



# Monitor Suite

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Doing more with less



THOMSON REUTERS

**WEST**<sup>®</sup>

# Sample Scenario

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A patent litigation firm is interested in finding new clients who have been facing increased Patent Infringement cases over the past 5 years, they could:

## Utilize Westlaw:

Search through hundreds of dockets and cases, looking for relevant trends and opportunities.

OR

## Monitor Suite

Get the same results in a matter of minutes...



# Source Content

Litigation, Patent & Trademark Data is drawn from Westlaw.

Including:

- All Federal Dockets
- 28 States Docket coverage
- USPTO Patent Filings
- Derwent International Patents
- US Trademarks
- SEC Filings
- SEDAR – Canadian
- LIVEEDGAR
- LEXPERT

The image shows three overlapping document pages. The top page is titled 'CASE INFORMATION' and contains fields for Case Number, Jury Demand, Demand, Nature of Suit, Key Name (RAM DIST), Jurisdiction, Plaintiff (Dustin A. B. Duzak, SC, Adam L. B.), Attorney(s), Status, Attorney A (J.P. STADT), Attorney F, Defendant (Microsoft), and Entry (4). The middle page is titled 'United States Patent Application' and contains fields for Published Application Number (2009011311), Title (INPUT MANA), Inventor(s) (NEED), Assignee (MICROSOFT), Application Number, Application Date, International Class, U.S. Class (719-315), and Related Information (No. 7,983,014, which Pat. No. 7,411,479). The bottom page is titled 'MICROSOFT CORP' and contains a 'TABLE OF CONTENTS' with links for COVER PAGE, OTHER EVENTS, LIST OF EXHIBITS, SIGNATURES, EXHIBIT INDEX, ADDITIONAL EXHIBITS, and CONSENTS-EXPERTS-COUNSEL. It also includes 'COMPANY INFORMATION' such as Company Name (MICROSOFT CORP), Company URL (http://www.microsoft.com), Address (One Microsoft Way), City (Redmond), State Province (WASHINGTON), Zip Code (980526399), Entry Phone Fax Number (4258626080), and State Incorporation Name (WASHINGTON).

# Overview

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Provides legal trending & analytic data for:

- Companies
- Industries
- Law Firms
- Attorneys
- Practice Areas
- Courts



# Overview

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Helps firms quickly identify:

- Client up sell opportunities
- Prospective new clients
- Competitive Threats
- New Market expansion opportunities

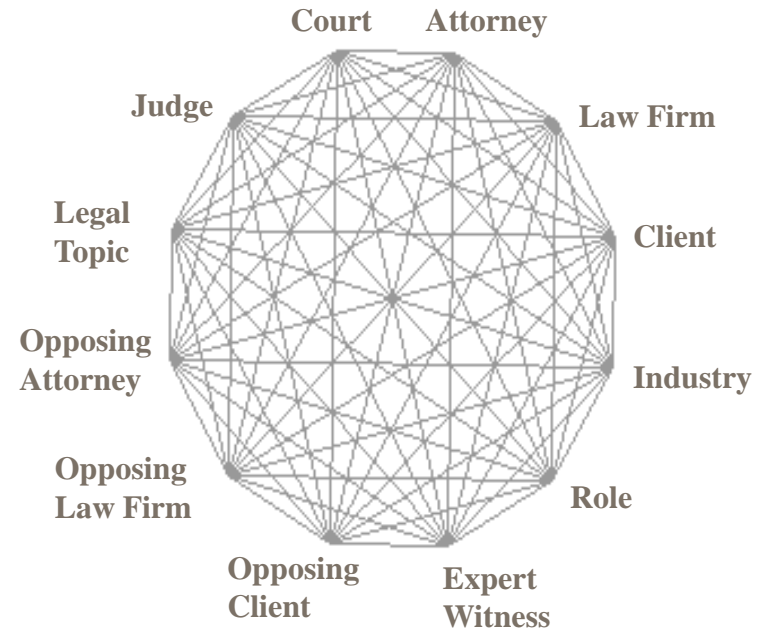
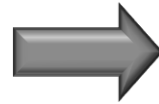


# Value Exchange

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**Input:** External data sources

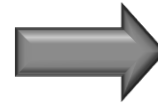
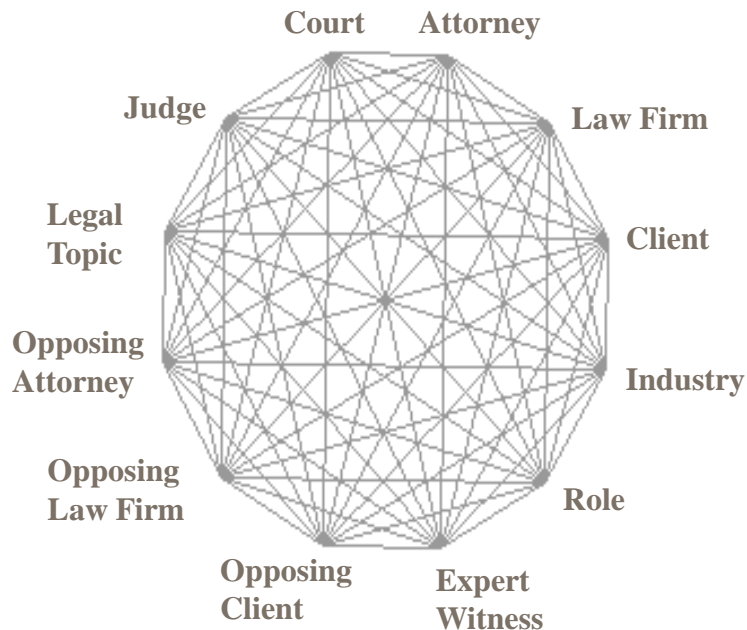
- Dockets / Cases
- Patent & Trademark Filings
- Deals
- Firm Contact Data



# Value Exchange

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**Output:** Identification of relationships answer BOL business questions



- Strategy
- Client Development
- Talent Mgmt

# Content Offerings

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## **Litigation Content:**

Analyze the emerging litigation trends and activity of key clients, industries, geographies and other firms to support business development and client retention.

## **Deal Content:**

Supports business development needs for M&A and Securities practices by mapping relationships between attorneys, underwriters, issuers, buyers and acquisition targets

## **IP Content:**

Combines data from docket summaries, and patent and trademark filings, to provide an unprecedented analysis of all phases of IP lifecycle for companies, industries and technology types



# Monitor Suite Today

# Choose Report Subject

- 13 report subjects to choose from
- Quick or advanced search options
- Specify entity of interest

The screenshot displays the 'MONITOR SUITE' interface. At the top, navigation links include 'HOME', 'myMONITOR', 'RESOURCES', and 'SIGN-OUT'. The main section is titled 'ADVANCED SEARCH' and features a 'Refine Search (optional)' sidebar with categories like 'Litigation Events', 'Patent Events', 'Trademark Events', 'Deals Analysis (M&A) Events', and 'Deals Analysis (R&P) Events'. A 'Date Range' is set to 'Last five years (07/2004 to 07/2009)'. The search criteria are set to 'Company', with a dropdown menu open showing 13 options: 'Company', 'Select an entity type', 'Attorney', 'Company', 'Court', 'Financial Advisor', 'Headquarters Location', 'Industry', 'Inventor Location', 'Judge', 'Law Firm', 'Patent Classification', 'Pending Transactions', 'Practice Area', 'Security Type', 'Trademark Classification', and 'Underwriter'. The 'Company' option is selected. A search input field contains the placeholder 'Enter Company Name' and a 'LOOK-UP' button. The footer includes copyright information for Thomson Reuters and a logo.

# Granular Search Refinements

- Apply filters before running report
- Specify date range
- Browse or search for specific topical area filters

The screenshot displays the MONITOR SUITE interface. At the top, there are navigation links: HOME, myMONITOR, RESOURCES, and SIGN-OUT. The main section is titled "ADVANCED SEARCH" and includes a "Search by: Company" filter set to "MICROSOFT CORP" with a "remove" link. Below this, the "Date Range" is set to "Last five years (07/2004 to 07/2009)". A "Refine Litigation Events - Practice Area" section is active, showing a list of filters. A blue box highlights the "Antitrust / Trade Regulation" filter, which is expanded to show a sub-list of related categories, including "Antitrust / Trade Regulation - Not Further Classified", "Aviation", "Computers, Software, and Internet", "Consumer Protection", "Covenants Not to Compete", "Crimes and Prosecutions", "Exemptions and Defenses", and "Federal NOS: Other Statutes: Antitrust (410)".

MONITOR SUITE

HOME myMONITOR RESOURCES SIGN-OUT

ADVANCED SEARCH

Search by: Company  
Refine Search (optional)

Company: MICROSOFT CORP remove  
Date Range: Last five years (07/2004 to 07/2009)

Undo Last Action | New Search

Refine Litigation Events - Practice Area

BACK TO SEARCH

ADD Administrative  
ADD Agriculture  
ADD Antitrust / Trade Regulation  
ADD Appeals  
ADD Arbitration / ADR  
ADD Art, Entertainment, and Sports Law  
ADD Bankruptcy  
ADD Business Organizations  
ADD Civil Rights  
ADD Commercial Law and

ADD Antitrust / Trade Regulation - Not Further Classified  
ADD Aviation  
ADD Computers, Software, and Internet  
ADD Consumer Protection  
ADD Covenants Not to Compete  
ADD Crimes and Prosecutions  
ADD Exemptions and Defenses  
ADD Federal NOS: Other Statutes: Antitrust (410)

# Company Reports

- See both distribution and trending for legal activity
- Easily navigate report sections
- Drill down on particular analytics of interest
- Save Reports
- Create Portal Links to report sections

MONITOR SUITE HOME myMONITOR RESOURCES SIGN-OUT

MICROSOFT CORP COMPANY SEARCH RESULTS save | create link | print/export | snippet

RESULTS - Hide Search Criteria Undo last action | Edit Company | New Search

[Company Summary \(1 company\)](#)  
[Litigation \(2120 events\)](#)  
 Practice Area  
 Courts  
 Law Firm Size  
 Docket and Opinion Breakdown  
**Law Firm Representation**  
 Presiding Judges  
 Attorney Representation  
 Legal Roles  
 Company Distribution  
 Industry Distribution  
 Source Documents  
 Company Name Variations  
 Source Description  
[Patent \(29757 events\)](#)  
[Trademark \(596 events\)](#)  
[Deal \(R&P\) \(2 events\)](#)  
[Deal \(M&A\) \(76 events\)](#)

**Company:** MICROSOFT CORP  
**Date Range:** Last five years (07/2004 to 07/2009) [edit](#)

**MICROSOFT CORP Law Firm Representation Trends & Analysis**

Show Description

**Law Firm Representation Distribution**

Law Firm Representation	Profile	Occurrences	%
<input type="checkbox"/> K&L Gates LLP		259	14.1%
<input type="checkbox"/> Perkins Coie		150	8.2%
<input type="checkbox"/> Fish & Richardson P.C.		136	7.4%
<input type="checkbox"/> Microsoft Corporation		111	6.0%
<input type="checkbox"/> Holland & Knight LLP		71	3.9%
<input type="checkbox"/> Montgomery McCracken, Walker & Rhoads, LLP		68	3.7%
<input type="checkbox"/> Sidley Austin LLP		54	2.9%
<input type="checkbox"/> Sullivan & Cromwell LLP		50	2.7%
<input type="checkbox"/> Heller Ehrman LLP		43	2.3%
<input type="checkbox"/> Other Law Firms (Full List)		893	48.7%

**REFOCUS RESULTS**

**Law Firm Representation Trend**

Click on a chart and drag mouse to zoom in on a chart area.

\*Data for partial year only

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# Customize Print Output

- Firm Branded Cover Sheet
- Add/Remove Sections
- Re-order
- Add Annotations
- Create Print Templates for easy re-use

MONITOR SUITE CLOSE

**REPORT OUTPUT OPTIONS**

- Customize Cover Page
- Customize Sections**
- Choose Output Format

[DOWNLOAD](#)

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**CUSTOMIZE SECTIONS**

**Template Options**

Select Report Format  [Apply](#)

Template (optional)

**Choose report sections**

By default, all sections are included. Uncheck to remove section from output.

Company Summary
  Litigation
  Patent
 [ADD SNIPPET](#)

Trademark
  Registrations and Pricing
  Mergers & Acquisitions

**Customize report sections by deleting or re-ordering**

Drag and drop to re-order sections or delete to remove from the report. Use the Select color bar above to move an entire section. Once you've completed your selection click continue to choose your report format.

[Undo Last Action](#) | [Restore to default](#)

[SAVE TEMPLATE](#)

Report Sections	Preview	Delete	Add Annotation
Table of Contents		X	
Search Criteria			
Litigation: Practice Area Trends & Analysis	●	X	■
Litigation: Court Trends & Analysis	●	X	■
Litigation: Law Firm Size Trends & Analysis	●	X	■
Litigation: Docket and Opinion Trends & Analysis	●	X	■
Litigation: Law Firm Representation Trends & Analysis	●	X	■
Litigation: Presiding Judge Trends & Analysis	●	X	■
Litigation: Attorney Representation Trends & Analysis	●	X	■
Litigation: Legal Role Trends & Analysis	●	X	■
Litigation: Company Distribution Trends & Analysis	●	X	■
Litigation: Industry Distribution Trends & Analysis	●	X	■
Litigation: Source Documents	●	X	■
Litigation: Company Name Variations	●	X	■
Litigation: Source Description	●	X	■
M&A: Transaction Status Trends & Analysis	●	X	■
M&A: Value Range Trends & Analysis	●	X	■
M&A: Financial Advisor Trends & Analysis	●	X	■
M&A: Law Firm Representation Trends & Analysis	●	X	■
M&A: Law Firm Role Trends & Analysis	●	X	■
M&A: Attorney Representation Trends & Analysis	●	X	■
M&A: Company Distribution Trends & Analysis	●	X	■
M&A: Industry Distribution Trends & Analysis	●	X	■
M&A: Recent Company Documents	●	X	■
M&A: Headquarters Location Trends & Analysis	●	X	■
M&A: Acquirer Firm to Target Firm Analysis	●	X	■
M&A: Acquirer Firm to Target Attorney Analysis	●	X	■
M&A: Acquirer Attorney to Target Firm Analysis	●	X	■
M&A: Acquirer Attorney to Target Attorney Analysis	●	X	■
M&A: M&A Source Documents	●	X	■
M&A: Company Name Variations	●	X	■
M&A: Source Description	●	X	■

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# Monitor Suite *Tomorrow*

# Analytic Toolkit – Report Builder

- Supports more strategic business development use-cases
- Generate lists of companies, law firms or attorneys, with specific attributes
- Integrate results into client development workflows and systems

The screenshot displays the 'MONITOR SUITE' interface for the 'Analytic Toolkit - Report Builder'. At the top, navigation links include 'HOME', 'myMONITOR', 'RESOURCES', and 'SIGN-OUT'. A progress bar shows five steps: 'Choose Report Subject', 'COMPANY Attributes' (highlighted in orange), 'Legal Event Attributes', 'Review Criteria', and 'Format Report & Run'. The main content area is divided into two panels. The left panel, titled 'Choose Company Attributes', features a 'CONTINUE' button and several expandable sections: 'HEADQUARTERS LOCATION', 'INDUSTRY', 'FINANCIAL METRICS' (with a dropdown arrow), 'STATIC' (with a dropdown arrow), '% CHANGE', 'GROWTH RATE', and 'EMPLOYEES'. Under 'FINANCIAL METRICS', two options are visible: 'REVENUE - MOST RECENT QUARTER' and 'REVENUE - MOST RECENT FISCAL YEAR'. The right panel, titled 'Report Criteria', shows a summary of the selected criteria: 'Show me companies with the following attributes:'. The criteria listed are: 'Headquarters in California, Oregon or Washington' with an 'AND Change to OR' link; 'Industry is Aerospace & Defense' with an 'AND Change to OR' link; and 'Revenue is > \$ 50 Billion'.

# Seamless SharePoint Integration

- Integrate Monitor Suite analytics seamlessly into SharePoint
- Customize colors & fonts
- Choose from variety of layout options
- Transparent authentication
- Dynamic creation

Welcome Dave Whiteside

**Harper | net** Harper & Mayer, LLP

Home Practice Administration Offices Training Clients Search Friday May 8th, 2009

HarperNet > Clients > Pages > Client.aspx All Sites

### Client Dashboard- Microsoft

**Client Profile**

Client Number: 099944  
 Address: One Microsoft Way  
 City/State: Redmond, WA  
 Zip: 98052-6399  
 Contact: Horacio Gutierrez  
 Phone: 425-882-8080  
 Open Date: 12 / 20 / 2002

**Business Description:**  
 Microsoft Corporation (Microsoft) is one of the largest IT companies in the world engaged in developing, manufacturing, licensing, and supporting software products.

**Microsoft in the News**

**Encyclopedic Knowledge, Then vs. Now**  
 By RANDALL STROSS  
 Much planning went into Microsoft's Encarta, but ultimately it couldn't compete with Google's Algorithms.  
 Wall Street Journal - May 3rd, 2009

**Microsoft Fights Antitrust Charge Over Its Browser**  
 By KEVIN J. O'BRIEN  
 Microsoft is responding to Opera's accusation that bundling Internet Explorer with Windows harms the market for browsers.  
 Wall Street Journal - April 30, 2009

**Microsoft Profit Falls for First Time in 23 Years**  
 By ASHLEE VANCE  
 The company's revenue dropped 6 percent and its profits by 32 percent compared with the same quarter last year.  
 Wall Street Journal - April 24, 2009

**Microsoft Litigation Trends by Practice Area**

**Active Matters** 1 to 18 of 18

Matter Number	Matter Description	Open Date	Billing Attorney
099944.00018	Lorem ipsum dolor sit amet	08/06/2008	JONES, B
099944.00012	Sed lectus sapien, faucibus vel	10/25/2007	JONES, B
099944.00003	Consectetur quis, viverra a, odio	01/21/2005	JONES, B
099944.00001	Vestibulum ante ipsum primis in	01/15/2005	JONES, B
099944.00013	Nullam vel tellus in diam dictum	04/22/2007	JONES, B
099944.00015	Fusce scelerisque ante et libero	06/04/2007	JONES, B
099944.00016	Praesent faucibus ipsum vitae	05/01/2008	JONES, B

**Recent Firm Work-Product**

...Attach Order and Writ of Attachment Against I.R.S.C.E. Attach Order and Writ of Attachment. Attach Order and Writ of Attachment because this Court's order issuance of a Right to Attach Order...

# Integrate Firm Relationships into Monitor Suite

- Integration with Contact Networks
- See who in your firm knows entities of interest within Monitor Suite
- Include relationships in printed reports

