Welcome to another in the continuing series of LexisNexis® PatentOptimizer™ task-based “how to” tutorials. This tutorial will cover how to quickly & efficiently generate a “due diligence” report containing post-issuance information relating to a portfolio of patents.

The first step is identifying the patents to be analyzed. This can be done in a variety of ways:

- From the “references cited” section of a patent;
- From a cite list of results from a patent search; or
- From a Word document containing patent numbers

Now let’s take a look at how to do it from the references cited. The first step is retrieving the patent you want to extract the references from. Here I am doing that with the Publication Number Search feature on LexisNexis® TotalPatent®:

Once you have the patent on the screen simply click on the Check References icon and PatentOptimizer will extract the patent numbers from the patent and present them in a dialog box.

Now let’s look at doing the same from a cite list of results:

and from a Microsoft® Word document:

Note that there is no consistent formatting of the patent numbers here; PatentOptimizer automatically recognizes variant citation formats with the dialog box on the screen:
Let's cover the available options. The first thing is to choose the patents you want. If you want them all, simply click on Select All—notice when you do this it will tell you the number selected for both U.S. and foreign patents. Starting from the top-right side of the dialog box there are various options:

- **The little “i” shows the coverage information for the databases the information is pulled from.**
- **View Patents** will retrieve the patents you have check marked (there is a maximum of 49 that can be retrieved at one time)
- **Dockets** will redirect you over to CourtLink® where the first docket will be retrieved
- **File Wrapper** will redirect you to our REEDFAX® website to order file histories
- **Pair** will pass you over to the USPTO website. Note the USPTO limitations in the dialog box:

Now let’s look at the options across the bottom of the dialog box:

- **Analytics** will load the check marked patent numbers into the PatentOptimizer Analytics feature. Please consult the tutorials on Analytics in the library to learn more about its capabilities
- **IDS** will load the check marked patent numbers into an IDS form utilizing either the HotDocs® software or the EFS-Web IDS form on the USPTO website. Please consult the tutorials on the IDS feature in the library to learn more about its capabilities.
- **OK** will simply close the dialog box
- **Help** will open a context-sensitive dialog box from the section of the PatentOptimizer Guide dealing specifically with the Check References feature
- **Report** will auto-generate an Excel® spreadsheet pre-formatted with column headers detailing the types of post-issuance information and will insert the detail of such information into the appropriate cell

Let’s take a look at the report:

Putting a check mark in the “Include All Numbers” box tells the software to assume that any 6, 7 or 11 digit number in a document or list you are extracting from is a patent number.

Here we see the various types of information instantly collated in one document. Simply save the spreadsheet to whatever location you’d like and you’re done.

Thank you for viewing this tutorial. We hope it was helpful. Please visit our library for a wide range of tutorials on LexisNexis PatentOptimizer and LexisNexis TotalPatent at www.lexisnexis.com/ip-tutorials.