



## OniX Agents — Complete Setup & Usage Guide

*Written for people who have never used a command line — every step assumes zero prior experience.*

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## 1. What You'll Need Before You Start

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- **A Mac.** These are Mac apps only, for now (Windows is on the roadmap).
- **An internet connection**, at least for the one-time setup steps below. After that, your searches themselves don't need the internet to stay private — see the privacy note in Section 4.
- **About 20 minutes**, total, for everything in Sections 2-4. You only do this once — after that, opening any Agent is just a double-click.

## 2. Step-by-Step: Installing Ollama (one-time, about 10 minutes)

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Ollama is the free program that runs the AI “brain” your Agents use to write summaries. You install it once, and it quietly works in the background after that — you'll never need to open it again.

**Step 1.** Open your web browser (Safari, Chrome, whichever you normally use).

**Step 2.** Go to this website: **ollama.com**

**Step 3.** Click the **Download** button on that page. A file will start downloading.

**Step 4.** Find the downloaded file — it'll be in your **Downloads** folder (look for the little downward-arrow icon in your browser, or open Finder and click “Downloads” on the left side). It will be named something like “Ollama.dmg” or similar.

**Step 5.** Double-click that file. A new window will pop up showing the Ollama icon and an Applications folder icon.

**Step 6.** Drag the Ollama icon onto the Applications folder icon in that same window. This installs it.

**Step 7.** Open your **Applications** folder (in Finder, on the left side) and double-click **Ollama** to open it for the first time.

**Step 8.** Your Mac will probably ask, “Are you sure you want to open this app downloaded from the internet?” — click **Open**. This is normal and only happens the first time.

**Step 9.** Ollama is now running quietly in the background. You may notice a small icon appear near the clock at the top of your screen — that's normal, and you don't need to click on it or do anything with it.

**Step 10.** Now you need to tell Ollama to download the specific AI model the Agents use. This one step uses a program called **Terminal**, which is already on your Mac — it just means typing a line of text instead of clicking buttons. It's completely normal to use it for this one step, and you'll only do it once, ever, no matter how many Agents you install.

- a. Look at the very top-right corner of your screen for a small magnifying-glass icon, and click it. (Or hold down the **Command** key and press the **Space bar** at the same time — same thing.)

- b. A search box will appear in the middle of your screen. Type: **Terminal**
- c. Press the **Enter** (or **Return**) key. A window will open — plain black or white background with some text in it. This is Terminal.
- d. Click once inside that window, so you see a blinking cursor.
- e. Type or copy-and-paste this exact line:

```
ollama pull llama3
```

*(To copy it: click right before the “o” in “ollama,” then drag your mouse to just after the “3,” then press Command+C to copy. Then click inside the Terminal window and press Command+V to paste.)*

- f. Press **Enter/Return**.
- g. You'll see numbers and percentages scrolling by — this is the download happening. It can take a few minutes depending on your internet speed. Just wait.
- h. When it stops moving and you see a blinking cursor with nothing else happening, it's done.
- i. You can now close the Terminal window (click the red circle in its top-left corner). **You will never need to open Terminal again** for any of this.

That's it — Ollama is fully set up. This whole section only happens once, no matter how many Agents you use.

### 3. Step-by-Step: Getting Your License Key

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**Step 1.** Once you're confirmed as a tester, you'll receive an email from **martin@onixhub.com** containing your license key — a short code that looks something like **XXXX-XXXX-XXXX-XXXX**.

**Step 2.** Keep that email open or handy — you'll copy this code in the next section, once for each Agent you install (the same code works for all of them, you just paste it into each Agent separately the first time you open it).

**Important — one key, one computer.** Your license key can be activated on only one computer at a time (this is intentional, so keys can't be shared or copied around). It's fine to use the same key across all of your different Agents (Competitive Analysis, Patent, Regulatory) — that's expected — but activating it on a second computer will be rejected with a message like “This license key is already active on a different computer.” If you ever need to move to a new computer, just email **martin@onixhub.com** and it'll be released on our end so you can activate it on the new one.

### 4. Step-by-Step: Downloading and Opening Your First Agent

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**Step 1.** Open the link you were given to the tester download page.

**Step 2.** Find the Agent you want to try first, and click its **Download** button.

**Step 3.** Look in your **Downloads** folder for the file that just downloaded — it will end in **.zip**.

**Step 4.** Double-click that .zip file. It will turn into an app (you'll see it appear right next to the zip file).

**Step 5.** Drag that app into your **Applications** folder (or just leave it on your Desktop — either works fine, it doesn't have to be in Applications).

**Step 6.** Double-click the app to open it. Since these apps are signed and verified by Apple, you should not see any security warning — if you do, see Troubleshooting (Section 9).

**Step 7.** The first time you open it, you'll see a screen asking for a **License Key**. Go back to the email from Section 3, select your code, copy it (Command+C), click inside the box in the app, and paste it (Command+V).

**Step 8.** Click **Activate**. You need to be connected to the internet for this one step only — it checks your key and registers this Agent to your computer. After this, activation is done for good on this Agent (you'd only see this screen again if you installed it on a different computer).

**Step 9.** Repeat Steps 1-8 for any other Agent you want to try — you'll paste the same license key each time, it's a separate one-time step per Agent, not per computer.

**A quick note on privacy, stated plainly:** after that one activation step, nothing about your actual searches, uploaded files, or generated reports is ever sent anywhere. The only thing that ever leaves your computer is your license key itself, checked briefly each time you open an Agent — never what you're researching.

## 5. OniX Competitive Analysis Agent — Full Guide

**Understanding the screen — the window is split into three columns, plus a strip along the bottom:**

- **Left column — Saved Searches.** A list of any searches you've saved for later, with buttons to Load, Save Current As..., or Delete one, plus controls for turning on automatic repeat searches (Enable / Run Due Searches Now) and a status line showing whether the background scheduler is on.
- **Middle column — this is where you actually work.** A **Topic** box, an **Additional context** box below it, a + button to attach files, one round button in the middle that starts (and later stops, or opens) your search, and a **Report preview** panel underneath that shows your finished report once it's ready.
- **Right column — Search & Report Settings.** A time-window and max-results choice, a “skip local AI analysis” checkbox, the **Report Hub** (checkboxes for which of the 5 reports you want), **Sources to Search** (which of the 20 sources to include, grouped by category, with Select All/Deselect All), **Stage of Development** filters, and a few “bonus preview” checkboxes (Grants.gov, Newsletter, Google News).
- **Bottom strip.** A progress bar and a scrolling log box showing exactly what the Agent is doing while your search runs — real headlines about your topic even show up here while you wait.

**Try this first:** Open the app, type **osteoarthritis** into the topic box, leave everything else as-is, and click **Run Search**. This gives you a real report in a few minutes so you can see exactly what you'll get before running your own topic.

**Step-by-step for your own search:**

**Step 1.** Open “Research Agent.app.”

**Step 2.** Type your topic (e.g., a disease, gene, or technology) into the topic box.

**Step 3.** *(Optional but recommended)* Type a longer sentence or two describing more specifically what you're after — the more specific, the more targeted your results.

**Step 4.** Check which of the 20 sources you want searched (5 are checked by default — leave them if you're not sure), pick a time window, and click **Run Search**.

**Step 5.** Before anything runs, a pop-up shows the exact search phrases it's about to use — you can edit these if you want, or just click to confirm.

**Step 6.** A progress bar fills in while it searches (a few minutes, since it's checking up to 20 sources). Real news headlines about your topic show up on screen while you wait.

**Step 7.** When it's done, click **Open Report** — a Word document opens automatically. It's also saved in the app's Reports folder if you want to find it again later.

**Report types — what each one answers:**

- **Full Report** — the complete picture: every matching grant, publication, and clinical trial found.
- **Active Researcher Landscape Report** — who's actually active in this space right now, ranked by funding first, then publications.
- **BD Intelligence One-Pager** — a single page distilling the key numbers, for a quick screening decision or a BD conversation.
- **Innovation Report** — scans for real novelty language (“first-in-class,” “breakthrough”) instead of just whoever's best-funded.
- **Target-Disease Opportunity Report** — the full genetic-target picture for your topic (only produced when your topic resolves to a specific gene/protein target).

#### What's inside the Full Report, section by section:

1. **Executive Summary** — an AI-written synthesis reading across every source together, not just a list of hits.
2. **Grants section** — every matching funded project found, each with a plain-English summary.
3. **Publications section** — matching papers and preprints, each summarized.
4. **Clinical Trials section** — matching trials, with real (not guessed) phase and intervention data pulled straight from the trial's own registration.
5. **Translational Snapshot** (*inside each record*) — Asset, Mechanism of Action, Development Stage, and Therapeutic Potential. For clinical trials, Asset and Stage are the trial's real registered data; for every other source, this is AI-inferred from the abstract and clearly labeled as such.
6. **Bonus context** (*every report, regardless of what you searched*) — open Grants.gov funding opportunities, the OniX OnPoint newsletter, and hyperlinked Google News headlines.

**Optional — recurring monitoring:** fill in a search the way you want it, click “Save Current As...,” and pick Daily, Weekly, or Monthly instead of “Manual only.” Click “Enable” once to turn on the background check that makes scheduled searches actually fire on their own.

**Optional — three sources need your own free key** (everything else works with no setup): OpenAlex, JSPS/KAKEN (Japan), and NHMRC (Australia). Click “API Keys...” under the title in the app window to add any of them — skipping this just means those three sources are left out of your report, with a clear note saying so.

## 6. OniX Patent Agent — Full Guide

### Understanding the screen — same three-column layout, plus a Settings button at the top:

- **Top.** A gear-icon **Settings** button — this is where you paste in the API key(s) from the section above.
- **Left column.** A **Data Source** choice (USPTO — US only, or Espacenet/EPO OPS — worldwide), plus an optional **Assignee/company** filter box if you want to narrow to a specific applicant.
- **Middle column — this is where you work.** A **Search topic** box, an **Additional context** box, and — only for the “Compare My Asset” report — a box to paste (or attach) your own invention description; a **+ Attach document** button, one round action button, and a live “Recent News” feed underneath.
- **Right column.** A date-window and max-results choice, a “skip local AI” checkbox, the **Report Hub** (radio buttons for the 3 report types — a 4th, “Downstream Product/Industry Signal,” is grayed out as coming in a future version), and a **Landscape Highlights** panel that fills in with counts, top assignees, and clusters once your report is ready.
- **Bottom strip.** A status line and a scrolling progress log (this Agent doesn't have a progress bar — the log is how you know it's working).

**Try this first:** Open the app, pick “USPTO (US only)” as your Data Source (it's the faster one to set up — see below), type **GLP-1 receptor agonist** as your topic, and run it.

### Before your first real search — you need your own free key(s):

- **USPTO Open Data Portal (US only)** — go to [data.uspto.gov/apis/getting-started](https://data.uspto.gov/apis/getting-started), sign in or create a free account, verify with ID.me if you haven't already, and get your key. **This one is instant.**
- **Espacenet/EPO OPS (worldwide, ~100 offices)** — go to [developers.epo.org](https://developers.epo.org), create a free account, register for a Consumer Key/Secret. **This one is not instant** — EPO reviews new registrations, so do this a day or two before you actually need it.
- Paste whichever key(s) you got into the app's Settings screen the first time you open it. You only need the one(s) for the source(s) you plan to use.

### Step-by-step:

**Step 1.** Open “Patent Agent.app.”

**Step 2.** Pick a Data Source at the top: USPTO (US only) or Espacenet/EPO OPS (worldwide).

**Step 3.** Enter your topic or asset, plus any extra context.

**Step 4.** Pick a report type (see below), then run the search.

**Step 5.** Open the finished Word document when it's ready.

### Report types — what each one answers:

- **Landscape Overview** — who else is working in this space, and how crowded is it.
- **Compare My Asset** — how your own invention compares to what's already out there (paste your description, or attach a draft — .txt/.docx/.pdf).
- **Novelty & Prosecution Risk** — where prior art hits hardest, and who's had the roughest path to grant.

**What's inside a Landscape Overview report, section by section:**

7. **Summary counts** — total/granted/pending patents, unique assignees, inventors, and patent families.
8. **Top assignees and top countries** — who's filing the most, and where.
9. **Crowded-vs-sparse read** — a deterministic (not AI-guessed) flag per technology cluster, computed directly from official classification codes.
10. **Relevance-scored results** — each patent found gets an AI-judged High/Medium/Low relevance rating, with a real abstract and AI summary where available.
11. **Asset-type / mechanism-of-action chart** — a visual breakdown of what kinds of inventions came up most often.

## 7. OniX Regulatory Agent — Full Guide

### Understanding the screen — same three-column layout:

- **Left column — Resolved Intake.** Empty at first; once the Agent finishes asking its follow-up questions, this shows what it understood about your asset (molecule, entity type, stage, species, mechanism of action) as read-only rows, plus a “Start over” link if you need to correct something.
- **Middle column — this is where you work.** One large box to describe your asset in your own words, a + button to attach files, one round action button, and a live “Recent News” feed underneath it.
- **Right column.** A couple of “skip” checkboxes (skip local AI, skip related-trials cross-reference), the **Report Hub** (radio buttons for the 5 report types), and a **Highlights** panel showing key numbers, a chart, and — if something looks off — an orange “Check before relying on this” warning box.
- **Bottom strip.** A status line and a scrolling progress log (no progress bar for this Agent).
- **One thing that's different here:** the follow-up questions appear as small pop-up windows, one question at a time, rather than in the main window.

**Try this first:** Open the app and describe, in your own words: “a small molecule for osteoarthritis, still in early research” — then follow the guided questions.

### Step-by-step:

**Step 1.** Open “Regulatory Agent.app.”

**Step 2.** In the middle box, describe your asset in your own words — or click the + to attach up to 3 files (.txt/.docx/.pdf) instead of typing it out; each one is read and summarized automatically.

**Step 3.** Click the round arrow button. The Agent will ask a few short follow-up questions, but only where it isn't already confident (entity type, development stage, species, mechanism of action).

**Step 4.** It then shows you the exact search terms it's about to use — confirm them, edit them, or send it back to revise before anything runs.

**Step 5.** Watch the Progress log at the bottom while it works. When it's done, the Highlights panel fills in and the button turns green — click it to open your report.

### Report types — what each one answers (pick your asset once, then choose the lens):

- **Academic/TTO Asset Pre-Screen** (*always included*) — the full regulatory picture for this asset today.
- **+ Product Development Plan & Investor Deck** (*add-on*) — a draft roadmap and investor deck built from the same findings.

- **Asset Valuation & FTO Report** — what this asset is worth, and how much runway and protection it actually has.
- **Competitive Intelligence & Pipeline Disruption Dashboard** — who else is coming after this space.
- **De-Risking & IND-Enabling Due Diligence Report** — what could slow this asset down, and what hidden costs come with it.

**What's inside the Pre-Screen report, section by section:**

12. **FDA approval history** — pulled directly from Drugs@FDA.
13. **Safety signal** — adverse-event data from FAERS.
14. **Recalls and current labeling.**
15. **Orphan Drug Designation status.**
16. **CMS pricing benchmark** — NADAC drug-pricing data.
17. **Special-modality flags** — automatic checks for DEA-controlled substances, NRC-regulated radiopharmaceuticals, and USDA/EPA/APHIS-regulated veterinary or GMO material (this Agent covers animal-health questions, not just human drugs).
18. **Related clinical trials** — a ClinicalTrials.gov cross-reference.
19. **Recent news.**

## 8. OniX Asset Intelligence Agent — Full Guide

*Consulting-only right now — run by our team on your request rather than a download. The guide below is what you'll get; contact [martin@onixhub.com](mailto:martin@onixhub.com) to request one, or see it run live if you're a tester with hands-on access.*

### Understanding the screen — same three-column layout as the others:

- **Left column.** Checkboxes for which companion sections to include — Competitive Analysis, Regulatory Landscape, Patent Landscape (two more, Funding and Industry/VC, are grayed out as coming soon) — plus a master “run everything” checkbox, an “also draft an investor deck” checkbox, and a “skip local AI” option.
- **Middle column — this is where you work.** One box to describe your asset, a + attach button (up to a capped number of PDFs), one round action button, and a “Good to know” panel underneath that shows helpful tips and switches to live news headlines while your report runs.
- **Right column.** The **Report Hub** — the Full Due-Diligence Report always runs; checkboxes let you add the Structural Pivot and Safety Window reports (three more items are grayed out as “coming in v2”) — and a **Highlights** panel with key counts and a chart once your report is ready.
- **Bottom strip.** A progress bar, a status line, and a scrolling progress log.
- **One thing that's different here:** confirming your asset happens in a short sequence of pop-up windows (what kind of asset it is, confirming the details, confirming the search terms) before the report actually runs.

**Try this first (if you have hands-on access):** use **aspirin** as your example asset — it's a real, thoroughly documented small molecule, a safe way to see exactly what a full report looks like.

### Step-by-step:

**Step 1.** Open “Asset Diligence.app” (or describe your asset to us directly, if this is being run for you).

**Step 2.** Describe your asset — name, structure if you have it (SMILES, sequence, or just a name), mechanism of action, and development stage.

**Step 3.** Check the boxes for which companion sections to include (Competitive Landscape, Regulatory Signal, Patent Landscape), and optionally the investor-deck draft.

**Step 4.** Click Run. This one takes longer than the others since it's pulling together multiple sections — that's expected, not frozen.

**Step 5.** When it's done, the Highlights panel summarizes key findings from each section; open the finished Word report (and investor deck, if you checked that box) directly.

### Report types — what each one answers:

- **Full Due-Diligence Report** (*always runs*) — the complete picture: target validity, safety signal, chemical novelty, competitive landscape, regulatory path, patent position, and a development roadmap.

- **Structural Pivot & Fast-Follower Report** — if a competitor tries to design around your patent with a small structural tweak, where's the easiest path, and does it lead somewhere worse?
- **Safety Window Flag Report** — does this target's normal tissue expression suggest an off-target toxicity risk?

**What's inside the Full Due-Diligence Report, section by section:**

20. **Section I — Target & Structure** — target expression (Human Protein Atlas), bioactivity/safety/toxicity (PubChem, ChEMBL), a real PubMed literature snapshot, and a structural analog comparison re-scored locally with RDKit.
21. **Section II — Competitive Landscape** — condensed signal from the Competitive Analysis Agent for this specific asset.
22. **Section III — Regulatory Signal** — condensed signal from the Regulatory Agent for this specific asset.
23. **Section IV — Patent Landscape** — condensed signal from the Patent Agent for this specific asset.
24. **Section V — Product Development Plan and Executive Summary & Outlook** — synthesizes all four sections into one read.
25. **Bonus** — a downloadable draft investor pitch-deck built from the same data.

## 9. Troubleshooting

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- **“Not available (Ollama unavailable...)” shows up anywhere in a report:** open Terminal (see Section 2, Step 10a-c for how) and type `ollama serve`, press Enter, leave that window open, and re-run your report. If that doesn't fix it, type `ollama list` — if nothing shows up, go back to Section 2, Step 10e and run `ollama pull llama3` again.
- **The app looks frozen:** these all show live progress in a log panel as they work — a search touching many sources, or attachments, can genuinely take several minutes. Check the log before assuming it's stuck.
- **“This license key is already active on a different computer”:** your key is already bound to another Mac. Email [martin@onixhub.com](mailto:martin@onixhub.com) to have it released, then activate again on this computer.
- **“App is damaged” message when opening:** try re-downloading — this almost always means the download itself didn't finish properly, not a security issue (these apps are signed and verified by Apple).
- **Anything else at all:** copy the exact message you're seeing and send it to [martin@onixhub.com](mailto:martin@onixhub.com) — real, specific feedback like this is exactly what improves the next version.

## 10. Getting Help

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Questions, feedback, or something that doesn't look right — reach out any time: [martin@onixhub.com](mailto:martin@onixhub.com). Tell us what worked, what didn't, and what you wish it also did — that goes straight into what ships next.

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