InnovationQ Plus Quick Start Guide

IP Authenticated Personal Accounts

Get Started, Search, Modify Search, Corporate Tree, Review Results, Visuals, Analyze, Save Work & Export, Support Resources

Updated August 2017

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Quick Start Guide:
Get Started – Logging In

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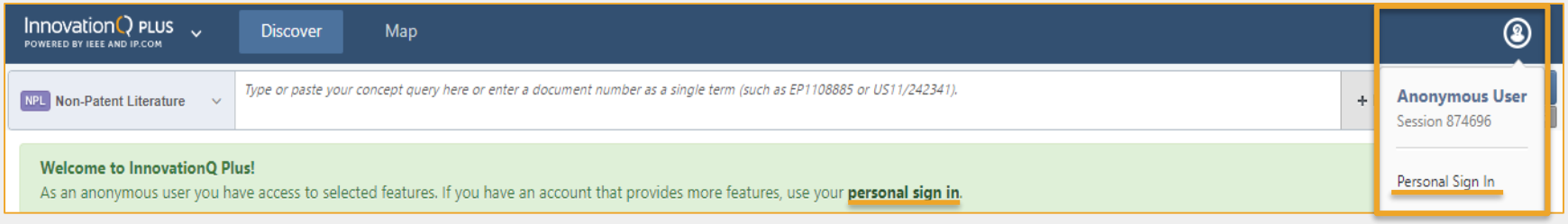
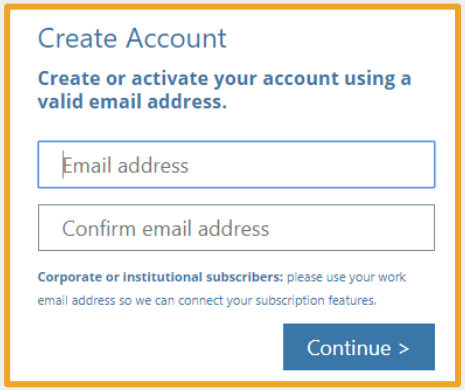


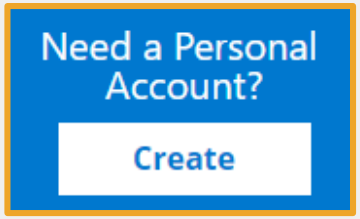
Set Up Personal Account and Log In

You will be automatically given access to InnovatonQ Plus via IP Authentication within the IP authenticated area. Set up and sign into a personal account to unlock additional features, including saved work, exports and analyze.

1. Go to www.iq.ip.com
2. Click one of the links prompting you sign in
3. Already set up? Enter named seat login credentials: email address and password
4. First time setting up? Click "Create" under "Need Personal Account" and follow prompts

Note: Named seats are NOT subject to IP Auth "simo" limit (limit to number of simultaneous users at one time)





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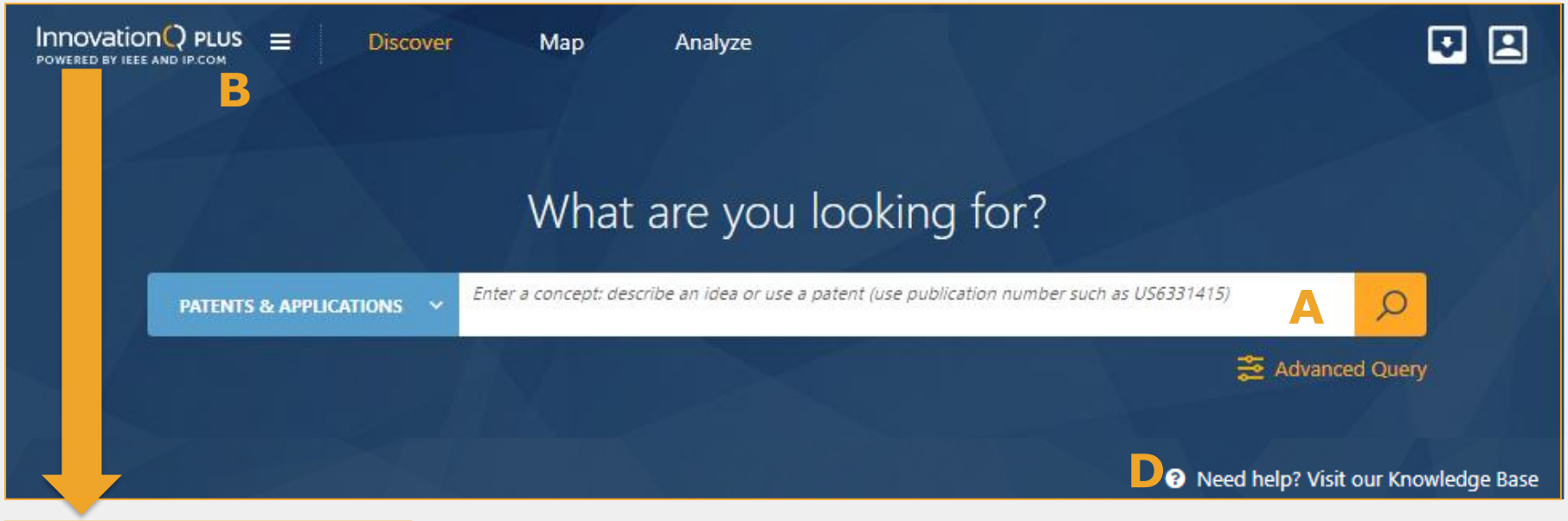
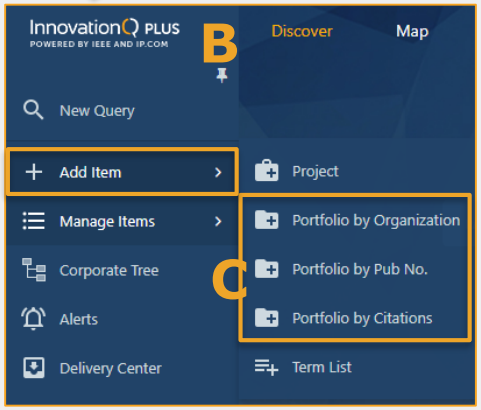
Quick Start Guide: Get Started





Log into InnovationQ Plus and begin searching right away, create portfolios, or access saved work to pick up where you left off

A. **Search Bar:** Enter your concept search
Note: Open the Advanced Query Builder for more options to search

B. **Sidebar menu:** Create a new project, open saved work or reports, use a portfolio wizard, or access Corporate Tree

C. **Portfolio Wizards:** create a portfolio of patents by publication number, company/organization, or create a portfolio of forward and/or backward citations

D. **Knowledge Base:** Visit the Knowledge Base for help and to learn more about InnovationQ Plus

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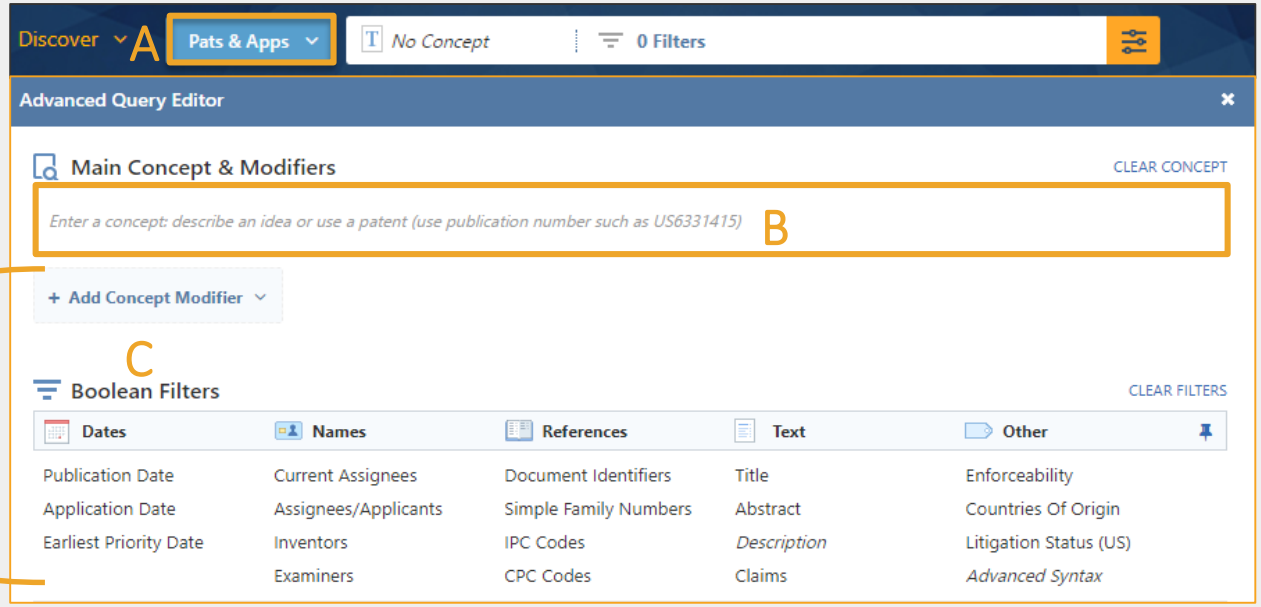
Quick Start Guide: Search



A. Select content to search
B. Enter a main concept
C. Add concept modifiers and/or Boolean filters (see pages 4-5)

SEARCH – Use the query box on the landing page or open the Advanced Query Editor

Type a concept query into the query box, such as:

1. Natural language description of what you're looking for
2. Cut and paste text from a patent, non-patent literature, invention disclosure, email, or any meaningful text
3. An entire document – type the publication number with the country code, e.g. US7123456

Please note: For security purposes, queries are deleted within 24 hours if not saved

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Quick Start Guide: Modify Search - Focus

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Concept modifiers are an important and effective way to focus results in a certain area by up- or down-weighting a concept(s) and pushing results to be "more like" or "less like" the modifier(s)

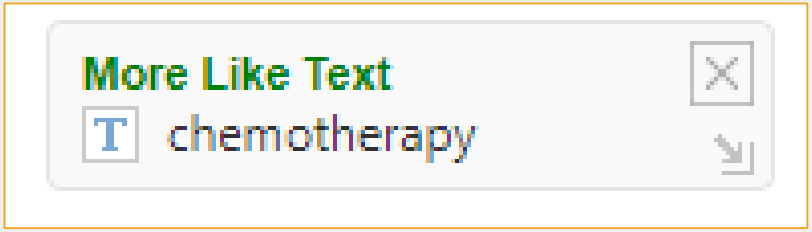
Concept Modifiers can be:

A. Text
Note: Terms the Term Heat Map/Cloud may provide insight into concept modifiers. Your concept modifier may be present in the main concept. The concept modifier helps direct the engine to what is important (or less important) and re-sorts the results to show the most relevant results to the top.

B. Entire document

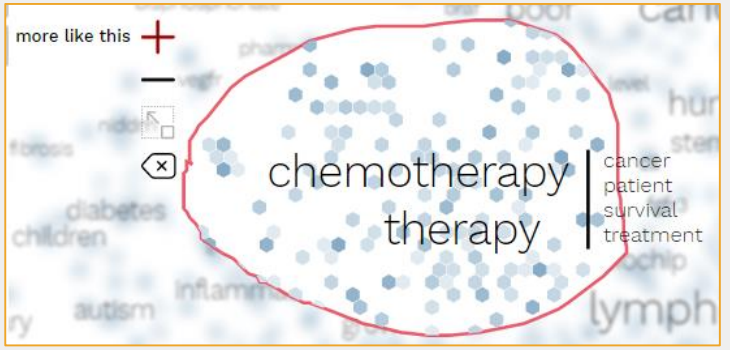
C. Area of the Semantic Map

A



B

C



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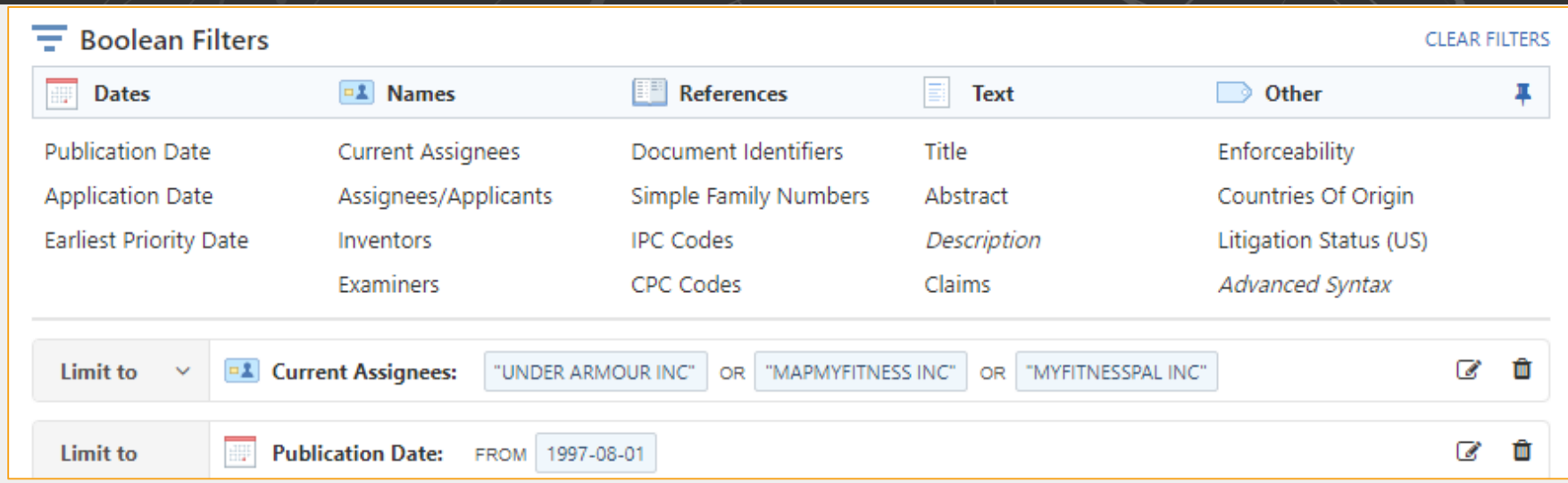
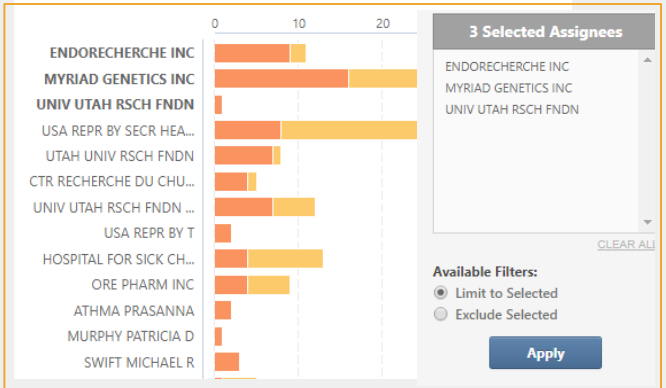
Quick Start Guide: Modify Search - Filters



Boolean Filters

- Add Boolean filters to a concept query or create a filter-only query
- Select one or more filters and enter filter criteria
- Filters are defaulted to "Limit to" and may be changed to "Exclude"
  Note: Use caution when using "Exclude" filters to avoid eliminating important art
- Non-Patent Literature and Patents + NPL have different filters available due to the limited fields available



Easily filter from some visualizations for easy and fast visual searching

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Quick Start Guide: Corporate Tree

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Accessing the Corporate Tree

The Corporate Tree helps create accurate and thorough patent portfolios, explore company relations, and view company financial information.

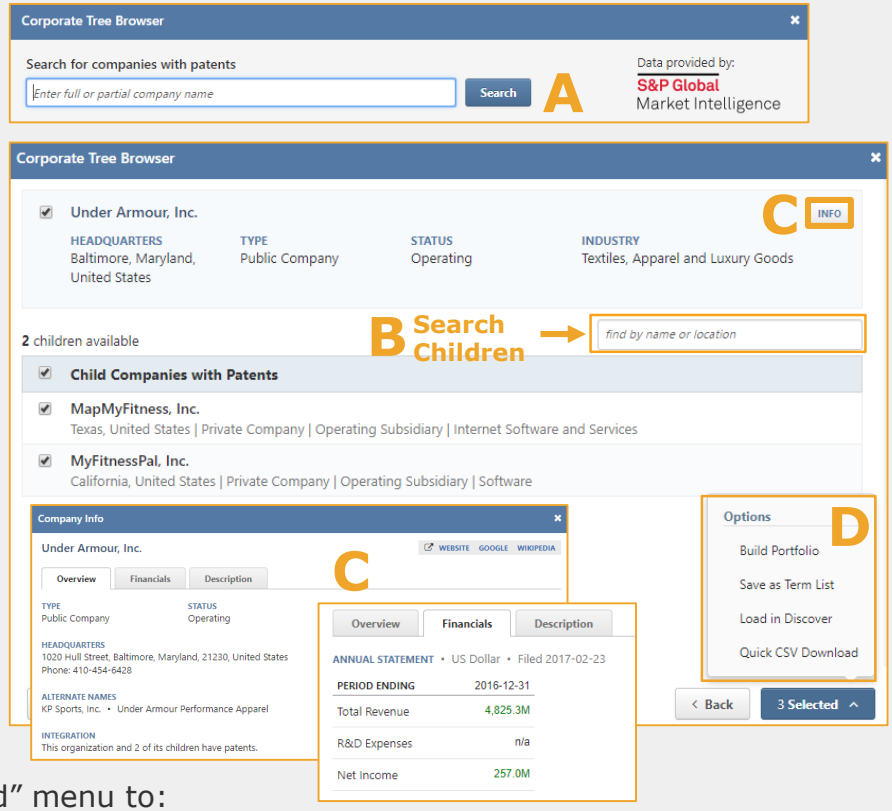
Three places to access the Corporate Tree:

1. Sidebar Menu (shown)
2. Portfolio by Organization Wizard

› Sidebar Menu > Add Items > Portfolio by Organization

Note: Use Portfolio by Organization Wizard to leverage Corporate Tree and name normalization to create the most complete and accurate portfolios

3. Current Assignee Filter



Using the Corporate Tree

A. Enter entity name and search
B. Click "VIEW" to see ultimate parent and children with patents (searchable)
C. Click "INFO" to view company information
D. Select ultimate parent and children and click "Selected" menu to:

› Build portfolio of patents assigned to the entity name(s) selected
› Save as Term List to be accessed later or used as a filter
› Load in Discover to load patents assigned to entity name(s) selected
› Quick CSV Download

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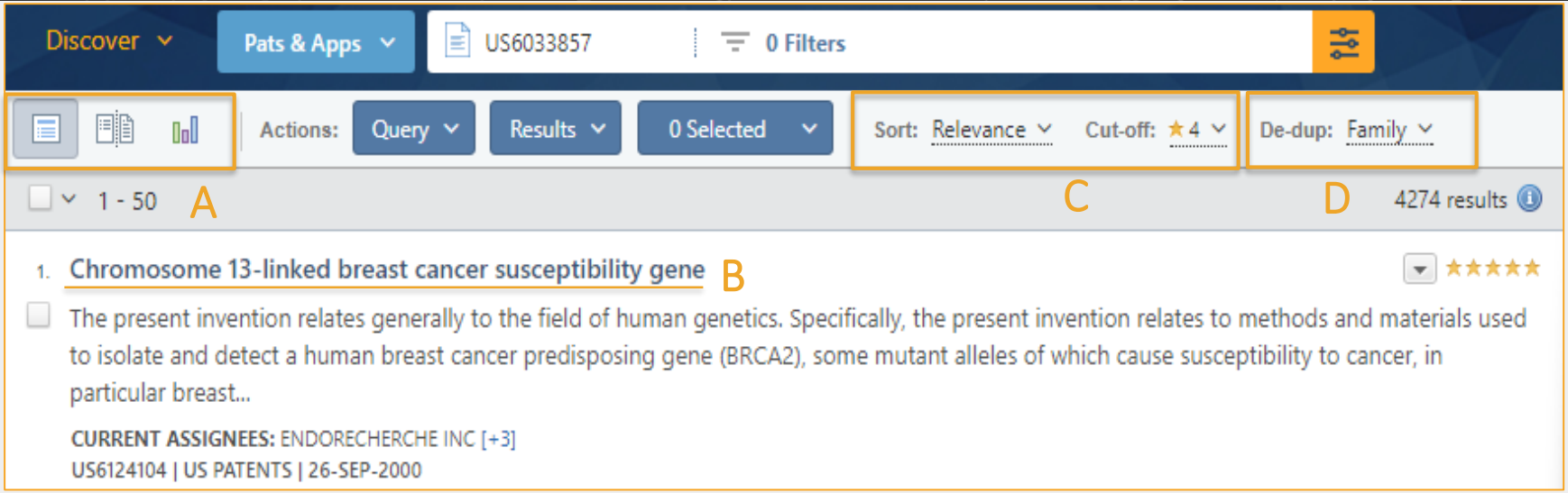
Quick Start Guide:
Review Results – Viewing Results



Results are shown below the query. Results are default sorted by relevance on a 5-star scale.

A. Switch your results view to see a split view (list of results next to a document preview) or visualizations
B. Click on the document title to open document preview for more detail
C. Sort by date or relevance and select relevance cut-off
D. De-dup results by Simple Family or Application Number

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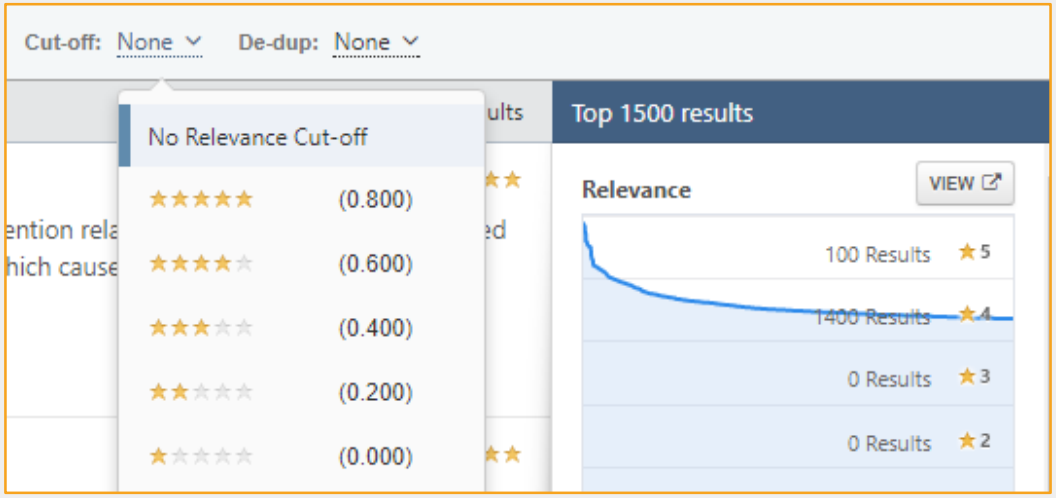
Quick Start Guide:
Review Results- Understanding Relevance



Concept search results are given a relevance rating based on relatedness to the query. Set the cut-off depending on the goal.

- 4 and 5 star results share most or all of the concepts from the query (review for possible knockout art)
- 3 star results share some concepts or features from the query (review for §103 non-obviousness or tangential technology)
- 1 and 2 star results are not likely important

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Quick Start Guide:
Review Results - Document Preview

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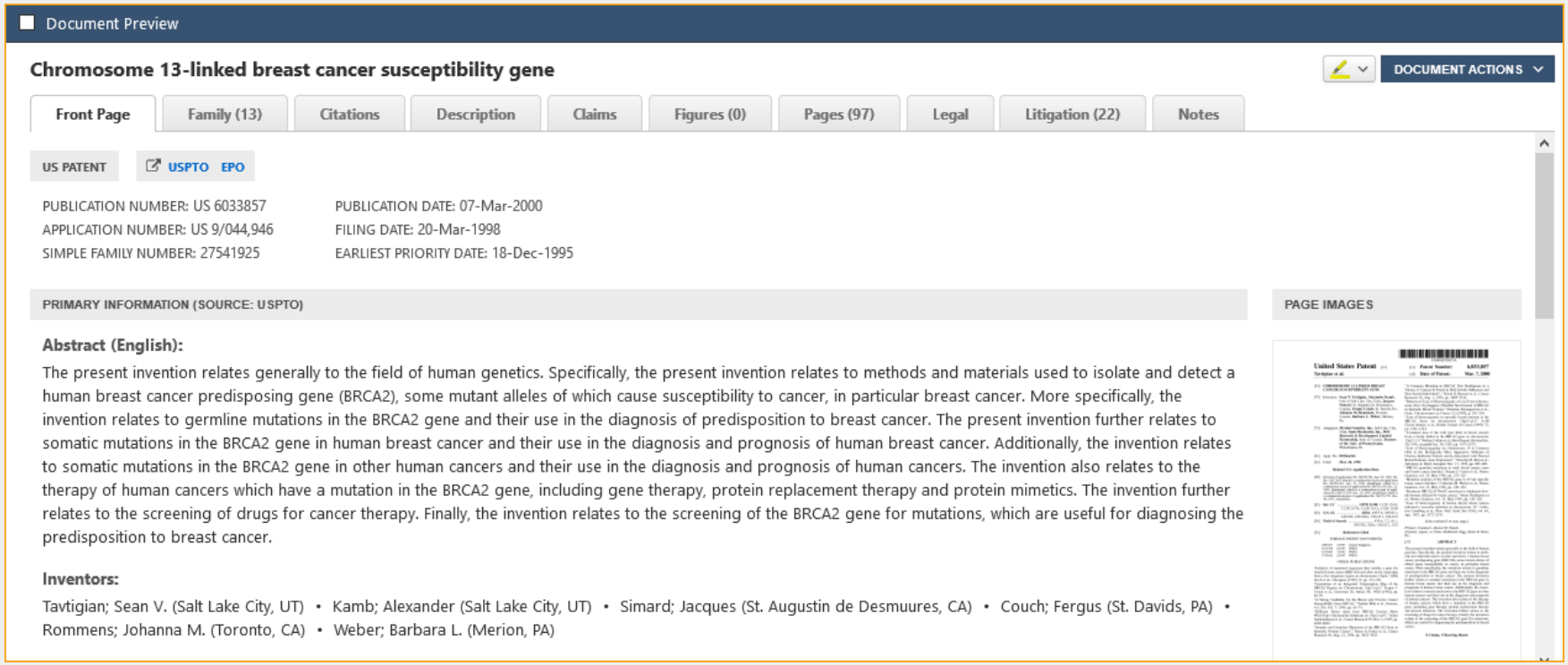

- Click on the document title to open the document preview
- Click through the tabs to view document details

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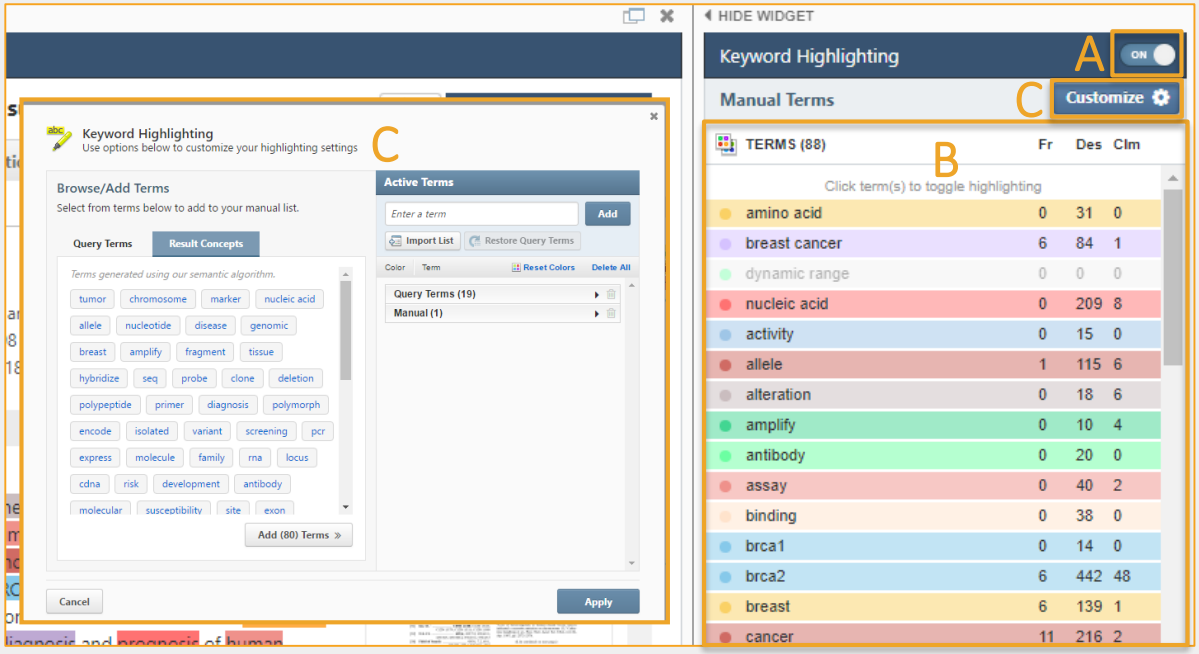
Quick Start Guide:
Review Results - Highlighting



Highlighting:

A. Turn on highlighting within the document preview

B. Keyword highlighting widget shows where a term appears in the document

C. Click "Customize" to view query terms, concept terms and add/remove terms to highlighting

Note: Concept terms provide a glimpse into the semantic engine by showing concepts prevalent in the result set.

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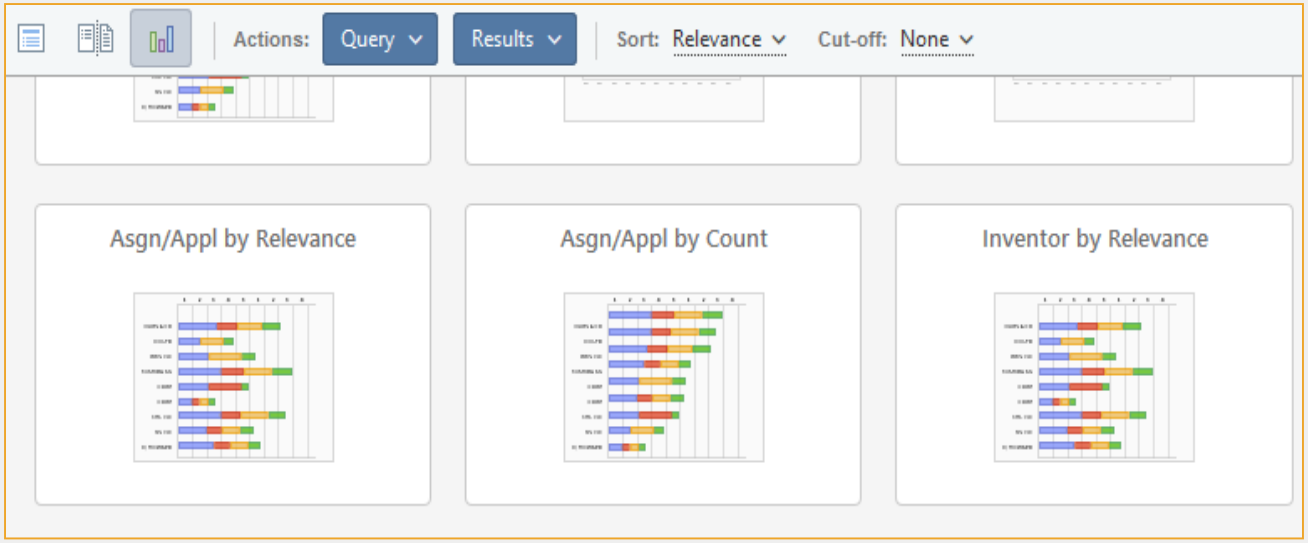
Quick Start Guide:
Review Results – Visual Temperature Checks



Visual Temperature Checks:

In addition to the Results Concepts shown in highlighting, visualizations may also provide visual temperature checks to see if you're on the right track and provide insight into the quality of the results.

- Click the visualizations view from the result set, and chart options will appear including "Term Heat Map" and "Term Cloud." These visuals also provide transparency into the semantic engine, just like within highlighting.

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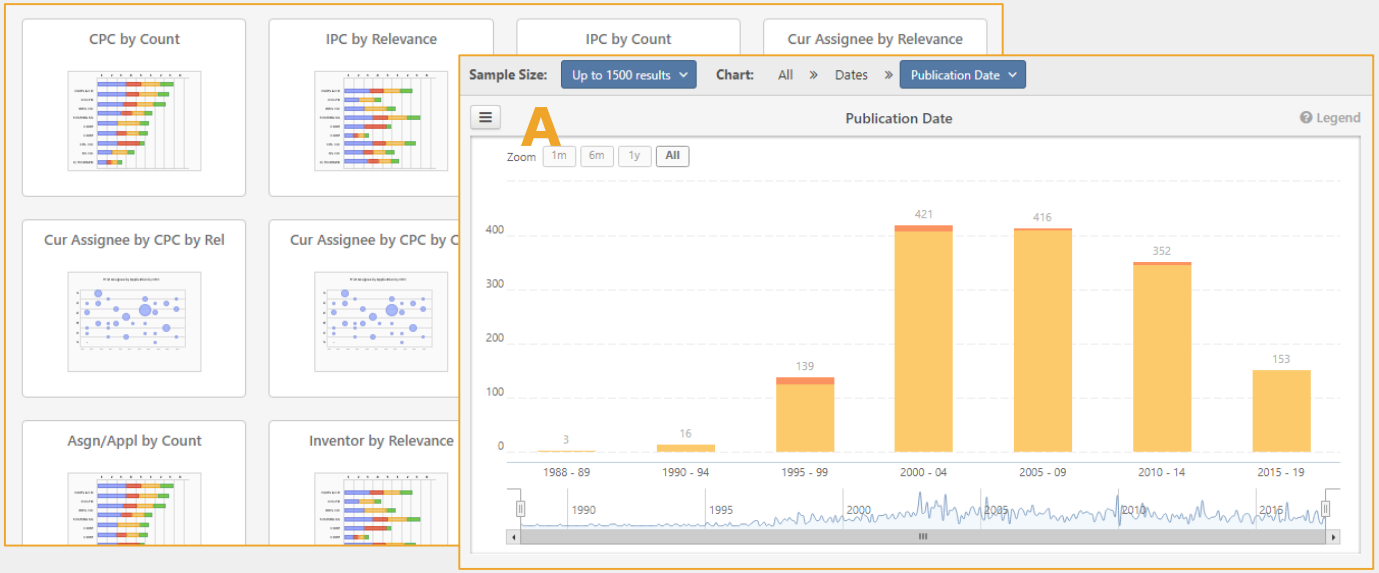
Quick Start Guide: Visuals– Visualization



Visualization:

Quickly learn about top results via a variety of charts available in the visualizations view.

- Visually search using built in filters

A. Download images

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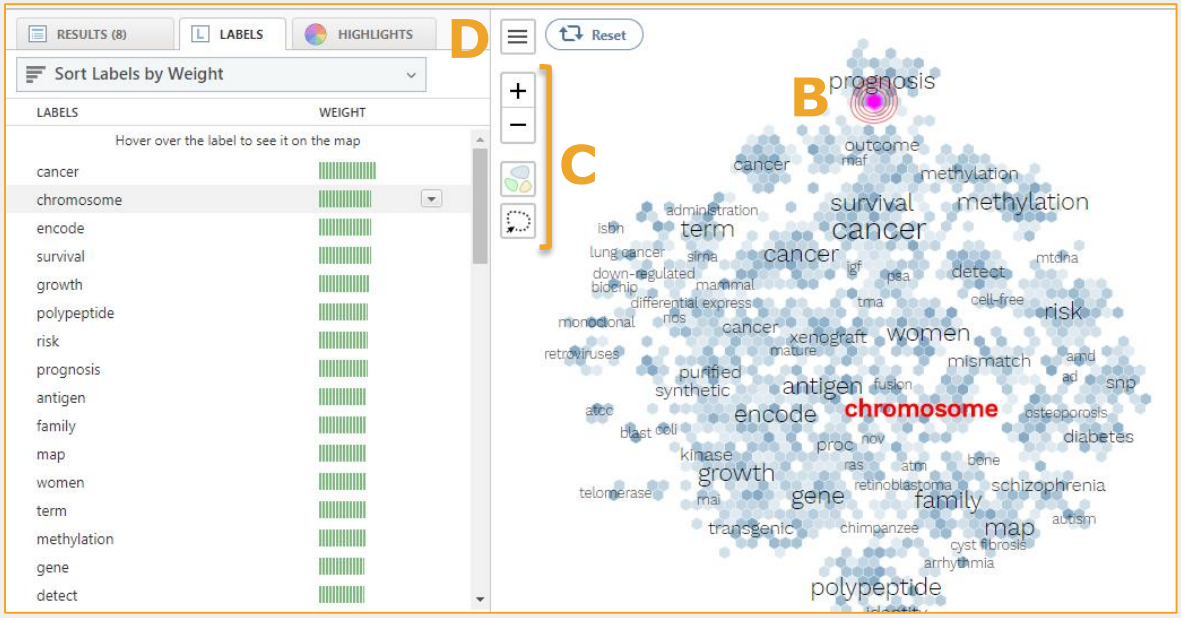
Quick Start Guide: Visuals– Semantic Map



Semantic Map:

The Semantic Map is an interactive tool that shows a visual representation of results and provides insight into the relationships between the documents. Labels seek to help understand what is unique about the documents in various regions.

B. The darker the shade, the higher the concentration of documents to see trends
Note: When you click on a honeycomb, concentric circles appear, also correlating to how many documents are contained within

C. Use the tool to select an area of the Map. Free lasso or use auto regions to learn more about areas of the Map and zoom to dig in

D. View results, a list of Map labels showing weight on the Map, or Highlight to color the Map by assignee or S&P ultimate parent

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Quick Start Guide: Analyze

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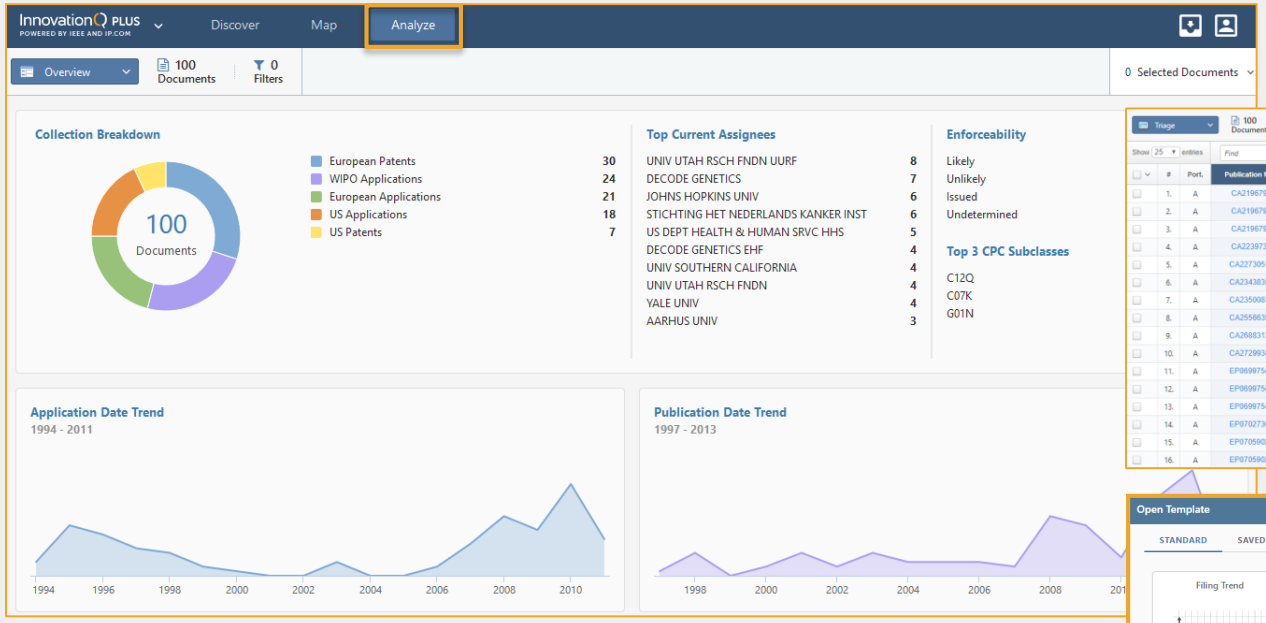

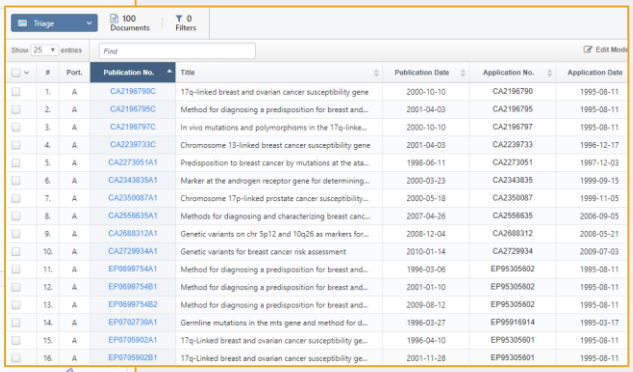

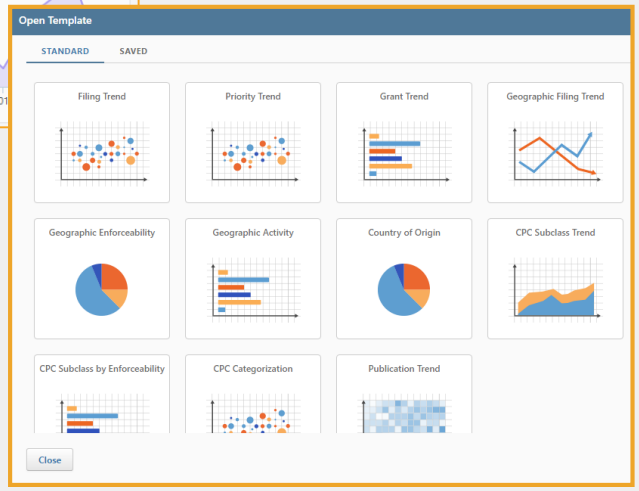

Analyze:

Load portfolios into Analyze to understand patent data and extract knowledge and information. Filter, zoom, and edit charts on the fly and create meaningful visuals.
Analyze provides 3 views:

1. Overview – dashboard view of documents
2. Triage – sort and search in a spreadsheet view
3. Charts – create highly customizable charts

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Quick Start Guide: Actions and Exports

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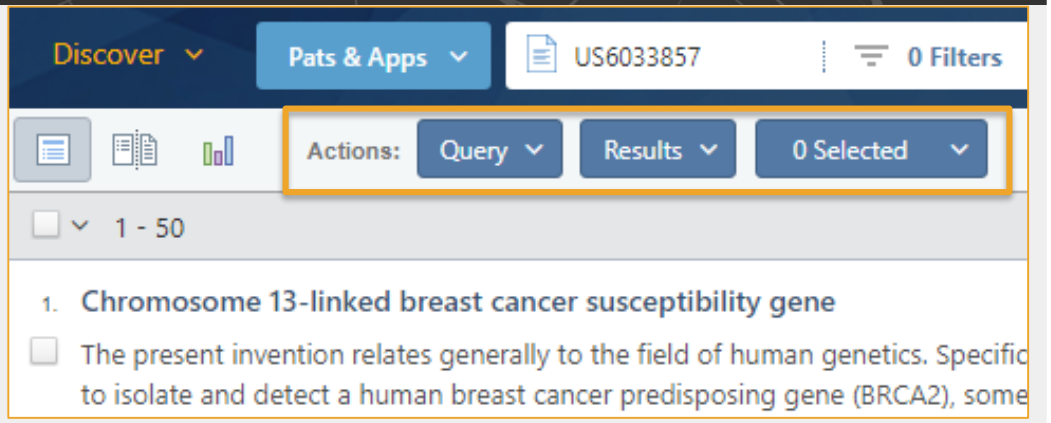
Result Actions:

Use Actions Menus:

- **Query:** save queries, create alerts, export query text
- **Results:** save results or export from the results set
- **Selected:** Select documents with check boxed and save and export the selected documents only

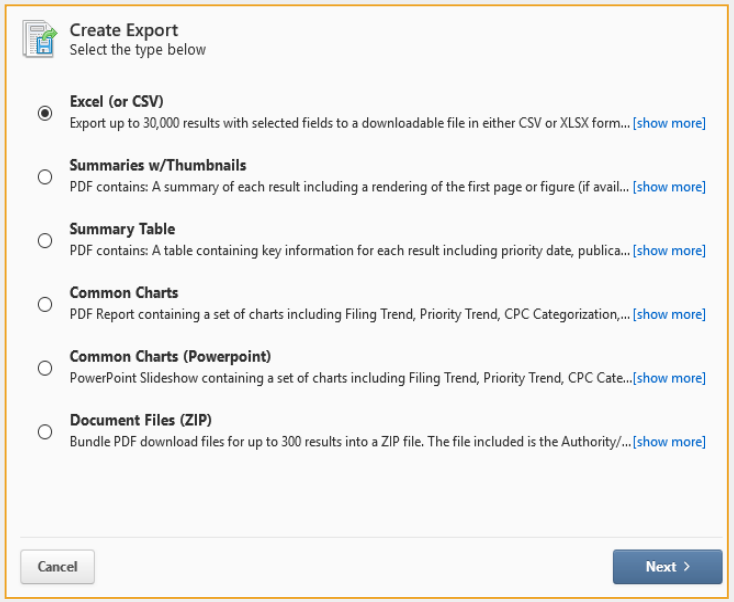


Exports:

There are a variety of options for exports. Choose "Create Export" under the Results Actions menu

- Export data in CSV, XLSX, PDF, PPT, and ZIP
- Exports can be accessed in the Delivery Center found in the sidebar menu or Delivery Center icon in the upper right corner

Note: Exports expire 90 days after creation. Attach exports to a project to save in InnovationQ Plus, email, or save the file



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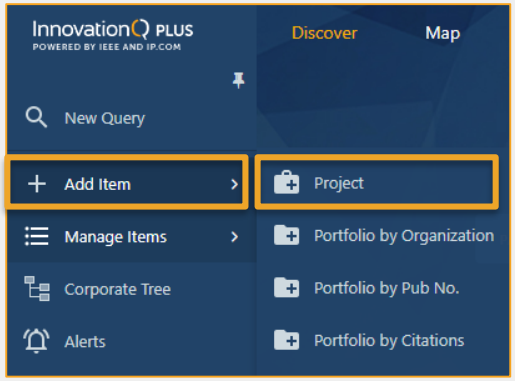
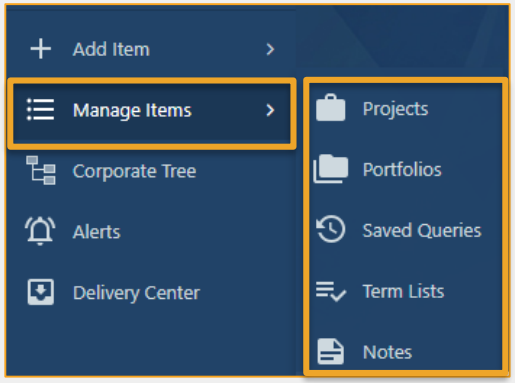
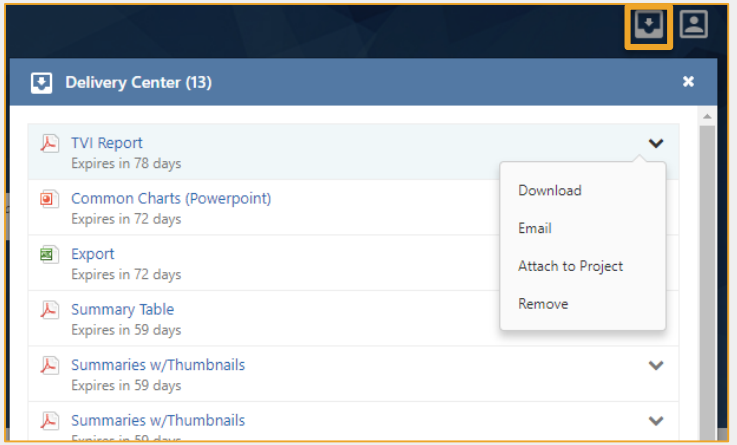
Quick Start Guide: Saved Work







Create a Project:

Create a project to save portfolios, queries and terms list into. Attach exports to projects to save. Share projects with colleagues on the same subscription

- Open the sidebar and click Add Item > Project

Saved Work:

Access and manage saved work from the sidebar menu

- Open the sidebar and click Manage
- Select item type to open

Delivery Center:

Access exports and exports from the Delivery Center in the upper right corner or in the sidebar menu

- Items expire in 90 days from the Delivery Center
- Download, email, or attach items to a project

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Quick Start Guide: Support Resources

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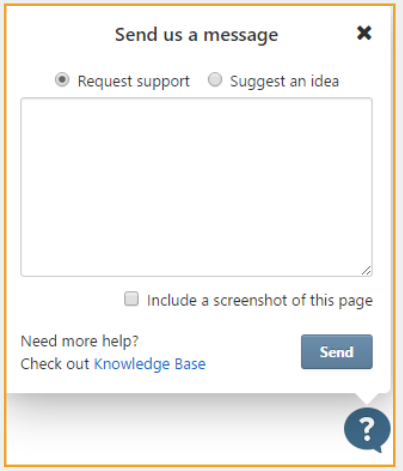
We're here for you! We're available to answer questions and provide training to ensure you are getting maximum value from InnovationQ Plus

- **Contact us from InnovationQ Plus:**
  Click the "?" at the bottom right corner of every screen to ask questions, report difficulties, or provide feedback



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