

CAS IP SOLUTIONS GUIDEBOOK

Insights and tools for competitive intelligence
and effective patent monitoring

Maximize and protect your IP

Innovation doesn't have a limit, but commercialization might.

Effective monitoring of the competitive landscape is an essential part of strategic portfolio management. Staying up-to-date with patent and non-patent literature is key to retaining your competitive advantage and protecting your intellectual property (IP). As the volume of available innovation data continues to increase, it is important to consider how expert tools can help you navigate this increasingly complex landscape. By using powerful precision search and analysis tools to interrogate a comprehensive collection of global databases, advanced scientific and patent information solutions can transform your patent search and monitoring processes.

Comprehensive data ensures confident decisions

Timely access to accurate information is crucial for IP teams to navigate the competitive landscape. Having up-to-date and complete knowledge empowers successful IP decision-making in key strategic areas.

1. Competitive intelligence

Regular assessment of the IP and scientific landscape enables opportunities and threats to be identified and analyzed.

2. Patent protection

Safeguard your innovations and asset value by making timely and informed decisions. Early identification of potential patent infringements strengthens your ability to enforce and defend your IP rights.

3. IP strategy development

Proactively monitoring trends, applications, and legal action in relevant fields enables early identification of opportunities to leverage your current portfolio. Uncovering these changes early improves patent prospects and is essential to maintaining a competitive advantage.



Patent monitoring is evolving

Pressures for businesses to innovate and globalize mean that both patent application volume and complexity are continuously increasing. To keep up with these changes, IP search and monitoring tools are constantly developing and increasing.

Powerful tools such as CAS STNext® improve workflow efficiency by introducing precision search alerts from more than 100 discipline-relevant global databases combined with authoritative scientist-curated content and a comprehensive collection of patent literature. These tools have many applications and help identify:

- Competitive patenting activities.
- New members of existing patent families.
- Changes in legal status as a result of patent granting, expiry, or lapse.
- Potential infringements of your IP rights.
- New technological or geographical opportunities.

By identifying changes in the relevant landscape, IP monitoring tools contribute to the protection of assets, ensuring that value is maximized and competitive advantages are retained.

“Between business development, R&D, business decisions, patent litigation, post-market safety analysis — if you can think about it, there’s probably a reason why you need to be monitoring for it.”

Matt Garver,
IP search analyst, CAS

Essential features of IP research tools

When used effectively, IP research platforms can transform your ability to gather competitive intelligence and protect your portfolio across the entire innovation lifecycle — from early research to post-market surveillance. To do this well, an effective IP information tool must be comprehensive, powerful, and precise.

Comprehensive

In your IP search and monitoring endeavors, it's not just about accessing a vast array of data sources; it's about developing a comprehensive perspective of the global innovation landscape. CAS IP experts add value to our vast collection of patent and non-patent literature by normalizing data and tagging concepts in many databases.

Access to a comprehensive selection of refined IP and scientific information is pivotal in identifying white space, gauging freedom to operate (FTO) across multiple jurisdictions, and monitoring competitors with accuracy. Utilizing these enriched sources bolsters your confidence in competitive intelligence, enabling you to identify loopholes, opportunities for defensive patenting, and technology inflection points with certainty.

Powerful and precise

With more than three million patents submitted and many more non-patent literature published annually, it is essential to streamline IP monitoring strategies without jeopardizing search accuracy. Whether you're searching for broad or specific IP information, precision search tools are powerful assets to filter results, ensuring that only relevant entries are returned.

IP information tools should have options to tailor your searches to minimize the time and resources needed to find specific information, allowing for highly relevant, comprehensive, and efficient searching. This is vital when monitoring changes to application or patent status, or tracking changes in your domain of interest.

Optimizing IP monitoring for informed decision-making

Whether you are aiming to gain competitive intelligence, scout emerging technology, develop an IP strategy, or answer questions like “Can we market this product?” and “How long could we drive revenue from this product?” — you need a monitoring program.

IP monitoring involves searches that are performed periodically — daily, weekly, monthly, quarterly. You never know what will provoke an idea or insight. If you aren’t paying attention to trends in the technology and competitive landscape, including the publication of non-patent literature that may precede patents by months to years, you risk missing those “pivot” moments.

Monitoring vs. searching

You might start with a search for FTO, patentability, or other specific insight, but the job doesn’t end there. Ongoing patent monitoring protects your R&D investments by keeping a pulse on competitor activity, safeguarding FTO in specific jurisdictions, and identifying legal status changes.

Did a competitor forget to pay a patent annuity payment? That might be an opportunity for you to enter a new competitive space.

Setting up a custom monitoring program

While the availability of comprehensive and sophisticated searchable databases is crucial in patent search and monitoring tools, the real value lies in effectively customizing and utilizing these resources for patent monitoring.

Patent monitoring strategies implemented with CAS STNext can be designed to leverage manual or automatic search alerts, depending on the needs of each project. Manual searches may be more applicable to projects that require frequent adjustments to queries or an irregular search cadence, while automatic searches are valuable for delivering timely insights that can be easily shared with essential stakeholders.

Another key consideration when planning a monitoring strategy is the varying nature of scientific and patent databases — these resources may operate with different update frequencies, unique search features, or varied jurisdictional coverage. Multi-file alerts in CAS STNext can be customized to leverage different queries and delivery frequency for each database, ensuring the most precise and comprehensive results.

This is pertinent for IP searchers using different platforms for varied search projects and functions. A monitoring program should not only align with your specific needs but also efficiently manage the deluge of information, setting the stage for continuous, effective monitoring of critical IP for years to come.



Plan a multi-file alert in CAS STNext

- 1.** Create a common multi-file query in one of the files of interest or create a separate database-specific query in each file.
Tip → Use separate queries to take advantage of unique search features in different databases, such as organism or geographic terms in BIOSISTM and MeSH indexing, limiters, or subheadings in MEDLINE.
- 2.** Open the relevant files, e.g., FILE BIOSIS MEDLINE and enter ALERT MFILE or SDI MFILE to combine them into a multi-file alert.
Tip → SDI = Selective Dissemination of Information (and is a CAS synonym for "Alert.")
- 3.** Enter a name for the SDI and select general multi-file options, e.g., delivery method.
Tip → Choose a standard multi-database alert for delivery in separate emails according to individual database frequency or choose an alert package that delivers all results in a single email on a weekly or monthly basis.
- 4.** Enter a name for each single-file alert within the multi-file alert and further file-specific options to tailor your search.
- 5.** Choose update field codes and display formats individually for each file of interest.
Tip → Use the UP/UPM update code to eliminate previous answers instead of using ED (Entry Date) in dynamically updated databases, e.g., HCAplus.



CAS STNext elevates IP research and monitoring

CAS STNext is a premier scientific IP information search solution. Scientist-curated content, patent information, and leading global databases combine to provide the most comprehensive and up-to-date collection of patent and non-patent technical content. Featuring cutting-edge precision search tools and innovative time-saving alerts, the advanced features of CAS STNext provide powerful ways to leverage comprehensive content and strengthen your IP research outcomes.

Access to comprehensive and complete IP information

As the competitive landscape expands and evolves, it is essential to streamline your workflow to maintain productivity and drive innovation. By providing access to the most up-to-date and complete collection of patents, non-patent literature, and chemical databases in one platform, CAS STNext can improve the efficiency of your IP searches.

Substance/structure-based search

Having access to an unsurpassed collection of chemical substance data allows you to easily set up structure-based queries. CAS STNext provides access to over 230 million substances in CAS REGISTRY®, as well as the Derwent Chemical Resource and the Derwent Markush Resource, amongst others. This comprehensive collection of chemical information allows for confident and efficient substance searching.

Custom alert capabilities

Alerts keep you up-to-date with R&D trends and IP landscape changes. Whether you want to monitor new geographical markets, new members of patent families, competitor patenting activities, or potential infringements, alerts can be a powerful strategic tool.

Tailoring alerts to specific databases or designing them to apply to multiple sources provides flexibility in your searching. Both manual and automatic alerts are possible, allowing you to control the frequency of your search result reports. Further personalization options exist, including refining results by removing information that you have seen previously.

Use of scripts to refine functionality

The option to save scripts eases repetitive tasks and enables sharing within your team to ensure effective collaboration and consistent search results. By using command-line input, you can generate more sophisticated search queries, precise refinements, and a personalized display. For example, scripts allow you to choose between limiting results by entry date (ED) or date updated (UP). Using the updated limiter ensures you won't miss any relevant information, such as the addition of a keyword to a previously missed entry.

Duplicate record removal

Take advantage of the CAS STNext option to remove duplicate results and save valuable time. When setting up an alerts package, you can also set your preferences for duplicate removal by specifying your preferred primary database.

Earliest publication of non-patent literature

CPlus, included in CAS STNext, covers almost one million publications from preprints (before the peer review process starts).. Integrated access to this information ensures visibility into the earliest possible time of the disclosure of research as a potential prior art source.

Expert customer support

Experienced IP searchers and scientists can provide expert assistance with CAS STNext via detailed online training materials, webinars, and worldwide training.

Confidential searching

Any CAS STNext search is confidential with practices in place to protect your privacy.

Advanced IP research tools can transform your patent monitoring process

Monitoring is an important component of any IP strategy. Timely knowledge of the competitive landscape is key to understanding what is out there and how you can avoid or capitalize on it.

Learn more about how CAS can help you secure competitive intelligence and protect your IP.

CAS connects the world's scientific knowledge to accelerate breakthroughs that improve lives. We empower global innovators to efficiently navigate today's complex data landscape and make confident decisions in each phase of the innovation journey. As a specialist in scientific knowledge management, our team builds the largest authoritative collection of human-curated scientific data in the world and provides essential information solutions, services, and expertise. Scientists, patent professionals, and business leaders across industries rely on CAS to help them uncover opportunities, mitigate risks, and unlock shared knowledge so they can get from inspiration to innovation faster. CAS is a division of the American Chemical Society.

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