

Create alerts with hierarchical filters in Cortellis



Create alerts with hierarchical filters in Cortellis

How to easily include sub terms indexed under your keywords and set up alerts to monitor updates and ensure nothing is missed.

Example: Set up alerts on viral vector based gene therapies in phase 3.

The screenshot shows the Cortellis search interface. At the top, the search bar contains the text "viral vector based gene therapy". A purple circle with the number "1" is next to the search bar, and a callout box points to the search button with the text "Enter your keyword and click **Search**." Below the search bar, there are tabs for "Drugs", "Deals", "Clinical trials", "Companies", "Patents", and "More". The "Drugs" tab is selected. Below the tabs, it says "2,511 drug results" and "Show search query". To the right, there are links for "Generate competitive landscape", "Analytics", "Export", and "Save and Alert". Below these links, there are filter buttons: "Drugs with...", "Status", "Indication", and "Technology". A purple circle with the number "2" is next to the "Technology" filter button, and a callout box points to the "All filters" button with the text "Open the filters panel by clicking **All filters**." To the right of the filter buttons, there is a "Columns" button and a search icon. At the bottom right, there are buttons for "Table" and "Charts".

Note: Similar steps can be followed for searches on indications, actions and other technologies such as vaccines.

Note 2: Similar steps can be followed for searches on deals, patents and other content sets.

Hierarchical filters in Cortellis

The screenshot shows a 'Filter' dialog box with a sidebar on the left and a main content area on the right. The sidebar contains a list of filter categories: 'Development status', 'Status | Indication | Company | Country', 'Action and technology', 'Company details', 'Sales and market analysis', 'Milestone', and 'Regulatory and safety'. The 'Action and technology' category is highlighted with a purple box and a purple circle containing the number '3'. A callout box points to this category with the text: 'Go to the filter of interest -in this case Action and technology.' The main content area is divided into three sections: 'Target-based action', 'Other action', and 'Technology'. Each section has a header, a sub-header, and a button labeled 'Add [section name]'. The 'Technology' section has a button labeled 'Hierarchy' highlighted with a purple box and a purple circle containing the number '4'. A callout box points to this button with the text: 'Click the **Hierarchy** button and look up your keyword to display the Cortellis ontology -sub terms and broader terms associated to it. Hierarchies are available for indications, target-based actions, technologies, and companies.'

Filter

Development status
Status | Indication | Company | Country

3 Action and technology

Go to the filter of interest -in this case Action and technology.

Company details

Sales and market analysis

Milestone

Regulatory and safety

Target-based action

Add target-based action

Other action

Add other action

Technology

4 Hierarchy

Click the **Hierarchy** button and look up your keyword to display the Cortellis ontology -sub terms and broader terms associated to it.

Hierarchies are available for indications, target-based actions, technologies, and companies.

Hierarchical filters in Cortellis

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Development status

Status | Indication | Company | Country

✓

Action and technology

Date

Company details

Sales and market analysis

Milestone

Regulatory and safety

Reason for dis

Clear all

Technology

Viral vector based gene therapy (32) Add Other action

✓

Gene therapy (35)

✓

Viral vector based gene therapy (32)

✓

Adeno-associated virus based gene therapy (25)

✓

Retrovirus based gene therapy (4)

✓

Adenovirus based gene therapy (2)

✓

Herpes virus based gene therapy (1)

>

☐

Non-viral vector based gene therapy (3)

☐

DNA vaccine (1)

6

Apply

Go to other filters of interest such as phase 3 under **Development status**.

In this example, all sub terms are automatically included under 'viral vector based gene therapy' when the latter is selected in the hierarchy.

Once you have finished selecting filters, click **Apply** to retrieve your results.

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Create alerts in Cortellis

Cortellis

Q "viral vector based gene therapy" X

Assistant ...

Search

Drugs

Deals

Clinical trials

Companies

Patents

More

32 drug results ⓘ Show search query

Generate competitive landscape

Analytics

Export

Save and Alert

Drugs with...

Status

Indication

Technology

All filters

Columns

Table Charts

Status: Phase 3 Clinical X

Other action: Viral vector based gene therapy X

Clear all filters

Optional:
Rename alert.

Save and alert

What would you like to save?

✓ Search

Report

Details

Name

viral vector based gene therapy in phase 3

Set alert

Alerts in Cortellis

In this example, alerts will be triggered by drugs changing phase of development and any updates to the drug's history such as:

- licensing announcements,
- news on clinical trials,
- and more.

Save and alert

Alerts notify you of new or removed records in your search results. To additionally include updated records, select a reason for update.

Reason for update ⓘ ☐ Chemistry ☒ Development profile ☒ Development status ☐ Drug name ☐ Index

Format ☒ HTML (default) ☐ Text

Alert start date 8/27/2026

Frequency Daily

Alert me if no updates ☐

Recipient Email Address monica.romero@clarivate.com

Save

Optional:
Select reasons for update.

9 Confirm frequency of updates.

10

Once you have selected your preferences, click **Save** to create your alert.

Alerts in Cortellis

Search saved and alert set successfully!

Notification on the screen and an email will confirm that Cortellis is keeping an eye on your competitors and send you updates at your chosen frequency: daily, weekly, or monthly.

Cortellis

All your alerts are now here.

Access your alerts and saved searches from **My work** panel.

Saved searches and reports

Search history

Name	Content type	Search type	Saved as	Alert	Alert frequency	Date created/updated
viral vector based gene therapy in phase 3	Drugs	Filter/Browse/Find by	Search	☒	Daily	26-08-2026

My work

Searches and alerts

Search History

Settings

Language

Sign out

Rerun, edit or delete your search with these options.