

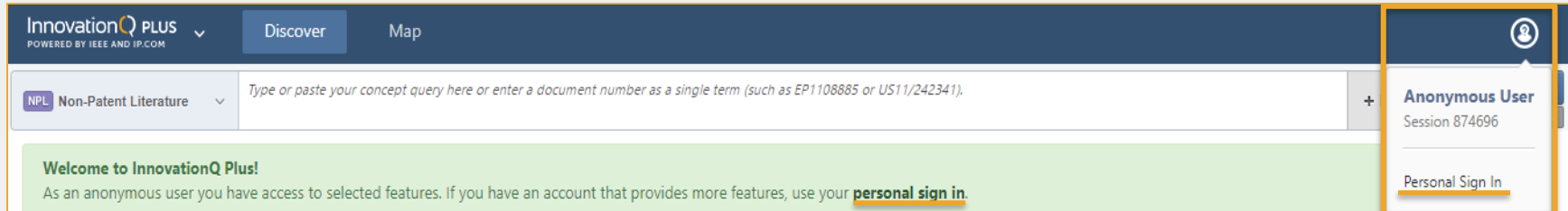
InnovationQ Plus Quick Start Guide

IP Authenticated Personal Accounts

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

Updated August 2017

Quick Start Guide: Get Started – Logging In



Set Up Personal Account and Log In

You will be automatically given access to InnovationQ 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)

Create Account

Create or activate your account using a valid email address.

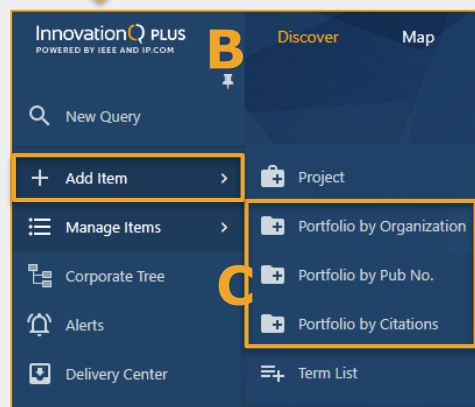
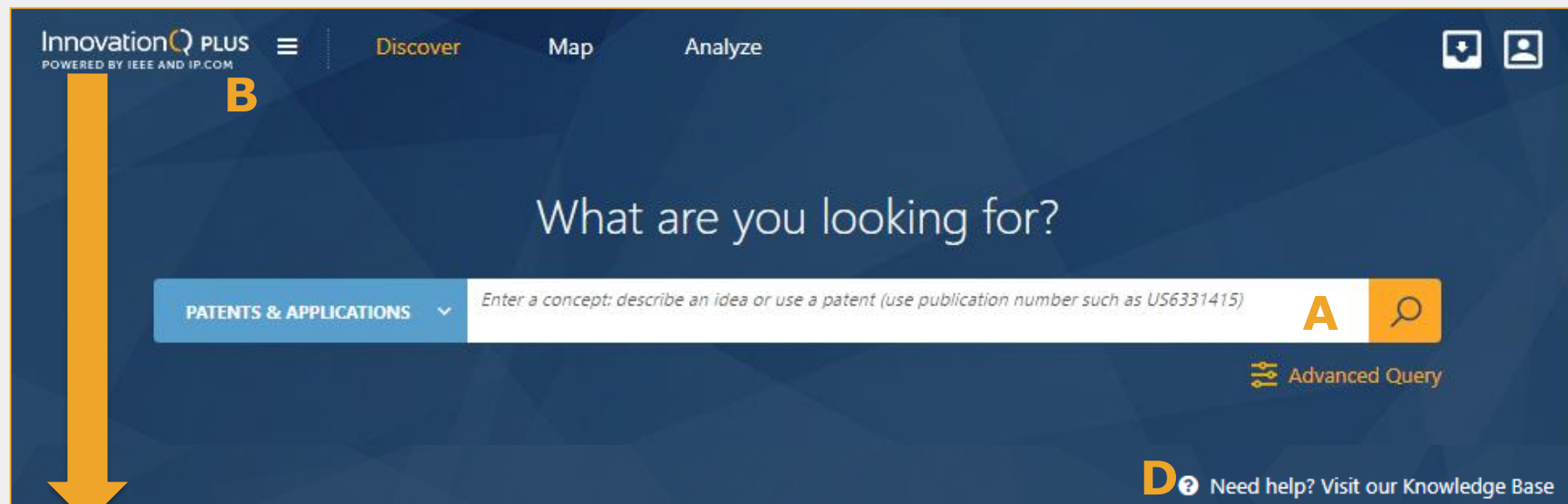
Corporate or institutional subscribers: please use your work email address so we can connect your subscription features.

[Continue >](#)

Need a Personal Account?

[Create](#)

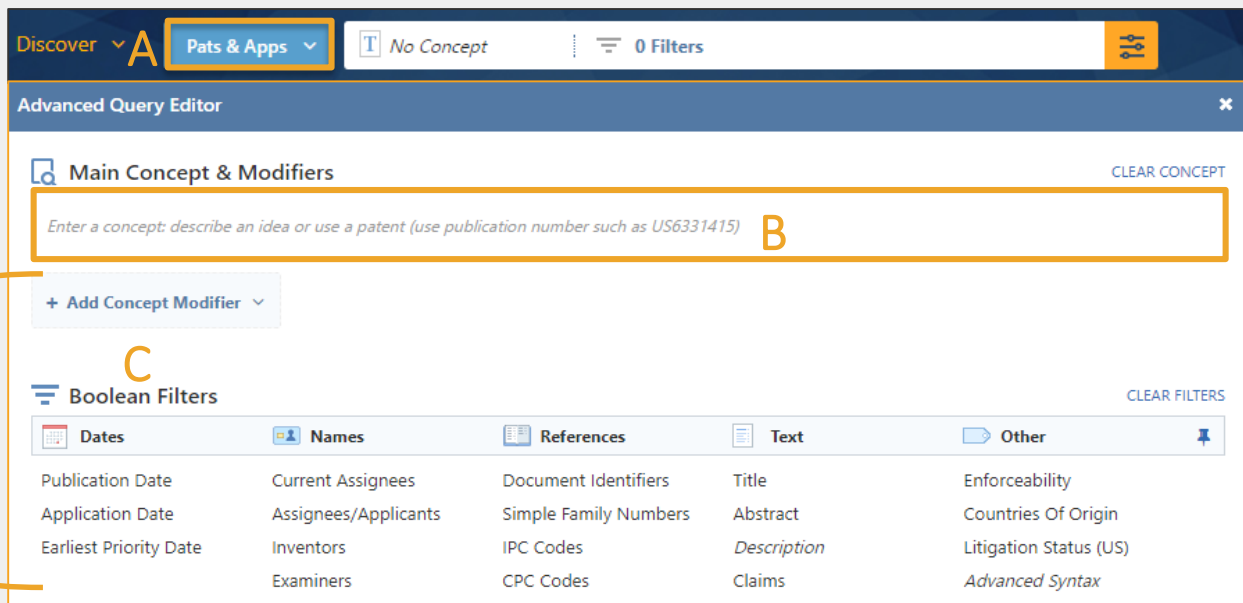
Quick Start Guide: Get Started







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

Quick Start Guide: Search





Discover  **A** Pats & Apps  No Concept 0 Filters 

Advanced Query Editor 

 Main Concept & Modifiers 

Enter a concept: describe an idea or use a patent (use publication number such as US6331415) **B**

+ Add Concept Modifier 

C Boolean Filters 

Dates	Names	References	Text	Other
Publication Date	Current Assignees	Document Identifiers	Title	Enforceability
Application Date	Assignees/Applicants	Simple Family Numbers	Abstract	Countries Of Origin
Earliest Priority Date	Inventors	IPC Codes	Description	Litigation Status (US)
	Examiners	CPC Codes	Claims	Advanced Syntax

- 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

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:

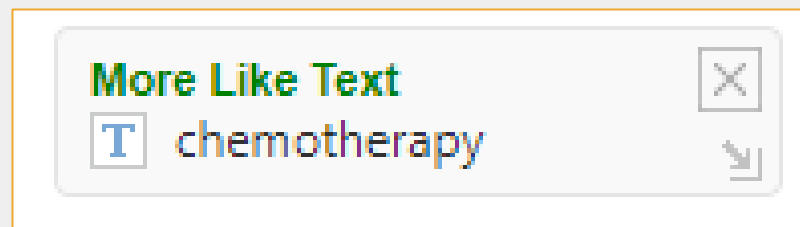
A. Text

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.

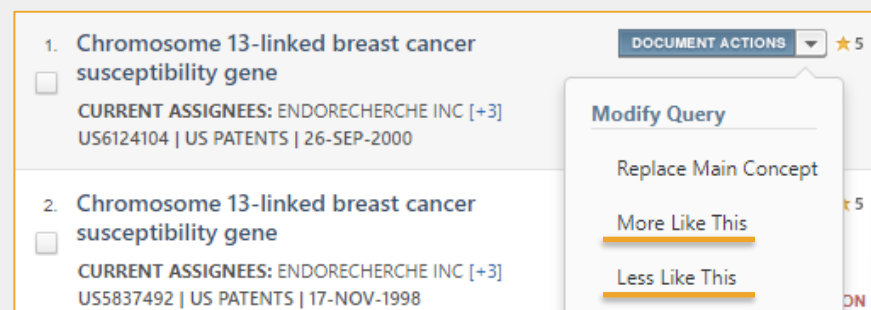
B. Entire document

C. Area of the Semantic Map

A



B



C



Quick Start Guide: Modify Search - Filters

Boolean Filters

CLEAR FILTERS

Dates	Names	References	Text	Other
Publication Date	Current Assignees	Document Identifiers	Title	Enforceability
Application Date	Assignees/Applicants	Simple Family Numbers	Abstract	Countries Of Origin
Earliest Priority Date	Inventors	IPC Codes	Description	Litigation Status (US)
	Examiners	CPC Codes	Claims	Advanced Syntax

Limit to

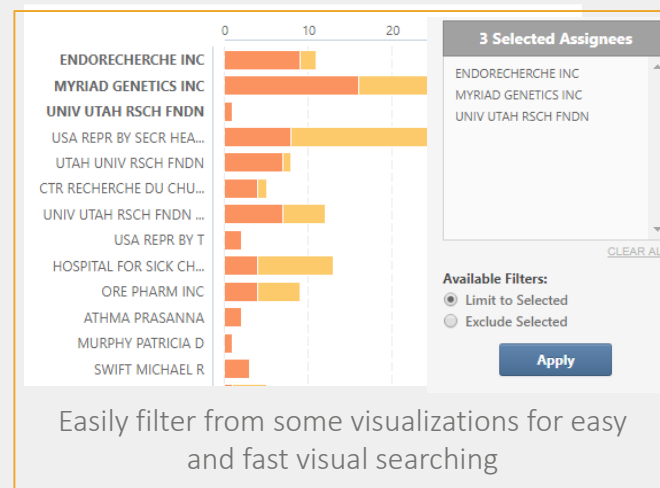
Current Assignees: "UNDER ARMOUR INC" OR "MAPMYFITNESS INC" OR "MYFITNESSPAL INC"

Limit to

Publication Date: FROM 1997-08-01

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



Quick Start Guide: Corporate Tree

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

The screenshot displays the 'Corporate Tree Browser' interface. At the top, there is a search bar labeled 'Search for companies with patents' with a placeholder 'Enter full or partial company name' and a 'Search' button. To the right of the search bar, it says 'Data provided by: S&P Global Market Intelligence'. Below the search bar, the main content area shows a list of companies. The first company is 'Under Armour, Inc.' with details: HEADQUARTERS (Baltimore, Maryland, United States), TYPE (Public Company), STATUS (Operating), and INDUSTRY (Textiles, Apparel and Luxury Goods). Below this, it says '2 children available' and 'Search Children' with a search box 'find by name or location'. The children listed are 'Child Companies with Patents': 'MapMyFitness, Inc.' (Texas, United States | Private Company | Operating Subsidiary | Internet Software and Services) and 'MyFitnessPal, Inc.' (California, United States | Private Company | Operating Subsidiary | Software). On the right side of the main content area, there is an 'Options' menu with buttons: 'Build Portfolio', 'Save as Term List', 'Load in Discover', and 'Quick CSV Download'. At the bottom right, there is a 'Back' button and a '3 Selected' button.

Corporate Tree Browser

Search for companies with patents
Enter full or partial company name Search

Data provided by: S&P Global Market Intelligence

Under Armour, Inc. **INFO**

HEADQUARTERS
Baltimore, Maryland,
United States

TYPE
Public Company

STATUS
Operating

INDUSTRY
Textiles, Apparel and Luxury Goods

2 children available

Search Children → find by name or location

Child Companies with Patents

MapMyFitness, Inc.
Texas, United States | Private Company | Operating Subsidiary | Internet Software and Services

MyFitnessPal, Inc.
California, United States | Private Company | Operating Subsidiary | Software

Company Info

Under Armour, Inc. **WEBSITE** **GOOGLE** **WIKIPEDIA**

Overview **Financials** **Description**

TYPE
Public Company

STATUS
Operating

HEADQUARTERS
1020 Hull Street, Baltimore, Maryland, 21230, United States
Phone: 410-454-6428

ALTERNATE NAMES
XP Sports, Inc. • Under Armour Performance Apparel

INTEGRATION
This organization and 2 of its children have patents.

Overview **Financials** **Description**

ANNUAL STATEMENT • US Dollar • Filed 2017-02-23

PERIOD ENDING 2016-12-31

Total Revenue 4,825.3M

R&D Expenses n/a

Net Income 257.0M

Options

Build Portfolio

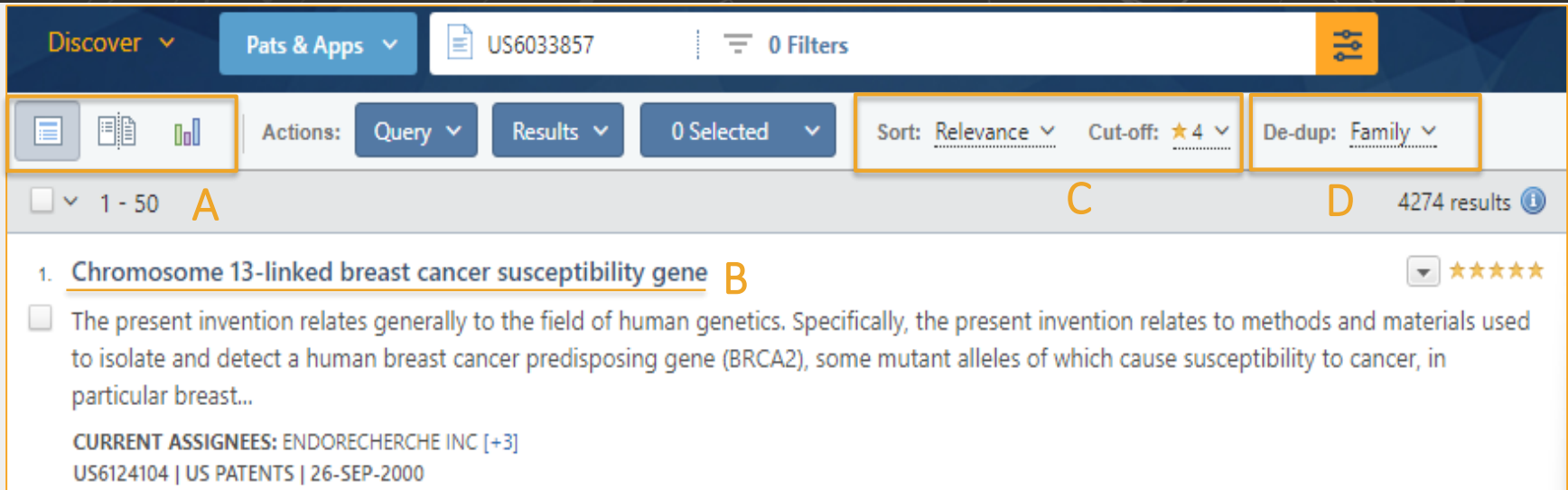
Save as Term List

Load in Discover

Quick CSV Download

< Back 3 Selected ^

Quick Start Guide: Review Results – Viewing Results



Discover ▾ Pats & Apps ▾ US6033857 0 Filters

Actions: Query ▾ Results ▾ 0 Selected ▾ Sort: Relevance ▾ Cut-off: ★ 4 ▾ De-dup: Family ▾

1 - 50 1 - 50 4274 results

1. Chromosome 13-linked breast cancer susceptibility gene

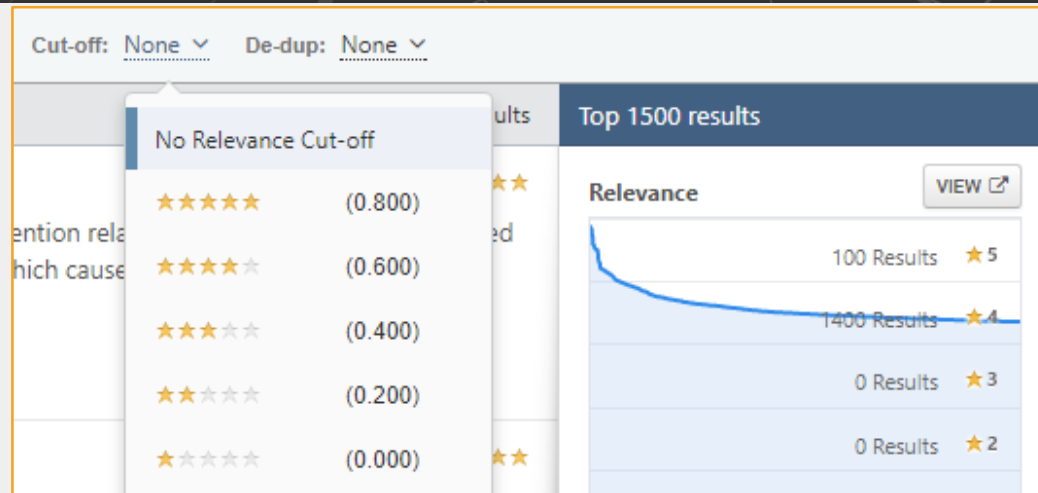
The present invention relates generally to the field of human genetics. Specifically, the present invention relates to methods and materials used to isolate and detect a human breast cancer predisposing gene (BRCA2), some mutant alleles of which cause susceptibility to cancer, in particular breast...

CURRENT ASSIGNEES: ENDORECHERCHE INC [+3]
US6124104 | US PATENTS | 26-SEP-2000

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

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

Quick Start Guide: Review Results - Document Preview

Document Preview

Chromosome 13-linked breast cancer susceptibility gene

DOCUMENT ACTIONS

Front Page

Family (13)

Citations

Description

Claims

Figures (0)

Pages (97)

Legal

Litigation (22)

Notes

US PATENT

USPTO EPO

PUBLICATION NUMBER: US 6033857

PUBLICATION DATE: 07-Mar-2000

APPLICATION NUMBER: US 9/044,946

FILING DATE: 20-Mar-1998

SIMPLE FAMILY NUMBER: 27541925

EARLIEST PRIORITY DATE: 18-Dec-1995

PRIMARY INFORMATION (SOURCE: USPTO)

Abstract (English):
The present invention relates generally to the field of human genetics. Specifically, the present invention relates to methods and materials used to isolate and detect a human breast cancer predisposing gene (BRCA2), some mutant alleles of which cause susceptibility to cancer, in particular breast cancer. More specifically, the invention relates to germline mutations in the BRCA2 gene and their use in the diagnosis of predisposition to breast cancer. The present invention further relates to somatic mutations in the BRCA2 gene in human breast cancer and their use in the diagnosis and prognosis of human breast cancer. Additionally, the invention relates to somatic mutations in the BRCA2 gene in other human cancers and their use in the diagnosis and prognosis of human cancers. The invention also relates to the therapy of human cancers which have a mutation in the BRCA2 gene, including gene therapy, protein replacement therapy and protein mimetics. The invention further relates to the screening of drugs for cancer therapy. Finally, the invention relates to the screening of the BRCA2 gene for mutations, which are useful for diagnosing the predisposition to breast cancer.

Inventors:
Tavtigian; Sean V. (Salt Lake City, UT) • Kamb; Alexander (Salt Lake City, UT) • Simard; Jacques (St. Augustin de Desmuures, CA) • Couch; Fergus (St. Davids, PA) • Rommens; Johanna M. (Toronto, CA) • Weber; Barbara L. (Merion, PA)

PAGE IMAGES

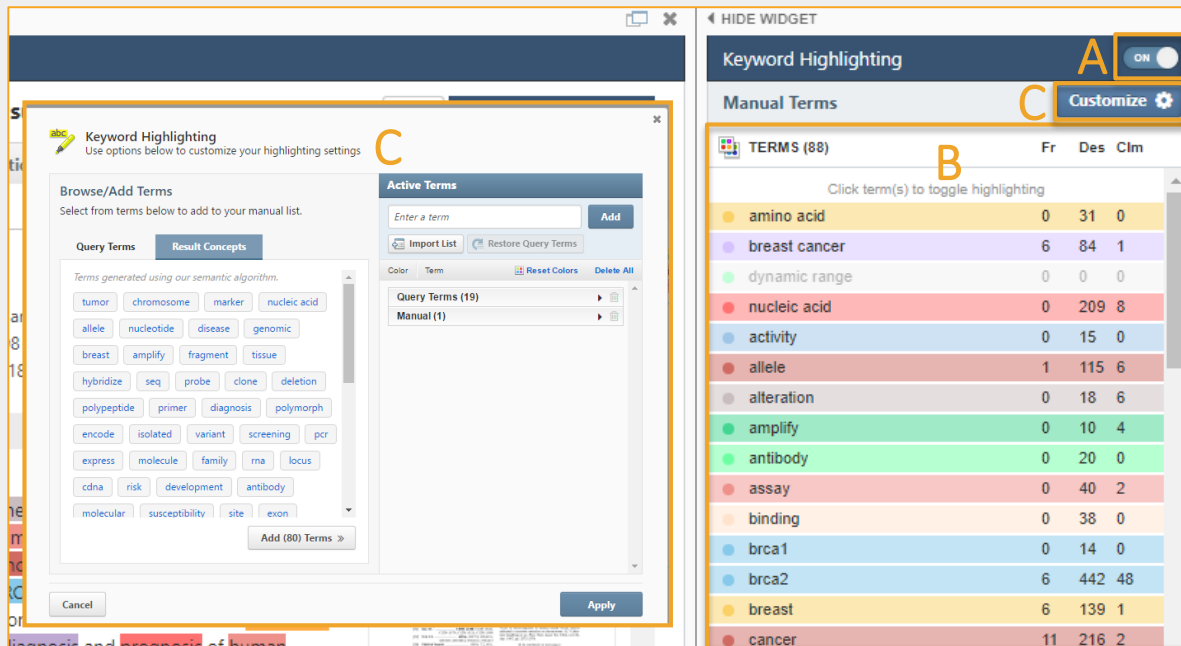
- Click on the document title to open the document preview
- Click through the tabs to view document details

10 08/2017

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Quick Start Guide: Review Results - Highlighting



The screenshot shows the 'Keyword Highlighting' widget. Annotation A points to the 'ON' toggle switch. Annotation B points to the 'TERMS (88)' table. Annotation C points to the 'Customize' button. The 'Manual Terms' section is also visible.

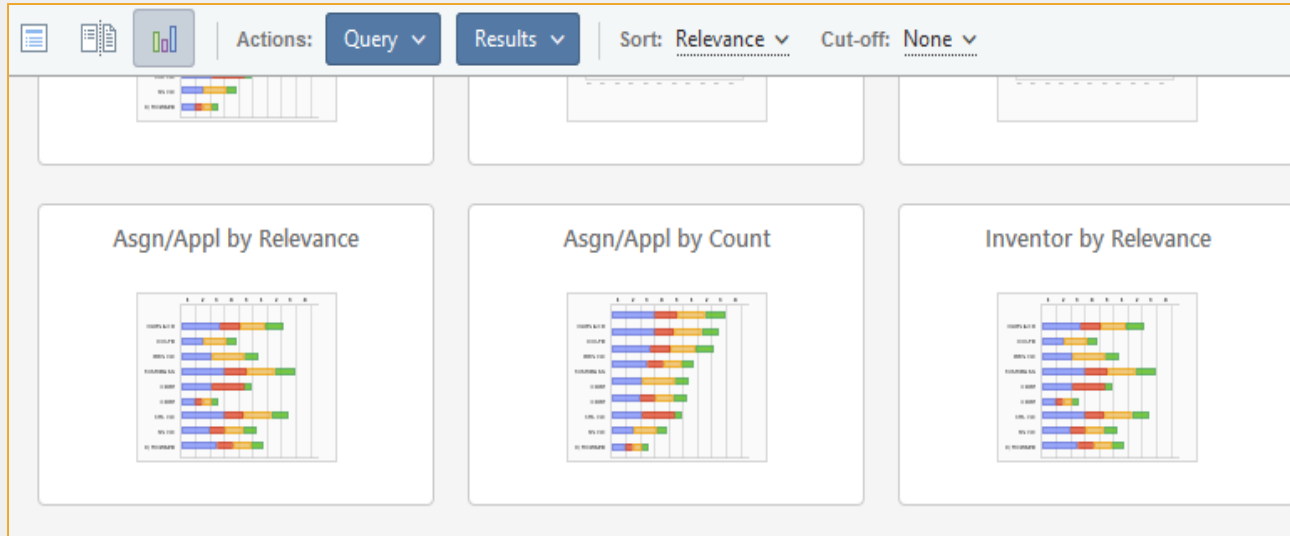
TERMS (88)	Fr	Des	Clin
amino acid	0	31	0
breast cancer	6	84	1
dynamic range	0	0	0
nucleic acid	0	209	8
activity	0	15	0
allele	1	115	6
alteration	0	18	6
amplify	0	10	4
antibody	0	20	0
assay	0	40	2
binding	0	38	0
brca1	0	14	0
brca2	6	442	48
breast	6	139	1
cancer	11	216	2

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.

Quick Start Guide: Review Results – Visual Temperature Checks

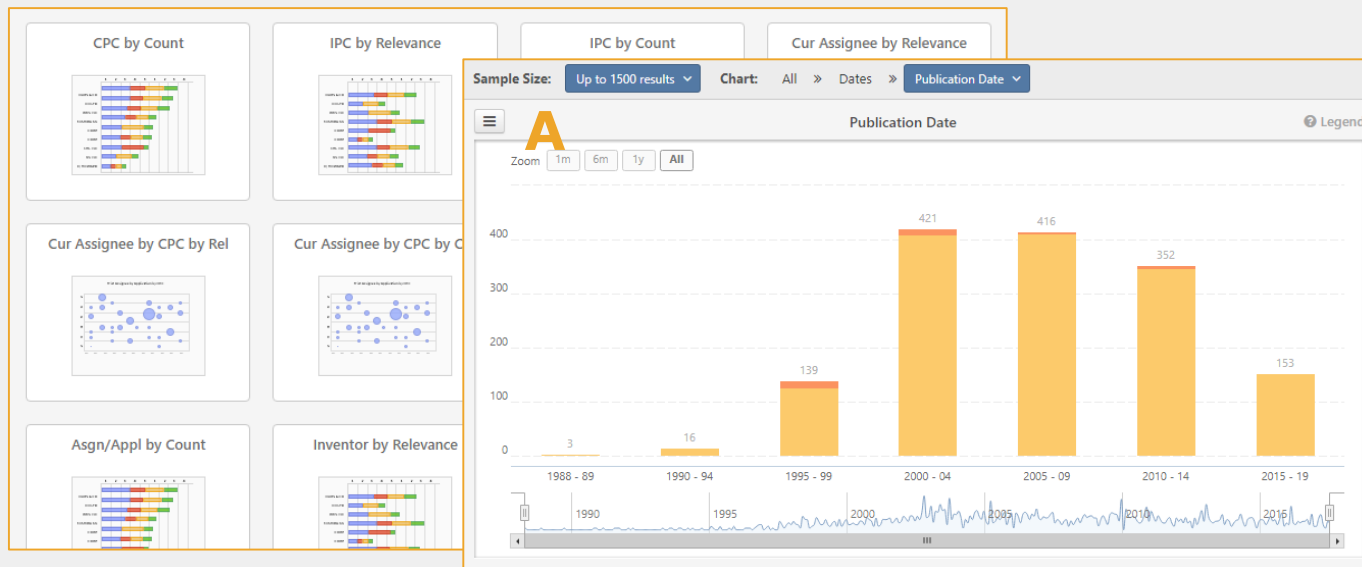


Visual Temperature Checks:

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.

Quick Start Guide: Visuals– Visualization



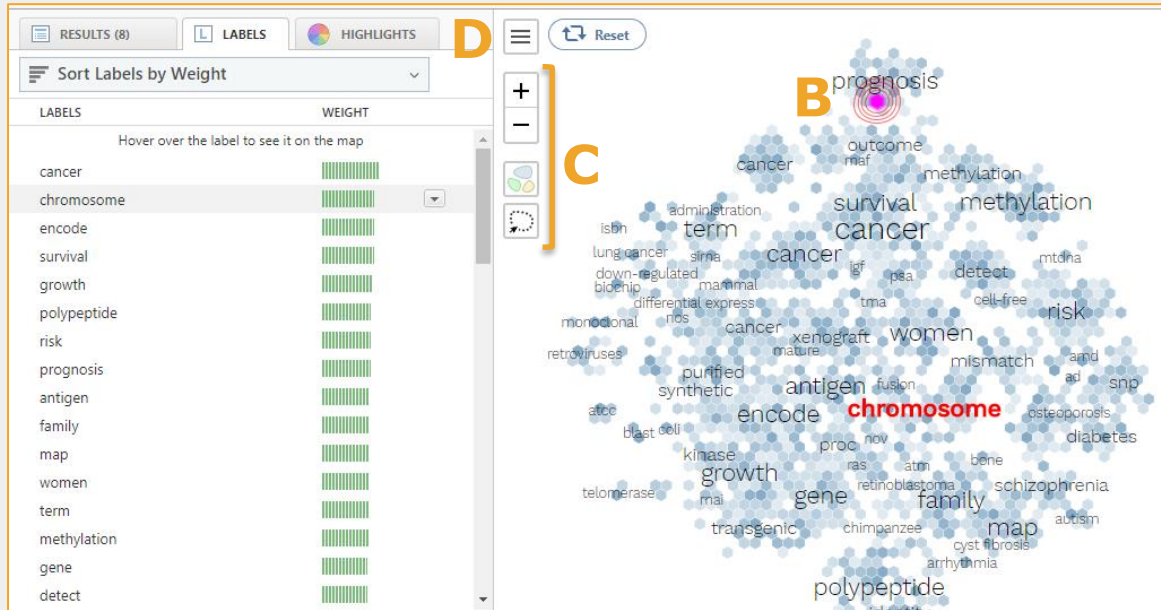
Visualization:

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

› Visually search using built in filters

A. Download images

Quick Start Guide: Visuals– Semantic Map

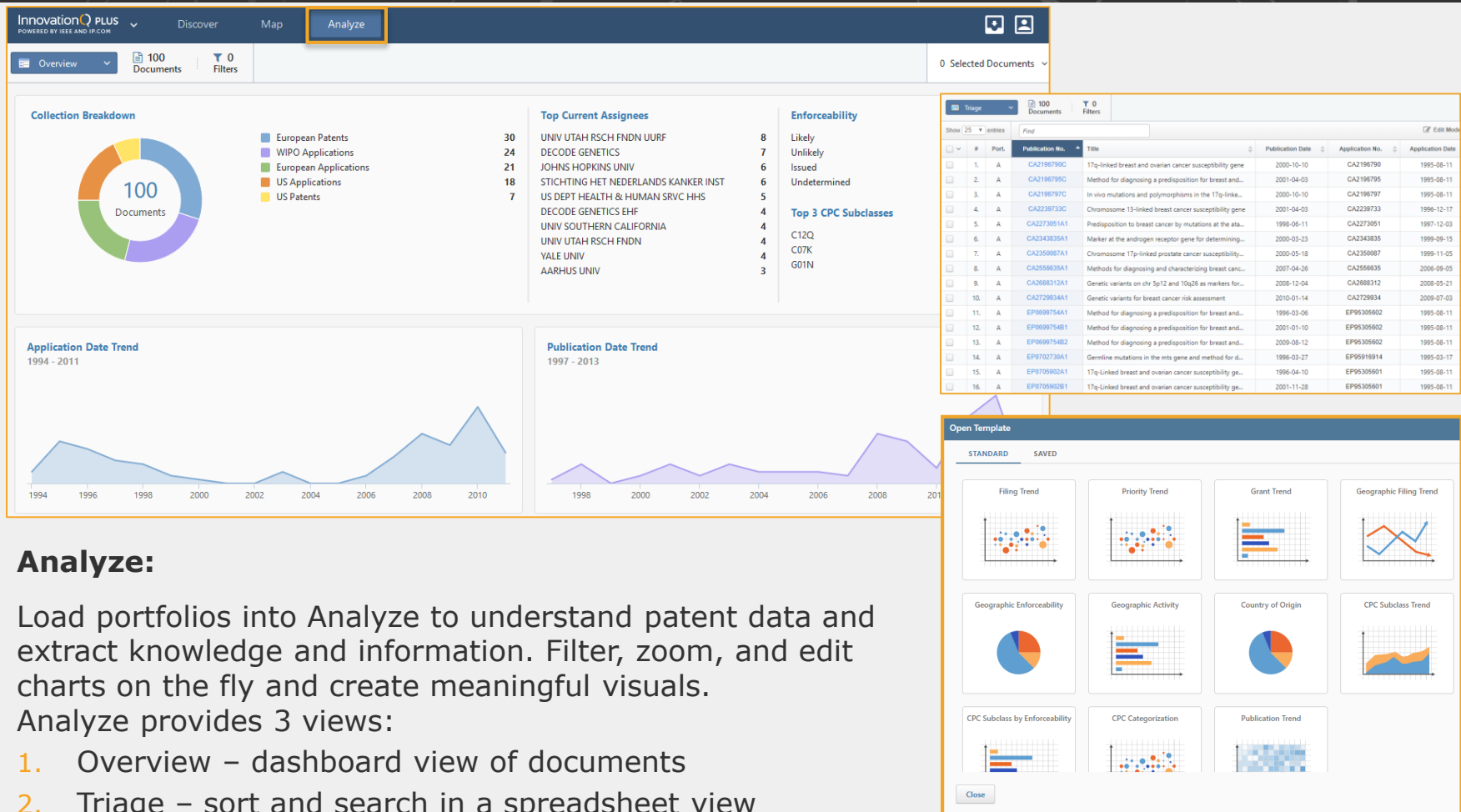


Semantic Map:

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

Quick Start Guide: Analyze



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

Quick Start Guide: Actions and Exports

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:

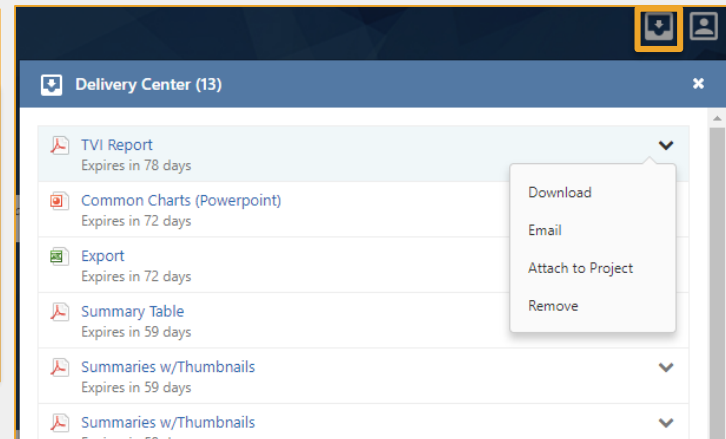
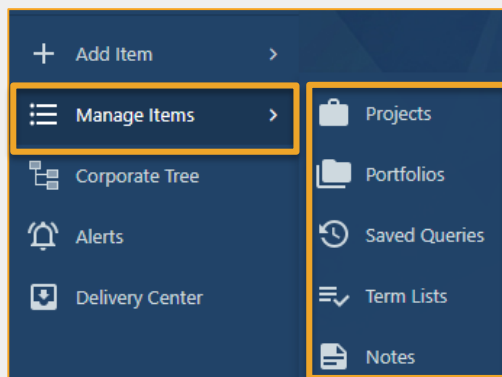
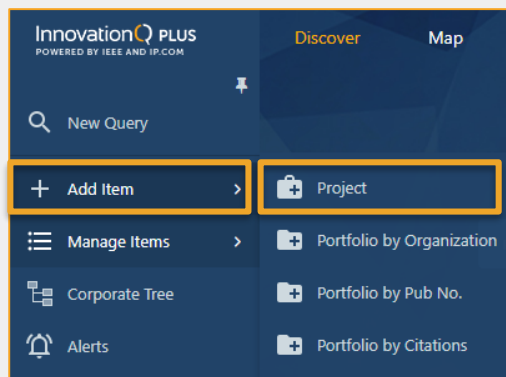
There are a variety of options for exports. Choose "Create Export" under the Results Actions menu

- 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

The screenshot displays the InnovationQ Plus interface. At the top, there's a navigation bar with 'Discover', 'Pats & Apps', and a document icon labeled 'US6033857'. Below this is a toolbar with icons for document, list, and chart. The 'Actions' menu is highlighted, showing 'Query', 'Results', and '0 Selected' options. Below the toolbar, a list of results is shown, with the first item '1. Chromosome 13-linked breast cancer susceptibility gene' selected. A 'Create Export' dialog box is open, showing options for export type: 'Excel (or CSV)', 'Summaries w/Thumbnails', 'Summary Table', 'Common Charts', 'Common Charts (Powerpoint)', and 'Document Files (ZIP)'. The 'Excel (or CSV)' option is selected. The dialog has 'Cancel' and 'Next >' buttons.

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

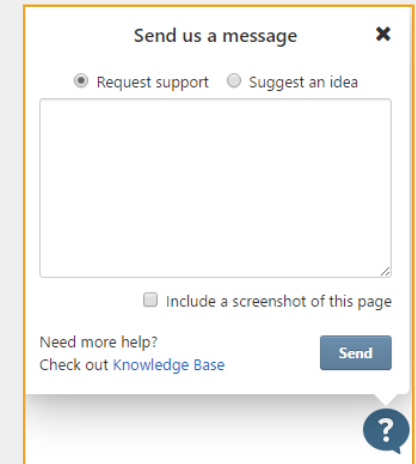
Delivery Center:

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

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
- › **Knowledge Base:** <http://guide.ip.com>
- › **Customer and Technical Support**
 - › **E:** iqplus@ieee.org
 - › **P:** 800 678 4333
- › Contact your representative at IP.com, your IEEE account manager, or the IEEE Client Services team at training@ieee.org.



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