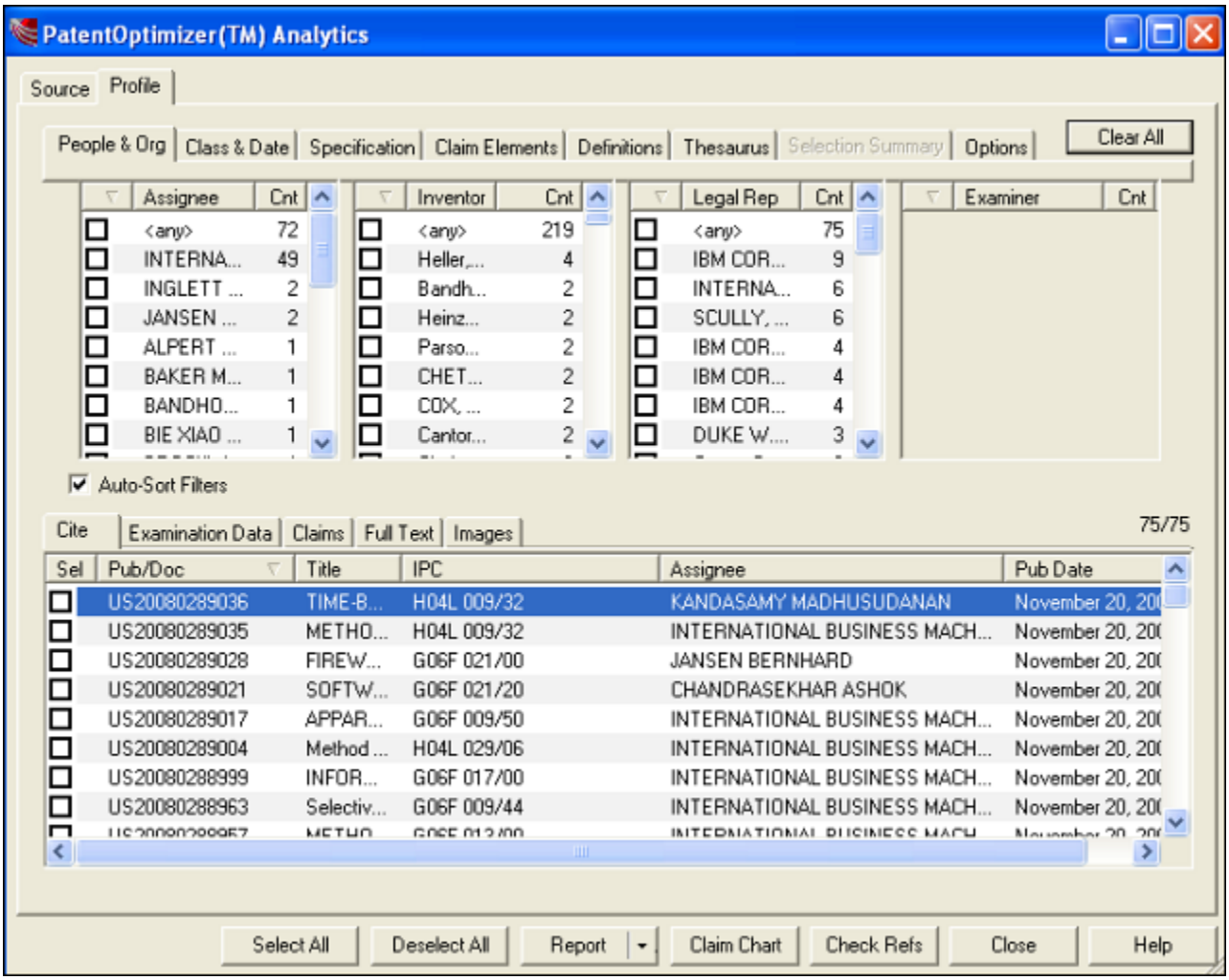
Max Docs	Select a value from the drop-down list. The fewer documents you analyze, the faster the analysis will be run. Choosing a larger number may result in an error message being displayed when you click the **Run Analytics Profile** button to warn you that some items may not be shown in the results.
Doc Type	Select a value from the drop-down list: ■ All ■ Granted ■ Applications
Authority	Select either or both of these options: ■ US - United States ■ WO - World Intellectual Property Organization (WIPO)
Class	Enter the main U.S. patent classification number in this box to limit the range of your search to a particular class/subclass of patents. **Tip:** Identify subclass with a # sign. **Example:** 229#112
IPC	Enter the International Patent Classification number. **Tip:** Identify subclass with a # sign. **Example:** B65D 043#14
Assignee	Enter a person or company name for the assignee at issue.
Legal Rep	Enter the name of the legal representative (individual or company name).
Inventor	Enter the name of an inventor.
Ref Cited	Enter the citing reference you want to find.
Date Range	Select a predefined date restriction from this drop-down list: ■ No Date Entered ■ Previous Week ■ Previous Month ■ Previous 3 Months ■ Previous 6 Months ■ Previous Year ■ Previous 2 Years ■ Previous 5 Years ■ Previous 10 Years
Date From	Select the option for From date, then choose the date you want to use by either: ■ Entering the date in the box in MM/DD/YY format

	■ Clicking the corresponding calendar button ( ) and selecting a date
Date To	Select the option for From date, then choose the To date you want to use by either: ■ Entering the date in the box in MM/DD/YY format ■ Clicking the corresponding calendar button ( ) and selecting a date
Run Analytics Profile	Click to analyze the displayed **Patents**. ■ A performance warning message may display to alert you that all parts, claim elements, terms, phrases and citations found in only one patent will not be shown ■ Click **OK** to continue. **Important:** The analysis takes about 1 second per patent. **Tip:** To increase performance speed and performance, and disable this warning message, reduce the number of patents to be analyzed, or navigate to the **Options** tab and adjust the **Optimize Results** setting.
Cancel	Click to cancel a **Run Analytics Profile** command.
Patents	Lists the patents you entered, that were found when you clicked the **Search** button on the Search tab, or that you Imported on the My Documents tab. **Tip:** When you enter patent numbers directly into this box, they must be entered on separate lines to be correctly detected by the tool. **Important:** Review the patent citations listed in this box, then select and delete any items you do not want to include in your analysis.
Summary	Reflects totals and averages of the analyzed data: ■ Item - Lists the type of item that was analyzed (e.g., Claims, Inventors, Examiners) ■ Average - Lists the average number for each item ■ Total - Lists the total number for each item ■ Unique - Lists the number of unique instances for each item

Profile Tab

The profile tab contains the patent analysis results.

The following image shows the Analytics dialog box displaying the Profile tab.



Value	Description
Clear All	Click this to clear all selections made across all of the Profile filter tabs.

Filter Tabs

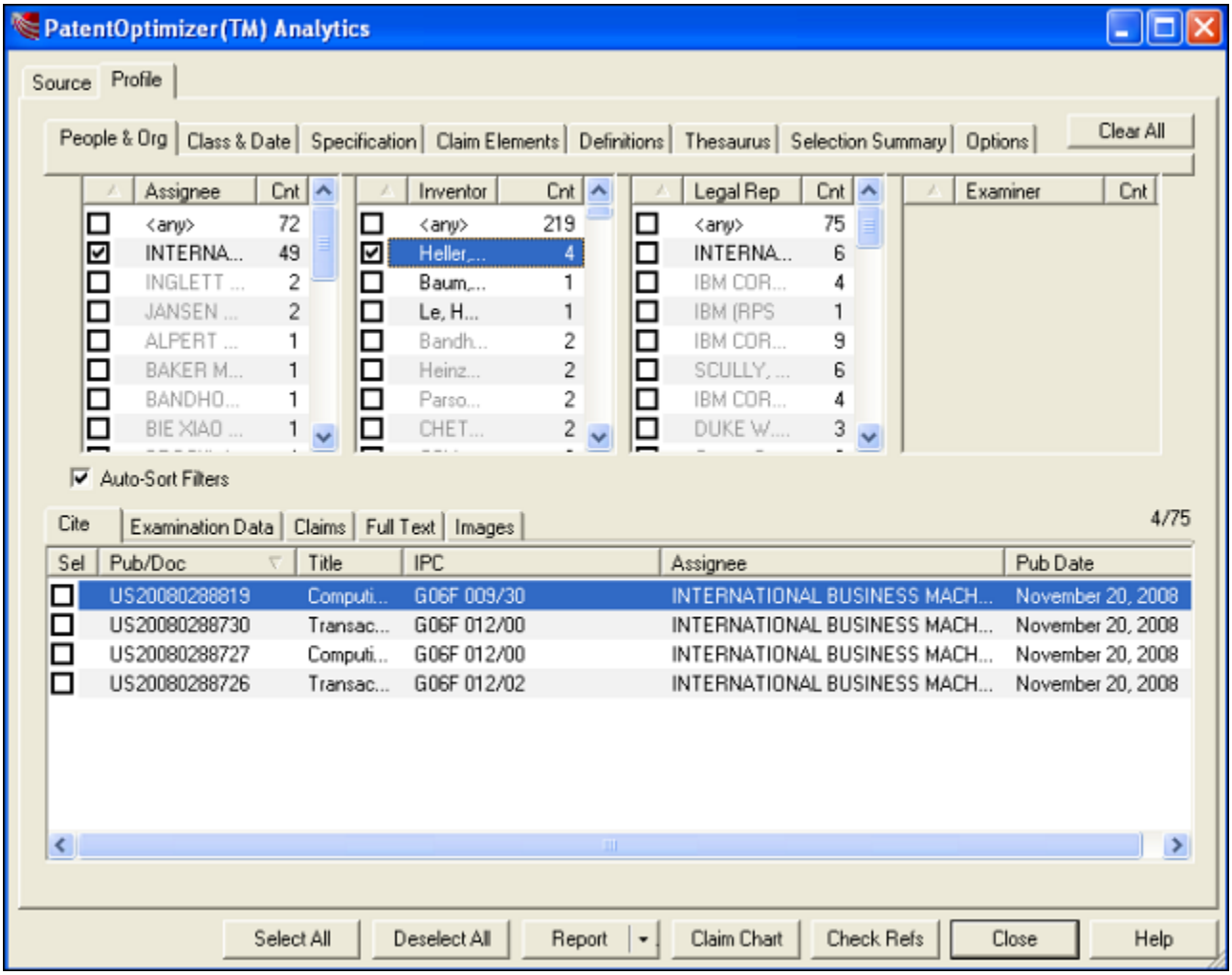
The filter tabs across the top are joined together with Boolean AND logic; within each filter, selections are ordered. All hits are identified with total counts, in rank order (highest to lowest). Selecting a value results in filtering of data in the bottom half of the display. The filter data not contained in an answer set in the filter tabs is grayed out.

Tip:

To apply "AND" logic within each filter tab as well as across filter tabs, select the **Apply "AND" Logic** check box in the Options filter tab.

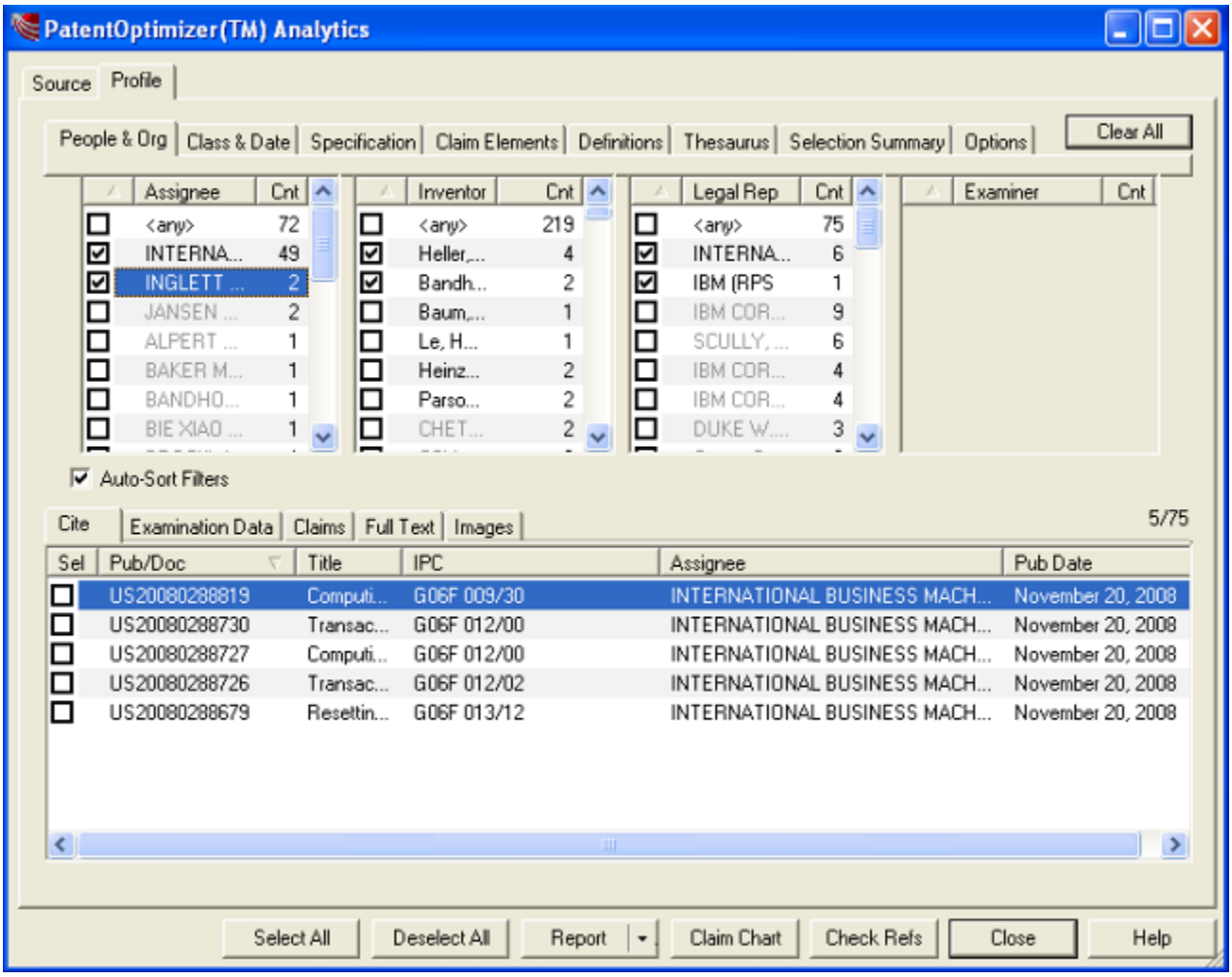
For example, selecting options from the different filters across the top treats each additional selection as a Boolean AND.

New! Auto sorting now takes place after you select a check box. That is, when you select a check box from anywhere in the list, it automatically moves to the top of the list.



Example:

Selecting multiple check boxes within a single filter treats each additional selection as a Boolean OR.



Value	Description
People & Org	Displays check boxes and Count [Cnt] columns as applicable for the patents being analyzed. For example: ■ Assignee ■ Inventor ■ Legal Rep ■ Examiner ■ Auto-Sort Filters
Class & Date	Displays check boxes and Count [Cnt] columns as applicable for the patents being analyzed. **Tip:** If you rest your pointer over a value in the **US Class** column, the description for that class (and subclass) will be displayed. To control whether both the class and subclass or just the class is displayed, click the **Options** tab and select your desired display option under **US Class Display**. ■ US Class ■ IPC ■ Filed Date

	■ Pub Date ■ Auto-Sort Filters
Specification	Displays check boxes and Count [Cnt] columns as applicable for the patents being analyzed. For example: ■ Parts ■ Terms ■ Phrases ■ Citations ■ Auto-Sort Filters
Claim Elements	Displays check boxes and Count [Cnt] columns for aggregate claim elements across all of the profiled documents. For example: ■ Claim Elements, with Variants (which are algorithmically derived from your selected portfolio of patents) **Tip:** If you select a Claim Element that has Variants, the table to the right lets you select any **Element Variants** you wish. Use these options at the right to further filter your results, if desired. ■ Limit Element Variants to Doc Claim Language ■ Locate and Display within o All Claims - identifies documents when selected elements appear anywhere in the claim set o Independent Claims - identifies documents when selected elements appear anywhere in a single independent claim o Auto-Sort Filters - automatically sorts results, placing the most relevant results at the top of the list
Definitions	Displays check boxes and Count [Cnt] columns for **Term** and **Definition** columns. The Definitions provided here are mined from express glossaries contained in various patents. These glossaries typically have a heading (such as GLOSSARY :) followed by a series of terms with definitions. Auto-Sort Filters - automatically sorts results, placing the most relevant results at the top of the list
Thesaurus	Displays check boxes and Count [Cnt] columns as derived from parts data located in your selected patent portfolio. For example: ■ Term/Phrase, with Variants **Tip:** If you select a Term/Phrase that has Variants, the table to the right lets you select any **Term/Phrase Variants** you wish. ■ Auto-Sort Filters - automatically sorts results, placing the most relevant results at the top of the list Thesaurus items are determined by identifying parts having name variants for the same part number as across multiple patents.

Selection Summary	Displays summary check boxes for viewing selections and overriding individual filters. For example: ■ Selection ■ Attribute ■ Auto-Sort Filters When you select or clear one or more of the **Sel** check boxes, a dialog box appears when you try to leave this tab, asking you if you want to "Update filters with selection changes?". Click **Yes** to save the changes you've made.
Options	Select from the following options, as desired: **Filters** ■ Counts | Filter Counts Only - Select to reflect counts that identify the subset defined by your filter selections ■ Specifications > Terms | Ignore Common - Select to ignore common terms appearing in terms filter ■ Standardization | Enable - Select to enable entity standardization across filters ■ US Class Display | Class or Class/Sub-Class - Select to enable US class display filters or display class/subclass filters ■ Apply "AND" Logic - Select one or more check boxes for the type of filter (List) to which you would like to have AND logic applied, instead of the typical OR logic within each filter tab ■ Combined Entities **Caution:** The changes you make will be reflected in your next session - not in the current Profile results o <Add> - Select to add a new combined entity o Edit - Select an item in the list, then click to modify that combined entity. The Combine Entities dialog box has these options: - <Add> - Select to add a new combined entity - OK - Click this button to save the changes you've made and exit this dialog box - Cancel - Click this button to cancel the changes you've made and exit this dialog box - Edit - Click this button to modify the name of the item you selected - Delete - Click this button to remove the item you selected from the list of combined entities - Duration - Select either **Permanent** or **This Session Only** o Delete - Select an item in the list, then click to delete that item **Global** Optimize Results - Select one of these options from the drop-down list: ■ Optimize Results option ■ Maximum Documents value can be applied to: o None o >0 - 24

- Ignore Single Count
- 25 - 249
- Ignore 2 or Less
- 250 - 499
- Ignore 3 or Less
- Ignore 4 or Less
- 1000-1500
- Ignore 5 or Less
- 1500-2000

- Cache Offline - Click the checkbox to cache from your local disk drive, instead of caching records from a server
- Clear Cache - Click the checkbox to remove all saved patent data from the Analytics feature
- Views
  - Independent Only - select the Independent Only check box to view independent claims only in the Claims view tab
  - Add Part Nos. to Claims

Tip:
Since data will accumulate on your disk drive, you should clear the cache periodically to increase performance speed and decrease disk space usage.

View Tabs

The view tabs show the results you get once you have applied filters using the filter tabs at the top of the dialog box.

Select one or more check boxes in the view tabs that you want to run a **Report**, **Claim Chart**, or **Check References** on.

Value	Description
Cite	Select one or more items based on the columns displayed: ■ Pub Number - Publication Number ■ Title ■ IPC ■ Assignee ■ Granted Date The documents displayed are subject to your selections in the filter tabs.
Examination Data	Select one or more items based on: ■ Pub Number - Publication Number ■ Title ■ US Class ■ Legal Rep - Legal Representative ■ Inventor ■ Examiner ■ Ind Clms - Independent Claims ■ Claims
Claims	Select one or more publication numbers, then use the Claim Tree and Claim Text boxes to the right to navigate and view the associated claim hierarchy and text.
Full Text	Select one or more publication numbers, then use the box to the right to review the full plain text for your selections.

Images	■ View and manipulate thumbnail images that are available within the selected patent documents:
	  ○ US documents have thumbnail and drawing sheets available
	  ○ PCT documents have thumbnail images available
	■ Analytics Reports - click the Images worksheet checkbox to report selected patent images into an Excel worksheet (up to 200 patent documents)
	■ Cite View and Examination Data View - click the checkboxes under the images section to include images in these views

How do I insert a formatted patent citation?

Important:
This task can only be performed in a Microsoft® Word document.

1. Position your cursor where you want to insert the citation into your patent document.
2. Select **Citation** ( ) from a LexisNexis® PatentOptimizer™ menu, toolbar, or right-click menu.
3. Select the applicable category for the patent you want to cite from the **Type** drop-down list.
4. Type the full patent Number in the corresponding field.
5. Click **Get Patent Info**.
6. Select the desired citation format from the **Cite Format** drop-down list.
7. Click **Insert**.

How do I create a citation format?

Important:
This task can only be performed in a Microsoft® Word document.

1. Select **Citation** ( ) from a LexisNexis® PatentOptimizer™ menu, toolbar, or right-click menu.
2. Click **Add/Edit Cite Formats**.
3. Create a new citation format by highlighting an existing format, then clicking **Copy**.
4. In the Edit box, modify the name of the newly created format as desired.
5. In the lower pane, modify the definition for the newly created format by changing the text and punctuation outside of the bracketed material or the order of the bracketed material.
6. Click **Preview** to view a sample citation using the new format in the lowermost pane.
7. Click **Save** to save the citation format.

Tip:

- To reorganize all but the default citation format in order of preference, click the listing for a citation format that you want to move, then click the **Up Arrow** or **Down Arrow** until the selected listing is in the desired position
- To permanently remove a citation format, select the corresponding listing, then click **Delete**

How do I view claim structure?

1. Select **Check Claims** ( ) from a LexisNexis® PatentOptimizer™ menu, toolbar, or right-click menu.
2. Click the **Claim Tree** tab.

The Claim Refs pane of the tab illustrates the structure of your document's claims section in tree format, with each claim listing constituting a separate branch indented and assigned an icon per the claim's relationship status.

For further information, see How do I view claim relationships? in the User's Guide.

How do I research claim elements on the Internet?

1. Select **Check Claims** ( ) from a LexisNexis® PatentOptimizer™ menu, toolbar, or right-click menu.
2. Select the **Elements** check box. The Claim References pane refreshes to display a list of elements beneath the branch for the claim in which they appear in the claims section of your patent document.
3. In the **Claim References** pane, choose the listing for the claim for which you want to research elements.
4. Click **Search Claims**.
5. In the Search area, choose the tab for the type of search you want to perform (e.g., *lexis.com*® , Scopus® , or The Web).
6. As applicable based on the type of search being performed, choose the specific source you want to search from the list in the **Search** area pane (e.g., choose a search engine for the Web).
7. If you want to run a semantic analysis before your search, click:
   - The **Apply Semantic Analysis** button to run a semantic query against the terms in the Claim Elements list
   - The check box in the **Sel** column to specify which terms will be used in your search
   - The Previous ( ), Rerun Query ( ), and Next ( ) buttons if you want to view other search term sets or rerun the query
   - **Incl** or **Excl** next to an item to include (Boolean AND) or exclude (Boolean AND NOT) that term
   - An item's **Weight** number to change it (1=low prominence, 2=medium prominence, 3=high prominence) for your search
8. Click **Search** to perform the search and review the results.

Tip:
You may save material associated with your search for and associate it with a specific claim or element. For details on doing so, see How do I research claim elements? in the User's Guide and, specifically, steps 12 through 14 of that procedure.

How do I compare multiple patent documents?

1. Open the first document that you want to compare.
2. Click the **Compare Docs** toolbar button (), then click **OK**.
3. Open the next document that you want to compare.
4. Click the **Compare Docs** toolbar button (). The Compare Docs dialog is displayed, indicating which other documents are designated for comparison.
5. Proceed as applicable based on the desired course of action:
   - To compare the documents designated up to this point, click **Compare Now**. The Compare Docs window opens. Proceed to step 6.
   - To designate additional documents for comparison, repeat steps 3 and 4 for each such document.
   - To negate the designation for comparison of the most recently opened document, click **Cancel**, then step 5.
6. Compare the chosen documents by reviewing the information displayed in the Compare Docs window.

Note:
For further information, see How do I compare patent documents? in the User's Guide.

How do I verify antecedent basis?

1. Select **Check Claims** ( ) from a LexisNexis® PatentOptimizer™ menu, toolbar, or right-click menu.
2. Click the **Antecedent Basis** tab. The tab displays a table listing elements appearing in the document along with codes and icons denoting status pertaining to antecedent basis.

Note:
For further information, see How do I verify antecedent basis in a patent document? in the User's Guide.

How do I assess language consistency in a patent document?

1. Select **Check Claims** ( ) from a LexisNexis® PatentOptimizer™ menu, toolbar, or right-click menu.
2. Click either the **Terms** or **Phrases** tab. The tab displays a table listing either the terms or phrases found in the description and claims sections of your patent document.

Note:
If you find inconsistencies in language usage, you can navigate to the corresponding material in your document directly from the Check Claims dialog box, then post the desired corrections. For details on doing so, see How do I assess language consistency in a patent document? in the User's Guide (specifically, steps 6 through 8).

How do I programmatically mark claims and claim references?

Important:
This task can be performed only in a Microsoft® Word document.

1. Select **Mark Claims Wizard** ( ) from a LexisNexis® PatentOptimizer™ menu or toolbar.
2. When the tool has found the start of your claims section, click **Yes** in the displayed prompt.
3. When the tool has found a claim or claim reference, click **Yes** in the displayed prompt.

Tip:
Marking claims and claim references allows you to both verify numbering and automate renumbering in the event that you add, move, or remove claims. For further details on using this feature, see How do I verify claim numbering and referencing? in the User's Guide.

How do I detect part-labeling inconsistencies?

1. Select **Check Parts** ( ) from a LexisNexis® PatentOptimizer™ menu, toolbar, or right-click menu.
2. Review the displayed information, using the following as a reference in doing so:
   - The Parts Index pane on the Check Parts tab displays in numerical order each occurrence of identified part numbers along with the part name corresponding to each part-number occurrence, allowing you to easily see any part numbers associated with multiple part names
   - To see which if any part names are associated with multiple part numbers, click **Find Repeated Parts**

Tip:
For further details on using this feature, see How do I find part-labeling inconsistencies? in the User's Guide.

How do I correct part-labeling inconsistencies?

Important:
This task can only be performed in a Microsoft® Word document.

1. Select **Check Parts** ( ) from a LexisNexis® PatentOptimizer™ menu, toolbar, or right-click menu.
2. In the Check Parts dialog box, click **Edit** to open the Edit Parts dialog box.
3. In the list of part labels, select one or more labels for which you want to post corrections.
4. Indicate the desired changes, using the following as a guide in doing so:
   - To assign a different name to the selected part labels, type the desired name in the **Replace selected with field** within the Names area.
   - To assign a single new number to the selected part labels, select **New Number** from the **Replace selected with** drop-down list in the Numbers area, then type the desired number in the field beside the drop-down list.
   - To assign a range of new numbers to multiple selected part labels, first select **Range starting at** from the **Replace selected with** drop-down list in the Numbers area, next type the starting number of the desired range in the field beside the drop-down list, then select the increment by which you want to increase the numbers of the selected part labels numbered progressively higher than the starting part label.

   Tip:
   For further details on renumbering part labels across a range, see How do I correct part numbers associated with multiple part names? in the Users Guide (specifically, steps 5 through 7).
5. Click **Preview** button to review your changes before updating your document accordingly. New columns showing your changes are added to the table displayed in the Edit Parts dialog box.
6. Begin posting part-labeling corrections to your document by clicking **OK** and then clicking either **Replace** (to post corrections one at a time after reviewing each) or **Replace All** (to post all corrections at once without having the opportunity to review them first) in the displayed dialog box.

   Tip:
   See How do I correct part-label inconsistencies? in the User's Guide.

How do I insert part labels using placeholders?

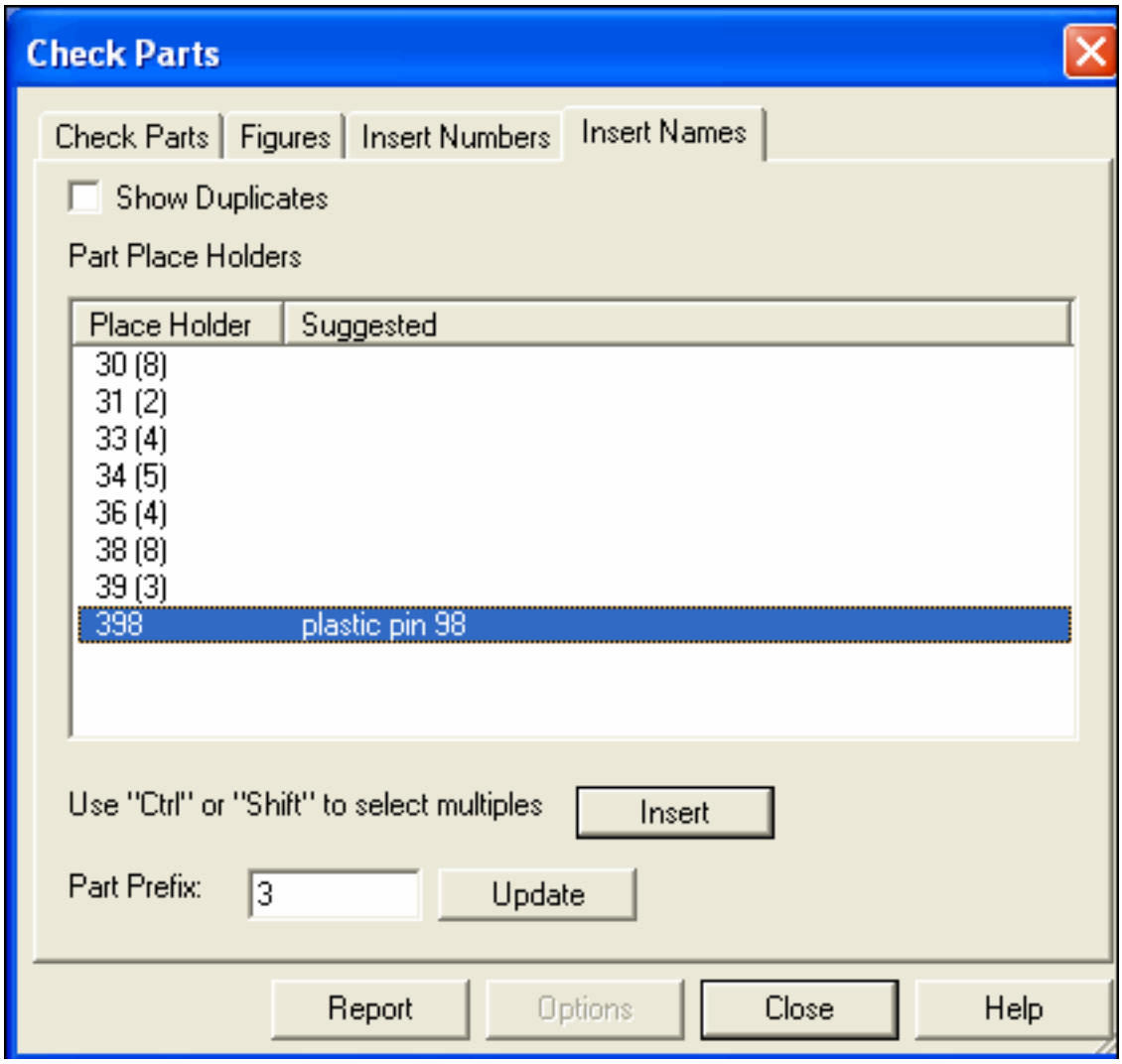
Important:
This task can only be performed in a Microsoft® Word document and requires that the name and number for the applicable part label be spelled out at least once in the document.

In situations where you must denote a lengthy part label numerous times in a patent document, the LexisNexis® PatentOptimizer™ service can ease the process, requiring you to designate the applicable label only once, after which you can type a single short placeholder at all other necessary places in your document then have the service automatically substitute the designated part label for all instances of the placeholder.

Note:
To address varied user preferences, the LexisNexis PatentOptimizer service allows you to modify the default placeholder prefix (see How do I change the prefix designating placeholders?.

1. In the Microsoft Word application, open the desired patent document.
2. At each location within the abstract, claims, and/or detailed description section where you want to insert the part label using a placeholder, type placeholder information using the following convention (substituting actual data for the bracketed material and omitting the brackets): `[part prefix][number of part being used]`
   The default placeholder prefix is fp. So to insert a placeholder for part 104, you would type fp104. Note that there should be no spaces between the part prefix and part number and that this functionality is not case sensitive.
3. Select **Check Parts** ( ) from a LexisNexis PatentOptimizer menu, toolbar, or right-click menu.

   Tip:
   If the service displays a message stating that the detailed drawing description section could not be found instead of displaying the Check Parts dialog box, you may have given the section a heading that the Check Parts feature doesn't recognize (for example, you may have used the abbreviation "DRWGS DESCR"). To fix this, see How do I specify unique variations in wording of section headings?, specifically entering your chosen wording in **Detailed Description of Drawings**.
4. Click the **Insert Names** tab to view all placeholders appearing in your document. The Part Place Holder pane displays a list of all placeholders identified in your document in table format along with suggested part-label substitutions.
   The following image shows the Check Parts dialog box displaying the Insert Names tab.



5. Review the suggested part label for each placeholder, then proceed as applicable based on the desired course of action:
   - To change a suggested part label, proceed to step 6.
   - To proceed without changing any suggested part labels, proceed to step 10.
6. In the **Part Place Holder** pane, click the rows corresponding to the placeholders for which you want to change the suggested part label. The row is highlighted.
7. Click within the **Suggested** column in the highlighted row. The corresponding field becomes editable.
8. Type the desired part label in the box.
9. Change additional suggested part labels or proceed without doing so, as desired:
   - To change additional suggested part labels, repeat steps 6 through 8.
   - To proceed without changing additional suggested part labels, go to step 10.
10. In the **Part Place Holder** pane select the listings corresponding to the placeholders for which you want to substitute part labels.

Tip:
You can select multiple consecutive or non-consecutive placeholders at once, as follows:

- To select multiple consecutive placeholders, click the listing corresponding to the first desired placeholder, then press and hold the **SHIFT** key, next click the listing corresponding to the last desired placeholder, and, finally, release the **SHIFT** key
- To select multiple non-consecutive placeholders, click the listing corresponding to the first desired placeholder, then press and hold the **CTRL** key, next click each listing corresponding to the remaining desired placeholders, and, finally, release the **CTRL** key

11. Click **Insert**. A message is displayed, citing the number of part labels to be inserted and informing you that any changes made can be negated using the **Edit/Undo** command in the Microsoft Word application.
12. Click **OK** to close the message and substitute the part labels for the selected placeholders in your patent document.
13. When you have finished inserting part labels, click **Close**.

How do I number unnumbered parts in the Abstract, Claims, and Detailed Description sections?

Important:
This task can only be performed in a Microsoft® Word document.

1. Select **Check Parts** ( ) from a LexisNexis® PatentOptimizer™ menu, toolbar, or right-click menu.
2. Select the **Insert Numbers** tab to view a list of all parts missing part numbers in the abstract, claims, and detailed description sections. The tab displays in table format a list of parts lacking part numbers along with suggested numbers for the parts, presented per analyzed document section.
3. In the Invalid Parts pane, select the part labels that you want to number in your document, then click **Insert**.
4. Begin posting part-numbers to your document by clicking the **OK** button in the displayed message and then clicking either **Replace** (to insert numbers one at a time after reviewing each) or **Replace All** (to insert all numbers at once without having the opportunity to review them first) in the displayed dialog box.

   Tip:
   For further details on using this feature, including editing part numbers before inserting them, see How do I insert missing part numbers? in the User's Guide.

How do I refine commonly used measurements?

Important:
This task can only be performed in a Microsoft® Word document.

1. Select **Check Measurements** ( ) from a LexisNexis PatentOptimizer menu or toolbar. The Check Measurements dialog box opens, displaying in table format a list of all detected commonly used measurements appearing within the document along with suggested substitutions.
2. Click to select the measurements you want to replace.
3. Click **Replace** to replace the measurements with the suggested measurements. A message is displayed, prompting you to confirm your desire to replace the selected measurements with the suggested alternate measurements.
4. Click **OK** to close the confirmation message and replace the selected measurements are with the suggested alternate measurements in your patent document.

Tip:
For further details on using this feature, see How do I refine commonly used measurements? in the User's Guide.

How do I view information on referenced patents?

Select **Check References** ( ) from the LexisNexis® PatentOptimizer™ toolbar or menu.

The Check References dialog box opens and display information related to each patent referenced in your document.

Tip:
For further details on using this feature, see Analyzing Referenced Patents in the User's Guide.

How do I generate reports?

By clicking the **Report** button in the dialog boxes listed below you can generate documents outlining corresponding information related to your patent documents, as follows:

Dialog box	Report information
Check Terms	■ Prior usage ■ Case reference ■ Alternate suggested terminology ■ Custom definitions for terms or phrases that you selected before clicking the **Report** button
Check Claims	■ Claim errors ■ Number of claims ■ A claim tree and/or chart ■ Reference bibliographic data ■ Terms and/or phrases found in the claims section but not the description section ■ Term and/or phrase usage in claims ■ Antecedent basis
Compare Docs	■ Documents that you compared ■ The elements, terms, and/or phrases that were changed between documents and the documents in which the changes occurred ■ The claim structure of each compared document
Check Parts	■ Identified part numbers and names ■ Part names associated with multiple part numbers, ordered alphabetically ■ Unnumbered parts organized by section (i.e., abstract, claims, and detailed description) and ordered per occurrence in the document ■ Any designated placeholders and corresponding part name and number
Check References	Post-issuance activity and ownership information for referenced patents that you selected before clicking the **Report** button
Check Measurements	Current measurements along with corresponding suggested alternatives, if any

Profile	■ Analytics Report
	  ○ Available after running the Analytics Profile from the **Source** tab
	  ○ May include thumbnail images in the Cite View or Examination Data View
	■ Pub/Doc Summary Report

How do I define section heading aliases?

In extracting information to perform functions, the service looks for predefined wording to identify sections in patent documents. You can, however, set the program to recognize sections based on unique, user-defined wording.

1. Select **Options** ( ) from a LexisNexis® PatentOptimizer™ menu, toolbar, or right-click menu.
2. In the Options dialog, select the **Section Headings** tab.
3. For each document section for which you want to specify one or more heading aliases, type the desired wording in the corresponding pane.

   Tip:
   To define multiple aliases for a given section, press the **ENTER** key between entries.

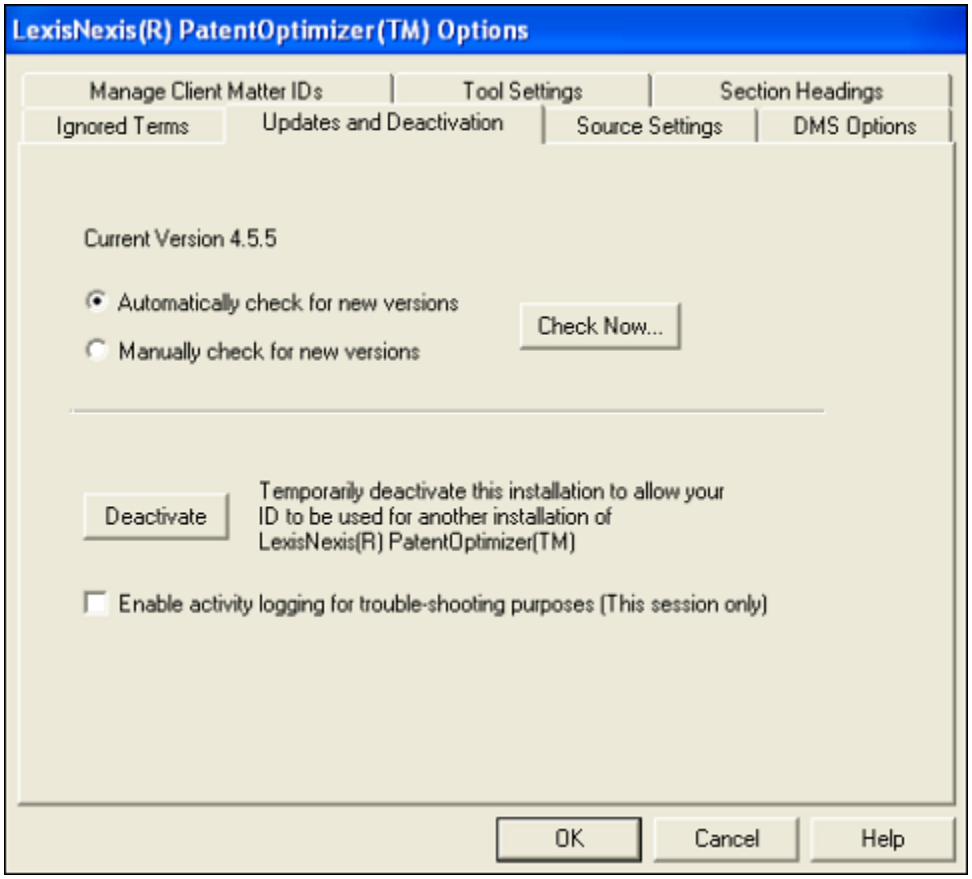
4. When you are finished, save your input and close the Options dialog box by clicking **OK**.

How do I deactivate the LexisNexis® PatentOptimizer™ Service?

Note:
You must have an active Internet connection to perform this task.

Your license for the LexisNexis® PatentOptimizer™ service allows you to use the software on one computer. You can, however, deactivate the service on one computer when you want to use it on another computer.

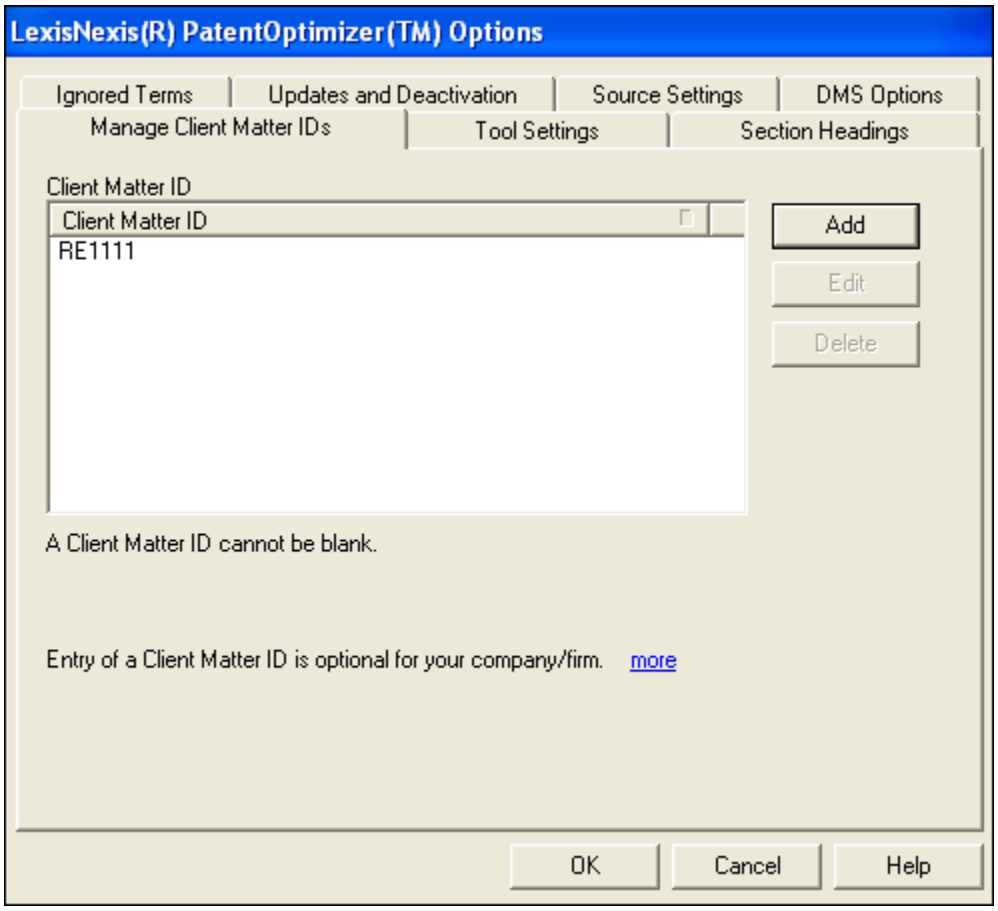
1. Open the Microsoft® Word, Internet Explorer, Adobe Acrobat®, or Adobe Reader® program as you normally would. The applicable program opens, displaying the LexisNexis PatentOptimizer in the upper portion of the program window.
2. Select **Options** ( ) from a LexisNexis PatentOptimizer menu, toolbar, or right-click menu. The LexisNexis(R) PatentOptimizer(TM) Options dialog box opens.
3. Select the **Updates and Deactivation** tab.
   The following image shows the Options dialog box displaying the Updates and Deactivation tab.



4. Click **Deactivate**. A dialog box opens, prompting you for your LexisNexis® User ID and Password.
5. Enter your LexisNexis® User ID and Password.
6. Click **OK**. The dialog box closes and a message is displayed, indicating that the service has been successfully deactivated.
7. Click **OK** to close the message and return the focus to the Options dialog box, where the **Deactivate** button is now unavailable.

How do I store client matter IDs?

1. Open the Microsoft® Word, Internet Explorer, Adobe Acrobat®, or Adobe Reader® program as you normally would.
2. Select **Options** ( ) from a LexisNexis PatentOptimizer menu, toolbar, or right-click menu. The LexisNexis(R) PatentOptimizer(TM) Options dialog box opens.
3. Click the **Manage Client Matter IDs** tab. The Manage Client Matter IDs tab of the Options dialog box opens (as shown below).



4. Click **Add**. A new empty entry with a blinking cursor appears.
5. In the empty entry, enter the applicable client matter ID.

   Tip: If a specific format is required for the client matter ID, that format will be illustrated in the area just beneath the list of client matter IDs.

6. When you are finished entering the client matter ID, press the **ENTER** key or click elsewhere within the dialog box.

   Tip: By default, client matter IDs are listed in reverse chronological order, that is, with the most recently stored client matter ID listed first.

   The client matter ID list refreshes to reflect the addition of the client matter ID.

7. Repeat steps 4 through 6 for each client matter ID you want to store.
8. When finished storing client matter IDs, save your input and close the Options dialog by clicking **OK**.

Tip:

For instructions on editing or deleting previously stored client matter IDs, see How do I track billable activity by client?.

How do I track billable activity by client?

Before You Begin:
Before tracking billable activity, you must store IDs for your clients.

As an aid in determining client billing charges, the LexisNexis® PatentOptimizer™ service provides a tracking mechanism for certain analysis and report activities performed by the service on a given day. In tracking billable activity, the LexisNexis PatentOptimizer service interfaces with the PowerInvoice™ service, from which you can generate monthly reports detailing the following information:

- Web ID of the staff member who performed the activity
- ID of the client for whom the activity was performed
- Date of service
- Service used to perform the activity
- Billable analysis activity or report activity

Activity is tracked on a daily basis, with activity for a given date, Web (user) ID, client ID, and task on a given date being combined into a single report record for that date.

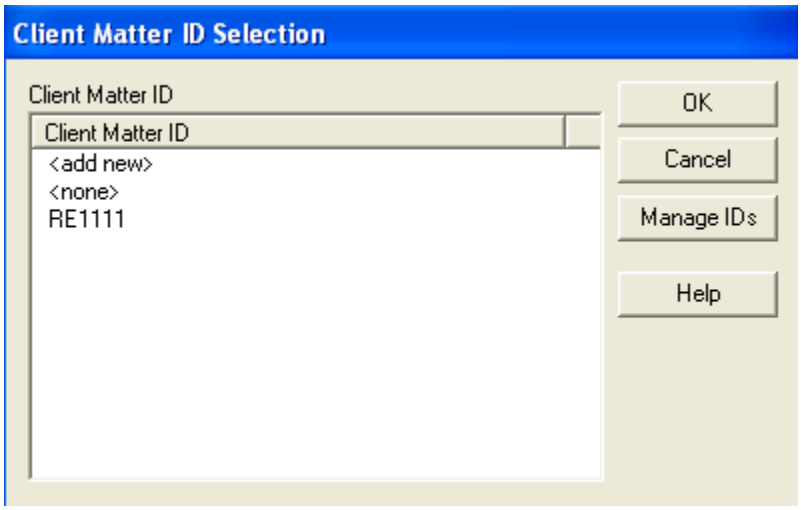
Important:
Whenever you perform a billable activity using the LexisNexis PatentOptimizer service while online, tracking information is sent to the PowerInvoice program in real time. If for some reason during a given month you elect to use the LexisNexis PatentOptimizer service offline, billable-activity information will be stored locally until you again use the service while online — which you must do before 10:00 p.m. E.S.T. of the last day of the month if you want the stored information to be included in the report for that month.

To speed entry while also ensuring consistency and, thus, accuracy of client matter IDs from session to session, the program provides for storage of this information. Once stored, client matter IDs can be modified as necessary. Should a client matter ID for some reason become obsolete, you can delete it from storage.

1. Open the desired document in Microsoft® Word, Internet Explorer, or Adobe Acrobat® as you normally would.
2. Initiate the activity tracking process in one of the following manners, as applicable:
   - If your lexis.com® ID is configured for mandatory entry of client matter IDs, and you have not previously selected a client matter ID against which to track activity since last opening the Microsoft Word, Internet Explorer, or Acrobat program, click the toolbar button for the billable activity that you want to perform [i.e., (Check References), (Check Terms), (Mark Terms), (Check Measurements), (Check Parts), (Check Claims), (Compare Docs), (Patent Citation), or (Mark Claims Wizard)]. The Client Matter ID Selection dialog is displayed.
   - If your lexis.com ID is configured for mandatory entry of client matter IDs, and you have previously selected a client matter ID against which to track activity since opening the Microsoft Word, Internet Explorer, or Acrobat program on the given day, or if your lexis.com ID is not configured for mandatory entry of client matter IDs, click **Assign Applicable Client Matter ID** ( ) on the toolbar. The Client Matter ID Selection dialog is displayed.
3. In the Client Matter ID Selection dialog box (shown below), choose the entry corresponding to the client for whom you are performing the activity.

   Tip:
   If you do not want to track activity for a particular client, choose the **<none>** entry.

   Note:
   By default, client matter IDs are listed in reverse chronological order, that is, with the most recently stored client matter ID listed first.



4. Click **OK**. The Client Matter ID Selection dialog closes, and you should proceed as applicable.
   - If at step 2 of this procedure you clicked the toolbar button for the billable activity that you want to perform, proceed directly with the activity. The service will track the activity being performed against the chosen client matter ID.
   - If at step 2 of this procedure you clicked the **Assign Applicable Client Matter ID** button, now click the toolbar button for the billable activity that you want to perform [i.e., (Check References), (Check Terms), (Mark Terms), (Check Measurements), (Check Parts), (Check Claims), (Compare Docs), (Patent Citation), or (Mark Claims Wizard)]. The service will track the activity being performed against the chosen client matter ID.

Important:
Client matter ID selection remains active until either you close the program (Microsoft Word, Internet Explorer, or Acrobat) or you choose a different client matter ID.

Technical Support

Technical Support is available 24 hours a day, 7 days a week. When calling for technical assistance, please have your user ID ready and be at the computer on which the program is running.

Phone:	1-800-543-6862 (U.S. and Canada)
Web:	http://www.lexisnexis.com/custserv/

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