STN® AnaVist™, Version 2.0

Quick Start Guide
for STN Login IDs for Shared Projects

Contents

INTRODUCTION

About this guide

This Quick Start Guide provides an overview of the basic capabilities of STN AnaVist® using an STN Login ID for Shared Projects.

You can access STN AnaVist with a:

- Regular, full-access STN® login ID
- STN Login ID for Shared Projects

With a regular STN login ID, you have access to all the capabilities of STN AnaVist and STN Express®.

STN Login IDs for Shared Projects are designed for viewing and customizing projects created by a holder of a full-access STN login ID. Holders of STN Login IDs for Shared Projects cannot perform any tasks that require access to STN Express such as creating search results in STN and importing them into STN AnaVist for visualization.

For details about what tasks can and cannot be performed with an STN Login ID for Shared Projects, visit www.cas.org.

The Guide assumes that you have installed STN AnaVist software and can connect to CAS. If you have problems installing or connecting, see the STN AnaVist Technical Support information at www.cas.org.

Additional information about STN AnaVist features is also available:

- STN AnaVist Help topics – Use the **Help** menu within STN AnaVist or press the **F1** key.
- Context-sensitive Help – Click a icon within STN AnaVist to view information about a specific feature.

In many places, this guide includes references to online Help topics where you can find more details and related information.

Using STN AnaVist with STN Login ID for Shared Projects

STN AnaVist is an interactive analysis and visualization software product that provides unique insights into trends and patterns in scientific and patent information.

Using STN AnaVist with an STN Login ID for Shared Projects involves the following main steps:

1. **Open** a shared project.
2. **Visualize** the information in the documents of the shared project.
3. **Explore** the visualizations to discover trends and relationships and find answers to your question(s).

Help Topics

- STN AnaVist Overview
- Login Access

Opening shared projects

To open and work with shared projects, you must have:

- STN AnaVist, Version 2.0, installed
- A full-access STN login ID or an STN Login ID for Shared Projects

**To open a shared project from an e-mail attachment:**

- Double-click the .shx file attachment.

STN AnaVist launches automatically. After you log in, the shared project is available for you to use in the STN AnaVist workspace.

To open a project that is saved to your computer or a shared file location:

1. Select **Open Project Copy** from the **File** menu.
2. Locate the .shx file.
3. Click **Open**.
   - Or -
   Click and drag the .shx file into the STN AnaVist workspace.

Double-click the icon for the shared project to use the visualizations.
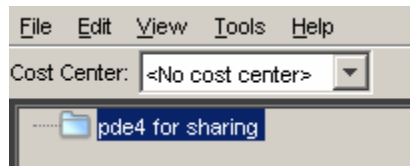
Help Topics

- Share Results
- Save a Project Copy
- Open a Project Copy

USING VISUALIZATION CHARTS

Displaying charts   When you open a shared project, the charts created or edited by the person who shared the project are displayed.

The following example shows the default charts:

- Researchers by Publication Year
- Key Organizations/Assignees
- Research Landscape

In addition, a Documents window is available for working with documents.
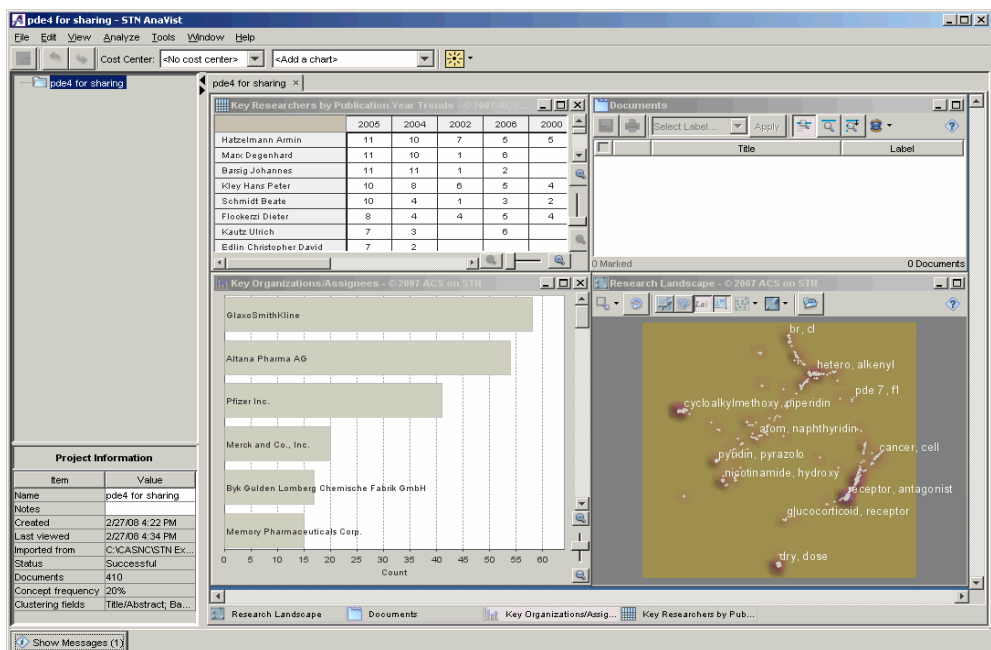
You can minimize or maximize each chart, or select either the **Tile** (default) or **Cascade** viewing option from the **Window** menu.

Key Organizations/ Assignees

Content of the Key Organizations/Assignees chart:

- This bar chart displays organizations or patent assignees. Hover on the name to see the document count.
- The name of each organization or assignee is extracted from the Corporate Source/Patent Assignee field of the documents.
- Names are algorithmically grouped.
- The top 50 terms are shown by default. (To change the number of terms displayed, right-click on the chart to access the **Properties**.)
- By default, names are sorted by descending document count.
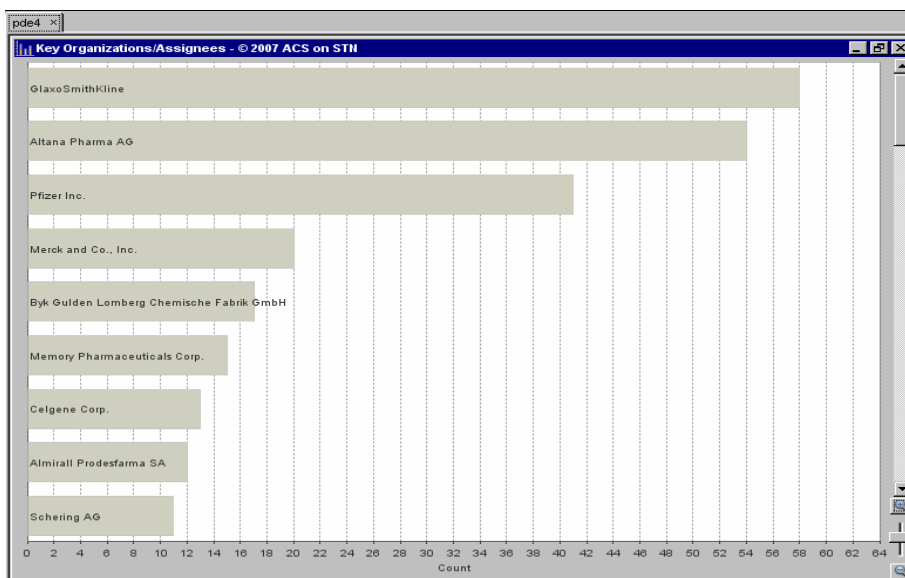
Working with the Key Organizations/Assignees chart:

To…	Do this…
Increase the number of shown bars	Use the density slider:
View and select from options such as **Print**, **Save As**, **Sort, Edit Terms,** or **Properties**	Right-click in the chart, and select one of the options.
Show highlighted bars only, sort, edit terms, or view properties	Select from the floating toolbar:

Help Topics

- Visualize Document Information
- Use Bar Charts
- Navigate Charts

Key Researchers by Publication Year Trends

Content of the Key Researchers by Publication Year Trends chart:

- This matrix chart displays key researchers with the corresponding document counts for the years of publication of documents.
- By default, the researchers are sorted by co-occurrence frequency.

pde4

Key Researchers by Publication Year Trends - © 2007 ACS on STN

	2005	2004	2002	2006	2000	2001	2003	1999	2007	1998	1997
Hatzelmann Armin	11	10	7	5	5	3	1	4			
Marx Degenhard	11	10	1	6						1	
Barsig Johannes	11	11	1	2			1				
Kley Hans Peter	10	8	6	5	4	2	1	4			
Schmidt Beate	10	4	1	3	2			1			
Flockerzi Dieter	8	4	4	5	4			2			
Kautz Ulrich	7	3		6							
Edlin Christopher David	7	2							1		
Bundschuh Daniela		2	6		3	3	2	1			
Grundler Gerhard	3	1	6		3						
Zitt Christof	6			5							
Mathias John Paul	6						4				
Redgrave Alison Judith	6	3									
Nickolaus Peter				6							
Martyres Domnic				6							
Sterk Geert Jan	3	5	3			2	1	1			
Beume Rolf		2			5		2	4			
Hopper Allen T	1	5	2	3			1				
Gutterer Beate			5		4			2			
Muller George W		5		3			2				
Gharat Laxmikant Atmaram	1	5		4							
Lindvall Mika Kristian	5	3							1		
Lakdawala Aftab Dawoodb...	3	5	1								
Jones Paul Spencer	5	3							1		
Menge Wiro M P B	3	5									
Fowler Kerry W		2	1			5					
Niemi Alf	5			1					1		
Myrman Mattias	5			1					1		
Johnson Martin Redpath	5	2									
Cook Caroline Mary	5	2									
Calander Sven	5			1					1		

Working with the Key Researchers by Publication Year Trends chart:

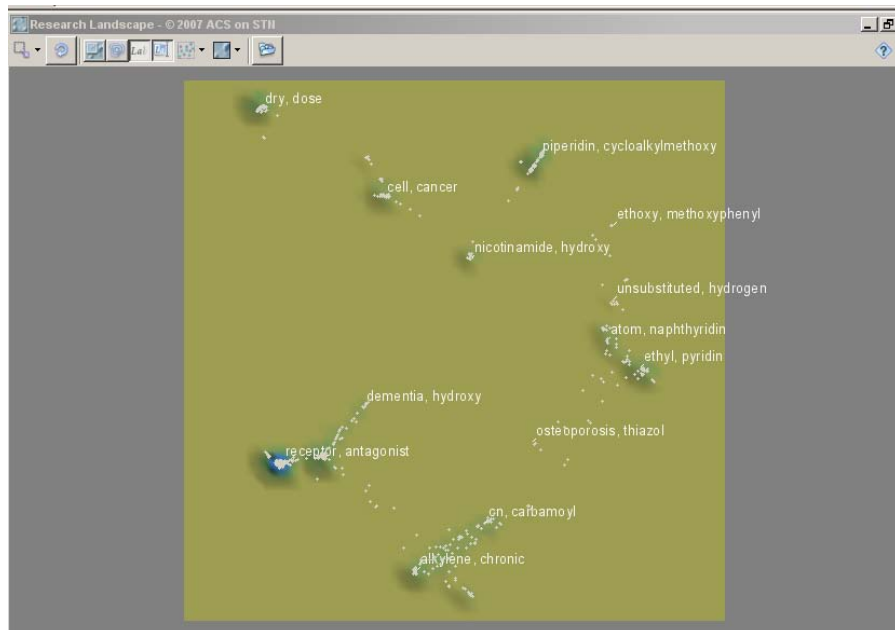| To…	Do this…
Control the density of the chart data	Use horizontal or vertical density sliders.
View and select from options such as **Print**, **Save As**, **Sort, Edit Terms,** or **Properties**	Right-click in the chart and select one of the options.
Show highlighted bars only, sort, edit terms, or view properties	Select from the floating toolbar:

Help Topics

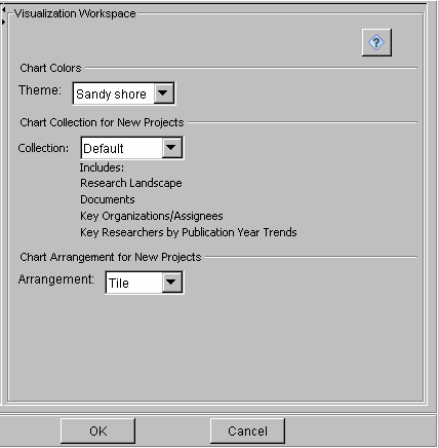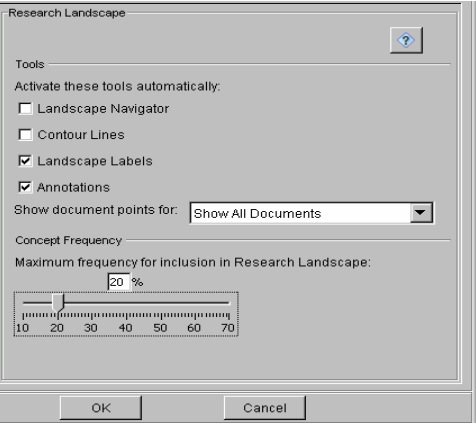- Visualize Document Information
- Use Matrix Charts
- Navigate Charts

Research Landscape

Content of the Research Landscape:

- Clusters of documents with similar content indicate possible research fronts
- Each document is represented once on the landscape by a dot.
- The two most frequently occurring concepts in each cluster are displayed in the landscape.

Working with the Research Landscape:

| To…	Do this…
View the most frequent concepts in the research front	Hover over a peak. cell, cancer cell [44] cancer [38] grow [25] pde [21] islet [19] pancreas [19] animal [18] cgmp [16] secreted [15] insulin [14]
Change the colors of the map	From the **Tools** menu, select **Preferences** and then **Visualization Workspace**. Visualization Workspace Chart Colors Theme: Sandy shore Chart Collection for New Projects Collection: Default Includes: Research Landscape Documents Key Organizations/Assignees Key Researchers by Publication Year Trends Chart Arrangement for New Projects Arrangement: Tile OK Cancel
Change the maximum frequency of occurrence of terms before they are included	From the **Tools** menu, select **Preferences** and then **Research Landscape**. Research Landscape Tools Activate these tools automatically: ☐ Landscape Navigator ☐ Contour Lines ☑ Landscape Labels ☑ Annotations Show document points for: Show All Documents Concept Frequency Maximum frequency for inclusion in Research Landscape: 20 % 10 20 30 40 50 60 70 OK Cancel

Working with the Research Landscape toolbar:

With the Research Landscape toolbar, you may change the appearance of the Research Landscape. Hover over each tool to view the tooltip describing its function. Some examples are:

Tool	Functions
Select Cursor with these options: • Highlight Cursor Tilt Cursor Zoom Cursor	• Highlight a set of documents • Tilt the Research Landscape • Zoom in on the Research Landscape
Show Landscape Navigator	Adjust how much of the landscape to display in the window. Landscape Navigator
Select Landscape View with these options: • 3D View 2D View (Light) 2D View (Dark)	Change Landscape View to: • 3D View (emphasizes document densities) • 2D View (light background) • 2D View (dark background)

An example of a 2D View on a white background:
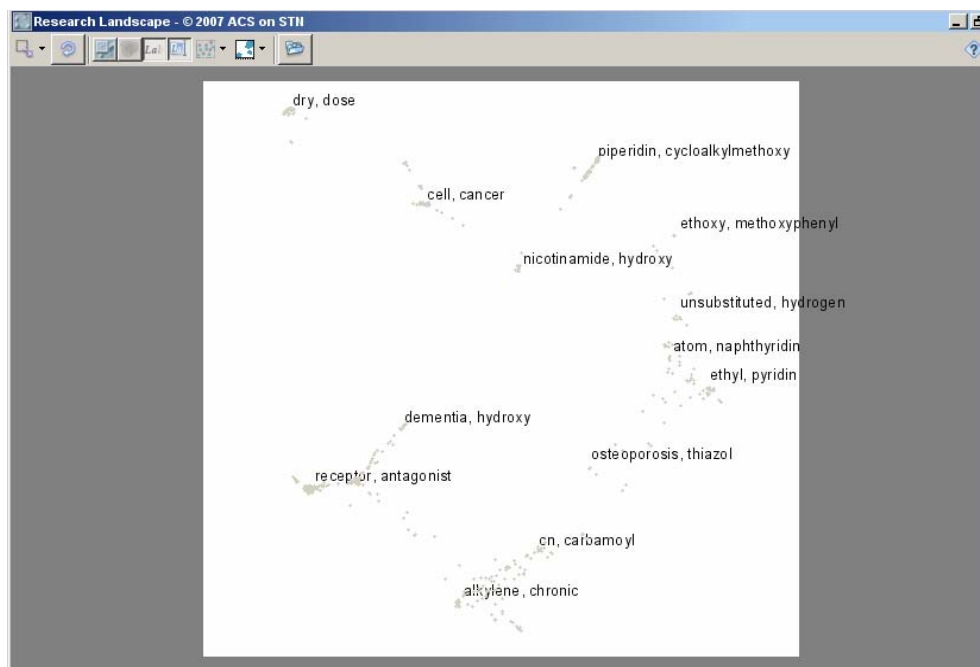
Help Topics

- Visualize Document Information
- How the Research Landscape Is Created
- Navigate the Research Landscape

Adding charts

To create additional charts, select from options within the **Add Chart** drop-down menu located on the toolbar.

This chart…	Displays document counts for…
Clustering Concepts	Cluster labels
Derwent Class	Patent codes from the DC field of WPINDEX
Derwent Manual Code	Patent codes from the MC field of WPINDEX
Document Distribution	Document types, e.g., patent and nonpatent
Key Researchers	Authors, editors, or inventors
Labels	User-assigned labels applied to documents
Patent Classifications	Main and secondary International Patent Classification (IPC) codes
Patent Countries	Patent-issuing countries
Patent Country Code/Kind Code	Patent Country Codes and Patent Kind Codes
Priority Application Years/Dates	Dates of filing of priority applications (The oldest date is chosen in cases of multiple priorities)
Publication Year Trends	Years of publication
Technology Indicators	CAS controlled indexing terms standardized across indexing periods. These terms occur in CAplus, USPATFULL, and USPAT2. CAS Registry Number[®] identifiers are not included.
Add Matrix Chart	Customized co-occurrences (User specified fields for rows and columns)

Help Topics

- Visualize Document Information
- Use Bar Charts
- Use Matrix Charts
- Navigate Charts

Editing terms within charts

STN AnaVist is designed to minimize scattering and produce "clean" charts the first time.

In addition, you may edit the terms within the charts by:

- Combining related terms
- Renaming term groups
- Deleting terms

To edit terms or groupings within a chart, right-click anywhere on the chart and select **Edit Terms**. You can drag and drop terms for grouping, or use the options on the screen.

To easily combine terms that appear far apart in your list, click the **Show Split Pane** ( ) button on the Term Editor to view the terms in two separate panes.

You can drag terms across the panes or within either pane. The content of the two panes is identical.
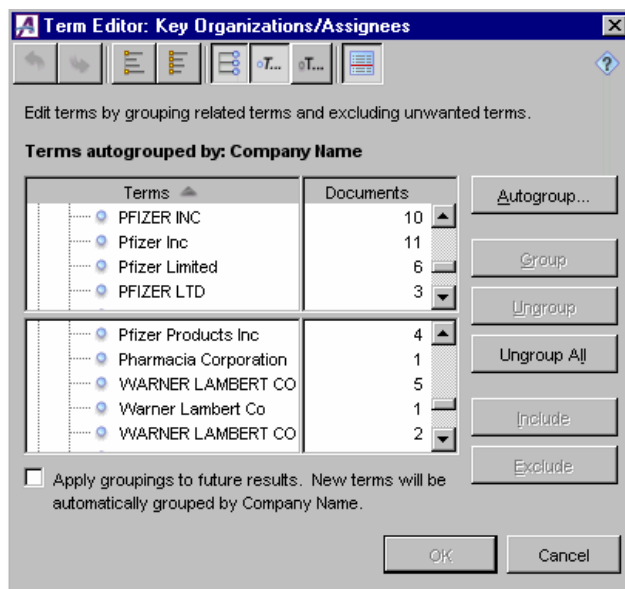
Help Topics

- Edit Terms and Clean Up Data
- Group Terms Automatically
- Use Split View

EXPLORING RELATIONSHIPS

STN AnaVist makes it possible to explore relationships among data in your documents so that you can quickly and easily answer questions such as:

- In what areas of research is a particular company engaged? Who are the key researchers? (See Example 1.)
- Who are the key patent assignees for a given area of research? (See Example 2.)
- How do two or more companies compare in terms of areas of research and key researchers? (See Example 3.)

To explore relationships:

1. Use the Highlight Manager to select one or more highlighting colors.
2. Highlight a portion of a chart or the Research Landscape.

With the STN AnaVist Highlight Manager, you can use multiple colors to compare as many as eight sets of documents and their relationships.
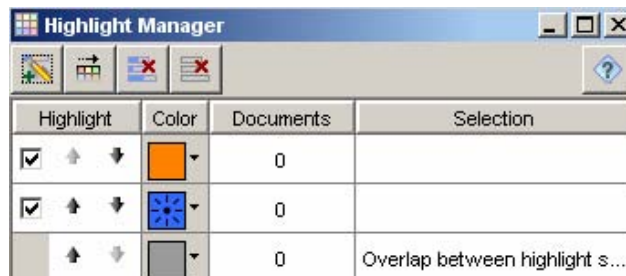
Using the Highlight Manager

To use the Highlight Manager, click the **Highlight Color Selector** ( ) and select **Highlight Manager** ( ).
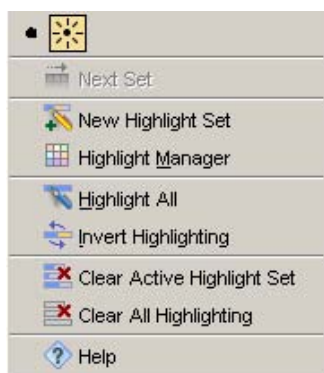
Within the Highlight Manager, rows represent individual highlight sets and columns represent information about those highlight sets. Click in the Color column to display a color palette. To change the color of the highlight set, click on the color of choice in the palette.

To add another highlight set, click **New Highlight Set** ( ). Click the **Highlight Manager** ( ) to select another color for this set from the color palette.


<table>
<tr><td></td><td colspan="4">Highlighting charts</td></tr>
</table>

To highlight…	Do this…
Bars or cells in charts	1. Click a bar or cell. 2. Use the **<Ctrl>** key to select nonconsecutive bars or cells. Use the **<Shift>** key to select consecutive bars or cells.
An area of the Research Landscape	1. Select the **Highlight Cursor** from the drop-down menu of the **Select Cursor** ( ). 2. Draw a box around an area of interest. (Use the **<Ctrl>** key to select multiple areas.)

Example 1　　**Find information on a company of interest. Who are the main researchers? What is the main research area? What documents or patents have been recently published by that company?**

In the Key Organizations/Assignees chart, highlight the company of interest by clicking on its bar. The bar becomes highlighted in the currently active highlighting color (green in this example) shown on the Highlight Color Selector (⬚).
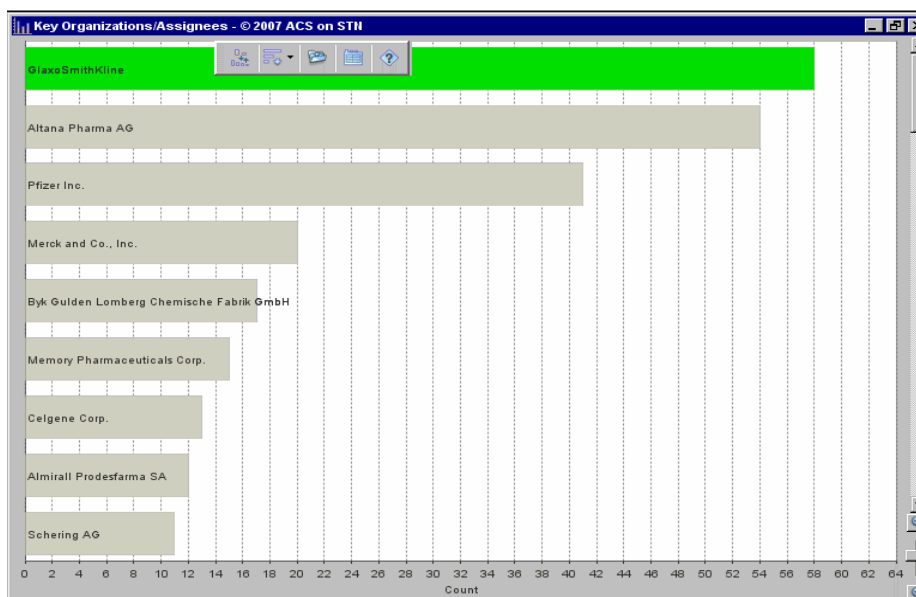
In the Researchers by Publication Year Trends chart, the cells for the documents by researchers from that company automatically become highlighted. The numbers in each highlighted cell indicate the number of documents published by a particular researcher for that year. For example, 1/4 means that this researcher authored 1 out of 4 documents published with the selected company as the organization or patent assignee.

	2005	2004	2002	2006	2000	2001	2003	1999	2007	1998	1997
Hatzelmann Armin	11	10	7	5	5	3	1	4			
Marx Degenhard	11	10	1	6						1	
Barsig Johannes	11	11	1	2			1				
Kley Hans Peter	10	8	6	5	4	2	1	4			
Schmidt Beate	10	4	1	3	2			1			
Flockerzi Dieter	8	4	4	5	4			2			
Kautz Ulrich	7	3		6							
Edlin Christopher David	7/7	2/2							1/1		
Bundschuh Daniela		2	6		3	3	2	1			
Grundler Gerhard	3	1	6		3						
Zitt Christof	6			5							
Mathias John Paul	6						4				
Redgrave Alison Judith	6/6	3/3									
Nickolaus Peter				6							
Martyres Domnic				6							
Sterk Geert Jan	3	5	3			2	1	1			
Beume Rolf		2			5		2	4			
Hopper Allen T	1	5	2	3			1				
Gutterer Beate			5		4			2			
Muller George W		5		3			2				
Gharat Laxmikant Atmaram	1	5		4							
Lindvall Mika Kristian	5/5	3/3							1/1		
Lakdawala Aftab Dawoodb...	3	5	1								
Jones Paul Spencer	5/5	3/3							1/1		
Menge Wiro M P B	3	5									
Fowler Kerry W		2	1			5					
Niemi Alf	5			1						1	
Myrman Mattias	5			1						1	
Johnson Martin Redpath	5/5	2/2									
Cook Caroline Mary	5/5	2/2									
Calander Sven	5			1						1	

Dots for the documents by that company also become highlighted (in green) in the Research Landscape.
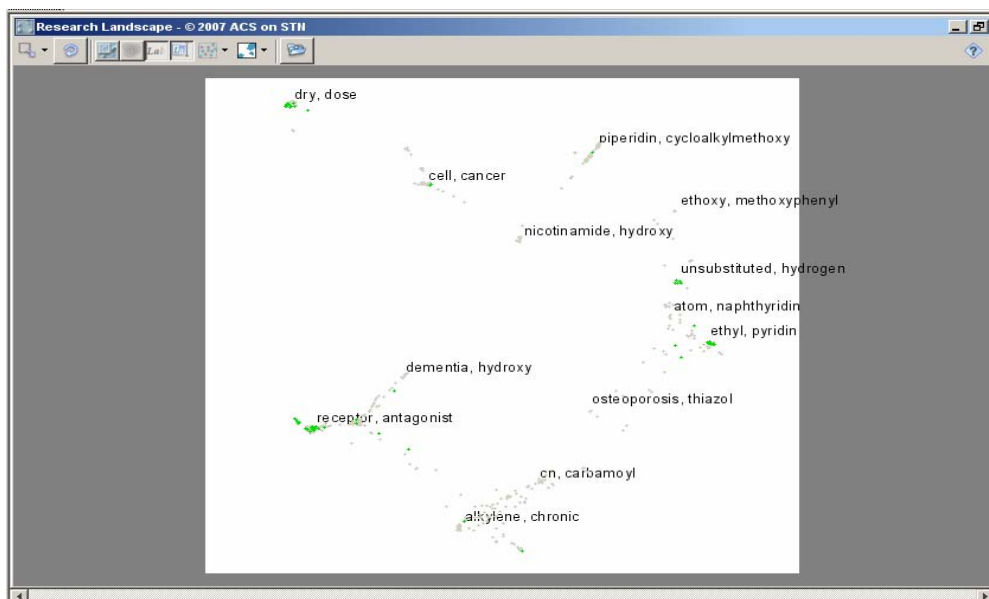
In addition, in the Documents window, green is applied to the boxes for the titles of the documents by that company.
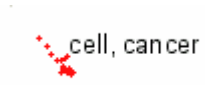

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Example 2   **What organizations and researchers are involved in a particular area of research?**

Use the **Highlight Manager** to choose another color ( ) for this set of documents.

In the Research Landscape, select a research area of interest. Dots for the documents become highlighted (in red in this example).

In the Key Organizations/Assignees chart, bars for key organizations/ assignees involved in that area automatically become highlighted. The portion of the bar that is highlighted in red reflects the portion of documents related to the area of research selected in the Research Landscape.
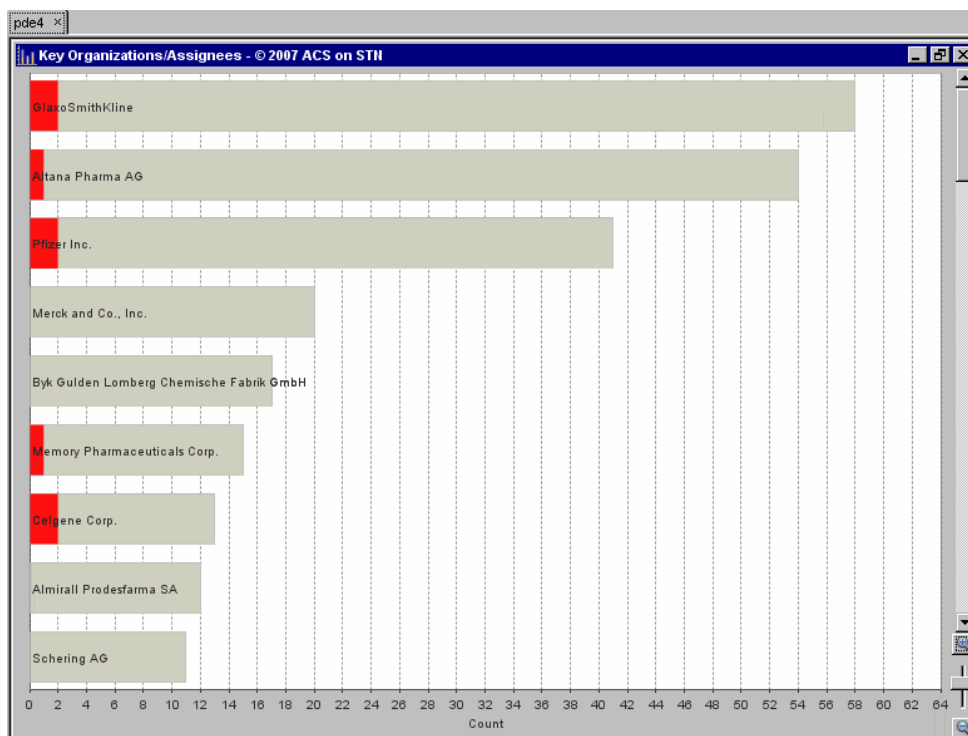
In the Key Researchers by Publication Year Trends chart, the cells for the corresponding documents automatically become highlighted. The numbers in the highlighted cells indicate the numbers of documents by a particular researcher. For example, 1/3 means that 1 out of 3 documents authored by the researcher deal with the research area selected in the Research Landscape.

| Key Researchers by Publication Year Trends - © 2007 ACS on STN	2005	2004	2002	2006	2000	2001	2003	1999	2007	1998	1997
Hatzelmann Armin	11	1/10	7	5	5	3	1	4			
Marx Degenhard	11	10	1	6						1	
Barsig Johannes	11	11	1	2			1				
Kley Hans Peter	10	8	6	5	4	2	1	4			
Schmidt Beate	10	4	1	3	2			1			
Flockerzi Dieter	8	4	4	5	4			2			
Kautz Ulrich	7	3		6							
Edlin Christopher David	7	2							1		
Bundschuh Daniela		2	6		3	3	2	1			
Grundler Gerhard	3	1	6		3						
Zitt Christof	6			5							
Mathias John Paul	6						4				
Redgrave Alison Judith	6	3									
Nickolaus Peter				6							
Martyres Domnic				6							
Sterk Geert Jan	3	5	3			2	1	1			
Beume Rolf		2			5		2	4			
Hopper Allen T	1	5	2	3			1				
Gutterer Beate			5		4			2			
Muller George W		1/5		1/3				2			
Gharat Laxmikant Atmaram	1	5		4							
Lindvall Mika Kristian	5	3							1		
Lakdawala Aftab Dawoodb...	3	5	1								
Jones Paul Spencer	5	3							1		
Menge Wiro M P B	3	5									
Fowler Kerry W		2	1			5					
Niemi Alf	5			1					1		
Myrman Mattias	5			1					1		
Johnson Martin Redpath	5	2									
Cook Caroline Mary	5	2									
Calander Sven	5			1					1		

In addition, the documents corresponding to the highlighted areas of the charts display in the Documents window.

Documents		
	Title	Label
1	A preparation of novel isoindolone derivatives, useful as PDE4 inhibitors. CAPLUS	
2	PDE4 inhibitors for the treatment of neoplasms of lymphoid cells. CAPLUS	
3	Preparation of 2-(fluoroalkoxyphenylalkyl)-1,3-dihydroisoindolones as PDE4, TNF-α, and/or MMP inhibitors. CAPLUS	
4	Cancer treatment method. CAPLUS	
5	Method for identifying compounds modulating intracellular distribution of phosphodiesterase (PDE) using live cells. CAPLUS	
6	Methods for the screening of non-recombinant cell lines capable of expressing a single PDE4 isoenzyme and for the screening of PDE4 inhibitors. CAPLUS	
7	Preparation of isoindoline derivatives for treatment of cancer, inflammatory bowel disease, and myelodysplastic syndrome. CAPLUS	
8	Preparation of fused pyrrole compounds as TNFα and/or PDE4 inhibitors for treatment of cancer, inflammatory disorders, and autoimmune diseases. CAPLUS	
9	A preparation of 7-aminoisoindolone derivatives. CAPLUS	
10	Preparation of acrylic amides for treatment of inflammation, diabetes, and related disorders. CAPLUS	
11	Preparation of indolizine compounds for treating conditions involving PDE4 or elevated levels of cytokines. CAPLUS	
12	Fluorescence-based mucus assay for measuring mucus secretion and for	

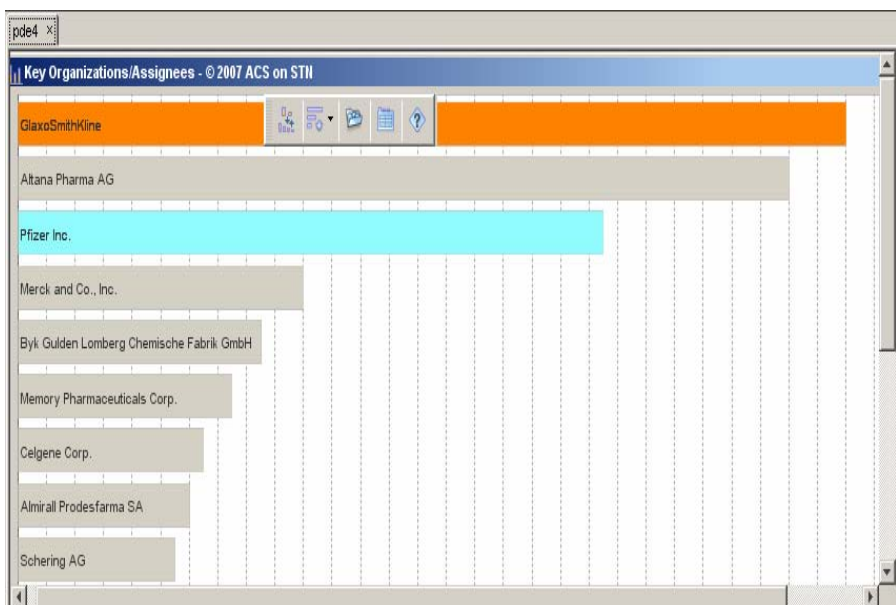0 Marked   18 Documents

Example 3   **How do two companies compare in terms of areas of research and key researchers?**

1. Use the Highlight Manager to choose the colors for the two sets of documents you want to compare:

   a. Click the **Highlight Color Selector**. Select **Clear All Highlighting** if you want to remove all previously used highlighting sets.
   b. Select **Highlight Manager**. In the Highlight Manager table, click the Color column to display a color palette. Select the color you want to use to highlight the documents for the first company.
   c. To add another highlight set, click **New Highlight Set** ( ). Click the **Highlight Manager** to select another color for this set from the color palette.
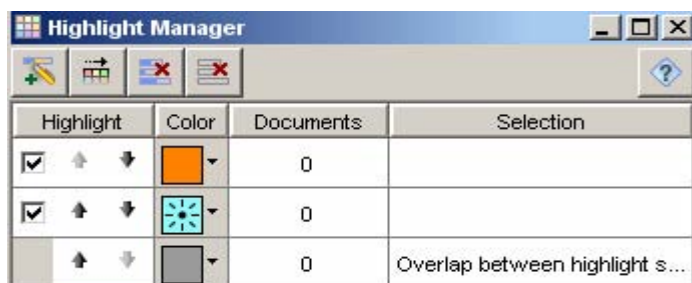
3. Highlight the two companies with different colors.

   a. Click the first color in the Highlight Manager. On the Key Organizations/Assignees chart, click the bar for the first company.
   b. Select the second color. Click the bar for the second company. The two companies that you are comparing are now highlighted in two different colors.

Data on the other charts are also appropriately highlighted with two colors.

In addition, the documents corresponding to the highlighted areas of the charts display in the Documents window.

Help Topics

- Use Bar Charts
- Use Matrix Charts
- Navigate Charts
- Navigate the Research Landscape
- Highlight Documents
- Use Comparison Highlighting
- Highlight Manager

WORKING WITH DOCUMENTS

Using labels

You can use labels to identify a group of documents within a visualized answer set. Labeling is especially useful for creating document subsets for subsequent saving, printing, or sharing.

Labels can consist of up to 30 characters and contain multiple words. Multiple labels may be applied per document.

You can label documents from:

- Charts in the visualization workspace
- Documents window

To label documents from a bar or matrix chart:

1. Select a bar or cell.
2. Right-click and select **Apply Label**.
3. Type a new label in the New Label(s) field to create a new label. Or, check the label(s) to be used in the Select Label(s) list drop-down menu.
4. Click **OK** to apply the labels.

To label documents from a Documents window:

1. Select documents to be labeled.
   Note: If no documents are selected, all documents displayed in the Documents window will be labeled.
2. To create a new label, select **New Label** from Select Label drop-down menu and enter the text for the label.
3. Click **Apply**.

The label is displayed in the Label column associated with the appropriate records.
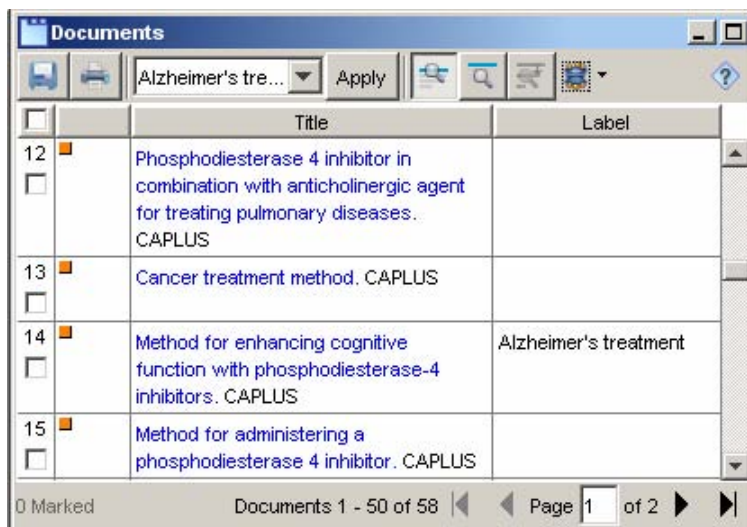
Managing labels

A bar chart is automatically generated when you create your first label within a project.   Right-click on the bar chart for each label to rename or delete the label.
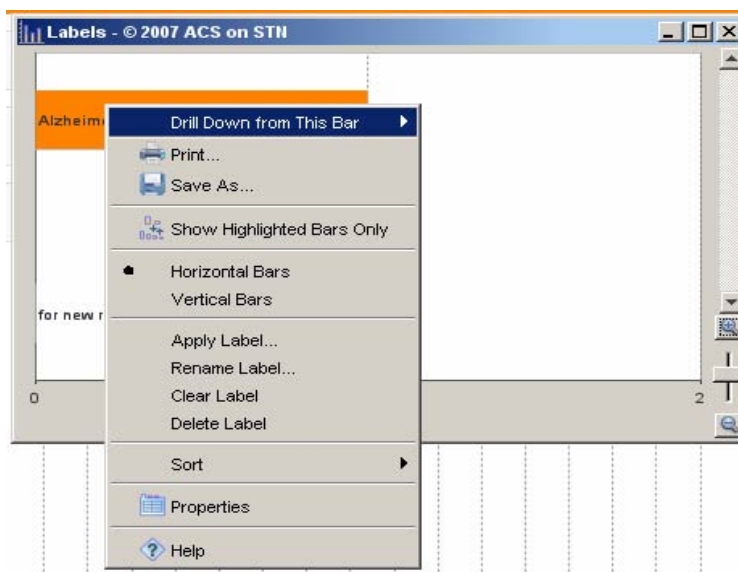
Using filters

Filtering provides a convenient way to create subsets of documents to be displayed, printed, or saved.

To filter documents, select from the options associated with the **Filter** icon.
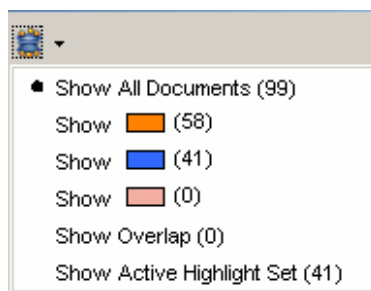
Help Topics

- Label Documents
- Labels Chart
- Documents Viewer

**Visualizing
a subset**

To create visualization charts for a subset of documents:

1. Create a highlighted document subset either by highlighting a portion of a visualization chart or by using the **Filter** option.

2. Click the **Visualize Subset** ([icon]) button on the toolbar, or select **Visualize Subset** from the **File** menu.
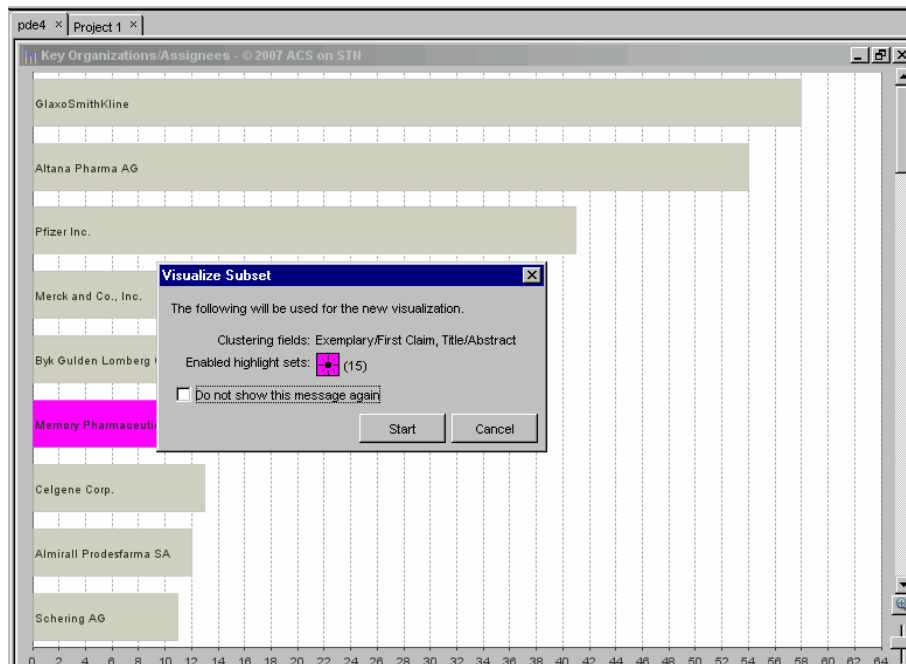

3. Click **Start**.

Visualization charts are created for the selected subset of documents. Each subset will be saved as a project and appear in the Projects List.

Help Topic

- Visualize a Subset

Viewing documents

STN AnaVist provides access to document data in a condensed format for quick and convenient display. You can display details for a document by clicking its title. The document is displayed in the Details window.
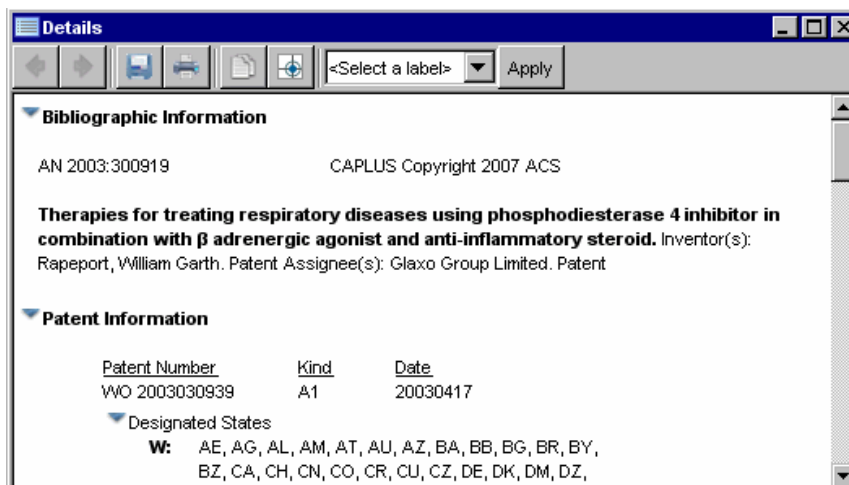
Getting originals

You can get copies or view options for obtaining original documents via the ChemPort® Connection™. To access ChemPort, click the **Full Text** ( ) icon in the Details window. Chemport opens in a separate browser window.

Help Topics

- View and Use Document Details

Saving and printing

To save a chart:

1. Access the chart.
2. Right-click and select **Save As**.
3. In the Save As dialog box, enter the location for the saved chart and the format. Bar and matrix charts can be saved in .csv (comma-separated values format), or in image file formats (.jpeg, .png). The Research Landscape may be saved only in image file formats.

To save documents:

1. In the Documents window, select the documents to be saved.

2. Click the **Save As** ( ) toolbar button, or right-click and select **Save As**.

3. In the Save As dialog box, select the file format (.pdf, .rtf) and specify a file name and location.

To print documents and charts:

- Click the printer ( ) icon.
  - Or -
  Right-click and select **Print**.

Help Topics:

- Documents Viewer
- Save Charts and Documents
- Print Charts and Document Records
- View and Use Document Details

WORKING WITH PROJECTS

Managing projects

Each visualization project is automatically labeled and numbered, e.g., Project 1. Projects are automatically saved for you and are available for further exploration in subsequent STN AnaVist sessions.

To access visualization charts that you have created, click on the project name.

To name, rename, delete, or add notes to the project, right-click on the project name and select the appropriate option.

Saving projects for sharing

You can save a project for sharing with a colleague. The project is saved in Shared AnaVist eXchange format (.shx) as a small file (less than 10 KB) that can be easily stored or sent by e-mail.

To save a project for sharing:

1. Open the project and select **Save Copy of "<project name>"** from the **File** menu.
   - Or -
   Right-click on the name of the project listed in the project area and select **Save Copy**.
   - Or -
   Right-click on the project tab and select **Save Copy**.
2. In the Save As window, specify a file location and a file name for the saved project.
3. Click **Save**.

The resulting .shx file may be saved to a shared file location or e-mailed to a colleague.
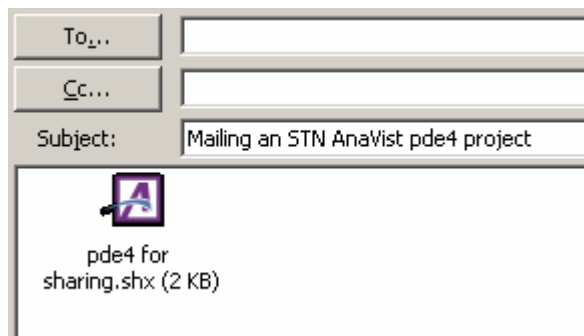
Help Topics

- Share Results
- Save a Project Copy
- Open a Project Copy

Creating reports   You can create two types of reports for your own use or for sharing with colleagues.

A Summary Report is a one-page overview that includes:

- Information about the project, e.g., creation date, number of documents
- Charts of publication trends, top organizations, and top authors/inventors
- Research Landscape
- A short list of selected documents from the project

A Detailed Report is a multiple-page document that contains:

- Summary of the project, e.g., databases and types of documents searched, total number of documents, overall publication trends
- Research Landscape
- Top organizations, including publication trends
- Collaboration charts, indicating documents that were co-authored by researchers at more than one organization
- Top researchers, including numbers of documents
- List of selected documents from the project

Reports are generated using predefined layouts. They may be saved in either .rtf or .pdf formats.

To create a report:

Before you begin: If you have not worked with your project in the current session, ensure that it is active by double-clicking the project name listed in the project area.

1. Select **Create Report** from the **File** menu.
   - Or -
   Right-click on the name of the project listed in the project area and select **Create Report**.
   - Or -
   Right-click on the project tab and select **Create Report**.
2. Select **Summary** or **Detailed**.
3. In the Save As window, specify a file location and a file name for the report. Select .rtf or .pdf format.
4. Click **Save**.

Help Topics

- Create a Report

LOGGING OFF

To log off, either:

- Select **Exit** from the **File** menu

- Close the STN AnaVist application by clicking the **Close** (☒) button.

By default, the session summary displays automatically at logoff. Your visualization project(s) are automatically saved.

Help Topics

- End a Session