



## STN® Viewer™ Tutorial 2

**Managing Projects:** Creating and managing a project in STN Viewer

### Agenda

- Navigating within the STN Viewer Patent Queue and within projects
- Selecting records
- Creating a project
- Deleting projects and records

## Using the **STN Viewer** involves 5 easy steps

- Step 1. Use STN Express to select the records to be evaluated from STN patent databases
- Step 2. Set up projects in the STN Viewer and move desired records to a project from the Patent Queue
- Step 3. Arrange, highlight, and annotate the records as needed in the project
- Step 4. Conduct in-depth evaluation of the full-text of patent records
- Step 5. Share evaluated results with your client

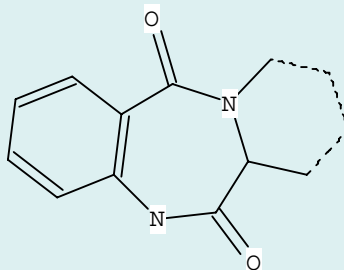
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## Search Question

### Search Question:

What has been reported in the patent arena concerning the following substance?



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## STN Viewer's Patent Queue contains our newly imported records

STN Viewer

Project List

Patent Queue

Filter by: Labels

Select Apply Label Actions Sort by...

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- We recommend keeping the Patent Queue clean.
- To move records out of the queue, place the records in a project.
- A project may contain some or all of the records you imported.
- There is no limit to the number of projects a user may have.
- 25 records are shown on each page.

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## Select records of interest to move them into a project

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Project List

Patent Queue

Filter by: Labels

Select Apply Label Actions Sort by...

Records may be sorted and filtered to find the most important ones.

Records must always be selected to move them into a project; you can select the records shown on your current page or all of the records in your project.

The selection choices:

- All
- None
- Viewed
- Not Viewed
- Invert
- By user rating (0-3 stars)

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## Use the Actions button to make a new project

The Actions link for moving a project will move the answer set into a project.

Notice: when inside the patent queue, the background is green; the background within a project is blue.

The Add Project link on the left may also be used.

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## A new project is created in the Project List

Remember, to do any action, one or more records must be selected.

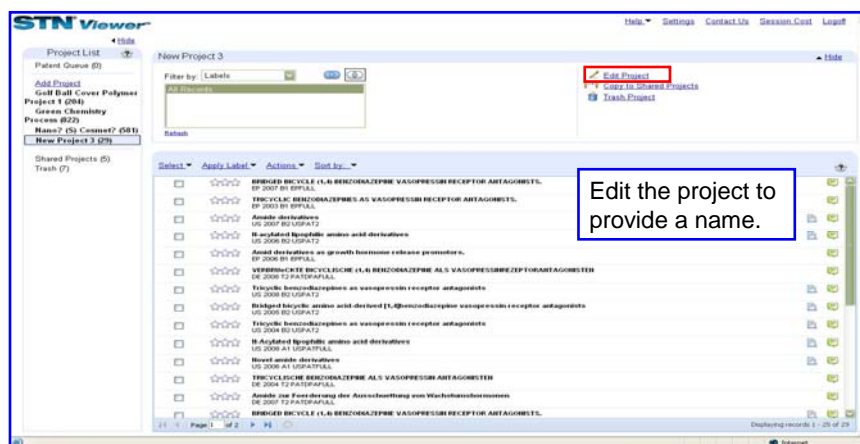
To see records, click on either the Patent Queue or the New Project tab, depending where the records are located.

Notice: the background within a project is blue; when inside the patent queue, the background is green.

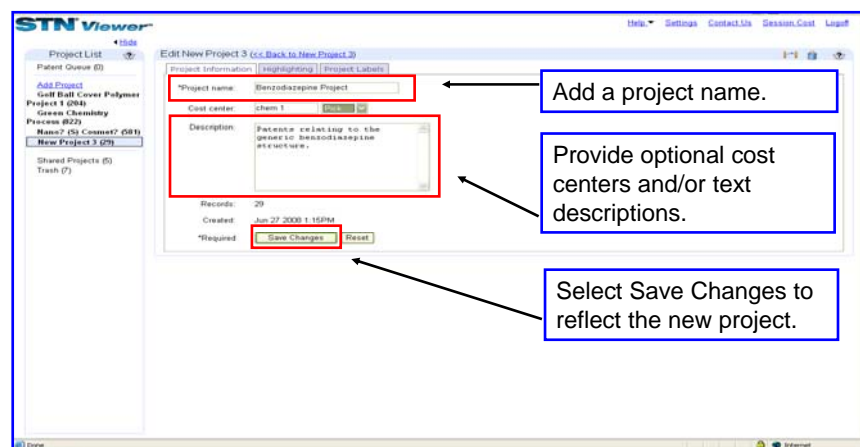
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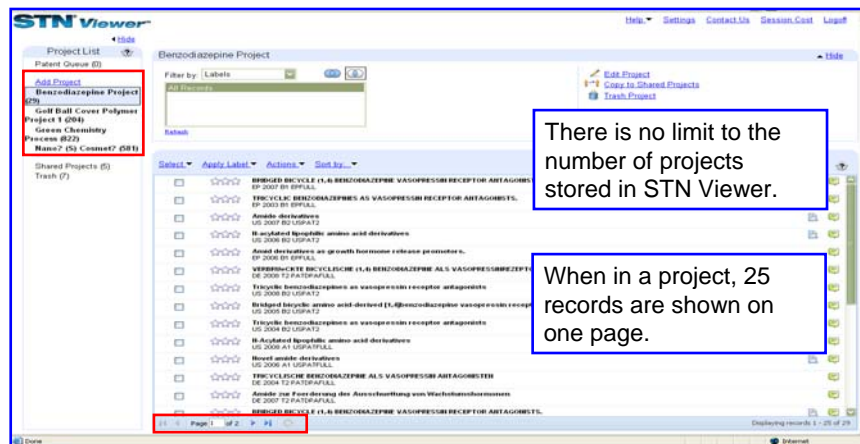
## Projects should be named



## Editing project information is easy



The project remains in the Project List until you remove it

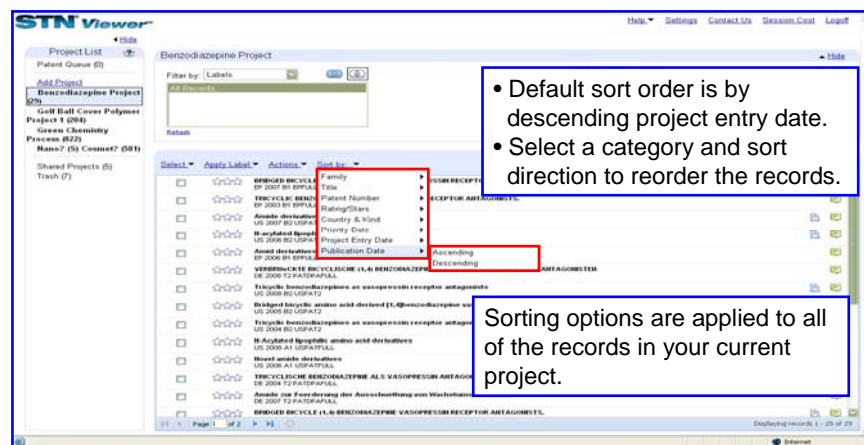


There is no limit to the number of projects stored in STN Viewer.

When in a project, 25 records are shown on one page.



Records in a project may be sorted in several ways



- Default sort order is by descending project entry date.
- Select a category and sort direction to reorder the records.

Sorting options are applied to all of the records in your current project.



## Use filtering to focus on specific records within your project

Seven filters are available:

- Labels
- Patent Country
- Publication Year
- Oldest Priority Year
- Assignee
- Country/Kind Code
- Rating/Stars

Only one type of filter may be applied at a time. Filtering combined with sorting can be very powerful.

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## Filtering provides document counts

Select multiple lines in the filter box by using Ctrl or Shift keys.

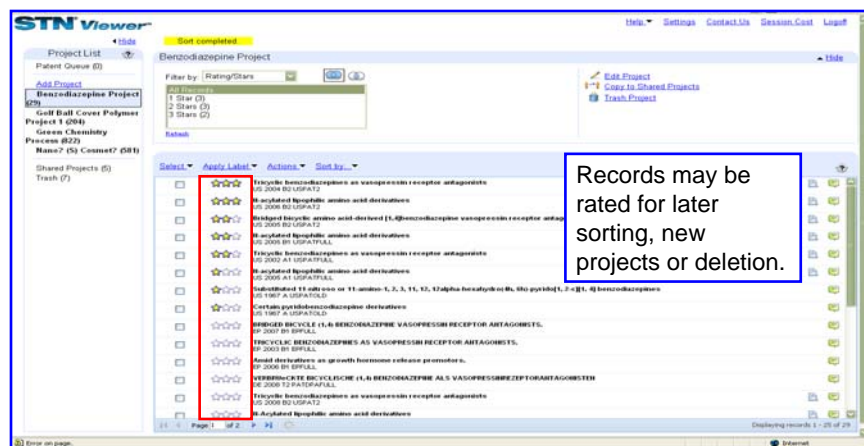
The filter selections are reflected immediately in the displayed records.

Displaying records 1 - 20 of 20

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## Selected records can be rated with 0-3 stars

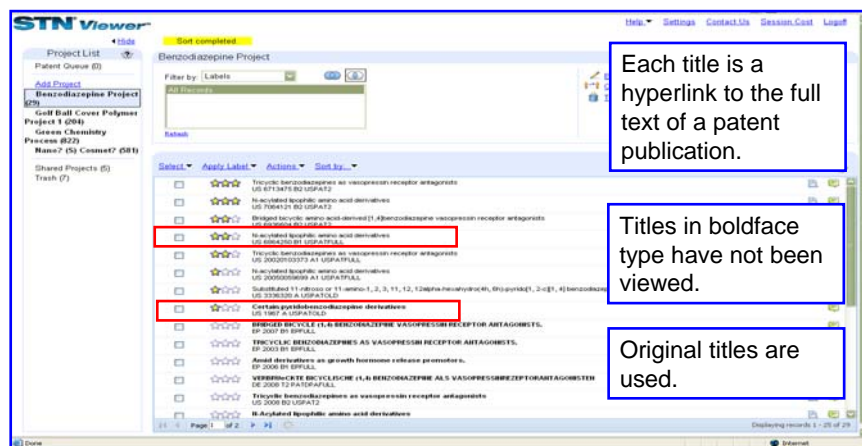


The screenshot shows the STN Viewer interface for a 'Benzodiazepine Project'. A list of records is displayed, each with a star rating icon (0, 1, 2, or 3 stars) and a checkbox. A text box on the right states: 'Records may be rated for later sorting, new projects or deletion.' The interface includes a 'Filter by Rating/Stars' dropdown and a 'Sort by' dropdown.

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## Record titles are hyperlinks to additional information



The screenshot shows the STN Viewer interface for a 'Benzodiazepine Project'. The list of records is displayed with their titles. A text box on the right states: 'Each title is a hyperlink to the full text of a patent publication.' Another text box notes: 'Titles in boldface type have not been viewed.' A third text box states: 'Original titles are used.' The interface includes a 'Filter by Labels' dropdown and a 'Sort by' dropdown.

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## Records are easily viewed for future inclusion or deletion

The screenshot shows the STN Viewer interface with a patent record selected. A callout box on the left states: "Records may be rated for later sorting, new projects, or deletion." Another callout box on the right states: "Moving from record to record is done with the arrow link." The interface includes a Project List on the left, a main text area for the patent abstract, and a right-hand sidebar with various filters and options.

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## Icons provide useful information

The screenshot shows a list of records in the STN Viewer interface. A callout box on the left states: "Only one abbreviated abstract is shown at a time; you can EITHER display the metadata OR the abstract for any records in the project." A callout box on the right states: "The paper button provides an abbreviated abstract (256 characters)." Another callout box on the right states: "The metadata icon shows the record detail when the record was initially entered into patent queue and entered into a project." The interface includes a Project List on the left, a main list area, and a right-hand sidebar with various filters and options.

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## Metadata link provides the date a record initially entered a Project

Substituted 11-ribose or 11-amino-1, 2, 3, 11, 12, 12alpha-hydroxy-2(6R, 8B)-oxo-8(1, 2a, 7H)-4H-benzodiazepines  
US 3336300 A US PATOLD

Certain pyridobenzodiazepine derivatives  
US 1987 A US PATOLD

BRIDGED BICYCLE (1,4) BENZODIAZEPINE VASOPRESSIN RECEPTOR ANTAGONISTS.  
EP 2007 01 EP FULL

TRICYCLIC BENZODIAZEPINES AS VASOPRESSIN RECEPTOR ANTAGONISTS.  
EP 2005 01 EP FULL

Product entry date: Jun 27, 2008 00:54 am  
Project entry date: Jun 27, 2008 09:15 am

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Displaying records 1 - 25 of 29

Metadata allows you to see when each record entered the Patent Queue and entered a Project for the first time.

## The Action menu provides the ability to manage projects and records

STN Viewer

Spot completed

Project List

Patent Queue (9)

Add Project

Benzodiazepine Project (9)

Gold Bull Cover Polymers Project 1 (9)

Green Chemistry Process (82)

Name? (5) Connect? (58)

Shared Projects (5)

Trash (7)

Filter by: Labels

Select Apply Label Actions Sort by

Send to Trash

Delete in 30 Days

Delete Now

Benzodiazepine vasopressin receptor antagonists

The Actions menu provides a variety of actions one can take with an answer set. Each action has choices.

When you use Send to Trash, you can Delete your project (or selected records) in 30 days or immediately.

The projects in Trash may be reinstated without loss of information or view charges

The screenshot shows the 'Trash' section of the STN Viewer interface. A table lists deleted records with columns for 'Item Type', 'Number/Name', 'Title/Description', and 'Days until deleted'. A red box highlights the 'Days until deleted' column header. A callout box points to the '30' value in the 'Days until deleted' column for the 'Golf Ball Cover Polymer Project'.

Item Type	Number/Name	Title/Description	Days until deleted
Project	Benzodiazepine Project	patents relating to the generic benzodiazepine structure	1
Project	Nano? (s) Cosmet?	Viewer Tutorial	1
Project	Nano? (s) Cosmet? 1	Viewer Tutorial	1
Project	New Project 1		1
Project	Golf Ball Cover Polymer Project	US, GB, DE, EP and WO patents related to elastomers in golf ball covers.	28
Project	Nano? (S) Cosmet?	Nanotech Cosmetic search for STN Viewer Tutorial 1	30
Project	New Project 2		30

Deleted records and projects may be held for 30 days, a count down of the number of days before deletion is provided.



Projects may be reinstated from the 30 day trash

The screenshot shows the 'Trash' section of the STN Viewer interface after restoration. A yellow notification bar at the top of the trash area reads: 'The 1 selected projects and/or records were restored.' The table below shows the same records as in the previous screenshot, but the 'Golf Ball Cover Polymer Project' is now listed in the 'Project List' on the left sidebar.

A notification appears once a project or record has been restored from the trash to the project list.



## Projects may be made at any time

- A project may be made from:
  - Records directly from the Patent Queue
  - Manipulated records from the Patent Queue
  - Another project
  - A combination of projects (through action menu)
  - The Add Project link
  - The Action pull down menu



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## See additional tutorials for more information

For more information on how to use STN Viewer, please view the following tutorials:

- Working with Records: highlighting and annotating records in STN Viewer
- Evaluating Records: using filter and sort options in STN Viewer
- Sharing Results: delivering shared projects and user IDs



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