Overview

There are three types of count options each containing a number of metrics.

1. Patent families
2. Forward citations
3. Other metrics

1. Patent families

These metrics are simple counts of patent families with different limits:

Limited by legal status

- Count of Alive patent families
- Count of Pending patent families
- Count of Granted patent families
- Count of Dead patent families

Limited by the presence of events
• Count of Litigated patent families
• Count of Opposed patent families
• Count of Licensed patent families
• Count of patent families which are Cited in standards (SEPs - Standard Essential Patents)

Limited by Other criteria

• Count of patent families with a Predator presence
• Count of patent families with a Shark presence
• Count of patent families with a Fence in place
• Count of patent families with exceptionally High forward citation counts
• Count of patent families with exceptionally High IPC dispersity
• Count of Coassigned patent families

2. Forward citations

The number of forward citations received by the families on each point on your graph.

• Count of All forward citations
• Count of Self forward citations
• Count of Non-self forward forward citations
• Count of Recent forward citations
• Count of Recent self forward citations
• Count of Recent non-self forward citations

Understanding "duplicate citations"

You may notice that the citation counts in the analysis module are sometime different from the results in the evaluation modules, this is because we have changed the logic of how citation counts are summed. To understand the difference, you need to understand the concept of "duplicate citations:

In the above example the total count of forward citations in the evaluation modules would be 1. Even though the three individual analyzed families each have a forward citation count of 1.

In the saved analysis the forward citation count of the portfolio illustrated above would be 3 and not 1. We calculate the citations for each family and then sum, to get the total number of citations.
This means that the number of citations you see when you make a selection on the graph won’t always match the number shown in the graph, because when you make a selection we remove the duplicates in the same way that the duplicates are removed from the counts in the evaluation modules:

Note the color by and drill down options are not available on the citation charts.

3. Other metrics

The final value option category contains all of the remaining metrics which are neither a count of patent families nor a count of forward citations.

- Velocity of application for new families over the last 5 years
- Average Family size
- Average Geographic coverage
- Average Generality index score
- Average Originality index score
- Average Radicalness index score
- Average Age
- Average first/main Claim length
- Average IPC count

Again, color by is not available for charts displaying these "Other metrics". When you make a selection or use the drill down, all source records will be shown. For instance, if you’re looking at a bar chart showing average claim length for IBM, when you make a selection you’ll see all of IBM’s families in this analysis.
Access

The metrics described above can be accessed exclusively by platinum users in saved analysis on the following charts:

- Bar/Column chart
- Pie chart
- Bubble chart / Heat map
- World map
- Hex chart
- Tag cloud
- Tabular bar

The metrics are not available for saved analysis created from WorkFiles because the data needed to calculate the metrics is not currently saved in the WorkFiles.

Definition table

<table>
<thead>
<tr>
<th>Type</th>
<th>Sub type</th>
<th>Metric</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patent families</td>
<td></td>
<td>All patent families</td>
<td></td>
</tr>
<tr>
<td>Patent families</td>
<td>Legal status</td>
<td>Alive</td>
<td></td>
</tr>
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<td>Pending</td>
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<td>Legal status</td>
<td>Granted</td>
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</tr>
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<td>Events</td>
<td>Licensed</td>
<td></td>
</tr>
<tr>
<td>Patent families</td>
<td>Events</td>
<td>Cited in a standard</td>
<td></td>
</tr>
<tr>
<td>Patent families</td>
<td>Other</td>
<td>Predator present</td>
<td>Number of families where over 15 percent and less than 30 percent of the forward citations (minimum of two) are from a single entity that is not the same as the assignee</td>
</tr>
<tr>
<td>Patent families</td>
<td>Other</td>
<td>Shark present</td>
<td>Number of families where over 30 percent of the forward citations (minimum of three) are from a single entity that is not the same as the assignee</td>
</tr>
<tr>
<td>Patent families</td>
<td>Other</td>
<td>Fence in place</td>
<td>Number of families where over 30 percent of the forward citations (minimum of three) are from the same assignee (self-citations)</td>
</tr>
<tr>
<td>Patent families</td>
<td>Other</td>
<td>High forward citations</td>
<td>Number of patent families where the number of forward citations is in excess of the average plus 3 standard deviation. The average is derived from the complete analysis set.</td>
</tr>
<tr>
<td><strong>Patent families</strong></td>
<td><strong>Other</strong></td>
<td><strong>High IPC dispersity</strong></td>
<td>Number of patent families where the number of different IPC/CPC subclasses (e.g. H04G) is in excess of the average plus 3 standard deviation. The average is derived from the complete analysis set.</td>
</tr>
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</tr>
<tr>
<td><strong>Patent families</strong></td>
<td><strong>Other</strong></td>
<td><strong>Coassigned</strong></td>
<td>The number of patent families with multiple assignees.</td>
</tr>
<tr>
<td><strong>Forward citations</strong></td>
<td><strong>All citations</strong></td>
<td><strong>Self citations</strong></td>
<td>The number of self citations calculated at the family level and then summed.</td>
</tr>
<tr>
<td><strong>Forward citations</strong></td>
<td><strong>Non-self citations</strong></td>
<td><strong>Recent citations</strong></td>
<td>The number of non-self citations calculated at the family level and then summed.</td>
</tr>
<tr>
<td><strong>Forward citations</strong></td>
<td><strong>Recent non-self citations</strong></td>
<td><strong>Recent self citations</strong></td>
<td>The number of non-self citations with an application date within the last 5 calendar years.</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td><strong>Velocity</strong></td>
<td><strong>Family size</strong></td>
<td>The average number of granted or pending patents in each patent family</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td><strong>Geographic coverage</strong></td>
<td><strong>Originality index</strong></td>
<td>Values range between 0 and 1; the score is calculated for each patent family and then averaged. In brief; the broader the spread of cited IPC/CPC subclasses the higher score. Fully defined by Hall Jaffe and Trajtenberg (2001)</td>
</tr>
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<td><strong>Other</strong></td>
<td><strong>Generality index</strong></td>
<td><strong>Radicalness index</strong></td>
<td>Values range between 0 and 1. The score is calculated for each patent family and then averaged. In brief; the broader the spread of citing IPC/CPC subclasses the higher score. Fully defined by Hall Jaffe and Trajtenberg (2001)</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td><strong>Age</strong></td>
<td><strong>Claim length</strong></td>
<td>The number of non-duplicate words in the first independent claim. Calculated for each patent family and averaged.</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td><strong>IPC count</strong></td>
<td><strong>the average number of different IPC/CPC subclasses (e.g. H04G) per patent family</strong></td>
<td></td>
</tr>
</tbody>
</table>