Activating the LexisNexis® *PatentOptimizer*™ Service

Before using the LexisNexis *PatentOptimizer* service for the first time you must activate it, initiating the process by clicking one of the buttons in the service-specific toolbar installed to the Microsoft® Word, Internet Explorer, and Adobe Acrobat® programs.

1 In the LexisNexis *PatentOptimizer* toolbar, click any button *except* those for **Options** ( ) and **Help** ( ).

> ***Note:*** For a list of toolbar buttons, see "Accessing Service Features," following.

2 In the displayed dialog, type your **LexisNexis® User ID** and **Password**, then activate the **OK** button.

The dialog closes and the LexisNexis *PatentOptimizer* service launches the feature you selected at step 1.

> ***Note:*** If you subsequently want to use the service on a different computer, you must first deactivate it on the current computer (see "Deactivating the LexisNexis PatentOptimizer Service," on page 7 of this document) then install and activate it on the computer on which you want to use it.

Accessing Service Features

You can access the LexisNexis *PatentOptimizer* features in several ways, specifically via toolbar, drop-down menu, or right-click menu.

To access service features via toolbar

> ***Tip:*** The LexisNexis *PatentOptimizer* toolbar is available in the Microsoft Word, Internet Explorer, and Adobe Acrobat-programs, although only certain buttons (indicated by an asterisk in the following list) are included in the latter three programs. To view a description of any toolbar button, position your mouse pointer over the button for several seconds.

Click the applicable LexisNexis *PatentOptimizer* toolbar button:

- *Check References
- *Check Terms
- *Mark Terms
- *Check Measurements
- *Check Parts
- *Check Claims
- *Compare Claims
- *LexisNexis® Patent Research
- *Web Search
- *Dictionary
- *Thesaurus
- Patent Citation
- Mark Claims Wizard
- Update Claims References
- Remove Markup
- *Options
- *Help
- *Assign Applicable Client Matter ID

> ***Tip:*** Most program features are also available via drop-down menu, and some are available via right-click menu (as described in the following procedure). The Remove Markup feature, however, is available only via toolbar button.

To access service features via menu

> ***Tip:*** Certain program features are available only in the MIcrosoft Word program and only via menu, with the Mark Claim Number ( ) and Mark Claim Reference ( ) features being available via both the drop-down and right-click menus and the Term Variants feature ( ) being available only via the right-click menu. Access to program features via menu is not available in the Internet Explorer program.

- From the **Tools** menu in the Microsoft Word or Adobe Acrobat program, choose **LexisNexis® PatentOptimizer™** followed by the applicable feature (as listed under "To access service features via toolbar," preceding).

> ***Note:*** The drop-down menu varies slightly between programs, with the version in the Adobe Acrobat program containing a subset of the features offered via the Microsoft Word version.

OR

- Right-click anywhere within a Microsoft Word document, then from the displayed menu choose **LexisNexis® PatentOptimizer™** followed by the applicable feature (as listed under "To access service features via toolbar," preceding).

> ***Note:*** The right-click menu contains a subset of the features offered via the drop-down menu and is not available in the Adobe Acrobat program.

Controlling Display of Program Dialog Boxes

1 Open the Options dialog box by clicking the **Options** toolbar button ( ).

> ***Tip:*** You can also open the Options dialog via drop-down or right-click menu (see page 1 of this document).

2 In the Options dialog box, activate the **Style** tab.

3 Activate the **Show dialog and application side by side** check box until a checkmark either appears (to display most program dialog boxes beside those of the third-party programs with which the service interacts) or clears (to display program dialog boxes over those of third-party programs).

4 Activate the **OK** button.

Finding Definitions or Synonyms or Searching the Web for a Selected Term

1 In your patent document, position your mouse pointer over or double-click to highlight the word(s) to be searched.

2 Click the applicable toolbar button to perform the desired task, as follows:

- To find a definition, click the **Dictionary** button ( ).
- To find a synonym, click the **Thesaurus** button ( ).
- To search the Web for the term(s), click the **Web Search** button ( ).

> ***Tip:*** You can also initiate these tasks via drop-down or right-click menu (see page 1 of this document).

3 Select the desired search engine from the list to the right of the browser pane.

> ***Tip:*** To block popups when using the Dictionary, Thesaurus, and Web Search features, activate the **Block Popups** check box in the corresponding dialog box until a checkmark is displayed. To navigate among multiple results obtained using these features, activate the **Back** or **Forward** buttons, as applicable.

Replacing a Word With a Synonym

> ***Note:*** This task can be performed only in a Microsoft Word document.

1 Select the word you want to replace then access the Thesaurus feature as outlined in steps 1 and 2 under "Finding Definitions or Synonyms or Searching the Web for a Selected Term," preceding.

2 In the browser pane on the left side of the Thesaurus dialog box, highlight the synonym that you want to substitute for the word currently selected in your document.

3 Activate the **Replace** button.

The word you have selected is passed to the Microsoft Word **Find and Replace** feature, where you may proceed as you normally would when finding and replacing text in that program.

> ***Tip:*** To instead replace a word using only *LexisNexis PatentOptmizer* sources, use the **Term Variants** feature accessed via the right-click menu.

Highlighting Terms Used in a Patent Document

1 Click the **Mark Terms** toolbar button ( ).

The Mark Terms – Options dialog box opens.

> ***Tip:*** You can also initiate this task via drop-down or right-click menu (see page 1 of this document).

2 Set the options as desired.

3 Activate the **OK** button to proceed with marking the terms in your document.

> ***Tip:*** To subsequently unmark the document, repeat step 1 of this procedure.

Viewing Identified Terminology and Reference Sources

1 Open the Check Terms dialog box by clicking the **Check Terms** toolbar button .

> ***Note:*** You can also open the Check Terms dialog via drop-down or right-click menu (see page 1 of this document).

2 In the Check Terms dialog, use the **Search Terms** tab to view identified terms and phrases one at a time ***OR*** use the **All Terms** tab to view a table of all identified terms and phrases.

> ***Tip:*** To navigate to the location of an identified term or phrase in your patent document from the All Terms tab, click the term or phrase in the displayed table.

3 View reference information for identified terminology and perform additional related actions, as follows:

- Click the blue patent numbers in the **Prior Usage** tab to access existing patents containing the identified term or phrase.
- Click the reference link in the **Case Refs** tab to view the full text of cases referencing the identified term or phrase.
- View custom definitions from user-created dictionaries via the **Definitions** tab.
- Select a term in the **Alternate Terms** tab and use the **Replace** button (located on the **Search Terms** tab) to replace the original term.
- Designate terms and phrases for inclusion in a report by either double-clicking the term (if working on the All Terms tab) or activating the **Add to Report** check box until a checkmark appears (if working on either tab).

Searching the LexisNexis Total Research System for Patents Containing Identified Terminology

1 Open the Check Terms dialog box by completing step 1 under "Viewing Identified Terminology and Reference Sources" preceding.

2 Select the desired term or phrase by navigating to it (if working on the **Search Terms** tab) or clicking it (if working on the **All Terms** tab).

3 Filter results by a U.S. patent classification number, as desired, by entering that number in the **Class** field.

4 Activate either the **General** button (to search complete patent content regardless of granting date) *OR* the **Recent Claims** button (to search only claims sections of patents granted in the past 6 months).

Checking Title and Abstract Length

1 Open the Check Terms dialog box by clicking the **Check Terms** toolbar button .

> ***Note:*** You can also open the Check Terms dialog via drop-down or right-click menu (see page 1 of this document).

2 In the Check Terms dialog box, activate the **Text Format** tab.

The tab displays the character and word counts for the title and abstract sections beside which are listed the maximum allowable counts as determined by the USPTO, and below which is shown the actual text of the currently selected analyzed section (i.e., abstract or title), with any material extending beyond the maximum allowable length highlighted in red.

Managing Ignored Terms

1 Either click the **Check Terms** toolbar button ( ) then click the **Options** button in the Check Terms dialog box or just click the **Options** toolbar button ( ).

2 In the displayed dialog box, activate the **Ignored Terms** tab.

3 Perform the desired maintenance activity, as follows:

- To put a new word on the ignored terms list, type the word in the entry field then activate the **Add** button.
- To clear a word from the ignored terms list, click the word within the list then activate the **Remove** button.
- To clear all words from the ignored terms list, activate the **Remove All** button.

4 Save your input and close the dialog box by activating the **OK** button.

Inserting a Formatted Patent Citation

> ***Note:*** This task can be performed only in a Microsoft Word document.

1 Position your cursor at the point in your patent document where you want to insert the citation.

2 Open the Insert Patent Citation dialog box by clicking the **Citation** toolbar button ( ).

> ***Note:*** You can also open the Insert Patent Citation dialog box via drop-down or right-click menu (see page 1 of this document).

3 From the **Type** drop-down list, choose the applicable category for the patent you want to cite.

4 Type the full patent **Number** in the corresponding field.

5 Activate the **Get Patent Info** button.

6 Choose the desired citation format from the **Cite Format** drop-down list.

7 Activate the **Insert** button.

Creating a Citation Format

> ***Note:*** This task can be performed from the Microsoft Word program.

1 Click the **Citation** toolbar button ( ).

> ***Note:*** You can also initiate this task via drop-down or right-click menu (see page 1 of this document).

2 In the Insert Patent Citation dialog box, activate the **Add/ Edit Cite Formats** button.

3 In the Patent Citation Formats dialog box, create a new citation format by highlighting an existing format, then activating the **Copy** button.

4 In the **Edit** field in the middle of the dialog box, modify the name of the newly created format as desired.

5 In the lower pane, modify the definition for the newly created format by changing the text and punctuation outside of the bracketed material or the order of the bracketed material.

6 Activate the **Preview** button to view in the lowermost pane a sample citation using the new format.

7 Save the citation format by activating the **Save** button.

> ***Tip:*** To reorganize all but the default citation format in order of preference, click the listing for a citation format that you want to move, then activate the **Up Arrow** or **Down Arrow** button until the selected listing is in the desired position. To permanently remove a citation format, click to select the corresponding listing, then activate the **Delete** button.

Viewing Claim Structure

1 Open the Check Claims dialog box by clicking the **Check Claims** toolbar button ( ).

> ***Note:*** You can also open the Check Claims dialog box via drop-down or right-click menu (see page 1 of this document).

2 In the Check Claims dialog box, activate the **Claim Tree** tab.

The Claim Refs pane of the tab illustrates in tree format the structure of your document's claims section, with each claim listing constituting a separate branch indented and assigned an icon per the claim's relationship status.

> ***Note:*** For further information, see "Viewing Claim Relationships" on page 107 of the User's Guide.

Researching Claim Elements on the Internet

1 Open the Check Claims dialog box by clicking the **Check Claims** toolbar button ( ).

> ***Note:*** You can also open the Check Claims dialog box via drop-down or right-click menu (see page 1 of this document).

2 In the Check Claims dialog, enable the **Elements** option by activating the corresponding check box until a checkmark is displayed.

The Claim Refs pane refreshes to display a list of elements beneath the branch for the claim in which they appear in the claims section of your patent document.

3 In the **Claim Refs** pane, choose the listing for the claim for which you want to research elements.

4 Activate the **Search Claims** button to open the Search Claims dialog box.

5 In the **Search** area, activate the applicable radio button to choose the type of search you want to perform (i.e., ***lexis.com***®, **Scopus**®, or **The Web**).

6 As applicable based on the type of search being performed, choose the specific source you want to search from the list in the Search area pane.

7 Activate the **Search** button to perform the search and review the results.

> ***Tip:*** You may save material associated with your search for and associate it with a specific claim or element. For details on doing so, refer to "To research claim elements" beginning on page 113 of the User's Guide and, specifically, steps 13 through 16 of that procedure.

Comparing Multiple Patent Documents

1 Open the first document that you want to compare.

2 Click the **Compare Claims** toolbar button ( ), then activate the **OK** button in the displayed message.

3 Open the next document that you want to compare.

4 Click the **Compare Claims** toolbar button ( ).

The Compare Claims dialog is displayed, indicating which other documents are designated for comparison.

5 Proceed as applicable based on the desired course of action:

- To compare the documents designated up to this point, activate the **Compare Now** button. The Compare Claims window opens. Proceed to step 6.

OR

- To designate additional documents for comparison, repeat steps 3 and 4 for each such document.

OR

- To negate the designation for comparison of the most recently opened document, activate the **Cancel** button, then repeat step 5.

6 Compare the chosen documents by reviewing the information displayed in the Compare Claims window.

> ***Note:*** For further information, see "Comparing Patent Documents" on page 147 of the User's Guide.

Verifying Antecedent Basis

1 Open the Check Claims dialog box by clicking the **Check Claims** toolbar button ( ).

> ***Note:*** You can also open the Check Claims dialog box via drop-down or right-click menu (see page 1 of this document).

2 In the Check Claims dialog box, activate the **Antecedent Basis** tab.

The tab displays a table listing elements appearing in the document along with codes and icons denoting status pertaining to antecedent basis.

> ***Note:*** For further information, see "Verifying Antecedent Basis in a Patent Document" on page 124 of the User's Guide.

Assessing Language Consistency in a Patent Document

1 Open the Check Claims dialog box by click the **Check Claims** toolbar button ( ).

> ***Note:*** You can also open the Check Claims dialog box via drop-down or right-click menu (see page 1 of this document).

2 In the Check Claims dialog, activate either the **Terms** or the **Phrases** tab.

The tab displays a table listing either the terms or phrases found in the description and claims sections of your patent document.

> ***Tip:*** Should you find inconsistencies in language usage, you can navigate to the corresponding material in your document directly from the Check Claims dialog box then post the desired corrections. For details on doing so, refer to "To assess language consistency in a patent document" beginning on page 132 of the User's Guide and, specifically, steps 6 through 8.

Programmatically Marking Claims and Claim References

> ***Note:*** This task can be performed only in a Microsoft Word document.

1 Open the Mark Claims Wizard by clicking the **Mark Claims Wizard** toolbar button ( ).

> ***Tip:*** You can also open the Mark Claims Wizard via drop-down or right-click menu (see page 1 of this document).

2 When the tool has found the start of your claims section, choose **Yes** in the displayed prompt.

3 When the tool has found a claim or claim reference, choose **Yes** in the displayed prompt.

> ***Tip:*** Marking claims and claim references allows you to both verify numbering and automate renumbering in the event that you add, move, or remove claims. For further details on using this feature, see "Verifying Claim Numbering and Referencing" on page 138 of the User's Guide.

Detecting Part-Labeling Inconsistencies

1 Open the Check Parts dialog box by clicking the **Check Parts** toolbar button ( ).

> ***Tip:*** You can also open the Check Parts dialog box via drop-down menu (see page 1 of this document).

2 Review the displayed information, using the following as a reference in doing so:

- The Parts Index pane on the Check Parts tab displays in numerical order each occurrence of all identified part numbers along with the part name corresponding to each part-number occurrence, allowing you to easily see any part numbers associated with multiple part names.
- To see which if any part names are associated with multiple part numbers, activate the **Find Repeated Parts** button.

> ***Tip:*** For further details on using this feature, see "Detecting Part-Labeling Inconsistencies" beginning on page 165 of the User's Guide.

Correcting Part-Labeling Inconsistencies

> ***Note:*** This task can be performed only in a Microsoft Word document.

1 Open the Check Parts dialog box by clicking the **Check Parts** toolbar button ( ).

> ***Tip:*** You can also open the Check Parts dialog box via drop-down menu (see page 1 of this document).

2 In the Check Parts dialog box, activate the **Edit** button to open the Edit Parts dialog box.

3 In the list of part labels, select one or more labels for which you want to post corrections.

4 Indicate the desired changes, using the following as a guide in doing so:

- To assign a different name to the selected part label(s), type the desired name in the **Replace selected with** field within the **Names** area.
- To assign a single new number to the selected part label(s), choose **New Number** from the **Replace selected with** drop-down list in the **Numbers** area, then type the desired number in the field beside the drop-down list.
- To assign a range of new numbers to multiple selected part labels, first choose **Range starting at** from the **Replace selected with** drop-down list in the **Numbers** area, next type the starting number of the desired range in the field beside the drop-down list, then choose the increment by which you want to increase the numbers of the selected part label(s) numbered progressively higher than the starting part label.

> ***Tip:*** For further details on renumbering part labels across a range, please see "To correct part numbers" beginning on page 180 of the User's Guide and, specifically, step 5 through 7 of that procedure.

5 Activate the **Preview** button to review your change(s) before updating your document accordingly.

New columns showing your changes are added to the table displayed in the Edit Parts dialog box.

6 Begin posting part-labeling corrections to your document by activating the **OK** button and then activating either the **Replace** button (to post corrections one at a time after reviewing each) or the **Replace All** button (to post all corrections at once without having the opportunity to review them first) in the displayed dialog box.

> ***Tip:*** For further details on using this feature, see "Correcting Part-Labeling Inconsistencies" beginning on page 174 of the User's Guide.

Inserting Part Labels via Placeholders

> ***Note:*** This task can be performed only in a Microsoft Word document and requires that the name and number for the applicable part label be spelled out at least once in the document.

1 At each location within the abstract, claims, and/or detailed description section where you want to insert the part label via placeholder, type placeholder information per the following convention (substituting actual data for the bracketed material and omitting the brackets):

[part prefix][number of part being used]

2 Open the Check Parts dialog box by clicking the **Check Parts** toolbar button ( ).

> ***Tip:*** You can also open the Check Parts dialog box via drop-down menu (see page 1 of this document).

3 In the Check Parts dialog box, activate the **Insert Part Names** tab to view all placeholders appearing in your document.

4 In the Part Place Holder pane, select the placeholder(s) for which you want to insert the indicated part label(s), then activate the **Insert** button.

A message is displayed, citing the number of part labels to be inserted and informing you that any changes made can be negated using the **Edit/Undo** function in the Microsoft Word application.

5 Activate the **OK** button to close the message and substitute the part labels for the selected placeholder(s) in your patent document.

> ***Tip:*** For further details on using this feature, including editing suggested part labels before inserting them, see “Inserting Part Labels via Placeholders” beginning on page 189 of the User’s Guide.

Numbering Unnumbered Parts in the Abstract, Claims, and Detailed Description Sections

> ***Note:*** This task can be performed only in a Microsoft Word document.

1 Open the Check Parts dialog box by clicking the **Check Parts** toolbar button ( ).

> ***Tip:*** You can also open the Check Parts dialog box via drop-down menu (see page 1 of this document).

2 Activate the **Insert Part Numbers** tab to view a list of all parts missing part numbers in the abstract, claims, and detailed description sections.

The tab displays in table format a list of parts lacking part numbers along with suggested numbers for the parts, presented per analyzed document section.

3 In the Invalid Parts pane, select the part label(s) that you want to number in your document, then activate the **Insert** button.

4 Begin posting part-numbers to your document by activating the **OK** button in the displayed message and then activating either the **Replace** button (to insert numbers one at a time after reviewing each) or the **Replace All** button (to insert all numbers at once without having the opportunity to review them first) in the displayed dialog box.

> ***Tip:*** For further details on using this feature, including editing part numbers before inserting them, see “Managing Unnumbered Part Labels” beginning on page 185 of the User’s Guide.

Refining Commonly Used Measurements

> ***Note:*** This task can be performed only in a Microsoft Word document.

1 Click the **Check Measurements** toolbar button ( ).

The Check Measurements dialog box opens, displaying in table format a list of all detected commonly used measurements appearing within the document along with suggested substitutions.

> ***Tip:*** You can also open the Check Measurement dialog box via drop-down menu (see page 1 of this document).

2 Click to select the measurement(s) you want to refine.

3 Activate the **Replace** button to replace the measurement(s) with the suggested measurement(s).

A message is displayed, prompting you to confirm your desire to replace the selected measurement(s) with the suggested alternate measurement(s).

4 Activate the **OK** button to close the confirmation message and replace the selected measurement(s) are with the suggested alternate measurement(s) in your patent document.

> ***Tip:*** For further details on using this feature, see “Refining Commonly Used Measurements” beginning on page 203 of the User’s Guide.

Viewing Information on Referenced Patents

Click the **Check References** toolbar button ( ).

The Check References dialog box opens, displaying in table format information related to each patent referenced in your document.

> ***Tip:*** You can also open the Check Reference dialog box via drop-down menu (see page 1 of this document). For further details on using this feature, see “Analyzing Referenced Patents” beginning on page 213 of the User’s Guide.

Generating Reports

By activating the **Report** button in the dialog boxes listed below you can generate documents outlining corresponding information related to your patent documents, as follows:

- *Check Terms* dialog box — Prior usage, case reference, alternate suggested terminology, and/or custom definitions for terms or phrases that you selected before activating the Report button
- *Check Claims* dialog box — Number of claims; a claim tree and/or chart; reference bibliographic data; terms and/or phrases found in the claims section but not the description section; term and/or phrase usage in claims; and/or Antecedent basis
- *Compare Claims* dialog box — Documents that you compared; the elements, terms, and/or phrases that were changed between documents and the documents in which the changes occurred; and the claim structure of each compared document
- *Check Parts* dialog box — Identified part numbers and names; part names associated with multiple part numbers, ordered alphabetically; unnumbered parts organized by section (i.e., abstract, claims, and detailed description) and ordered per occurrence in the document; and any designated placeholders and corresponding part name and number

- *Check References* dialog box — Post-issuance activity and ownership information for referenced patents that you selected before activating the Report button
- *Check Measurements* dialog box — Current measurements along with corresponding suggested alternatives, if any

Defining Section Heading Aliases

In extracting information to perform functions, the service looks for pre-defined wording to identify sections in patent documents. You can, however, set the program to recognize sections based on unique, user-defined wording.

1 Open the Options dialog box by clicking the **Options** toolbar button ( ).

> ***Tip:*** You can also open the Options dialog via drop-down or right-click menu (see page 1 of this document).

2 In the Options dialog, activate the **Section Headings** tab.

3 For each document section for which you want to specify one or more heading aliases, type the desired wording in the corresponding pane.

> ***Tip:*** To define multiple aliases for a given section, press the **ENTER** key between entries.

4 When you are finished, save your input and close the Options dialog box by activating the **OK** button.

Deactivating the LexisNexis *PatentOptimizer* Service

1 Open the Options dialog box by clicking the **Options** toolbar button ( ).

> ***Tip:*** You can also open the Options dialog via drop-down or right-click menu (see page 1 of this document).

2 Activate the **Updates and Deactivation** tab.

3 Click the **Deactivate** button.

A dialog box opens, prompting you for your LexisNexis® User ID and Password.

4 Type your **LexisNexis® User ID** and **Password**, then activate the **OK** button.

The dialog box closes and a message is displayed, indicating that the service has been successfully deactivated.

5 Activate the **OK** button to close the message and return the focus to the Options dialog box, where the Deactivate button is now unavailable.

Tracking Billable Activity by Client

As an aid in determining client billing charges, the LexisNexis *PatentOptimizer* service provides a tracking mechanism for certain analysis and report activities performed by the service on a given day. In tracking billable activity, the LexisNexis *PatentOptimizer* service interfaces with the PowerInvoice™ service, from which you can generate monthly reports. Before tracking billable activity, you must store IDs for your clients.

▸ To store client matter IDs

1 Open the Options dialog box by clicking the **Options** toolbar button ( ).

> ***Tip:*** You can also open the Options dialog via drop-down or right-click menu (see page 1 of this document).

2 Activate the **Manage Client Matter IDs** tab.

3 Activate the **Add** button. A new empty entry with a blinking cursor is displayed.

4 In the empty entry, type the applicable client matter ID.

> ***Tip:*** If a specific format is required for the client matter ID, that format will be illustrated in the area just beneath the list of client matter IDs.

5 When you are finished typing the client matter ID, press the ENTER key or click elsewhere within the dialog. The client matter ID list refreshes to reflect the addition of the client matter ID.

> ***Tip:*** By default, client matter IDs are listed in reverse chronological order, that is, with the most recently stored client matter ID listed first.

6 Repeat steps 3 through 5 for each client matter ID you want to store.

7 When finished storing client matter IDs, save your input and close the Options dialog by activating the **OK** button.

> ***Note:*** For instructions on editing or deleting previously stored client matter IDs, please refer to “Tracking Billable Activity by Client” on page 26 in the User’s Guide.

▸ To track billable activity by client

> **IMPORTANT!** Whenever you perform a billable activity using the LexisNexis *PatentOptimizer* service while online, tracking information is sent to the PowerInvoice program in real time. If for some reason during a given month you elect to use the LexisNexis *PatentOptimizer* service offline, billable-activity information will be stored locally until you again use the service while online — which you must do before 10:00 p.m. E.S.T. of the last day of the month if you want the stored information to be included in the report for that month.

1 Open the desired document in the Microsoft Word, Internet Explorer, or Adobe Acrobat program as you normally would.

2 Initiate the activity tracking process in one of the following manners, as applicable:

- If your *lexis.com*® ID is configured for mandatory entry of client matter IDs, and you have not previously selected a client matter ID against which to track activity since last opening the Microsoft Word, Internet Explorer, or Adobe Acrobat program, click the toolbar button for the billable activity that you want to perform [i.e., either (Check References), (Check Terms), (Mark Terms), (Check Measurements), (Check Parts), (Check Claims), (Compare Claims), (Patent Citation), or (Mark Claims Wizard)]. The Client Matter ID Selection dialog is displayed.

OR

- If your *lexis.com* ID is configured for mandatory entry of client matter IDs, and you have previously selected a client matter ID against which to track activity since opening the Microsoft Word, Internet Explorer, or Adobe Acrobat program on the given day, or if your *lexis.com* ID is not configured for mandatory entry of client matter IDs, click the **Assign Applicable Client Matter ID** button ( ) in the toolbar. The Client Matter ID Selection dialog is displayed.

3 In the Client Matter ID Selection dialog, choose the entry corresponding to the client for whom you are performing the activity.

> ***Tip:*** If for some reason you do not want to track activity for a particular client, choose the **<none>** entry.

> ***Note:*** By default, client matter IDs are listed in reverse chronological order, that is, with the most recently stored client matter ID listed first. For information on sorting and finding client matter IDs, see the Tip on page 33 in the User's Guide.

4 Activate the **OK** button. The Client Matter ID Selection dialog closes, and you should proceed as applicable:

- If at step 2 of this procedure you clicked the toolbar button for the billable activity that you want to perform, proceed directly with the activity. The service will track the activity being performed against the chosen client matter ID.

OR

- If at step 2 of this procedure you clicked the Assign Applicable Client Matter ID button, now click the toolbar button for the billable activity that you want to perform [i.e., either (Check References), (Check Terms), (Mark Terms), (Check Measurements), (Check Parts), (Check Claims), (Compare Claims), (Patent Citation), or (Mark Claims Wizard)], then proceed with the activity. The service will track the activity being performed against the chosen client matter ID.

> **IMPORTANT!** Client matter ID selection remains active until either you close the Microsoft Word, Internet Explorer, or Adobe Acrobat program or you choose a different client matter ID.

Technical Support

Technical Support is available 24 hours a day, 7 days a week. When calling for technical assistance, please have your user ID ready and be at the computer on which the program is running.

Phone: 1-800-543-6862 (U.S. and Canada)

Web: http://www.lexisnexis.com/custserv/

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