



# MONITOR SUITE

## USER GUIDE

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# Introduction to Monitor Suite

## What is Monitor Suite?

Monitor Suite is the foundation of a law firm competitive intelligence program. It provides an unprecedented fact-base for client planning, cross-selling, client acquisition, pitch preparation, lateral hiring, merger analysis, and office openings. Monitor Suite provides strategic intelligence about businesses, industries, practice areas, courts, law firms, lawyers, and judges. You can run searches and then generate reports using data from several main components: Litigation, Patent, Trademark, and Deal (M&A, bonds, loans, and Private Equity).

## System Requirements

- Windows Vista, Windows XP Professional, or Mac OS X
- Internet Connection
- Internet Explorer 6.0 or later (Windows XP Professional), Internet Explorer 7.0 (Windows XP Professional), Internet Explorer 7.0 (Vista), Safari 3.1 (Mac OS X), Google Chrome
- Cookies and JavaScript enabled in your browser

## Available Features in Monitor Suite

### SEARCH

Construct a search based on specific characteristics to return exactly the type of results you need. For more information, see “Searching in Monitor Suite” on page 6.

### REPORTS

Generate and customize a report and then save it or share it with colleagues. You can create report templates to run against different companies or you can save a specific report to run at a later time to get refreshed results. For more information, see “Reporting” on page 21.

### MYMONITOR

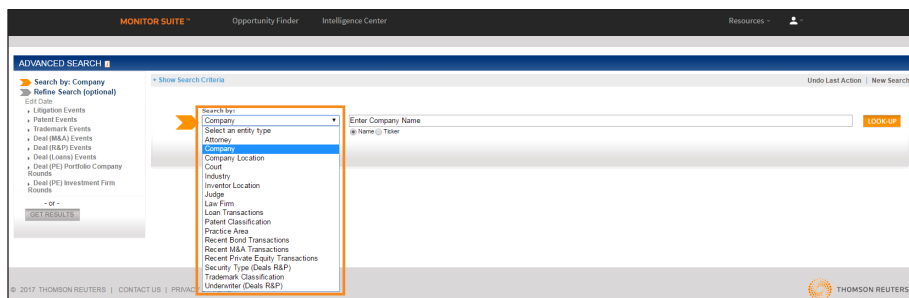
myMonitor allows you to create default settings for ongoing use of Monitor Suite. Using myMonitor, you can also save searches and report formats. For more information, see “myMonitor” on page 44.

# Searching in Monitor Suite

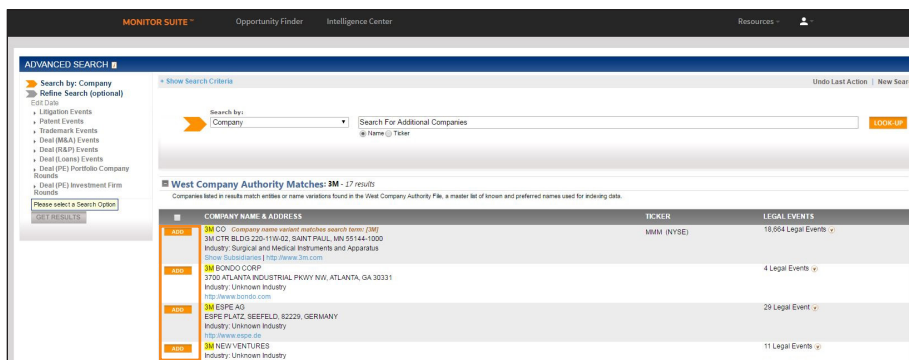
## Search

When you access Monitor Suite, the Search page is displayed. To run a search, complete the following:

1. Select an entity type from the **Search by** drop-down list.



2. Enter a search term in the field next to the **Look-Up** button. The search engine is not case sensitive.
3. Click **Look-Up**. The Search window displays the results of the search.



4. Click **Add** next to the items you want to include in your search. You can add as many as necessary.
5. Click **Get Results**. The Search Results appear for your specified criteria
  - Click an analytical section link, e.g., **Practice Area**, in the left navigation area to view the corresponding section of the report.
  - For more information about searching by category, see "Entity Types" on page 8.

## SEARCH TIPS

The following guidelines apply when searching in Monitor Suite:

- Searches are not case sensitive.
- Punctuation in a search will be ignored. Entering **A.B. Electronics** will return the same result as **AB Electronics**.
- Searches are limited to 300 results.

- Entering multiple search terms will require both terms to be included in the result, but not in any particular order.
- You can type all or part of a word. The Monitor Suite search engine uses a “start with” search at the word level. This can be useful when you are not completely sure of the name of the entity for which you are searching. For example, entering **America Bank** will retrieve:  
 America Bank  
 American Bank  
 American Bankcorp  
 Bank of America  
 Bank of South America  
 American National Bank
- View the search criteria by clicking **Show Search Criteria** above the search categories.

## SEARCH SCREEN SECTIONS

The Search screen is divided into two sections:

### West Authority Matches

The West Authority File (e.g., **Company, Financial Advisor**) is a list of known and preferred names used for indexing data. The authority file contains name variations which have been identified for a given entity. Companies listed in this result section match entities or name variations found in the West Authority. The West Authority control fulfills two important functions:

- It establishes a single interpretation of items with similar or identical headings. For example, entities, such as legal professionals and companies, can be uniquely identified by variants of name, location, credentials, relationships, documents, etc.
- It allows items that should be grouped together to collocated (e.g., variants of a company name).

### Other Possible Matches

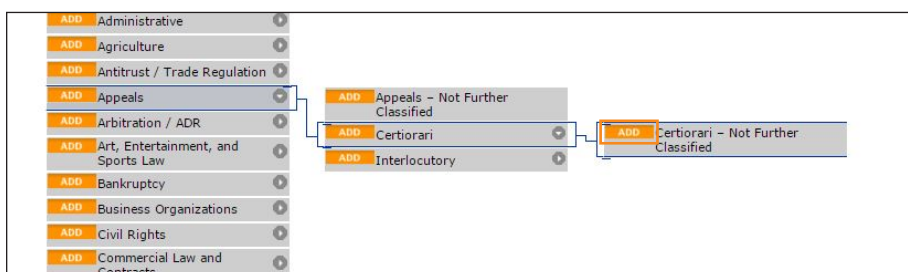
The Other Possible Matches section comprises a list of companies that have been referenced in the underlying source documents from which the data in Monitor reports is gathered, such as cases and dockets. However, such companies do not match companies or name variation found in West’s Company Authority File. This section lists companies referenced in underlying documents but not found in West’s master list of known entities.

## SEARCHING WITH THE BROWSE FEATURE

Some search categories allow you to search using the Browse feature, which displays a tree hierarchy containing an expandable list of selections to add to your search criteria. If you are unsure of which search term to use within a category, the Browse feature allows you to view a list of selections to add to your search criteria.

To browse, complete the following:

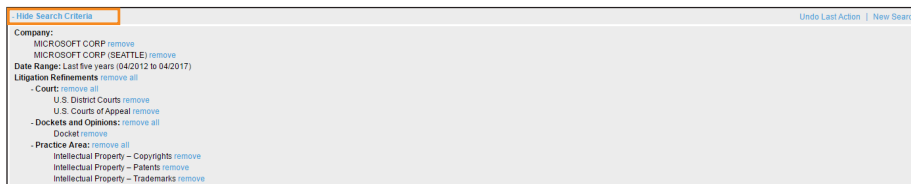
1. Navigate to the Search screen.
2. Select an entity type from the **Search by** drop-down list (e.g., **Industry** or **Practice Area**).
3. Click **Browse**. The tree hierarchy is displayed.



4. From the list of available selections, determine which selections you want to add to your search criteria.
5. Click **Add** next to the desired selection. The selected item appears in the Search Criteria box.
  - You can add multiple selections to your search criteria.
  - You can select a parent level in the tree hierarchy or individual categories. If you select an item from a parent level, all of the categories within that level will be selected.
  - Remove any selections you have added by clicking **Remove**.

### SEARCH CRITERIA BOX

As you select items within the specific criteria areas, the refinements are added to the Search Criteria box at the top of the screen.



- Click **Show Search Criteria** to view the search criteria.
- Click **Hide Search Criteria** to hide the search criteria.
- Click **remove** to modify results by removing refinements.
- Click **edit** to edit the date range. This is only available after the search results are displayed.
- Click **Undo last action** to remove an item from the search criteria.
- Click **New Search** to remove all search criteria and begin with a new search.

### Entity Types

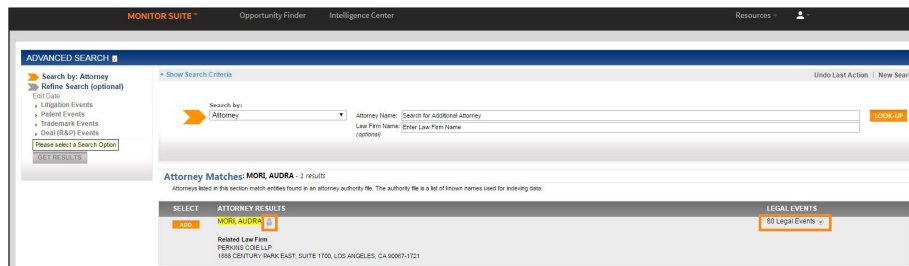
While **Company** is the default selection, Monitor Suite allows you to categorize your search according to a variety of entity types:

- Attorney
- Company
- Company Location
- Court
- Industry
- Inventor Location
- Judge
- Law Firm
- Loan Transactions
- Patent Classification
- Practice Area
- Recent Bond Transactions
- Recent M&A Transactions
- Recent Private Equity Transactions
- Security Type (Deals R&P)
- Trademark Classification
- Underwriter (Deals R&P)



## SEARCHING BY ATTORNEY

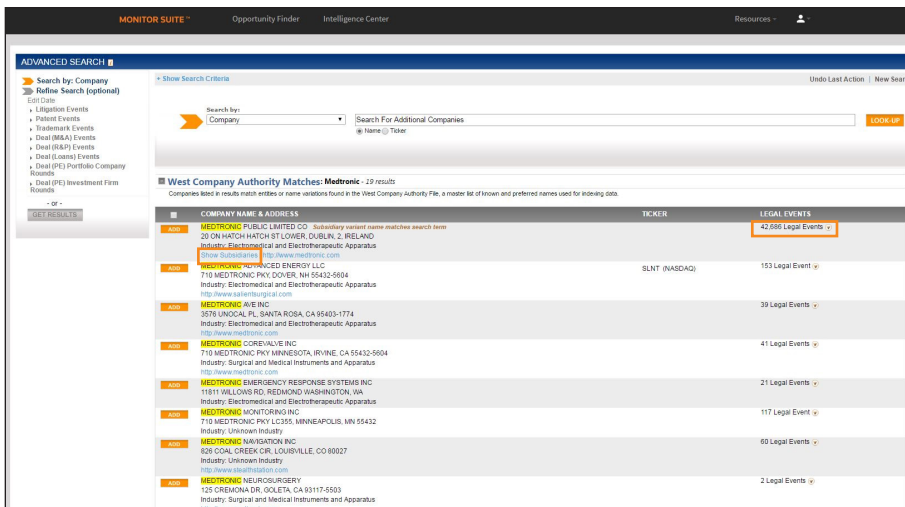
1. To search by attorney, select **Attorney** from the **Search by** drop-down list.
2. Enter the name of the attorney in the **Enter Attorney Name** field. You can also add the attorney's law firm name in the **Law Firm Name** field.
3. Click **Look-Up**. The Attorney Matches screen is displayed.



4. Click **Add** next to the attorneys you want to add to your search criteria. Click **Remove** to remove them. The name you select appears in the Search Criteria box.
  - Click the **Profile** icon to view the attorney's profile in the Thomson Legal Record.
  - Hover over the **Legal Events** arrow to view a breakdown of legal events for that attorney.
5. You can add multiple attorneys to your search criteria. Conducting another search will not cause you to lose search criteria you have already added.
6. You can refine your search by date as well as specific criteria:
  - Click **Edit Date** to specify a date range.
  - Click a content type and refinement category (e.g., **Litigation Events/Courts**) to refine your search by specific criteria.
7. Click **Get Results**.

## SEARCHING BY COMPANY

1. To search by company or ticker, select **Company** from the **Search by** drop-down list.
2. Select **Name** or **Ticker**.
3. Enter a company name or ticker in the **Enter Company** field.
4. Click **Look-Up**. The results of your search are displayed in the West Company Authority Matches and the Other Possible Matches areas below the **Search** field.
  - The Legal Events are associated with the headquarters, and each subsidiary is displayed.
  - Click the **Show Subsidiaries** link to view a list of subsidiaries with legal events associated with the company. Click **Hide Subsidiaries** to collapse the list.
  - Hover over the **Legal Events** arrow to view a company's legal events.



- Click **Add** next to the company you want to add to your search criteria. Click **Remove** to remove it. You can also add and remove subsidiaries in the same manner. Companies that have been added to your search criteria are listed below the Search Criteria heading.
- You can add multiple companies to your search criteria. Conducting another search will not cause you to lose search criteria you have already added.
- You can refine your search by date as well as specific criteria:
  - Click **Edit Date** to specify a date range.
  - Click a content type and refinement category (e.g., **Litigation Events/Courts**) to refine your search by specific criteria.
- Click **Get Results**.

## SEARCHING BY COMPANY LOCATION

- To search by company location, select **Company Location** from the **Search by** drop-down list.
- Enter a city, state, or country in the **Enter city/state/country** field. The field will autopopulate as you type.
- Select the desired location from the autopopulated list. It will be added to the search criteria.
- You can add multiple locations to your search criteria. Conducting another search will not cause you to lose search criteria you have already added.
- You can refine your search by date as well as specific criteria:
  - Click **Edit Date** to specify a date range.
  - Click a content type and refinement category (e.g., **Litigation Events/Courts**) to refine your search by specific criteria.
- Click **Get Results**. The Company Location Search Results are displayed.
- Click **Edit Company Location** to change the location search criteria.

## SEARCHING BY COURT

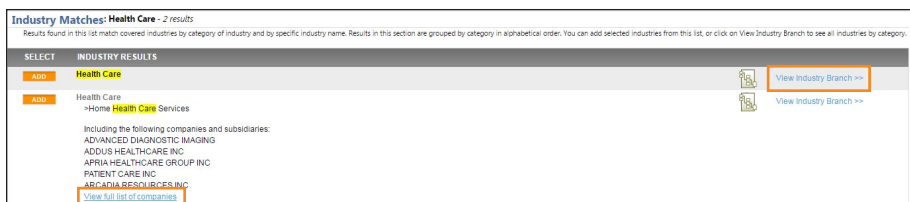
- To search by state or federal court, select **Court** from the **Search by** drop-down list.
- Do one of the following:
  - Enter a court name in the **Enter Court Name** field. The field will begin to autopopulate. Select the desired court and click **Add**.



- Click **Browse** and then click **Add** to select a court from the tree hierarchy. Click **Remove** to remove a court from the search criteria.
- You can refine your search by date as well as specific criteria:
    - Click **Edit Date** to specify a date range.
    - Click a content type and refinement category (e.g., **Litigation Events/Courts**) to refine your search by specific criteria.
  - Click **Get Results**.

### SEARCHING BY INDUSTRY

- To search by industry, select **Industry** from the **Search by** drop-down list.
- Do one of the following:
  - Enter an industry name in the **Enter Industry Name** field and click **Look-Up**. The Industry Search Results page is displayed listing the first five companies in the industry branch. Click **Add** to add an industry to your search criteria. Click the **View Industry Branch** link to view the Industry tree hierarchy. Click the **View full list of companies** link to view all companies covered by the applicable Industry.



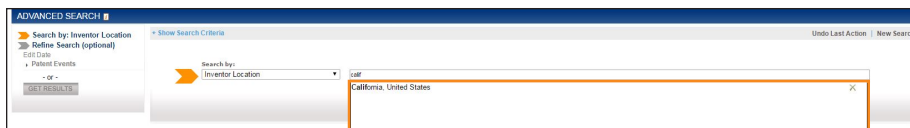
- Click **Browse** and then click **Add** to select industries from the tree hierarchy. Click **Remove** to remove an industry from the search criteria.



- You can refine your search by date as well as specific criteria:
  - Click **Edit Date** to specify a date range.
  - Click a content type and refinement category (e.g., **Litigation Events/Courts**) to refine your search by specific criteria.
- Click **Get Results**.

### SEARCHING BY INVENTOR LOCATION

- To search by inventor location, select **Inventor Location** from the **Search by** drop-down list.
- Enter the appropriate information in the **Enter state/country** field. It will autopopulate if the location is available.



3. Select the desired location from the autopopulated list. The selected location appears in the Search Criteria box.
4. You can add multiple locations to your search criteria. Conducting another search will not cause you to lose search criteria you have already added.
5. You can refine your search by date as well as specific criteria:
  - Click **Edit Date** to specify a date range.
  - Click a content type and refinement category (e.g., **Litigation Events/Courts**) to refine your search by specific criteria
6. Click **Get Results**.

## SEARCHING BY JUDGE

1. To search by judge, select **Judge** from the **Search by** drop-down list.
2. Enter the name of the judge in the **Enter Judge Name** field.
3. Click **Look-Up**. The Judge Matches screen is displayed.

Search by: Judge Search For Additional Judges LOOK-UP

**Judge Matches: Johnson, Bill Hon. - 3 results**  
Judges listed in this section match entries found in a Judge authority file. The authority file is a list of known names used for indexing data.

SELECT	JUDGE RESULTS	LEGAL EVENTS
ADD	JOHNSON, HON. WILLIAM A.	1 Legal Event
ADD	Related Court STATE OF FLORIDA CIRCUIT COURT, 11TH JUDICIAL CIRCUIT DADE COUNTY COURTHOUSE, 75 WEST FLAGLER STREET MIAMI, FL 33130	
ADD	JOHNSON, HON. WILLIAM A.	64 Legal Events
ADD	JOHNSON, HON. WILLIAM P.	1,698 Legal Events
	Related Court UNITED STATES DISTRICT COURT, NEW MEXICO PETE V. DOMENICI U.S. COURTHOUSE, 333 LOMAS BLVD. NW, ALBUQUERQUE, NM 87102	

4. Click **Add** next to the judge you want to add to your search criteria. Click **Remove** to remove the judge. The name you select appears in the Search Criteria box.
  - Click the **Profile** icon to view the judge's profile in the Thomson Legal Record.
5. You can add multiple judges to your search criteria. Conducting another search will not cause you to lose search criteria you have already added.
6. You can refine your search by date as well as specific criteria:
  - Click **Edit Date** to specify a date range.
  - Click a content type and refinement category (e.g., **Litigation Events/Courts**) to refine your search by specific criteria.
7. Click **Get Results**.

## SEARCHING BY LAW FIRM

1. To search by law firm, select **Law Firm** from the **Search by** drop-down list.
2. Enter the name of the law firm in the **Enter Law Firm Name** field. You can also add the firm's location, if desired.
3. Click **Look-Up**. The Firm Name Matches screen is displayed.

Search by: Law Firm Law Firm Name: Search For Additional Law Firms LOOK-UP

**Firm Name Matches: Briggs & Briggs - 2 results**  
Law Firms listed in this section match entities or name variations found in the Legal Professional Authority. This authority file is a list of known and preferred names used for indexing data.

SELECT	LAW FIRM RESULTS	LEGAL EVENTS
ADD	BRIGGS & BRIGGS	9 Legal Events
	18222 GRAVELLY LN DR SW, TACOMA, WA 98499-5005	
ADD	ADAMS, BRIGGS & BRIGGS, ATTORNEYS AT LAW  Firm name variant matches search term: [BRIGGS & BRIGGS] 119 MAGNOLIA AVENUE, DAYTONA BEACH, FL 32114-4303 www.gandongelaw.com	2 Legal Events

4. Click **Add** next to the law firm you want to add to your search criteria. Click **Remove** to remove it.
  - Click the **Profile** icon to view the law firm profile in the Thomson Legal Record.
  - Hover over the **Legal Events** arrow to view a breakdown of legal events for that law firm.
5. You can refine your search by date as well as specific criteria:
  - Click **Edit Date** to specify a date range.
  - Click a content type and refinement category (e.g., **Litigation Events/Courts**) to refine your search by specific criteria.
6. Click **Get Results**.

### SEARCHING BY LOAN TRANSACTIONS

1. To search by loan transactions, select **Loan Transactions** from the **Search by** drop-down list.
2. You can refine your search by date as well as specific criteria:
  - Click **Edit Date** to specify a date range.
  - Click a content type and refinement category (e.g., **Deal (Loans) Events/Loan Status**) to refine your search by specific criteria.
3. Click **Get Results**.

### SEARCHING BY PATENT CLASSIFICATION

1. To search by patent classification, select **Patent Classification** from the **Search by** drop-down list.
2. Select the classification type you want to search for (e.g., **All Classification Types**, **US Classification**, **Derwent Classification**, **International Classification**).
3. Do one of the following:
  - Enter a patent classification in the **Enter Patent Classification** field (e.g. *Medical*) and click **Look-Up**. The Patent Classification Matches screen is displayed. Click **Add** next to the patent classification you want to add to your search criteria. Click the **View Classification Branch** link to view, add, or remove items from the tree hierarchy.

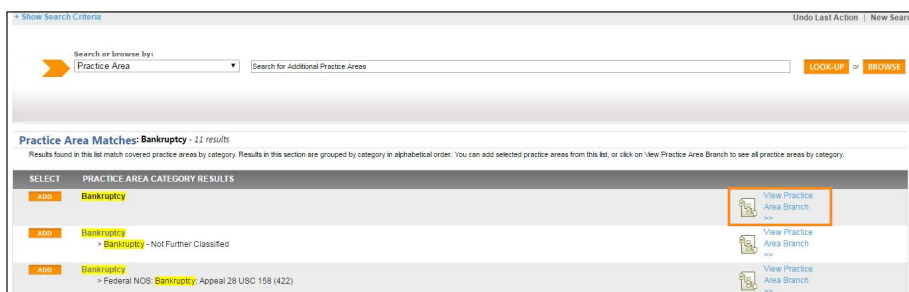
The screenshot shows the 'Patent Classification Matches' interface. At the top, there's a search bar with 'Patent Classification' selected in the dropdown. Below it, there are radio buttons for 'All Classification Types', 'US Classification', 'Derwent Classification', and 'International Classification'. The 'US Classification' option is selected. To the right of these buttons are 'LOOK-UP' and 'BROWSE' buttons. Below the search bar, it says 'Patent Classification Matches: Apparel - 52 results'. A table displays the results, with the first row highlighted. The table has two columns: one for the classification code and description, and another for a 'View USPTO Classification Branch' link. The first row shows '002: APPAREL' and the link is highlighted with an orange box.

Classification	Description	Action
002: APPAREL		<a href="#">View USPTO Classification Branch &gt;&gt;</a>
024: BUCKLES, BUTTONS, CLASPS, ETC.	> 0240003.1: ARTICLE HOLDER ATTACHABLE TO APPAREL OR BODY	<a href="#">View USPTO Classification Branch &gt;&gt;</a>
024: BUCKLES, BUTTONS, CLASPS, ETC., ...	> 0240573.09: With fixed detached member completing interlock (e.g., hook type) > 024578.1: For <b>accords</b> and related accessories	<a href="#">View USPTO Classification Branch &gt;&gt;</a>
024: BUCKLES, BUTTONS, CLASPS, ETC., ...	> 0245588.1: Hook > 024588.12: For <b>accords</b>	<a href="#">View USPTO Classification Branch &gt;&gt;</a>

- Click **Browse** and then click **Add** to select a patent classification from the tree hierarchy. Click **Remove** to remove a patent classification from the search criteria.
4. You can refine your search by date as well as specific criteria:
    - Click **Edit Date** to specify a date range.
    - Click a content type and refinement category (e.g., **Litigation Events/Courts**) to refine your search by specific criteria.
  5. Click **Get Results**.

## SEARCHING BY PRACTICE AREA

1. To search by practice area, select *Practice Area* from the *Search by* drop-down list.
2. Do one of the following:
  - Enter a practice area in the Enter Practice Area field (e.g. *Environmental*) and click **Look-Up**. The Practice Area Search Results page is displayed. Click **Add** next to the practice area you want to add to your search criteria. Click the **View Practice Area Branch** link to view, add, or remove items from the tree hierarchy.



- Click **Browse** and then click **Add** to select a practice area from the tree hierarchy. Click **Remove** to remove a practice area from the search criteria.
3. You can refine your search by date as well as specific criteria:
    - Click **Edit Date** to specify a date range.
    - Click a content type and refinement category (e.g., *Litigation Events/Courts*) to refine your search by specific criteria.
  4. Click **Get Results**.

## SEARCHING BY RECENT BOND TRANSACTIONS

1. To search by recent bond transactions, select *Recent Bond Transactions* from the *Search by* drop-down list.
2. You can refine your search by date as well as specific criteria:
  - Click **Edit Date** to specify a date range.
  - Click a content type and refinement category (e.g., *Deal (Bonds) Events/Bond Status*) to refine your search by specific criteria.
3. Click **Get Results**.

## SEARCHING BY RECENT M&A TRANSACTIONS

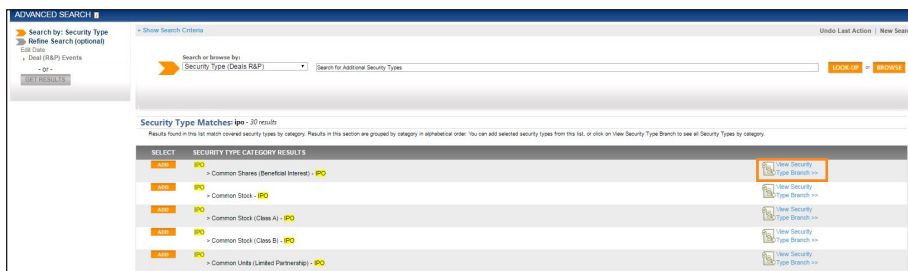
1. To search by recent M&A transactions, select *Recent M&A Transactions* from the *Search by* drop-down list.
2. You can refine your search by date as well as specific criteria:
  - Click **Edit Date** to specify a date range.
  - Click a content type and refinement category (e.g., *Deal (M&A) Events/Transaction Status*) to refine your search by specific criteria.
3. Click **Get Results**.

## SEARCHING BY RECENT PRIVATE EQUITY TRANSACTIONS

1. To search by recent private equity transactions, select *Recent Private Equity Transactions* from the *Search by* drop-down list.
2. You can refine your search by date as well as specific criteria:
  - Click **Edit Date** to specify a date range.
  - Click a content type and refinement category (e.g., *Deal (PE) Portfolio Company Rounds/Related Financing*) to refine your search by specific criteria.
3. Click **Get Results**.

### SEARCHING BY SECURITY TYPE (DEALS R&P)

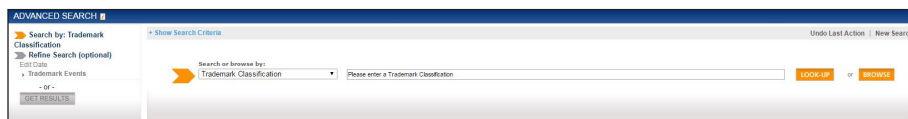
1. To search by security type, select **Security Type** from the **Search by** drop-down list.
2. Do one of the following:
  - Enter a security type in the **Enter Security Type** field, and click **Look-Up**. The Security Type Matches screen is displayed. Click **Add** next to the security type you want to add to your search criteria. Click the **View Security Type Branch** link to view, add, or remove items from the tree hierarchy.



- Click **Browse** and then click **Add** to select a security type from the tree hierarchy. Click **Remove** to remove a security type from the search criteria.
3. You can refine your search by date as well as specific criteria:
    - Click **Edit Date** to specify a date range.
    - Click a content type and refinement category (e.g., **Litigation Events/Courts**) to refine your search by specific criteria.
  4. Click **Get Results**.

### SEARCHING BY TRADEMARK CLASSIFICATION

1. To search by trademark classification, select **Trademark Classification** from the **Search by** drop-down list.
2. Do one of the following:
  - Enter a trademark classification in the **Enter Trademark Classification** field (e.g. **Goods**) and click **Look-Up**. The Trademark Classification Matches screen is displayed. Click **Add** next to the trademark classification you want to add to your search criteria. Click the **View Trademark Classification Branch** link to view, add, or remove items from the tree hierarchy.



- Click **Browse** and then click **Add** to select a trademark classification from the tree hierarchy. Click **Remove** to remove a trademark classification from the search criteria.
3. You can refine your search by date as well as specific criteria:
    - Click **Edit Date** to specify a date range.
    - Click a content type and refinement category (e.g., **Litigation Events/Courts**) to refine your search by specific criteria.
  4. Click **Get Results**.

**SEARCHING BY UNDERWRITER (DEALS R&P)**

1. To search by underwriter, select **Underwriter** from the **Search by** drop-down list.
2. Select **Name** or **Ticker**.
3. Enter an underwriter name or ticker in the **Enter Underwriter Name** or **Enter Underwriter Ticker** field.
4. Click **Look-Up**. The Underwriter Matches screen is displayed.
  - Click the **Source Documents** arrow to view a breakdown of source documents for each underwriter.
  - Click the **Show Subsidiaries** link to view a list of subsidiaries associated with the underwriter. Click **Hide Subsidiaries** to collapse the list.

Search by: Underwriter (Deals R&P) Search for Additional Underwriters [Look-Up]

Underwriter Matches: Capital One - 2 results

Underwriters listed in this section match entities or name variations found in an authority file. This authority file is a list of known and preferred names used for indexing data. The authority file contains name variations which have been identified for a given entity.

SELECT	UNDERWRITER NAME AND ADDRESS	TICKER	SOURCE DOCUMENTS
ADD	<b>CAPITAL ONE</b> 261 COMLY RD, LINCOLN PARK, NJ 07035 Industry: Unknown Industry <a href="http://www.capitalone.com">http://www.capitalone.com</a>		26 Source Documents

5. Click **Add** next to the underwriter you want to add to your search criteria. Click **Remove** to remove it.
6. You can add multiple underwriters to your search criteria. Conducting another search will not cause you to lose search criteria you have already added.
7. You can refine your search by date as well as specific criteria:
  - Click **Edit Date** to specify a date range.
  - Click a content type and refinement category (e.g., **Litigation Events/Courts**) to refine your search by specific criteria.
8. Click **Get Results**.



## Refining Your Search

The Refine Search selection displays after you search for and add an entity. You can refine a search by date, specific criteria, or both.

COMPANY NAME & ADDRESS	TICKER	LEGAL EVENTS
3M CO 3M CTR BLDG 220-11W-02, SAINT PAUL, MN 55144-1000 Industry: Surgical and Medical Instruments and Apparatus <a href="#">Show Substances</a>   <a href="http://www.3m.com">http://www.3m.com</a>	MUM (NYSE)	18,574 Legal Events
VALEANT PHARMACEUTICALS INTERNATIONAL INC 2150 SAINT-ELZEAR BLVD W, LAVAL, HTL 4AB, CANADA Industry: Drugs <a href="#">Show Substances</a>   <a href="http://www.valeant.com">http://www.valeant.com</a>		3,392 Legal Events

## REFINING BY DATE

1. Click **Edit Date**. The Date Range page is displayed.

2. Do one of the following:

- Enter dates in the **start date** and **end date** fields using the mm/yyyy format. If the current date is displayed, the search provides results through the current date.
- Use the **3m**, **6m**, **1y**, **3y**, or **5y** links to set a date range for the last 3 months, 6 months, 1 year, 3 years, or 5 years.

3. Click **Get Results**.

## REFINING BY SPECIFIC CRITERIA

Depending on the entity type you use, you can narrow the focus of the following content types from the Refine Search screen:

- Litigation Events
- Patent Events
- Trademark Events
- Deal (M&A) Events
- Deal (R&P) Events
- Deal (PE) Portfolio Company Rounds
- Deal (PE) Investment Firm Rounds

Some entity types have a limited number of options for refining a search.

If you do not refine by a specific criteria, the results will be for all events for the selected company, industry, law firm, etc. You can make selections from one or more event areas without losing criteria you have already selected from other areas.

### Refining By Litigation Criteria

Litigation events analyze litigation activity the selected entity has been involved with over the selected time frame. The reports show litigation pattern changes that may indicate potential business changes that may correlate with these trends. To refine a search by litigation events criteria, complete the following:

1. Run a Search using the appropriate entity type and then select your entity choices.
2. Under **Refine Search**, click **Litigation Events** to display Litigation refinement categories.
3. Click a refinement category (e.g., **Practice Area, Courts**), and select from the available options. Click **Show Search Criteria** to show your selections or **Hide Search Criteria** to hide them.
4. Click **Get Results**. The Search Results screen is displayed showing the first section of your report. Click an analytical section link (e.g., **Practice Area, Courts**) to view the corresponding section of the report.

### Refining By Patent Events Criteria

Patent events summarize patent holdings and filing activities based on information from U.S. Patents, U.S. Patent Applications, U.S. Patent Assignments, and International Patents.

Depending on your entity type (i.e. company, attorney, industry) you can narrow by Patent Classification or Inventor Location.

To refine a search by patent events criteria, complete the following:

1. Run a Search using the appropriate entity type.
2. Under **Refine Search**, click **Patent Events** to display Patent refinement categories. The Patent Classification screen is displayed showing the patent event areas for the category.

**Note:** Patent Events are not available for all search categories.

3. Click a refinement category (e.g., **Patent Classification, Inventor Location**), and select from the available options.
4. Click **Get Results**. The Search Results screen is displayed showing the first section of your report. Click an analytical section link (e.g., **Applications: Location**) to view the corresponding section of the report.

### Refining By Trademark Events Criteria

Trademark events summarize holdings and filing activities based on information from U.S. Trademarks, U.S. Trademark Applications, and U.S. Trademark Assignments. You can narrow your search according to trademark classification.

To refine a search by trademark events criteria, complete the following:

1. Run a Search using the appropriate entity type.
2. Under **Refine Search**, click **Trademark Events** to display Trademark refinement categories, and click **Trademark Classifications**.

**Note:** Trademark Events are not available for all search categories.

3. Do one of the following:
  - Enter a trademark classification and click **Look-Up**.
  - Click **Browse** to select a trademark classification from the tree hierarchy. Locate the trademark classification you want to add to your search criteria and click the **Add** button.
4. Click **Get Results**. The Search Results page is displayed showing the first section of your report. Click an analytical section link (e.g., **US Trademark Distribution Trends & Analysis**) to view the corresponding section of the report.

### Refining By Deal Analysis Events Criteria

Deal Registrations and Prospectus (R&P) and Deal Mergers and Acquisitions (M&A) events analyze deal activity the selected entity has been involved with over a selected time frame. The reports show pattern changes that indicate potential business changes that may correlate with these trends.

To refine a search by deal events criteria, complete the following:

1. Run a Search using the appropriate entity type.
  2. Under **Refine Search**, click **Deal (M&A)** or **Deal (R&P)** to display Deal refinement categories.
- Note:** Deal Events are not available for all entity types.
3. Click a refinement category (e.g., **Transaction Status**, **Value Range**, etc.), and select from the available options.
  4. Enter a **Value Range** for each event type.
  5. Click **Get Results**. The Search Results page is displayed showing the first section of your report. Click an analytical section link (e.g., **Value Range**) to view the corresponding section of the report.

### Refining By Deal (Loans) Events Criteria

To refine a search by Deal (Loans) events criteria, complete the following:

1. Run a Search using the appropriate entity type.
  2. Under **Refine Search**, click **Deal (Loans)** to display Deal refinement categories.
- Note:** Deal Events are not available for all entity types.
3. Click a refinement category (e.g., **Loan Status**, **Total Commitment**, **Company Role**), and select from the available options.
  4. Click **Get Results**. The Search Results page is displayed showing the first section of your report. Click an analytical section link (e.g., **Borrowers**) to view the corresponding section of the report.

### Refining By Deal (PE) Portfolio Company Rounds Criteria

To refine a search by Deal (PE) Portfolio Company Rounds criteria, complete the following:

1. Run a Search using the appropriate entity type.
  2. Under **Refine Search**, click **Deal (PE) Portfolio Company** to display Deal refinement categories.
- Note:** Deal Events are not available for all entity types.
3. Click a refinement category (e.g., **Related Financing**), and select from the available options.
  4. Click **Get Results**. The Search Results page is displayed showing the first section of your report. Click an analytical section link (e.g., **Investment Funds**) to view the corresponding section of the report.

### Refining By Deal (PE) Investment Firm Rounds Criteria

To refine a search by Deal (PE) Investment Firm Rounds criteria, complete the following:

1. Run a Search using the appropriate entity type.
  2. Under **Refine Search**, click **Deal (PE) Investment Firm Rounds** to display Deal refinement categories.
- Note:** Deal Events are not available for all entity types.
3. Click a refinement category (e.g., **Fund Size**, **Firm Capital Under Management**), and select from the available options.
  4. Click **Get Results**. The Search Results page is displayed showing the first section of your report. Click an analytical section link (e.g., **Fund: Type**) to view the corresponding section of the report.

## Saving a Search

Monitor Suite allows you to save a search and run it at a later time.

1. Perform a Search.
2. From the action bar in the upper right of the screen, click **save**. The save search options are displayed.
3. Enter a name for the search in the ***Name your Search*** field.
4. Select the desired option:
  - Select ***Save Search*** to save the exact search.
  - Select ***Save Search as template*** to save only the search criteria. This saves the search refinements you have selected, but allows you to choose another search subject (e.g., a different company or industry) to apply the saved refinements.
5. Click **Save**. A message is displayed confirming the saved search.
6. Click **OK**.

# Reporting

## Viewing Reports

Monitor Suite analytical reports provide law firms and corporations with insight to make strategic decisions, enabling users to better target their business development practices, as well as empowering users to utilize legal information and data to monitor market trends. Monitor Suite reports integrate Litigation, Intellectual Property, and Deal information to provide a complete competitive intelligence view for business development. These insights are critical to supporting law firm client development activities, and to positioning the firm as a strategic business partner to its clients.

- Litigation content utilizes critical data from court dockets and case law to provide analysis for business development professionals to target high-value prospective clients and to help them prepare tailored pitches that demonstrate knowledge of the client's needs and practices.
- Intellectual Property (IP) content aggregates data from patent and trademark filings as well as docket summaries, and provides unprecedented analysis of IP prosecution and associated litigation activity.
- Deal content displays relationship maps and trend reports which focus on financial data and the roles assumed by law firms. This information can lead to the highest value transactional legal work, including M&A, R&P, Loans, and Private Equity Transactions.

The Refine Search function allows you to build and run reports based on specific sets of search criteria and view detailed reports.

### VIEWING A LITIGATION REPORT

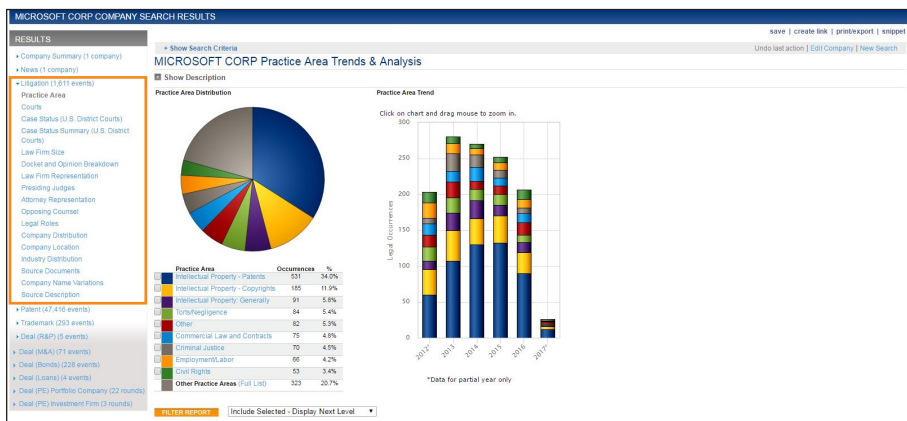
You can create a report for your specified search criteria for litigation events. Narrow the event focus by expanding the display of each section. The events you select display a multi-year aggregation of legal events and trends of legal activity across a range of criteria for your selected time frame (i.e., 3 months, 6 months, 1 year, 3 years, 5 years). These time frames are adjustable.

Because the information used to create a litigation profile is represented both numerically and graphically, trends in company, industry, law firm, attorney, and judge activity are clearly represented.

To view a litigation event report, complete the following:

1. Run a Search using the appropriate entity type.
2. In the **Refine Search** section, click **Litigation Events**.
3. Click a refinement category (e.g., **Practice Area**, **Courts**), and select from the available options.
4. Click **Show Search Criteria** to show the search criteria. Click **Hide Search Criteria** to hide it.

5. Click **Get Results**. The Search Results page is displayed showing the first section of your report.



6. Click an analytical link (e.g., **Practice Area**) in the left navigation area to view the corresponding section of the report. The Search Results screen is refreshed to display the results for the analytical section you selected.

## ABOUT LITIGATION REPORTS

Litigation events are divided into the following areas of analysis:

- **Practice Area.** Litigation events are analyzed by the occurrence of events pertaining to a particular practice area and the number of events per year for each practice area during the selected date range. The practice areas shown in Monitor Suite are organized using West's KeySearch system, which is based on the 150 year old Key Number System. Practice area listings for docket sheets and case opinions come from the dockets and opinions themselves and are indexed using the KeySearch practice areas. The Nature of Suit (NOS) codes used in the federal district courts have been integrated into the KeySearch practice areas. The Key Nature of Suit (KNOS) classification has also been integrated into the KeySearch practice areas. The Key Nature of Suit system has been created by West to provide an easy way to identify dockets with the same or similar case type across both state and federal jurisdictions. Key Nature of Suit classifications are based upon the case type information provided in the docket by the court and has been matched to the courts' case type taxonomies to create a uniform, searchable classification across jurisdictions.
- **Courts.** Represents the state and federal courts in which the entity has litigated during the selected date range. Litigation events are analyzed by the occurrences of events litigated in a particular jurisdiction.
- **Law Firm Size.** Represents the size distribution of law firms that have represented the entities included in the report during the selected date range. The size of law firms is based on the total number of attorneys within the entire law firm, not an individual office or geographic location. Law firm representation is analyzed by the occurrences of events in which law firms of a particular size represented the entity and the number of litigation events per year for each size of law firm.
- **Docket and Opinion Breakdown.** Tracks an entity's litigation activity using cases that have been filed (dockets) and cases where opinions have been issued (opinions). This section shows how many cases have been filed and how many opinions have been issued for the selected date range.
- **Law Firm Representation.** Represents the law firms that have represented entities in the litigation events included in the report during the selected date range. Law firm representation is analyzed by the occurrences of events associated with a law firm and the number of events per year for each law firm.
- **Presiding Judges.** Represents the judges who have presided over the legal events in the report during the selected date range. Litigation events are analyzed by a judge's occurrences of events and the number of events per year for each judge during the selected date range.

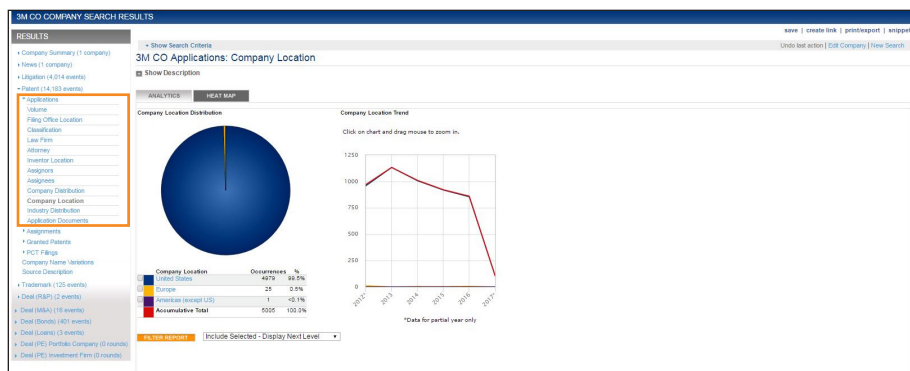
- **Attorney Representation.** Represents the attorneys that have represented entities in the litigation events included in the report during the selected date range. Attorney representation is analyzed by the occurrences of events associated with an attorney and the number of events per year for each attorney.
- **Legal Roles.** Represents the legal roles of entities implicated in the litigation events included in the report during the selected date range. Litigation events are analyzed by the occurrences of events for the particular role and the number of events per year for such legal role.
- **Company Distribution.** Represents the companies included in the report during the selected date range. This section includes both public and private corporations that are currently in business. Litigation events are analyzed by the occurrences of events litigated by a particular company and the number of litigation events per year for each company during the selected date range.
- **Industry Distribution.** Represents the industries included in the report during the selected date range. Litigation events are analyzed by the occurrences of events litigated by parties within a particular industry and the number of litigation events per year for such industry.
- **Source Documents.** Lists up to 1,000 of the most recent dockets and/or opinions for the litigation events included in the report. To view the full text of a document on Westlaw, click the citation for that document.
- **Company Name Variations.** For company reports, the company names used by the company in legal and business transactions during the selected date range, as found in legal source documents such as dockets and cases.
- **Source Description.** Lists sources from which information is retrieved about lawyers, law firms, legal roles, representation, and parties from Westlaw documents, including opinions and dockets.

## VIEWING A PATENT REPORT

Patent reports summarize patent holdings and filing activities based on information from U.S. patents, U.S. patent applications, U.S. patent assignments, and international patents.

To view a patent events report, complete the following:

1. Run a Search using the appropriate entity type.
  2. In the **Refine Search** section, click **Patent Events** to display a list of events. The Patent Classification screen is displayed showing the patent event areas for the category.
- Note:** Patent Events are not available for all search categories.
3. Select a refinement category (e.g., **Patent Classification, Inventor Location**), and select from the available options.
  4. Click **Show Search Criteria** to show the search criteria. Click **Hide Search Criteria** to hide it.
  5. Click **Get Results**. The Search Results page is displayed showing the first section of your report.



6. Click an analytical section link (e.g., **Applications: Filing Office Location**) in the left navigation area to view the corresponding section of the report. The Search Results page is refreshed to display the results for the analytical section you selected.

## ABOUT PATENT REPORTS

Patent reports are divided into several areas of analysis.

### Applications

- **Volume.** Represents intellectual property activity by tracking patent applications that have been filed during the selected date range.
- **Filing Office Location.** Represents patent applications by country in which the patent office is located. Patent applications are analyzed by the number of patent applications per country, overall share of patent applications associated with a particular country, and the number of patent applications from a particular country each year during the selected date range.
- **Classification.** Represents patent applications by classification type. Patent applications are analyzed by the number of patent applications, overall share of patent applications associated with a particular classification, and the number of patent applications with a particular classification each year during the selected date range. Three classifications types are available:
  - **U.S. Patent Classification Analysis.** The U.S. patent classifications related to the selected companies, for the specified time frame, by classification type.
  - **International Classification Analysis.** The international patent classifications related to the selected companies, for the specified time frame, by classification type.
  - **Derwent Classification Analysis.** The Derwent patent classifications related to the selected companies, for the specified time frame, by classification type.
- **Law Firm.** Represents patent applications by associated law firm. Patent applications are analyzed by the number of patent applications per law firm, overall share of patent applications associated with a particular law firm, and the number of patent applications associated with a particular law firm each year during the selected date range.
- **Attorney.** Represents patent applications by associated attorney. Patent applications are analyzed by the number of patent applications per attorney, overall share of patent applications associated with a particular attorney, and the number of patent applications associated with a particular attorney each year during the selected date range.
- **Inventor Location.** Represents patent applications by inventor location. Patent applications are analyzed by the number of patent applications per location, overall share of patent applications associated with a particular location, and the number of patent applications associated with a particular location each year during the selected date range.
- **Assignors.** Represents assignors which have been assigned patent applications during the selected date range. Patent assignments are analyzed by assignor for trends over time and overall share of events.
- **Assignees.** Represents assignees which have been assigned patent applications during the selected date range. Patent assignments are analyzed by assignee for trends over time and overall share of events.
- **Company Distribution.** The companies represented in the report during the selected date range, including both public and private corporations currently in business. Patent events are analyzed by the overall share of events associated with a particular company and the number of events per year for each company.
- **Company Location.** Displays patent applications by company locations, which includes locations of both public and private corporations currently in business.
- **Industry Distribution.** Industries associated with the patent events in the report during the selected date range. Patent events are analyzed by the overall share of events associated with a particular industry and the number of events per year for each industry.
- **Application Documents.** Lists the most recent patent applications documents relating to the patent application activity during the selected date range. To view a patent application abstract on Westlaw, click the **Abstract** link in the *Westlaw Links* column next to the desired patent application abstract.



## Assignments

- **Volume.** Represents intellectual property activity by tracking patent assignments that have been filed during the selected date range.
- **Law Firm.** Represents patent assignments by associated law firm. Patent assignments are analyzed by the number of patent assignments per law firm, overall share of patent assignments associated with a particular law firm, and the number of patent assignments associated with a particular law firm each year during the selected date range.
- **Attorney.** Represents patent assignments by associated attorney. Patent assignments are analyzed by the number of patent assignments per attorney, overall share of patent assignments associated with a particular attorney, and the number of patent assignments associated with a particular attorney each year during the selected date range.
- **Company Distribution.** The companies represented in the report during the selected date range, including both public and private corporations currently in business. Patent events are analyzed by the overall share of events associated with a particular company and the number of events per year for each company.
- **Company Location.** Displays patent assignments by company locations, which includes locations of both public and private corporations currently in business.
- **Industry Distribution.** Industries associated with the patent events in the report during the selected date range. Patent events are analyzed by the overall share of events associated with a particular industry and the number of events per year for each industry.
- **Assignment Documents.** Lists the most recent patent assignment documents relating to the patent assignment activity during the selected date range. To view a patent assignment abstract on Westlaw, click the **Abstract** link in the *Westlaw Links* column next to the desired patent assignment abstract.

## Granted Patents

- **Volume.** Represents intellectual property activity by tracking patents that have been granted during the selected date range.
- **Filing Office Location.** Represents granted patents by the country in which the patent office is located. Granted patents are analyzed by the number of granted patents per country, overall share of granted patents associated with a particular country, and the number of granted patents from a particular country each year during the selected date range.
- **Classification.** Represents granted patents by classification type. Granted patents are analyzed by the number of granted patents, overall share of granted patents associated with a particular classification, and the number of granted patents from a particular classification each year during the selected date range. Three classification types are available:
  - **U.S. Patent Classification Analysis.** The U.S. patent classifications related to the selected companies, for the specified time frame, by classification type.
  - **International Classification Analysis.** The international patent classifications related to the selected companies, for the specified time frame, by classification type.
  - **Derwent Classification Analysis.** The Derwent patent classifications related to the selected companies, for the specified time frame, by classification type.
- **Law Firm.** Represents granted patents by associated law firm. Granted patents are analyzed by the number of granted patents per law firm, overall share of granted patents associated with a particular law firm, and the number of granted patents associated with a particular law firm each year during the selected date range.
- **Attorney.** Represents granted patents by associated attorney. Granted patents are analyzed by the number of granted patents per attorney, overall share of granted patents associated with a particular attorney, and the number of granted patents associated with a particular attorney each year during the selected date range.

- **Inventor Location.** Represents granted patents by inventor location. Granted patents are analyzed by the number of granted patents per location, overall share of granted patents associated with a particular location, and the number of granted patents associated with a particular location each year during the selected date range.
- **Assignors.** Represents assignors which have been assigned granted patents during the selected date range. Granted patents are analyzed by assignor for trends over time and overall share of events.
- **Assignees.** Represents assignees which have been assigned granted patents during the selected date range. Granted patents are analyzed by assignee for trends over time and overall share of events.
- **Company Distribution.** The companies represented in the report during the selected date range, including both public and private corporations currently in business. Patent events are analyzed by the overall share of events associated with a particular company and the number of events per year for each company.
- **Company Location.** Displays granted patents by company locations, which includes locations of both public and private corporations currently in business.
- **Industry Distribution.** Industries associated with the patent events in the report during the selected date range. Patent events are analyzed by the overall share of events associated with a particular industry and the number of events per year for each industry.
- **Granted Patent Documents.** Lists the most recent granted patent documents relating to the granted patent activity during the selected date range. To view a granted patent abstract on Westlaw, click the **Abstract** link in the *Westlaw Links* column next to the desired granted patent abstract.
- **Patents in Litigation.** A summary of patent litigation for the selected date range. This list shows the date a case was filed, the classification and title of the patent in question, and the parties and representative firms involved. To view the full text of the related document on Westlaw, click its link.

#### Patent Cooperation Treaty (PCT) Filings

- **Volume.** Represents intellectual property activity by tracking PCT documents that have been filed during the selected date range.
- **Classification.** Displays PCT Filings by classification. PCT Filings are analyzed by number, overall share per classification, and number per classification per year within the date range. Choose International or Derwent.
- **Law Firm.** Represents PCT Filings by associated law firm. PCT Filings are analyzed by the number of PCT Filings per law firm, overall share of PCT Filings associated with a particular law firm, and the number of PCT Filings associated with a particular law firm each year during the selected date range.
- **Attorney.** Represents PCT Filings by associated attorney. PCT Filings are analyzed by the number of PCT Filings per attorney, overall share of PCT Filings associated with a particular attorney, and the number of PCT Filings associated with a particular attorney each year during the selected date range.
- **Inventor Location.** Represents PCT Filings by inventor location. PCT Filings are analyzed by the number of PCT Filings per location, overall share of PCT Filings associated with a particular location, and the number of PCT Filings associated with a particular location each year during the selected date range.
- **Company Distribution.** The companies represented in the report during the selected date range, including both public and private corporations currently in business. PCT Filings are analyzed by the overall share of PCT Filings associated with a particular company and the number of PCT Filings per year for each company.
- **Company Location.** Displays granted patents by company locations, which includes locations of both public and private corporations currently in business.

- **Industry Distribution.** Industries associated with the patent events in the report during the selected date range. Patent events are analyzed by the overall share of events associated with a particular industry and the number of events per year for each industry.
- **PCT Filings Documents.** Lists the most recent PCT Filing documents relating to the PCT Filing activity during the selected date range. To view a PCT Filing abstract on Westlaw, click the **Abstract** link in the Westlaw Links column next to the desired PCT Filing abstract.

### Company Name Variations

- The various company names under which the selected companies have done business, as found in the intellectual property source documents in the specified time. These are public or private corporations that are currently in business. The Document Match List displays a list of matching documents.

### Source Description

- Lists sources from which information is retrieved about U.S. Patent Applications, Patent Assignments, International Patents, and Patent Cooperation Treaty applications from Westlaw documents.

## VIEWING A TRADEMARK REPORT

Trademark reports summarize holdings and filing activities based on information from U.S. trademarks, U.S. trademark applications, and U.S. trademark assignments.

To view a trademark report, complete the following:

1. Run a Search using the appropriate entity type.
2. In the **Refine Search** section, click **Trademark Events** to display a list of events.
3. Click **Trademark Classification**.

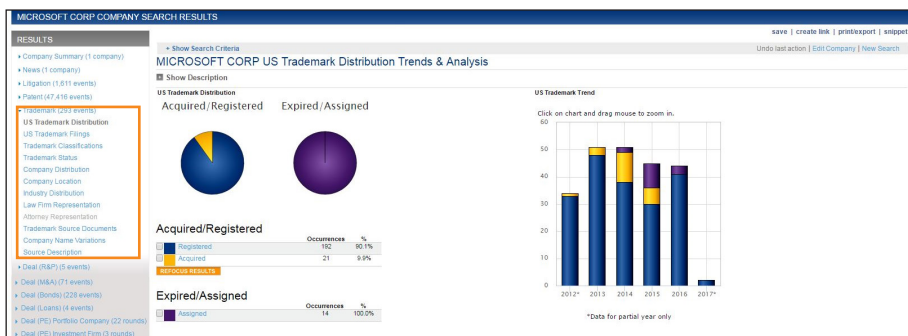
**Note:** Trademark Events are not available for all entity types.

4. Do one of the following:

- Enter a trademark classification in the field and click **Look-Up**.
- Click **Browse** to select a trademark classification from the tree hierarchy. Click **Add** next to the trademark classification you want to add to your search criteria.

5. Click **Show Search Criteria** to show the search criteria. Click **Hide Search Criteria** to hide it.

6. Click **Get Results**. The Search Results page is displayed showing the first section of your report.



7. Click an analytical section link (e.g., **US Trademark Distribution**) in the left navigation area to view the corresponding section of the report. The Search Results page is refreshed to display the results for the analytical section you selected.

## ABOUT TRADEMARK REPORTS

Trademark events are divided into the following areas of analysis:

- **U.S. Trademark Distribution.** Represents the aggregated trend of U.S. trademark holdings of the selected entities over the selected time period, including gains and losses in such holdings due to registrations, expirations, and assignments. To refocus the report by certain criteria, click a section of a chart or an item in a table or list.
- **U.S. Trademark Filings.** Represents the aggregated trend of U.S. trademark filings and registrations.
- **Trademark Classifications.** Represents the classifications of trademark activities related to the selected entities over the selected time period by classification type. To refocus and target the report by a classification, click the chart or list criteria.
- **Trademark Status.** Represents the status of trademarks relating to the selected entities over the selected time period by status type. To refocus and target the report by status, click the chart or list criteria.
- **Company Distribution.** The companies represented in the report during the selected date range, including both public and private corporations currently in business. Trademark events are analyzed by the overall share of events associated with a particular company and the number of events per year for each company.
- **Company Location.** Displays trademarks by company locations, which includes locations of both public and private corporations currently in business.
- **Industry Distribution.** Industries associated with the trademark events in the report during the selected date range. Trademark events are analyzed by the overall share of events associated with a particular industry and the number of events per year for each industry.
- **Law Firm Representation.** Represents the law firms related to the selected entities over the selected time period. To refocus the report by selected criteria, click a section of a chart or an item in a table or list.
- **Attorney Representation.** Displays the attorneys related to the selected entities over the selected time period. To refocus the report by selected criteria, click a section of a chart or an item in a table or list.
- **Trademark Source Documents.** Represents the Trademark Source Documents List for the selected entities over the selected time period.
- **Company Name Variations.** Represents the various company names under which the selected companies have done business, as found in the Intellectual Property source documents for the selected time period. These are public or private corporations that are currently in business.
- **Source Description.** Lists sources from which information is retrieved about U.S. Trademarks, Trademark Applications, and Trademarks Assignments from Westlaw documents.

## VIEWING A DEAL (R&P) REPORT

The Deal Registration and Prospectus (R&P) selection aggregates and analyzes specific data points from Business Law Center. It creates clear relationship maps and trend reports, focusing on financial data and the roles assumed by attorneys.

To view a deal analysis report, complete the following:

1. Run a Search using the appropriate entity type.
2. On the **Refine Search** page, click **Deal (R&P)** to display a list of events.

**Note:** This procedure is the same for Deal Mergers and Acquisitions (M&A), but the events must be refined independently. Deal Events are not available for all search categories.

3. Select a refinement category (e.g., **Security Type**, **Value Range**), and select from the available options.
4. Click **Show Search Criteria** to show the search criteria. Click **Hide Search Criteria** to hide it.

5. Click **Get Results**. The Search Results page is displayed showing the first section of your report.



6. Click an analytical section link (e.g., **Security Type**) in the left navigation area to view the corresponding section of the report. The Search Results page is refreshed to display the results for the analytical section you selected.

## ABOUT DEAL (R&P) REPORTS

Deal events are divided into the following areas of analysis:

- **Security Type.** Represents the security types for transactions analyzed in the report. Security types are analyzed for value trends, number of transactions, and occurrences of transactions for the selected date range.
- **Value Range.** Represents the value range of transactions in the report. Value ranges are analyzed for value trends, number of transactions, and occurrences of transactions for the selected date range.
- **Underwriter.** Represents the distribution of underwriters involved in transactions included in the report during the selected date range. Transactions are analyzed by underwriter for value trends, number of transactions, and occurrences of transactions for each underwriter.
- **Law Firm Representation.** Represents the law firms that have served as issuer's counsel, underwriter's counsel, co-counsel, or in other capacities for transactions included in the report during the selected date range. Transactions are analyzed by law firm for value trends, number of transactions, and occurrences of transactions for each law firm.
- **Law Firm Role.** Represents the distribution of transactions in this report among the roles of law firms (issuer counsel, underwriter counsel, and other counsel). Law firm roles are analyzed for value trends, number of transactions, and occurrences of transactions for the selected date range.
- **Attorney Representation.** Represent attorneys who have served as issuer's counsel, underwriter's counsel, co-counsel, or in other capacities for transactions included in the report during the selected date range. Transactions are analyzed by attorney for value trends, number of transactions, and occurrences of transactions for each attorney.
- **Company Distribution.** Represents the companies involved in the transactions included in the report during the selected date range. This section includes both public and private corporations that are currently in business. Events are analyzed by the occurrence of transactions involving a particular company and the number of transaction events per year for each company during the selected date range.
- **Industry Distribution.** Represents the industries associated with companies involved in the transactions included in the report. The identification of industries is based on the primary industry of the companies.
- **Company Location.** Represents the locations for companies involved in the transactions listed in the report. Transactions are analyzed by location for value trends, number of transactions, and occurrences of transactions for each location.

- **R&P Source Documents.** Identifies the most recent documents relating to a registration or prospectus for transactions included in the report during the selected date range. To view an abstract of the filings or the filings associated with a transaction, click the appropriate link in the Business Law Center column.
- **Company Name Variations.** Represents various company names under which the company has done business, as found in the R&P source documents during the selected date range.
- **Source Description.** Lists the source information on which Monitor Suite Registration and Prospectus Profiles are based.

## VIEWING A DEAL (M&A) REPORT

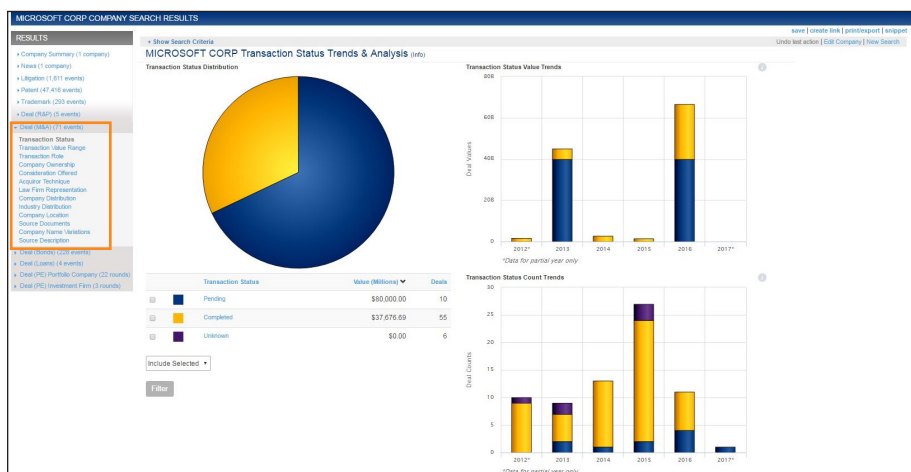
The Deal Mergers and Acquisitions (M&A) Events selection aggregates and analyzes specific data points from Business Law Center. It creates clear relationship maps and trend reports, focusing on financial data and the roles assumed by attorneys.

To view a deal M&A report, complete the following:

1. Run a Search using the appropriate entity type.
2. On the **Refine Search** page, click **Deal (M&A)** to display a list of events.

**Note:** This procedure is the same for Deal Registrations & Prospectus (R&P), but the events must be refined independently. Deal Events are not available for all search categories.

3. Select a refinement category (e.g., **Transaction Status**, **Value Range**), and select from the available options.
4. Click **Show Search Criteria** to show the search criteria. Click **Hide Search Criteria** to hide it.
5. Click **Get Results**. The Search Results page is displayed showing the first section of your report.



6. Click an analytical section link (e.g., **Value Range**) in the left navigation area to view the corresponding section of the report. The Search Results page is refreshed to display the results for the analytical section you selected.

## ABOUT DEAL (M&A) REPORTS

- **Transaction Status.** Classifies the status of the mergers and acquisitions included in the report during the selected date range. Mergers and acquisitions are analyzed by status for value trends, number of transactions, and occurrences of transactions in each status category.
- **Transaction Value Range.** Represents the value range of transactions in the report. Value ranges are analyzed for value trends, number of transactions, and occurrences of transactions for the selected date range.
- **Transaction Role.** Shows company roles for the transactions analyzed in this report within the date range. Analyzes company roles by value trends and number of transactions.
- **Company Ownership.** Displays the ownership status of the target or acquiror company at the time of the announcement date.

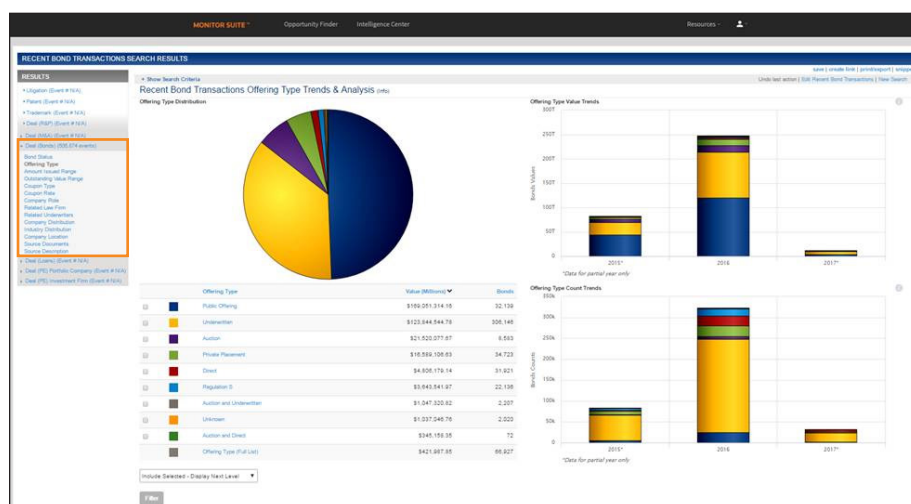
- **Consideration Offered.** Lists consideration categories of the deals in this report.
- **Acquiror Technique.** Displays significant features or characteristics about the transaction.
- **Law Firm Representation.** Represents the law firms that represented parties in transactions included in the report during the selected date range. Transactions are analyzed by law firm for value trends, number of transactions, and occurrences of transactions for each law firm.
- **Company Distribution.** Displays the companies represented in the report during the selected date range. This section includes both public and private corporations that are currently in business. Events are analyzed by the share of transactions involving a particular company and the number of transaction events per year for each company during the selected date range.
- **Industry Distribution.** Represents the industries associated with the target corporations in the mergers and acquisitions included in the report. The identification of industries is based on the primary industry of the target companies. Transactions are analyzed by the occurrences of transactions associated with a particular industry and the number of transactions per year for each industry during the selected date range.
- **Company Location.** Represents locations for companies involved in the transactions listed in this report. Transactions are analyzed by location for value trends, number of transactions, and occurrences of transactions for each location.
- **M&A Source Documents.** Identifies the most recent documents relating to a merger or acquisition included in the report during the selected date range.
- **Company Name Variations.** Displays the various company names under which the company has done business, as found in the M&A source documents during the selected date range.
- **Source Description.** Lists source information on which Monitor Suite Mergers and Acquisitions Profiles are based.

## VIEWING A DEAL (BONDS) REPORT

The Deal (Bonds) Events selection aggregates and analyzes specific data points from Business Law Center. It creates clear relationship maps and trend reports, focusing on financial data and the roles assumed by attorneys.

To view a deal bonds report, complete the following:

1. Run a Search using the appropriate entity type.
2. On the **Refine Search** page, click **Deal (Bonds)** to display a list of events.
3. Click **Show Search Criteria** to show the search criteria. Click **Hide Search Criteria** to hide it.
4. Click **Get Results**. The Search Results page is displayed showing the first section of your report.





5. Click an analytical section link (e.g., **Offering Type**) in the left navigation area to view the corresponding section of the report. The Search Results page is refreshed to display the results for the analytical section you selected.

#### ABOUT DEAL (BONDS) REPORTS

- **Bond Status.** Classifies the status of the bonds included in the report within the date range. Analyzes status types for value trends, number of bonds, and overall share.
- **Offering Type.** Shows the nature of the bond registration. Analyzes offering types for value trends, number of bonds, and overall share within the date range.
- **Amount Issued Range.** Shows the amount range of the bond at the time of issue in U.S. dollars. Amount issued is not available when the bond issue date occurs in the future.
- **Outstanding Value Range.** Shows the outstanding amount range of the bond in U.S. dollars.
- **Coupon Type.** Lists the coupon payment applicable to the asset. Analyzes coupon type for value trends, number of transactions, and overall share within the date range.
- **Coupon Rate.** Shows the interest rate for bonds within the date range. Analyzes coupon rate for value trends, number of transactions, and overall share within the date range.
- **Company Role.** Shows the roles of the companies for the transactions analyzed in this report within the date range. Analyzes company roles by value trends and number of transactions.
- **Related Law Firm.** Shows law firms involved in a bond transaction. Analyzes law firm representation for value trends, number of bonds, and overall share.
- **Related Underwriters.** Lists underwriters involved in a bond transaction. Analyzes related underwriters for value trends, number of bonds, and overall share.
- **Company Distribution.** Displays companies represented in this report within the date range. Includes both public and private corporations currently in business. Analyzes transactions by share of a company and by number per year, per company.
- **Industry Distribution.** Displays industries represented in this report within the date range. Analyzes transactions by overall share of events within a particular industry and by number of events per year, per industry.
- **Company Location.** Displays locations for companies involved in transactions listed in this report. Analyzes transactions by company locations for value trends, number, and overall share.
- **Bonds Source Documents.** Identifies up to the most recent 1,000 documents relating to a bond transaction included in this report during the selected date range.
- **Source Description.** Lists source information on which Monitor Suite Bonds Profiles are based.

#### VIEWING A DEAL (LOANS) REPORT

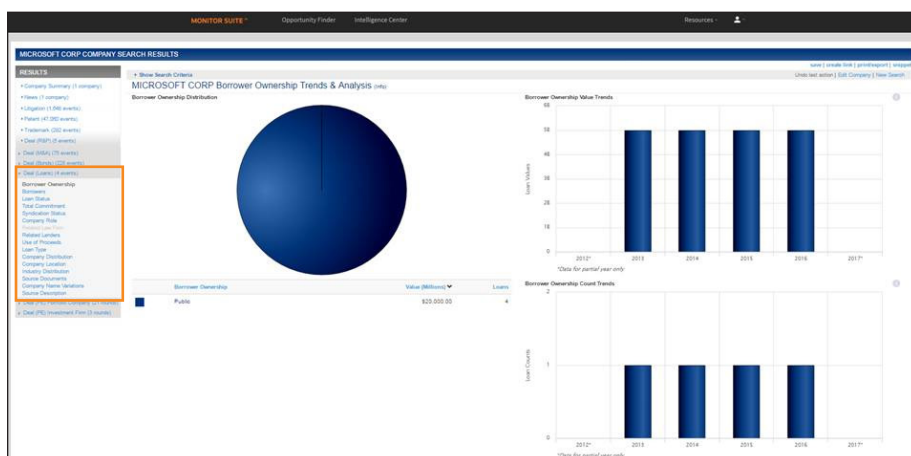
The Deal (Loans) Events selection aggregates and analyzes specific data points from Business Law Center. It creates clear relationship maps and trend reports, focusing on financial data and the roles assumed by attorneys.

To view a deal loans report, complete the following:

1. Run a Search using the appropriate entity type.
2. On the **Refine Search** page, click **Deal (Loans)** to display a list of events.
3. Select a refinement category (e.g., **Loan Status, Company Role**), and select from the available options.
4. Click **Show Search Criteria** to show the search criteria. Click **Hide Search Criteria** to hide it.



5. Click **Get Results**. The Search Results page is displayed showing the first section of your report.



6. Click an analytical section link (e.g., **Borrowers**) in the left navigation area to view the corresponding section of the report. The Search Results page is refreshed to display the results for the analytical section you selected.

### ABOUT DEAL (LOANS) REPORTS

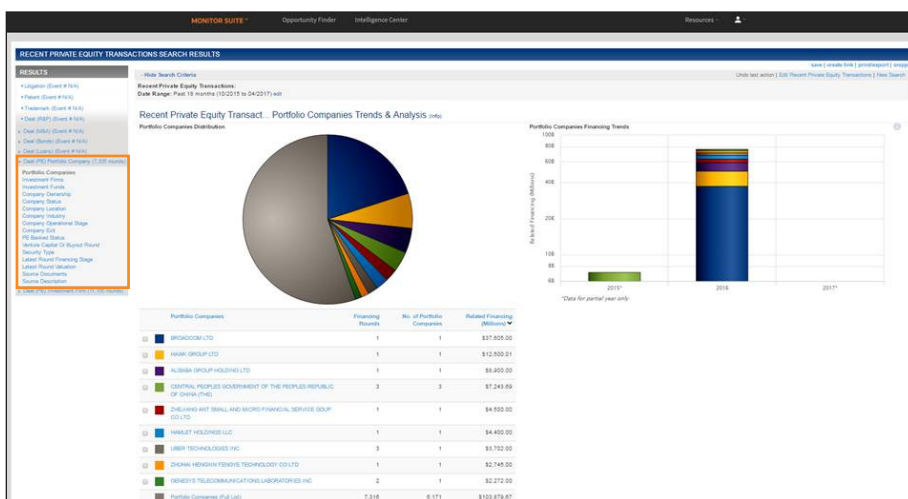
- **Borrower Ownership.** Shows the current ownership status of the borrower as of the date of the report.
- **Borrowers.** Displays borrowers involved in the loan transactions included in this report within the date range.
- **Loan Status.** Classifies the statuses of loans included in this report within the date range.
- **Total Commitment.** Shows the total value of lender commitment for transactions in this report. Analyzes values for trends, number of transactions, and overall share of transactions within the date range.
- **Syndication Status.** Shows the current status of the loan's syndication process. Shows the syndication status of the origination or most recent amendment to the loan.
- **Company Role.** Shows the roles of the companies for the transactions analyzed in this report within the date range. Analyzes company roles by value trends and number of transactions.
- **Related Law Firm.** Displays related law firms for borrowers and lenders involved in loan transactions included in this report. Related law firms are vaunted at the tranche level of the loan transaction.
- **Related Lenders.** Displays lenders involved in the loan transactions included in this report within the date range. Related lenders are counted at the tranche level of the loan transaction.
- **Use of Proceeds.** Shows the purpose for which the loan was issued. Use of Proceeds is counted at the tranche level of the loan transaction.
- **Loan Type.** Classifies the type of loans included in this report. Loan type is counted at the tranche level.
- **Company Distribution.** Displays companies represented in this report within the date range. Includes both public and private corporations currently in business. Analyzes transaction by share of company and by number per year, per company.
- **Company Location.** Displays locations for companies involved in transactions listed in this report. Analyzes transactions by company locations for value trends, number, and overall share.
- **Industry Distribution.** Displays industries represented in this report within the date range. Analyzes loan transactions by overall share of events within a particular industry and by number of events per year, per company.
- **Loans Source Documents.** Identifies up to the most recent 1,000 documents relating to a loan transaction included in this report during the selected date range.
- **Source Description.** Lists source information on which Monitor Suite Loans Profiles are based.

## VIEWING A DEAL (PE) PORTFOLIO COMPANY REPORT

The Deal (PE) Portfolio Company Rounds selection aggregates and analyzes specific data points from Business Law Center. It creates clear relationship maps and trend reports, focusing on financial data and the roles assumed by attorneys.

To view a deal (PE Portfolio Company) report, complete the following:

1. Run a Search using the appropriate entity type.
2. On the **Refine Search** page, click **Deal (PE) Portfolio Company Rounds** to display a list of events.
3. Select a refinement category (e.g., **Related Financing**), and select from the available options.
4. Click **Show Search Criteria** to show the search criteria. Click **Hide Search Criteria** to hide it.
5. Click **Get Results**. The Search Results page is displayed showing the first section of your report.



6. Click an analytical section link (e.g., **Investment Funds**) in the left navigation area to view the corresponding section of the report. The Search Results page is refreshed to display the results for the analytical section you selected.

## ABOUT DEAL (PE) PORTFOLIO COMPANY REPORTS

- **Portfolio Companies.** Displays the names of the Portfolio Companies that received private equity funding from investment firms/funds.
- **Investment Firms.** Displays the Investment Firms that provided funding to the portfolio companies in the search criteria.
- **Investment Funds.** Displays the Investment Funds that provided funding to the portfolio companies in the search criteria.
- **Company Ownership.** Displays the ownership status for each portfolio company that received funding in the time period searched. Company ownership information is based on the most recent transaction received.
- **Company Status.** Displays the company status for each portfolio company that received funding in the time period searched. Company Status information is based on the most recent transaction received.
- **Company Location.** Displays the location of the portfolio companies that received private equity funding from investment firms/funds.
- **Company Industry.** Displays the industry distribution of the portfolio companies that received funding in the time period searched.
- **Company Operational Stage.** Displays the operational stage for each portfolio company that received funding in the time period searched. Operational stage information is based on the most recent transaction received.
- **Company Exit.** Displays the exit type for each portfolio company that received funding in the time period searched. A portfolio company that has exited more than once may display more than one exit type.



## ABOUT DEAL (PE) INVESTMENT FIRM REPORTS

- **Fund: Portfolio Companies.** Displays the names of the Portfolio Companies that received private equity funding from investment firms/funds.
- **Fund: Investment Funds.** Displays the names of the investment funds managed by the investment firms.
- **Fund: Type.** Displays the types of funds managed by the investment firms.
- **Fund: Fundraising Status.** Displays the fundraising status of the funds managed by the investment firms.
- **Fund: Investments Type.** Displays the general category of fund investment type managed by the investment firms.
- **Fund: Stage (Focus).** Displays the stage focus of the funds managed by the investment firms. Stage focus is based on private equity transaction data.
- **Fund: Portfolio Company Industry.** Displays the industry distribution of the portfolio companies invested in by the funds.
- **Fund: Portfolio Company Location.** Displays the location of the portfolio companies invested in by the funds.
- **Firm: Investment Firms.** Displays the names of the investment firms represented in this report.
- **Firm: Type.** Displays the type of investment firms represented in this report.
- **Firm: Status.** Displays the current status of the investment firms represented in this report.
- **Source Documents.** Identifies up to the most recent 1,000 documents relating to a private equity transaction included in this report during the selected date range. Note, while Private Equity results in Monitor Suite count financing rounds, there will not be one source document per round. The source documents in Business Law Center contain data on multiple financing rounds.
- **Source Description.** Lists source information on which Monitor Suite Private Equity Portfolio Company Profiles are based.

## Viewing a Company Summary

When you perform a company search, you can view a summary of information about the searched company.

1. Run a company search.
2. Click **Company Summary** in the left navigation area. The Company Summary links are displayed in the left navigation area, and the Business Description for the company is displayed in the search results.

**MICROSOFT CORP COMPANY SEARCH RESULTS**

RESULTS

- Company Summary (1 company)
- Business Description
- Financial Summary
- Officers
- Directors
- Industries
- Key Competitors
- Product Information
- Other Recent Reports

Hide Search Criteria

Company: MICROSOFT CORP  
Date Range: Last five years (03/2012 to 03/2017) with Bonds Date Range: 03/2012 to Future with

**MICROSOFT CORP Business Description**

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**Date: February 22, 2017**

**Location:** 1 Microsoft Way  
Redmond, WA98052-8300  
United States  
Phone: 425-882-8080  
Fax: 425-936-6150  
Toll-free:  
Website: www.microsoft.com

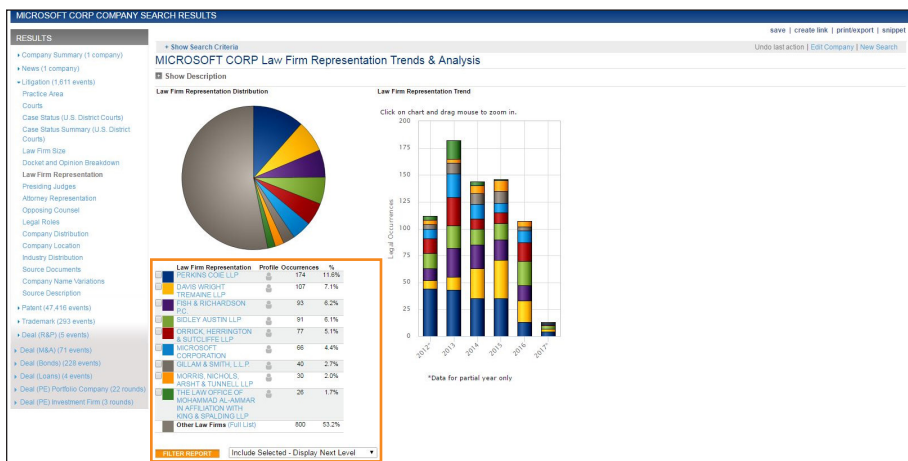
**Ticker Information:** Company Type: Public  
Stock Exchange: NASDAQ OMX Ticker Symbol: MSFT

**Business Description:** Microsoft is omnipresent. It's Windows operating system and Office suite of productivity software dominate their markets. The company's cloud computing platform, Azure, is one of the leaders in that burgeoning market. Customers range from individuals and small businesses to the world's biggest companies and government agencies. Microsoft makes tablets

3. Click a link (e.g., **Financial Summary**) in the left navigation area to view the corresponding section of the report. The Search Results page is refreshed to display the results for the section you selected.

## Include Selected or Exclude Selected Results

The Include Selected and Exclude Selected features allow you to drill down into a section's search results, and you can Include or Exclude results from any result page using any refinement category. Including or excluding results is similar to refining and achieves the same results. However, when you include or exclude selected results, you refocus your results after your search results have been returned, rather than refining a search from the Refine Search page before clicking **Get Results**.



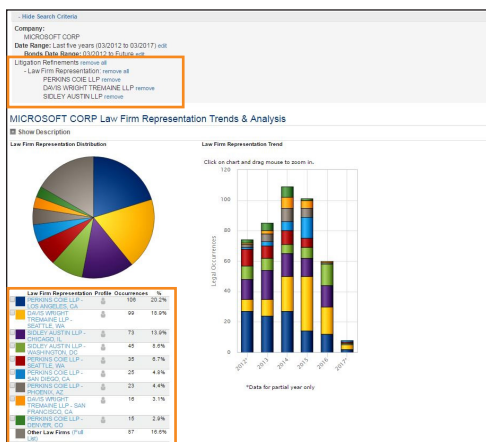
From this page, you can refocus your results by including or excluding selected criteria. You also have the option to display the next level, or display the current level when you include or exclude criteria.

### INCLUDE SELECTED CRITERIA

The Include Selected feature allows you to narrow your search to only the criteria you select and eliminate results that are not relevant to the focus of your search.

To include selected criteria, complete the following, with Law Firm Representation as the example refinement category:

1. Run a Search using the appropriate entity type.
2. Under Litigation, select **Law Firm Representation**.
3. Select the check boxes preceding the criteria you want to include.
4. Select **Include Selected - Display Current Level** from the drop-down menu, and then click **Filter Report**. The page refreshes to display the criteria you selected. The selected law firms are displayed in the Search Criteria box.
5. You can also continue to filter the report by other criteria listed in the Results box using the same method.
6. Save the search for future reference, if desired.

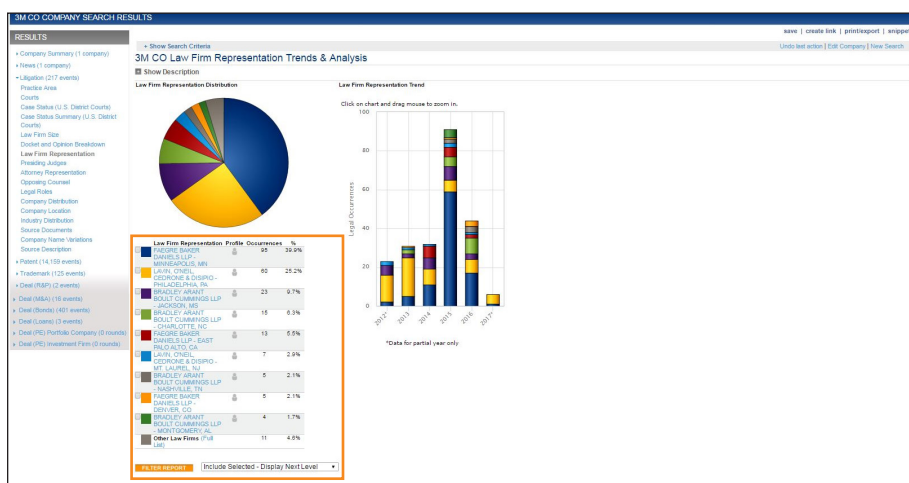


## EXCLUDE SELECTED CRITERIA

The Exclude Selected feature allows you to remove search results and focus on event criteria you specify, while also allowing you to capture future events.

To exclude selected criteria, complete the following, with Law Firm Representation as the example refinement category:

1. Run a Search using the appropriate entity type.
2. Under **Litigation**, select **Law Firm Representation**.
3. Select the check boxes preceding the criteria you want to exclude.
4. Select **Exclude Selected - Display Current Level** from the drop-down menu, and then click **Filter Report**. The page refreshes to display the criteria that remains after you excluded criteria. The selected law firms are displayed as *Excluded* in the Search Criteria box.
5. You can also continue to filter the report by other criteria listed in the Results box using the same method.
6. Save the search for future reference, if desired.

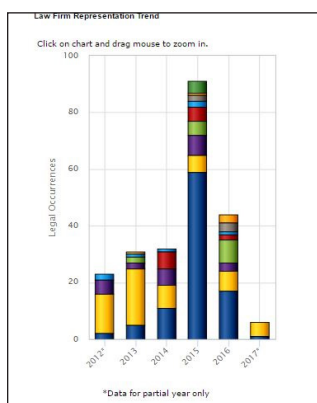


## TREND CHART ZOOM

You can zoom in to narrow the focus of any area of the trend chart on the Search Results page.

To zoom in on a chart area, complete the following:

1. Click and drag your mouse over the trend chart. A box is created. Drag your mouse so the box covers the area of the chart you want to zoom in on.



2. Release your mouse button. The chart is refreshed to display a zoomed-in view of the area you selected.
3. Click **Reset Zoom** to remove the zoom and display the initial view of the chart.

## Working with the Action Bar

The action bar is located near the top of the Results page and allows you to save reports, print or export reports, and manipulate report criteria.



### SAVING A REPORT

To save a report, complete the following:

1. Run a Search.
2. Click **save** on the action bar in the upper right of the search results screen.
3. Enter a name for the search in the *Name Your Search* field.
4. Select **Save Search** to save the exact search, or select **Save Search as template** to save only the search criteria.
5. Click **Save**. A message is displayed confirming the search.
6. Click **OK**.

### CREATING A LINK TO A REPORT

You can create a link to a report or report section, which allows you to share the report with other users within your organization or post it to a portal page. When you create a link to a report, the report has an embedded encrypted password, allowing anyone within your organization to access the report without logging in to Monitor Suite.

To create a link to a report, complete the following:

1. Run a Search and refine your search results as desired.
2. Click **create link** on the action bar in the upper right of the search results screen. A menu is displayed.
3. Click **Quick link to Report** to create a link to the entire report, or click **Quick link to Section only** to create a link to the current section of the report.
4. A window appears with the report/section URL displayed. Copy the URL.
5. Click **OK**. You can now paste the link into an email or other document.

### CREATING ENHANCED PORTAL LINKS

Enhanced portal links allow you to create a link to a report section, which you can then post to your firm's portal site. The enhanced portal link is automatically updated each time the portal site is accessed. You can create enhanced portal links from an existing portal link template or you can create a new portal link style template that can be scaled and customized to fit your firm's portal site.

#### Creating an Enhanced Portal Link

To create an enhanced portal link with an existing portal link template, complete the following:

1. Run a Search and refine your search results as desired.
2. Click **create link** on the action bar in the upper right of the search results screen. A menu is displayed.
3. Click **Create enhanced portal link**. The Enhanced Portal Links page is displayed.



The screenshot shows the 'ENHANCED PORTAL LINKS' window with the 'Select Portal Link Style' tab active. The tab has a sub-header 'Select Portal Link Style *Optional*' and a description: 'Use the options below to select an existing style template or create a new template to display data from your portal link.' Below this is a 'Select Style Template' dropdown menu with 'Default' selected, and a 'Create Style Template' link. A 'CONTINUE' button is at the bottom right. On the right side, the 'Current Portal Link Criteria' panel shows 'Portal Link Name: MICROSOFT CORP Legal Role Trends & Analysis' and 'Style Template: Default'. A 'Preview Section' link is also visible.

4. On the Select Portal Link Style tab, choose a style template from the *Select Style Template* drop-down list, and click **Continue**. The Add Annotation tab is displayed.
5. To add an optional annotation:
  - Select an existing annotation from the Add Annotation list; Or
  - Click the **Create New Annotation** link. Complete the name, notes, and annotation text sections and then click **Select** to add the annotation to the EPL.
6. Click **Create**. A confirmation message is displayed with the portal link. The link is also saved in MyMonitor.
7. Copy the link and then click **OK**.

### Creating a Portal Link Style Template

To create an enhanced portal link with a new portal link template, complete the following:

1. Run a Search and refine your search results as desired.
2. Click **create link** on the action bar in the upper right of the search results page. A menu is displayed.
3. Click **Create enhanced portal link**. The Enhanced Portal Links window is displayed.
4. On the Select Portal Link Style Tab, click **Create Style Template**. The Style Templates page is displayed.

The screenshot shows the 'MONITOR SUITE' window with the 'STYLE TEMPLATES' section. The 'Select Template Layout' tab is active, with a sub-header 'Select Template Layout' and a description: 'Use the options below to customize your portal link. The Layout Options tab allows you to choose how much of the data will be viewable on the page. The Advanced Options tab allows you to select which columns of the table to view.' Below this are two tabs: 'Layout Options' and 'Advanced Options'. Under 'Layout Options', there are radio buttons for 'Full', 'No Trend Chart', 'No Pie Chart', and 'Table Only'. There are also three expandable sections for 'Full Page Layouts (984px)', 'One Quarter Width Layouts (234px)', 'One Half Width Layouts (484px)', and 'Three Quarters Width Layouts (734px)'. A 'CONTINUE' button is at the bottom right. On the right side, the 'Current Style Template Criteria' panel shows 'Selected Column Width: Full Page', 'Selected Layout: Full', 'Portal Link Font: Arial', 'Font Color: #000000', 'Hyperlink Color: #349DC8', 'Graph Color Palette: Standard Color Palette', and 'Title Banner: Visible'.



5. Under Layout Options, select one of the following layout sizes:

- Full Page Layouts
- One Quarter Width Layouts
- One Half Width Layouts
- Three Quarters Width Layouts

Your selections are displayed in the Current Style Template Criteria section on the right.

6. On the Advanced Options tab, select which columns to display in the analysis table (e.g., **Practice Area**).

7. Click **Continue**. The Name and Save Template tab is displayed.

8. Enter the name of the style template in the *Style Template Name* field, and an optional description of the template in the *Description* field.

9. Click **Save**. A confirmation message is displayed.

### PRINTING OR EXPORTING A REPORT

You can print or export a full report or just a report section.

#### Printing a Whole Report

1. Click **print/export** on the action bar in the upper right of the search results page. A menu is displayed.
2. Click **Print/Export whole report**. The Report Options page is displayed.
3. A report title is generated by default and is displayed in the *Title* field. Leave the default title, or enter a new one.
4. Enter a report description in the *Description* field, if desired.
5. Upload an image to the report, if desired.
6. If you want to apply a saved report template, select a template from the *Template* drop-down list. Your saved template selections will automatically apply.

Report Options

Save as a template DOWNLOAD PDF

**Format**

Title MICROSOFT CORP Company Report

Description

Cover page image Select Upload image

Template Select

Include ☒ Table of contents ☒ Search criteria Beginning of Report

**Report Sections**

Expand all | Deselect all | Undo | Add Snippet(s) Restore to default

- ☒ Company Summary
- ☒ News
- ☒ Litigation
- ☒ Patent Applications
- ☒ Patent Assignments
- ☒ Granted Patents
- ☒ PCT Filings
- ☒ Trademarks
- ☒ Deal (R&P)
- ☒ Deal (M&A)
- ☒ Deal (Bonds)
- ☒ Deal (Loans)
- ☒ Deal (PE) Portfolio Company
- ☒ Deal (PE) Investment Firm

7. Customize the report as desired.

**Note:** If you want to save the report format to use again, click **Save as a Template** to begin that process.

8. To include an annotation with a section, click the **annotation** icon to the right of the desired section in the Reports Sections list. A list of annotations is displayed. Click the radio button next to the annotation you want to include with the report section. To remove an annotation, click the **annotation** icon once more.
9. To add a snippet to your output, click **Add Snippet(s)** at the top of the Report Sections list. Select the desired snippet and click **Save Changes**. The snippet will appear at the bottom of the Report Sections list.
10. Click **Download PDF**. Monitor Suite will then generate the report.
11. Click the **Click here to download or open your report** link to open or save the report.

### Printing a Report Section

1. Click **print/export** on the action bar in the upper right of the search results screen. A menu is displayed.
2. Click **Print/Export this section**. Monitor Suite will generate and display the report section.
3. You can save or print the report section as desired.

### UPLOADING AN IMAGE TO A REPORT

You can upload an image (e.g., a firm logo or insignia) to accompany a report while printing or exporting a whole report.

To upload an image to a report, complete the following:

1. Complete steps 1-4 in “Printing a Whole Report” on page 41.
2. Click **Upload Image** in the Format section of the page. The Upload New Cover Page Image window is displayed.

3. Enter the name of the image in the **Name** field.
4. Click **Choose File** and navigate to the location of the graphic you want to upload.
5. Select the graphic you want to upload and click **Open**. The path and file name for the graphic is displayed in the **File** field.
6. Click **Upload**. A message is displayed confirming that the image has been saved.
7. Close the window.

### CUSTOMIZING A REPORT

You can customize report output options by reordering the sections of a report or individual rows within a section, removing rows from a section, or excluding one or more section groups of a report.

#### Excluding One or More Section Groups from Your Report

1. Click **print/export** on the action bar in the upper right of the search results page. A menu is displayed.
2. Click **Print/Export whole report**. The Report Options page is displayed.
3. Under Report Sections, deselect the check marks next to the section groups you want to exclude from your report. After you deselect a section group, the green check mark toggle changes to gray, indicating that the section will not be included in the report PDF.

## Reordering Reports

From the Report Sections page, you can rearrange the sections and customize the report to suit your needs. The report sections are grouped by type (i.e., Litigation, Patent, etc.). You can move an entire section group or reorder section rows within a section.

To reorder the sections of a report, complete the following:

1. Click **print/export** on the action bar in the upper right of the search results page. A menu is displayed.
2. Click **Print/Export whole report**.
3. Under Report Sections, click a section or section row and drag it to the place in the list where you want it to appear in your printed report. Release your mouse and section will drop into place.

**Report Options** Save as a template DOWNLOAD PDF

**Format**

Title: MICROSOFT CORP Company Report

Description:

Cover page image: Select Upload image

Template: Select

Include: ☒ Table of contents ☒ Search criteria Beginning of Report

**Report Sections** Expand all Deselect all Undo Add Snippet(s) Restore to default

- ☒ Company Summary
- ☒ News
- ☒ Litigation
- ☒ Patent Applications
- ☒ Patent Assignments
- ☒ Granted Patents
- ☒ PCT Filings
- ☒ Trademarks
- ☒ Deal (R&P)
- ☒ Deal (M&A)
- ☒ Deal (Bonds)
- ☒ Deal (Loans)
- ☒ Deal (PE) Portfolio Company
- ☒ Deal (PE) Investment Firm

## CREATING SNIPPETS

A snippet is a snapshot of an individual section that you can add to a report for comparison purposes.

1. Run a Search using the appropriate entity type.
2. Click **Snippet** on the action bar in the upper right of the search results page. The Create Snippet window is displayed.
3. Enter the name of the snippet in the *Name your snippet* field.
4. Enter *Notes* for the snippet, if desired.
5. Click **Save**. A message is displayed confirming that your snippet has been saved.
6. Click **OK**.

# myMonitor

The myMonitor feature allows you to create default settings for users and administrators for ongoing use of Monitor Suite. Using myMonitor, you can also save search and report information and condense all of your saved information in one location so you can easily access recent or saved searches, search templates, and report formats.

## Setting Preferences

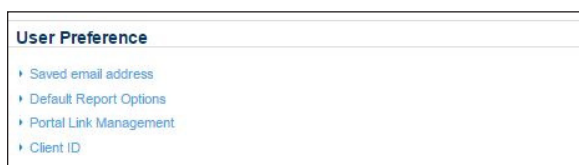
The Preferences menu is used to manage settings for users and perform administrator functions to create and modify users and manage access to Monitor Suite.

**Note:** You must have Admin access to perform administrator functions.

### MANAGING USER PREFERENCE

To modify user preference in myMonitor, complete the following:

1. Click **myMonitor** under Resources in the upper right of the Monitor Suite page.
2. Under myMonitor, click **Preferences**.
3. Click **User Preference**. The User Preference page is displayed.



4. Do any of the following:
  - Click **Saved email address** to edit the default email address. In the **Default email** field, enter the email address where any reports you generate will be sent, and click **Save**.
  - Click **Default Report Options** to change the default search anchor and refocus options.
    - Use the drop-down menu to change the default search anchor (e.g., **Company**). Select the default entity type that will be listed in the **Search by** drop-down list on the Monitor Suite home page (i.e., **Company**, **Law Firm**, **Industry**, or **Practice Area**).
    - Click the drop-down menu to change the default refocus options to include or exclude the current or next levels when filtering reports.

### MANAGING USERS WITH ADMIN PREFERENCE

You can use the Admin Preference feature in myMonitor to view, add, edit, or delete users via MyAccount. Click **User Management** and then click **Go to MyAccount**. You will be re-directed to the MyAccount site to manage users.

### MANAGING USER ACCESS WITH ADMIN PREFERENCE

To modify user access in MyMonitor, complete the following:

1. Under myMonitor, click **Preferences**.
2. Click **Admin Preference**. The Admin Preference page is displayed.
3. Do one of the following:
  - Select **Portal Link Management** and select **Admins Only** or **All Users** to set the account access for which users can create Portal Links. This sets the account access for users who can create and send links to Monitor Suite.

- ## Managing Recent Searches

1. Under myMonitor, click **Recent Searches**. The Recent Searches page is displayed.

2. Click the type of search you want to retrieve (e.g., **Company**, **Practice Area**).
3. Click **Run** next to the search you want to run. The search results for the recent search are displayed.

You can set the recent searches to display from 10 to 75 searches per page by selecting the desired option from the **Searches Shown** drop-down list. The Date Last Run column can be sorted in descending or ascending order by clicking the column title.

You can save a search and rerun it at a later time. To save a search, complete the following:

- | Company        |                    |                |   |                    |                    |
|----------------|--------------------|----------------|---|--------------------|--------------------|
|                | NAME               | COMPANY        | SEARCH REFINEMENTS  | DATE SAVED         | DATE LAST RUN      |
| Run<br>Details | Testno<br>testname | MICROSOFT CORP | Date Range: Last five years (03/2012 to 03/2017)<br>Bonds Date Range: 03/2012 to Future<br>Liquitor Refinements<br>- 1 in Firm On<br><a href="#">expanded view &gt;&gt;</a> | 3/22/2017 11:24 AM | 3/22/2017 11:24 AM |

- If you want to delete a search from your saved searches list, click **Delete** next to the appropriate search. Click **rename** to rename the saved search. Enter the new name for the saved search in the field, and click **Save**.

## Managing Saved Search Templates

You can save a search template that is based on specific criteria and use it for searches at a later time.

1. Under myMonitor, click **Saved Search Templates**. The Saved Search Templates page is displayed.

Company				
	Name	Search Refinements	Date Saved	Date Last Run
Load Delete	1 rename	Date Range: Last five years (3/3/2012 to 3/3/2017) Bonus Date Range: 3/3/2012 to Future Litigation Refinements - Practice Area: Intellectual Property - Patents Intellectual Property - Copyrights Intellectual Property - Generally Date Range: Last five years (3/3/2012 to 3/3/2017) Bonus Date Range: 3/3/2012 to Future Litigation Refinements - Law Firm Size: 251-500 501-750 - Legal Role: Defendant Counter-Claimant Respondent	3/30/2017 3:31 PM	3/30/2017 3:31 PM
	Test rename	Date Range: Last five years (3/3/2012 to 3/3/2017) Bonus Date Range: 3/3/2012 to Future Litigation Refinements - Law Firm Size: 251-500 501-750 - Legal Role: Defendant Counter-Claimant Respondent	3/30/2017 3:30 PM	3/30/2017 3:30 PM

2. Select the type of search template you want to use (e.g., **Company, Industry**).
3. Click **Load** next to the search template you want to use. The Template Search page is displayed.
4. From here, you can run your search according to the criteria saved in the search template and refine your results as you normally would.

If you want to delete a template from your saved search templates list, click **Delete** next to the appropriate template. Click **rename** to rename the saved template. Enter the new name for the saved template in the field, and click **Save**. The Date Last Run column can be sorted in descending or ascending order by clicking the column title.

## Managing Saved Report Output Formats

You can use an existing report output format for a new report. This saves time when you want to create several PDF reports with the same appearance. Within myMonitor, you can edit, rename, or delete an existing report output format.

1. Under myMonitor, click **Saved Report Output Formats**.
2. Click the report output format you want to see (e.g., **Company, Industry**). The Saved Report Output Formats page is displayed. Click **rename** to rename the report format. Click **delete** to delete the report format from your saved report formats list.

MONITOR SUITE™ Opportunity Finder Intelligence Center Resources				
SAVED REPORT OUTPUT FORMATS				
myMONITOR				
	Name	Search Refinements	Date Saved	
Details	Orange, Blower, Test		3/2/2017 11:01 AM	
Delete	testing for user guide		3/2/2017 9:48 AM	
Delete	testing size of name that will appear in the new print section, this is a really long name but it still might work, hopefully it wont break the new print section but it is something to test just in case now even longer!		6/29/2016 10:25 AM	
Delete	Testing size of name that will appear in the new print section, this is a really long name but it still might work, hopefully it wont break the new print section but it is something to test just in case now even longer!		6/29/2016 10:22 AM	

3. Click **Edit Format** next to the report format you want to change.
4. Reorder the report sections by dragging and dropping them into the desired location or remove them by clicking the **Delete** icon in the Delete column.
5. After you have edited the report format, click **Save template**.
6. The Save Changes window is displayed. Do one of the following:
  - Select **Save changes to** and click **Save** to save the changes to the existing report format. A message is displayed informing you that the previous saved report output will be over-written. Click **OK**.
  - Select **Save changes as new Report Format** to save a new report format. Enter the name of the new report in the field and click **Save**.

## Managing Snippets and Annotations

A snippet is a snapshot of an individual section that you can add to a report for comparison purposes. Using myMonitor, you can edit or delete snippets you have saved and add or change annotations.

### EDITING AND DELETING SNIPPETS

1. Under myMonitor, click **Saved Snippets**. The Snippets list is displayed showing all snippets saved in Monitor Suite.
2. Do one of the following:
  - Click **Delete** next to the snippet you want to delete. A message is displayed confirming that you want to delete the snippet. Click **OK**.
  - Click **Edit** next to the snippet you want to edit. The Edit Snippet window is displayed. Edit the name of the snippet and notes as desired and click **Save**.

### CREATING ANNOTATIONS

You can create annotations to provide additional information about the report section.

1. Under myMonitor, click **Saved Snippets**.
2. Under Saved Snippets, click **Annotations**. The Annotation list is displayed.
3. On the Annotations page, click **Create New Annotation**. The Create Annotation window is displayed.
4. Enter the name of the annotation in the **Annotation Name** field.
5. Enter **Notes** about the annotation, if desired.
6. Enter or paste the annotation text in the **Enter or Paste Text** field.
7. Click **Save**. The annotation is added to the Annotations list.

### EDITING AND DELETING ANNOTATIONS

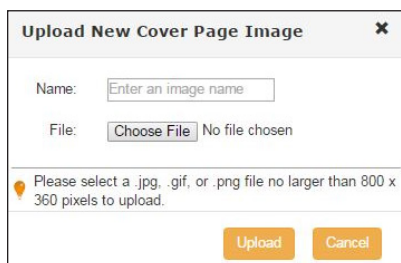
1. Under myMonitor, click **Saved Snippets**.
2. Under Saved Snippets, click **Annotations**. The Annotations list is displayed.
3. Do one of the following:
  - Click **Edit** next to the annotation you want to edit. The Edit Annotation window is displayed. Edit the annotation as desired and click **Save**.
  - Click **Delete** next to the annotation you want to delete. A message is displayed confirming you want to delete the snippet. Click **OK**.

## Managing Saved Images

You can upload images to Monitor Suite and add them to reports. Using myMonitor, you can upload, view, and delete images.

### UPLOADING IMAGES

1. Under myMonitor, click **Saved Images**. A list of images uploaded to Monitor Suite is displayed.
2. Click **Upload New Image**. The Cover Page Image Upload window is displayed.



**Upload New Cover Page Image** ✕

Name:

File:  No file chosen

Please select a .jpg, .gif, or .png file no larger than 800 x 360 pixels to upload.

3. Enter the name of the image in the *Name your cover page image* field.
4. Click **Browse** and navigate to the location of the graphic you want to upload.
5. Select the graphic you want to upload and click **Open**. The path and file name for the graphic is displayed in the *File* field.
6. Click **Upload**. A message is displayed confirming that the image has been saved.
7. Click **OK**. The image is added to the list.

#### VIEWING, RENAMING, AND DELETING IMAGES

1. Under myMonitor, click **Saved Images**. A list of all images uploaded to Monitor Suite is displayed.
2. Do one of the following:
  - Click the **View Image** icon next to the image you want to view. The image is displayed. Click **close** or press the **Esc** key to close the image.
  - Click **rename** under the name of the image you want to rename. Enter the new name of the image and click **Save**. A message is displayed confirming the image name has been updated.
  - Click **Delete** next to the image you want to delete. A message is displayed confirming you want to delete the image.

### Managing Portal Links

You can edit or delete portal link style templates or enhanced portal links using Portal Link Management in myMonitor. You can also copy the URL of an enhanced portal link to post to your firm's website.

#### EDITING AND DELETING PORTAL LINK STYLE TEMPLATES

To edit or delete portal link style templates, complete the following:

1. Under myMonitor, click **Portal Link Management**. The Portal Link Style Templates list is displayed showing all portal link style templates saved in Monitor Suite.
2. Do one of the following:
  - Click **Delete** next to the style template you want to delete. A message is displayed confirming that you want to delete the style template. Click **OK**.
  - Click **Edit** next to the style template you want to edit. The Style Templates screen is displayed. Edit the style template as desired, and click **Save**.

#### DELETING ENHANCED PORTAL LINKS

To edit or delete enhanced portal links, complete the following:

1. Under myMonitor, click **Enhanced Portal Links**. The Enhanced Portal Links list is displayed showing enhanced portal links saved by anchor type in Monitor Suite.
- Note:** If you have saved enhanced portal links in multiple anchor types, a list is displayed under Enhanced Portal Links in the left navigation area.
2. Select the anchor type (e.g., **Company**) for the enhanced portal link list you want to display.
  3. Click **Delete** next to the enhanced portal link you want to delete. A message is displayed confirming you want to delete the enhanced portal link.
  4. Click **OK**.



**COPYING AN ENHANCED PORTAL LINK**

To copy an enhanced portal link to your firm's portal site, complete the following:

1. Under myMonitor, click **Portal Link Management** and then click **Enhanced Portal Links**. The Enhanced Portal Links list is displayed showing enhanced portal links saved by anchor type in Monitor Suite.

**Note:** If you have saved enhanced portal links in multiple anchor types, a list is displayed under Enhanced Portal Links in the left navigation area.

2. Select an anchor type (e.g., **Company**) for the enhanced portal link list you want to display.
3. Click **Copy URL**. A message is displayed containing the section URL.
4. Copy the link, and click **OK**.

You can now embed the link on your firm's portal site. The enhanced portal link is automatically updated each time the portal site is accessed.

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#### LOOKING FOR MORE INFORMATION?

Monitor Suite is available on the Web at [monitorsuite.thomsonreuters.com](https://monitorsuite.thomsonreuters.com).

For assistance using Monitor Suite, call 1-877-347-6360.

For free reference materials, visit [legalsolutions.com/law-products/support/monitor-suite](https://legalsolutions.com/law-products/support/monitor-suite)



