

## Delphion Search Tips

### Tip: Basic Search Reminders: Did you know that...

--Stemming automatically occurs on Delphion, that is, when you enter a word, all words with the same stem are retrieved (e.g., prime retrieves primate, primaries, etc.). If you want the exact word, enclose it in quotation marks (e.g., "prime").

--Delphion automatically performs phrase searching (e.g., Optical fiber returns a result set that includes optical fiber, optical fibers and optic fiber.). To search a non-exact phrase, use parentheses and the AND connector (e.g., (Optical and fiber provides fiber optic, optical fiber and optical glass fiber.).

--Delphion processes queries in a particular order. For example, when using the AND and OR operators in the same query, place the words ORed together in parentheses: (CAT OR FELINE) AND DISEASE. If you want to search for patents with the words *feline* and *disease* in the Title, enter: (FELINE AND DISEASE) <in> title.

### Tip: What happens if you want to import patent numbers into a work file and the patents you requested are not available?

Delphion provides alternative/equivalent patents if the ones you requested are not available. You can view the equivalents in a Work File Validation Report. The Report tells you the number of requested patents replaced by equivalents and provides a link from which you can review details about the substitution(s). To accept the equivalents, click Save; to refuse, click Cancel Import, which cancels the entire Work File import operation.

### Tip: How do you make sure you have all patents (granted patents and unexamined applications) of a company that has merged with another company?

In this example you want to conduct a comprehensive search for Boeing patents. To conduct this search, you need to take into account not only original Boeing patents but any that have been reassigned to Boeing through mergers and acquisitions. McDonnell Douglas and Boeing merged in 1997; therefore, you cannot assume Boeing will be the name on patents published after the merger so you want to include patents from McDonnell Douglas that may now belong to Boeing. If a patent is reassigned, the name on the document keeps the name as it appeared on the original patent; thus, it can make the job of finding a patent difficult.

Using Delphion field search tool and the Corporate Tree feature helps to capture this information to retrieve these hard to find patents. Here's how:

1. From the Boolean search field box, choose assignee from the drop-down list, enter the company names Boeing OR Mcdonnell, and the countries you wish to search against. This part of the search searches all selected countries for the names entered, over 44 million patents.
2. Click the **Corporate Tree** button to the right of the Assignee names to display the Corporate Tree, enter the company name Boeing and click the **Original Assignee** button. This will search unexamined and granted documents that Boeing has submitted to the U.S. patent office. Note that Delphion lists the approximate number of patents submitted to the right of each entry. Check all of the Boeing entries you want to add to your search and click the **Save** button. **Note:** You can also select any McDonnell Douglas entries that might appear.
3. Select **Corporate Tree** again to find patents that are collected using merger, acquisition and cited reference data, type Boeing and click the **Hierarchy** button. The search is now looking at

U.S. granted patents, EP applications and granted patents, and PCT and WO applications. Select **Save** to populate the Boolean search form.

You now have a completed Boolean search page. Make sure to select the OR operator to put the parts of this search together.

### **Tip: How do I merge my Work Files?**

Work Files function like file folders containing Result Sets for the specific patent records that you want.

1. From the Work File Administration page, in the **ID** column, check the Work Files you want to merge.
2. Scroll to the bottom of the screen and choose the method you want to use for the merge.
  - Choose **OR** to combine sets of records and eliminate duplicates.
  - Choose **AND** to include only records that appear in all selected Work Files.
  - Additionally, you can select **AND NOT** and choose a Work File whose patents you do not want to appear in your new merged Work File.
3. Click **Merge** and the **Merge Work Files** page displays.
4. Enter a name for the new merged Work File.
5. Optionally, you can choose to change the description and display parameters before saving your new Work File.
6. Click **Save** to save your new Work File.
7. The **Work File Administration** page displays showing your new Work File.