



SimpleIndex TaxStacker Job Instructions

The Patent job is designed to take US Patent documents and extract the Patent Number and Title, then rename the file using those values. It does this through a combination of barcode recognition and OCR of the text. Likewise this process can be used with both PDF files pulled from the patent office website, or with scanned images of printed patents.

To run this job, three steps are required: Add some files to the Input folder, open the job in the SimpleIndex software, run the job.

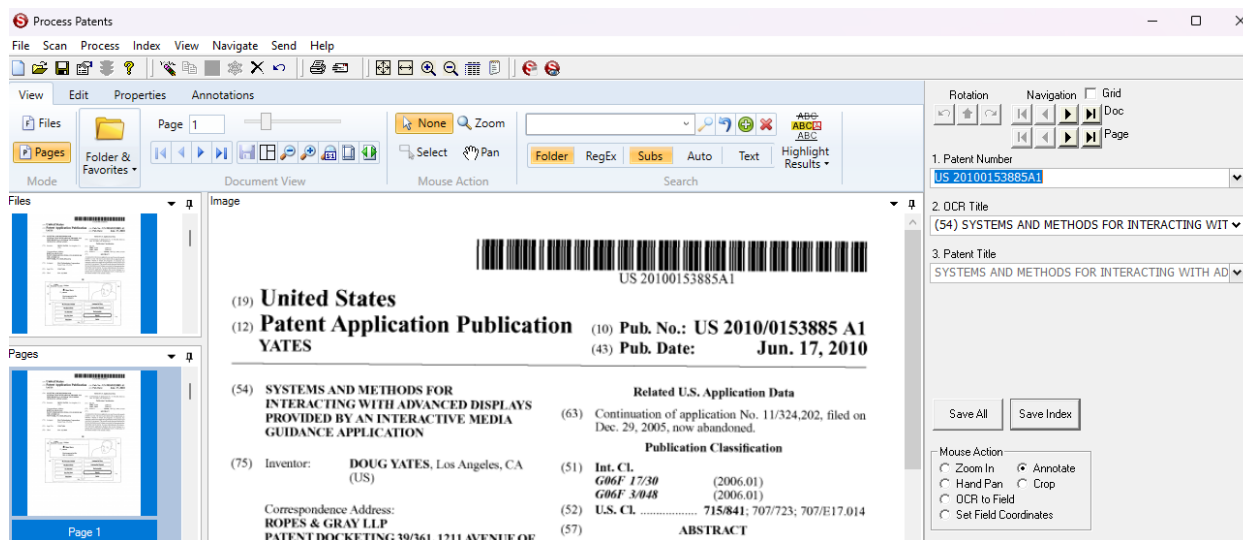
1. In the folder containing the contents of the Patents.zip file, copy a few patents to the folder labeled "Input". If the folder doesn't exist, simply add it and then copy your files into it.
2. Open SimpleIndex and click the Open Job button. Browse to the Patents folder and select Process Patents.sic then click Open.
3. Click the Run Job button.



1 SimpleIndex Buttons

At this point, SimpleIndex will spend a few moments moving the contents of the Input folder to a processing folder, perform OCR and barcode operations on those files and capture the Patent Number and the Title

When the matching is complete, SimpleIndex displays the first document along with two index fields for verification by the user. The third field is used to correctly format the title in field 2 by removing the “(54)” leading the title and ensuring the name does not exceed the character limit for naming files in Windows



2 Verification window showing first document and Index fields at right

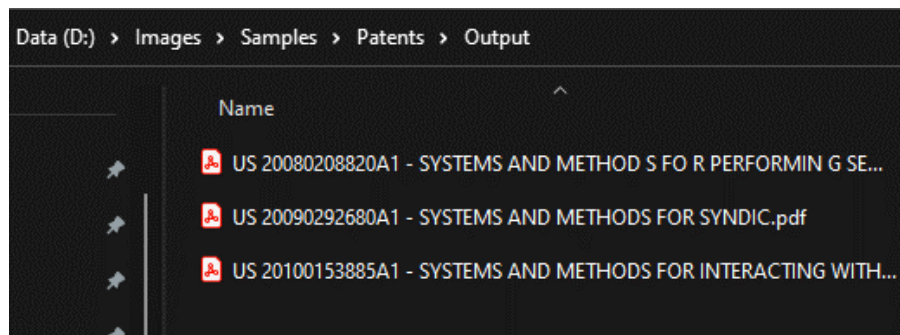
The user can now confirm the captured data and make any corrections should they be required.

When the information in each field is correct, click the Save Index button below the Index Fields.

SimpleIndex will move to the next document in the batch.

Again click Save Index. Proceed in this manner until all the pages have been verified.

After the clicking Save Index on the last page, SimpleIndex will present a prompt asking to release the batch. Clicking Yes here, moves to the export stage where the files are saved to an Output folder in the Patents folder.



3 Sample Output Folder

As noted at the beginning, the files are now named by the Patent Number and the Title found on the page.

Useful Links

[Patents Add-on for SimpleIndex](#)

[SimpleIndex Wiki](#)

[Contact SimpleIndex Support](#)