

# 11

## Creating Reports and Tables

### Overview

This chapter provides step-by-step instructions for creating reports or tables with the following STN Express tools:

| Tool                   | Function  |
|------------------------|---|
| Predefined Report Tool | Creates patent reports from transcripts.                                |
| Custom Report Tool     | Prepares reports including only desired transcript data and formatting. |
| Table Tool             | Creates a table of selected data from Search results.                   |

The following topics are included in this chapter:

- Creating Patent Reports
- Creating Custom Reports
- Saving Reports
- Creating Tables
- Saving Tables

### Creating Patent Reports

Use the **Predefined Report** tool to quickly create a formatted patent report from a transcript file.

Only answers from the patent files or patent-containing files, e.g., CPlus, with the PI (Patent Information) field are included in a patent report generated by the **Predefined Report** tool.

The content and format of the predefined report may not be modified. To create a customized report, use the **Custom Report** tool.

After creating a transcript, follow these steps to create a predefined patent report.

## Selecting the Predefined Report Tool

Click the **Predefined Report**  button on the Toolbar of the STN Express Main Menu or the STN Online and Results window.

You may also access the tool from the **Results** menu on the STN Express Main Menu or from the **File** menu of STN Online.

### Results

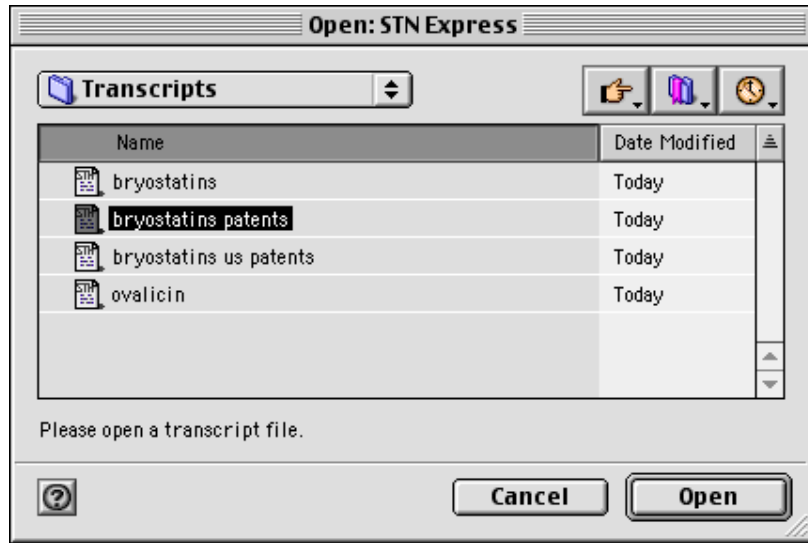
|                             |       |
|-----------------------------|-------|
| <b>Browse Transcript...</b> | ⇧ ⌘ B |
| <b>Print Transcript...</b>  |       |
| <b>Edit Transcript...</b>   |       |
| <b>Export Transcript...</b> | ⇧ ⌘ X |
| <b>Accounting...</b>        | ⌘ A   |
| <b>Table Tool...</b>        | ⇧ ⌘ T |
| <b>Report Tool...</b>       | ⇧ ⌘ R |
| <b>Predefined Report</b>    | ▶     |
| <b>Open...</b>              | ⌘ O   |

### File

|                               |       |
|-------------------------------|-------|
| <b>New Logon...</b>           | ⌘ N   |
| <b>Open...</b>                | ⌘ O   |
| <b>Close</b>                  | ⌘ W   |
| <b>Edit Text File...</b>      |       |
| <b>Transcript Filters...</b>  |       |
| <b>Combine Transcripts...</b> |       |
| <b>Table Tool...</b>          | ⇧ ⌘ T |
| <b>Report Tool...</b>         | ⇧ ⌘ R |
| <b>Predefined Reports</b>     | ▶     |
| <b>Save</b>                   | ⌘ S   |
| <b>Save As...</b>             | ⇧ ⌘ S |
| <b>Save Marked Records...</b> |       |
| <b>Page Setup...</b>          |       |
| <b>Print...</b>               | ⌘ P   |
| <b>Print Preview...</b>       |       |
| <b>Preferences...</b>         | ⇧ ⌘ F |
| <b>Quit</b>                   | ⌘ Q   |

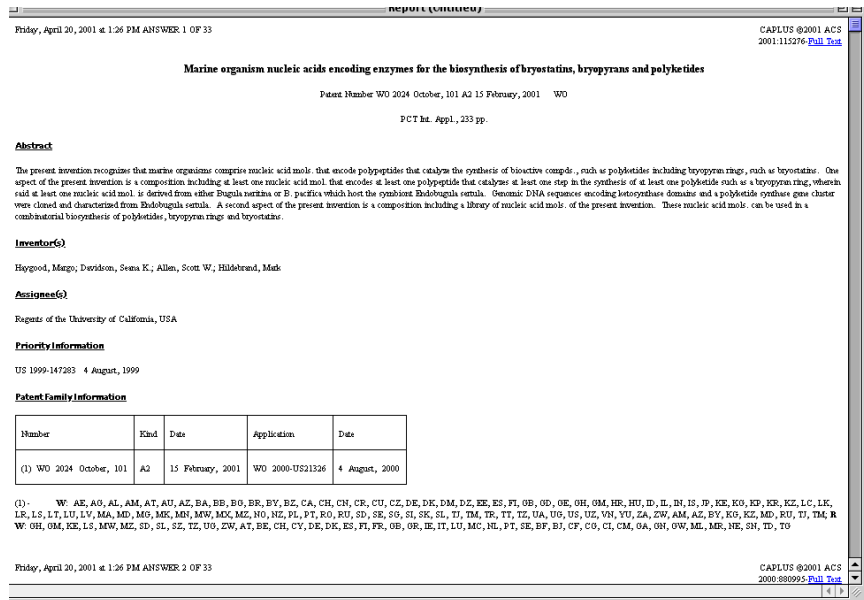
## Selecting a Transcript

In the Open: STN Express dialog box, select the transcript file for your patent report. Click **Open**.



## Patent Report

A predefined report is automatically displayed with patent records from your transcript.



## Creating Custom Reports

### Selecting the Custom Report Tool

Click the **Custom Report**  button on the Toolbar of the STN Express Main Menu or the STN Online and Results window.

You may also access the tool from **Results** on the Main Menu or from the **File** menu of the STN Online and Results window.

| Results              |     |
|----------------------|-----|
| Browse Transcript... | ⇧⌘B |
| Print Transcript...  |     |
| Edit Transcript...   |     |
| Export Transcript... | ⇧⌘X |
| Accounting...        | ⌘A  |
| Table Tool...        | ⇧⌘T |
| Report Tool...       | ⇧⌘R |
| Predefined Report    | ▶   |
| Open...              | ⌘O  |

| File                   |     |
|------------------------|-----|
| New Logon...           | ⌘N  |
| Open...                | ⌘O  |
| Close                  | ⌘W  |
| Edit Text File...      |     |
| Transcript Filters...  |     |
| Combine Transcripts... |     |
| Table Tool...          | ⇧⌘T |
| Report Tool...         | ⇧⌘R |
| Predefined Reports     | ▶   |
| Save                   | ⌘S  |
| Save As...             | ⇧⌘S |
| Save Marked Records... |     |
| Page Setup...          |     |
| Print...               | ⌘P  |
| Print Preview...       |     |
| Preferences...         | ⇧⌘F |
| Quit                   | ⌘Q  |

## Report Tool Window

The **Custom Report** tool opens the Report Tool window.



Select from the buttons on the left side of the Report Tool window.

Alternatively, use the **Next** and **Back** buttons to move sequentially among screens. When selected, each button displays a screen with options for you to choose. Once the transcripts are chosen, you can click buttons for different screens in any order.

| <b>Button</b> | <b>Function</b>                                     |
|---------------|---|
| Transcript    | To select one or more transcripts for the report.   |
| Template      | To select a template for the report.                |
| Content       | To define the content of the report.                |
| Highlighting  | To define highlighting in the report.               |
| Cover Page    | To define the content and format of the cover page. |
| Fields        | To select the fields from answers.                  |
| Statistics    | To define the charts for the report.                |

The Report Tool window also includes the following buttons on the bottom of the window:

| <b>Button</b> | <b>Function</b>   |
|---------------|---|
| Save Template | To save a custom template for reports.  |
| Finish        | To produce the report once all selections for content and style have been made. |
| Back          | To go back to a previous screen.  |
| Next          | To select the next screen.  |
| Cancel        | To cancel the report-generation process.  |

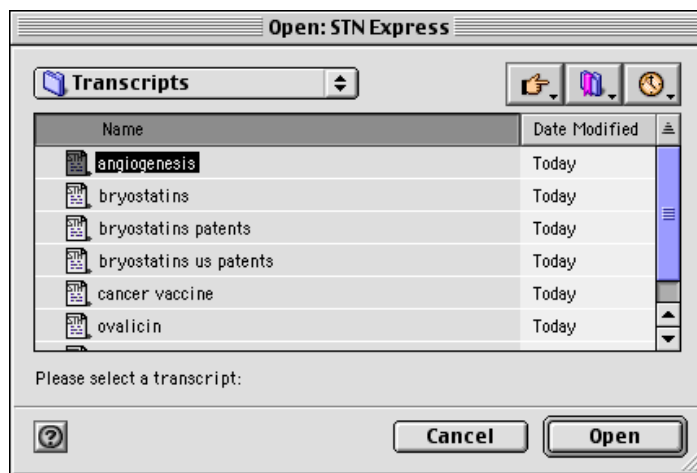
## Transcript



This window is displayed when you select the **Report Tool** or when you click the **Transcript** button in the Report Tool window.

The name of the most recently used transcript is displayed by default. Click the **Remove** button on the right if you do not want to select this transcript for your report.

Click the **Browse to Add** button on the right to locate other transcripts. The Open: STN Express dialog box opens with a list of transcripts for you to choose. Select a transcript or browse for other file locations.



Click **Open**. You are returned to the Transcript window for the Report Tool. You may select multiple transcripts for a single report.

## Template



When you click on the **Template** button of the Report Tool, a list of the currently available templates is displayed.

The **Description** box shows a summary of the attributes of the selected template.

Report and Table templates display separately. To view both report and table templates, choose the **All** radio button. A Table template may be used for a report and vice versa, but attributes that are not applicable will be ignored.

To locate templates that are not in the default Transcripts folder, click the **Change Folder** button and navigate to that location.

Click **Choose Template** to select the highlighted template for this report.



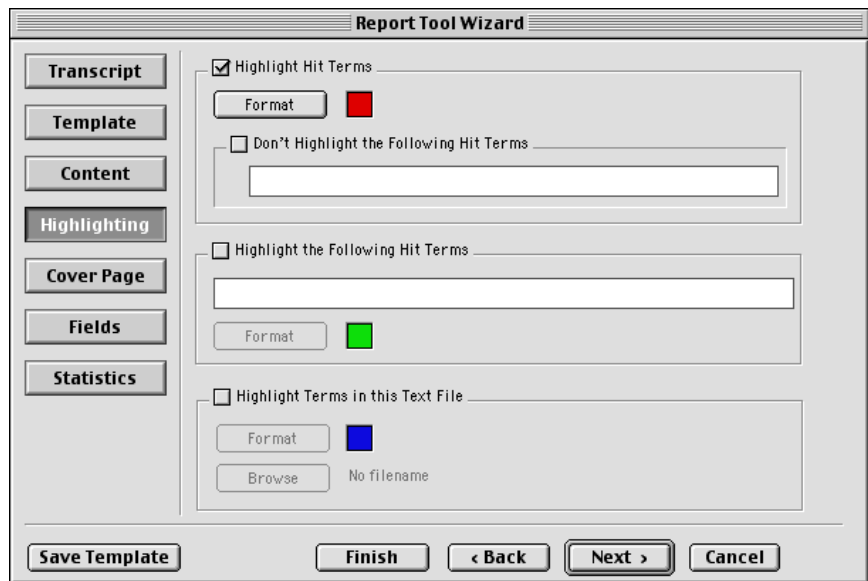
## Content



In the Content window you may select parts of the transcript for your report. Click in the appropriate boxes to include this content in your report.

When the Report Tool is used again, the previous content selections will be recalled.

## Highlighting



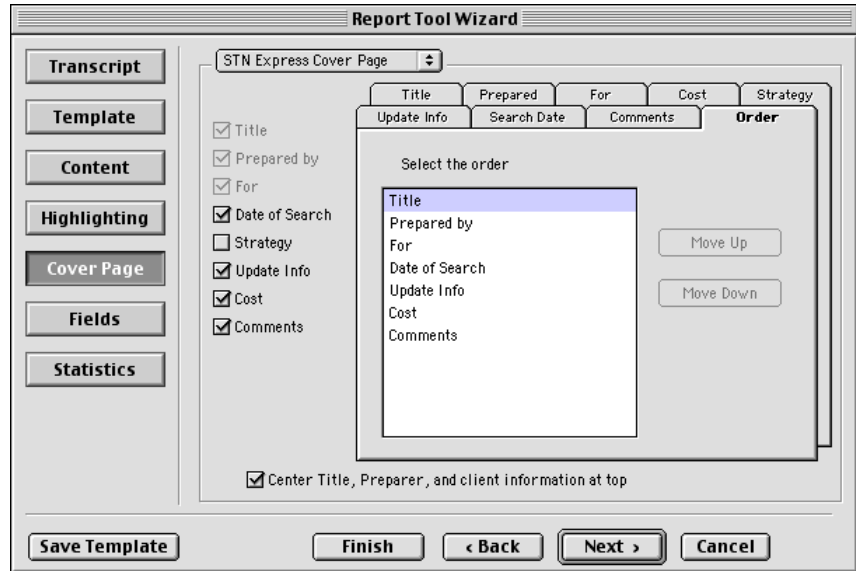
The Highlighting screen shows the following options:

| Highlighting Option               | Result If Selected  |
|-----------------------------------|---|
| Highlight Hit Terms               | Hit-terms are highlighted in red. Select the <b>Format</b> button to change the font and/or the color of highlighting. To remove all hit-term highlighting, deselect this option.   |
| Highlight the Following Terms     | Type the terms to be highlighted. Choose <b>Format</b> to change the font and/or color of highlighting. The highlighted terms may be any terms in your answers. Terms should be separated with commas. Multiword terms between commas will be highlighted only when the entire phrase is present. This feature is case-insensitive. |
| Highlight Terms in this Text File | Highlight a list of terms saved in a text file. <b>Browse</b> for a saved file. Choose <b>Format</b> to change the font and/or color of highlighting. Each line of the text file is treated as a phrase. This feature is case-insensitive.  |

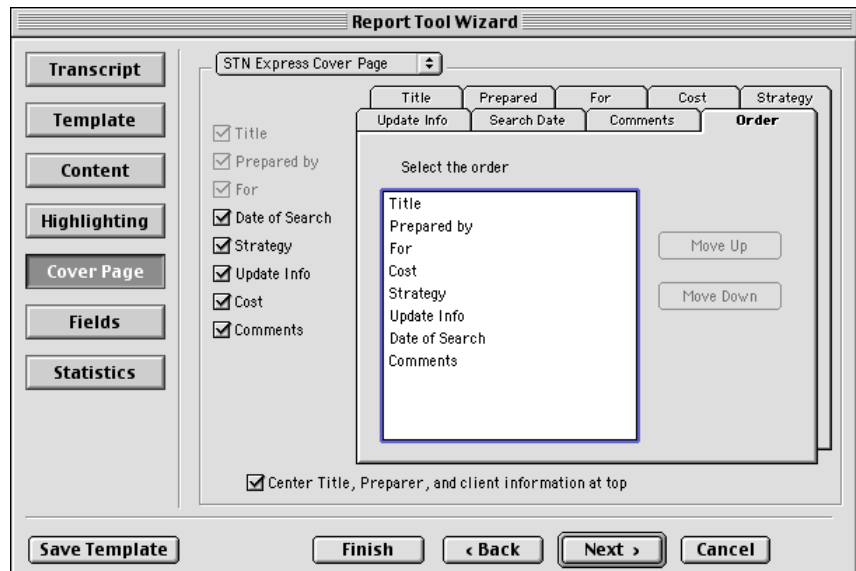
When you select **Format**, the following options are displayed.



## Cover Page



1. Select **STN Express Cover Page** if you want to create a cover page for your report.
2. Choose the content of your cover page by selecting from the checkboxes on the left, e.g., **Cost**. Note that **Title**, **Prepared By**, and **For** can not be deselected.
3. Choose if you want to center the **Title**, **Prepared By**, and **For**. If you do not select this option, all elements of the cover page are left-justified.



4. Select the order of appearance of the selected items on the cover page by highlighting the item and moving it with the Move Up and Move Down buttons.

If a centered option, e.g., **Title**, is selected, you cannot change the order of the **Title**, **Prepared By**, and **For**.

- Click the tab for each desired selection, e.g., **Title**, to enter or modify the existing information and default format for the selection.

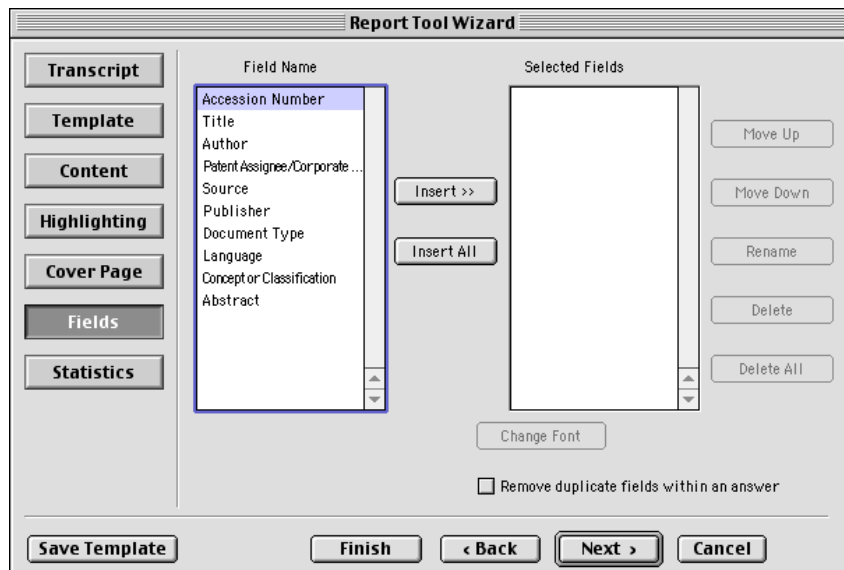
For example, when you click the **Title** tab, the default title, consisting of the names of the transcripts, is displayed in the default font and size. You may modify or replace the text and select the **Format** button to change the font.



Other items that are automatically filled include:

- **Prepared By** (from User Data in Preferences)
- **Date of Search** (from the transcript's file-creation date)
- **Strategy** (from last DISPLAY HISTORY in transcript)
- **Update Information** (from databases entered in transcript)
- **Cost** (last cost display in transcript)

## Fields



When you select the **Fields** button on the left, you are guided in selecting the fields for your report.

The available fields are those found in the transcripts. A blank Selected Fields window is displayed on the right.

Use the buttons on the screen for selecting the fields:

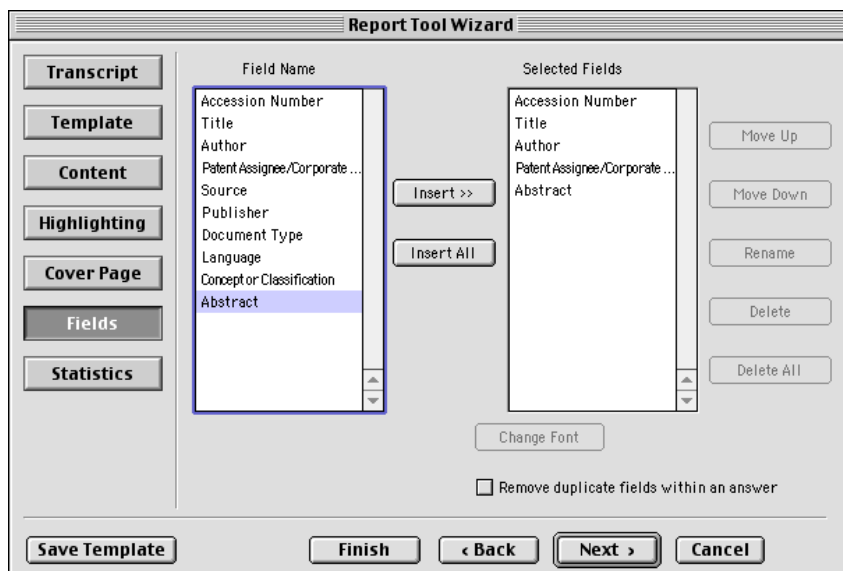
| Button     | Function  |
|------------|---|
| Insert     | Insert any highlighted fields from the <b>Field Name</b> list into the <b>Selected Fields</b> list. |
| Insert All | Insert all the fields from the <b>Field Name</b> list into the <b>Selected Fields</b> list.         |
| Rename     | Rename a highlighted field from the <b>Selected Fields</b> list.                                    |
| Delete     | Delete any highlighted fields from the <b>Selected Fields</b> list.                                 |
| Delete All | Delete all the fields from the <b>Selected Fields</b> list.   |

For example, you might want to use the **Insert All** button to select all fields, and then use the **Delete** button to delete any fields that are not desired. You may select multiple fields using the **Shift** and the **Apple** keys.

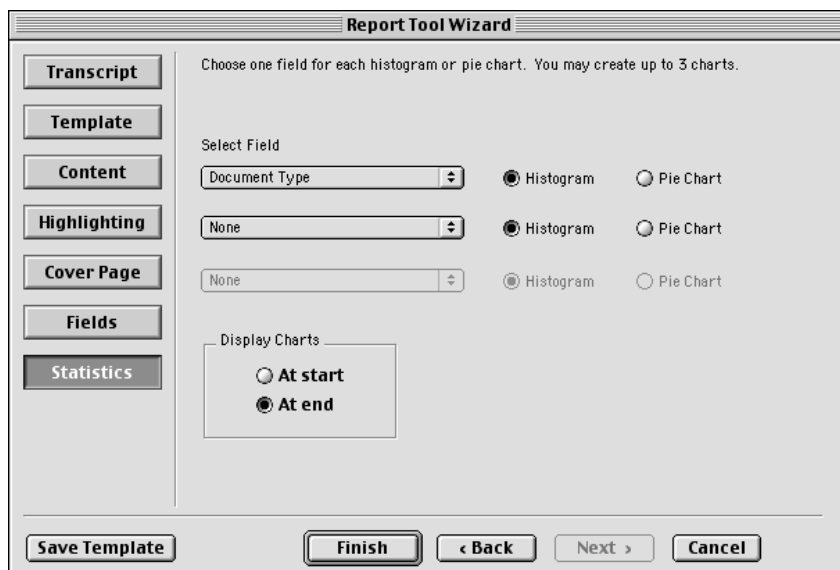
You may also change the order of Selected Fields by using the Move Up and Move Down buttons on the right.

You may change the format of any highlighted fields in the Selected Fields list by clicking the **Change Font** button. The information that displays after selecting the **Change Font** button reflects the properties of the fields in the **Selected Fields** box.

An example of the final selection for a report is shown below.



## Statistics



This window is used for defining histograms or pie charts in your report. You may create up to three histograms or pie charts from the transcript as part of the report.

Choose one field for each histogram or pie chart. You may also choose to display the graphs at the beginning or at the end of your report.

## Saving Templates

Click the **Save Template** button when you want to save the attributes of the current report as a template for future use.

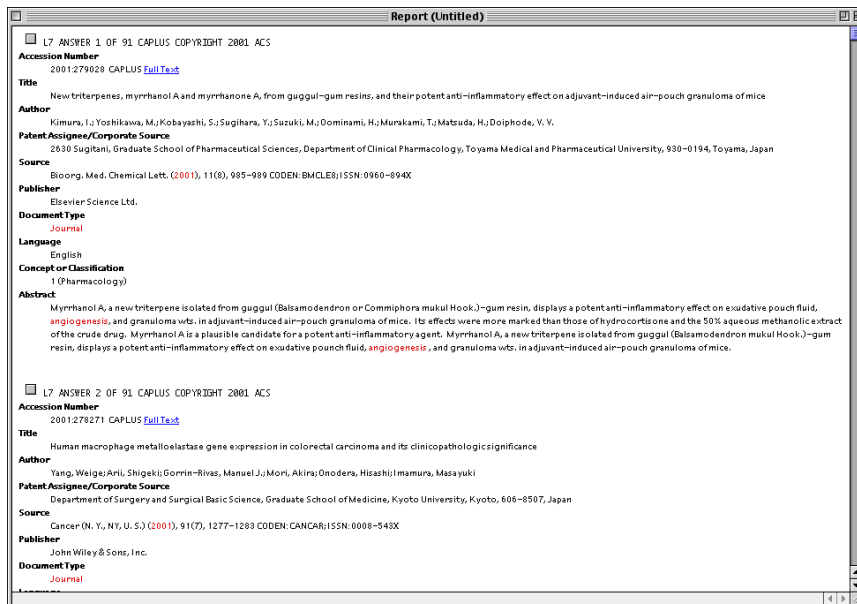


In the Save dialog box, enter a name for your template and click **Save**.



## Generating Reports

To generate a custom report, click **Finish**. The report is displayed.



## Editing Reports

To edit a field in a report, follow these steps:

1. Double-click on the field.
2. Choose **Edit Field**.
3. Make the changes.
4. Click **OK**.



## Inserting Comments in Reports

To insert a comment for an answer, follow these steps:

1. Double-click on the answer.
2. Choose **Edit Record Comments**.
3. Type the comment.
4. Click **OK**.

## Saving Reports

You may save a report as the following types of files:

- STN Express report file
- Rich Text Format file
- HTML file
- Microsoft Excel file
- ASCII file.

## Saving as STN Report Files

To save a report as an STN Express Report, follow these steps after creating a report:

1. Select **Save** from the **File** menu in the STN Online and Results window.

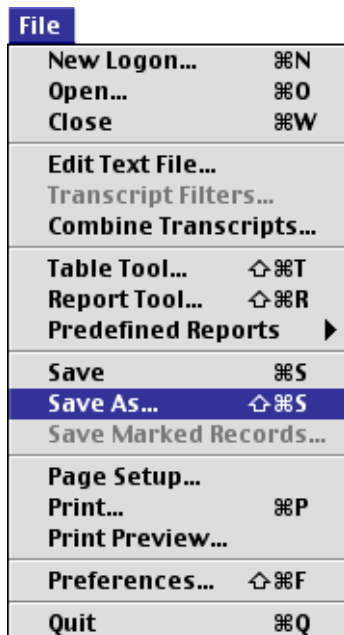
| File                   |     |
|------------------------|-----|
| New Logon...           | ⌘N  |
| Open...                | ⌘O  |
| Close                  | ⌘W  |
| Edit Text File...      |     |
| Transcript Filters...  |     |
| Combine Transcripts... |     |
| Table Tool...          | ⇧⌘T |
| Report Tool...         | ⇧⌘R |
| Predefined Reports     | ▶   |
| Save                   | ⌘S  |
| Save As...             | ⇧⌘S |
| Save Marked Records... |     |
| Page Setup...          |     |
| Print...               | ⌘P  |
| Print Preview...       |     |
| Preferences...         | ⇧⌘F |
| Quit                   | ⌘Q  |

- In the Name dialog box, enter or modify the file name. Click **Save**.

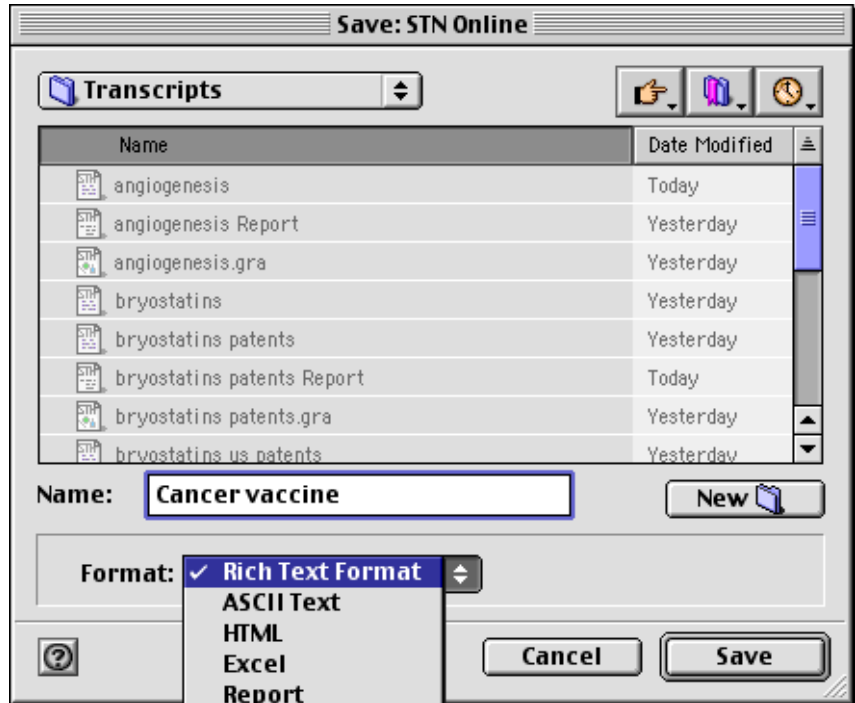


## Saving Reports in RTF, HTML, and Excel Formats

- Select **Save As** from the **File** menu to save the report in standard formats: Rich Text Format, ASCII Text, HTML, or Excel.



- In the Name dialog box, enter or modify the file name. Choose a format for the saved report file. Click **Save**.

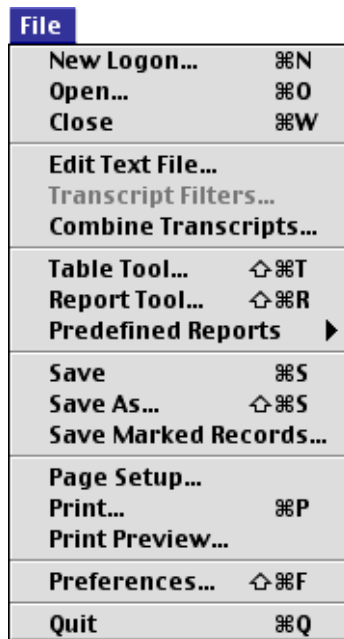


## Saving Marked Answers in Custom Reports

- Each record in the custom report is preceded by a selection box. Select the box to mark the record for saving.



2. Select **Save Marked Records** from the **File** menu.



3. Another Report window opens, showing only the selected answers. Once you are certain that it contains the answers you desire, save the report by selecting **Save As** from the **File** menu and choosing the file format.


## Creating Tables

To create tables of data from answers in your transcripts, use the **Table Tool**. For example, you may create tables with:

- Substance names, molecular formulas, and structures from the Registry file
- Titles, patent assignees, and IPCs from patent records
- Patent numbers, titles, and graphics
- Trademarks and related data from the trademark files EUMAS and DEMAS

## Selecting the Table Tool

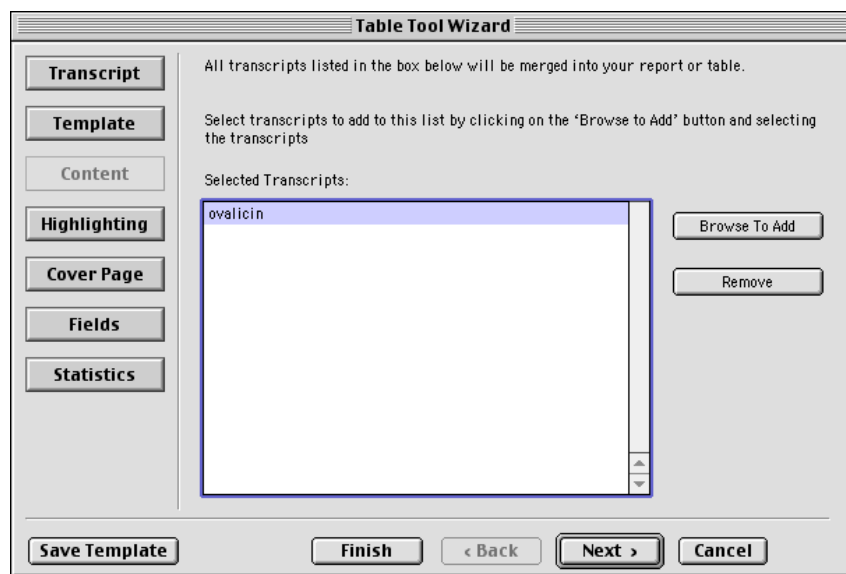
To use the **Table Tool**, follow this procedure.

1. Click the **Table Tool**  button. This button is available on the Toolbar of the STN Express Main Menu and the STN Online and Results window.

You may also access the **Table Tool** from the **Results** menu of the STN Express Main Menu or from the **File** menu of the STN Online and Results window.

## Table Tool Window

The Table Tool window is displayed with the most recently used transcript listed. To create a table from answers in your transcript, select from the buttons on the left side panel of the Table Tool window. When selected, each button displays a window with options for you to choose.



The Table Tool window contains the following buttons for your use:

| <b>Button</b> | <b>Function</b>  |
|---------------|--|
| Transcript    | To select transcripts for the table.                                   |
| Template      | To select a template for the table.                                    |
| Highlighting  | To define highlighting in the table.                                   |
| Cover Page    | To define the content and format of the cover page.                    |
| Fields        | To select the fields (from answers displayed) to include in the table. |
| Statistics    | To define the charts.  |

The Table Tool window also includes the following buttons (on the bottom of the window):

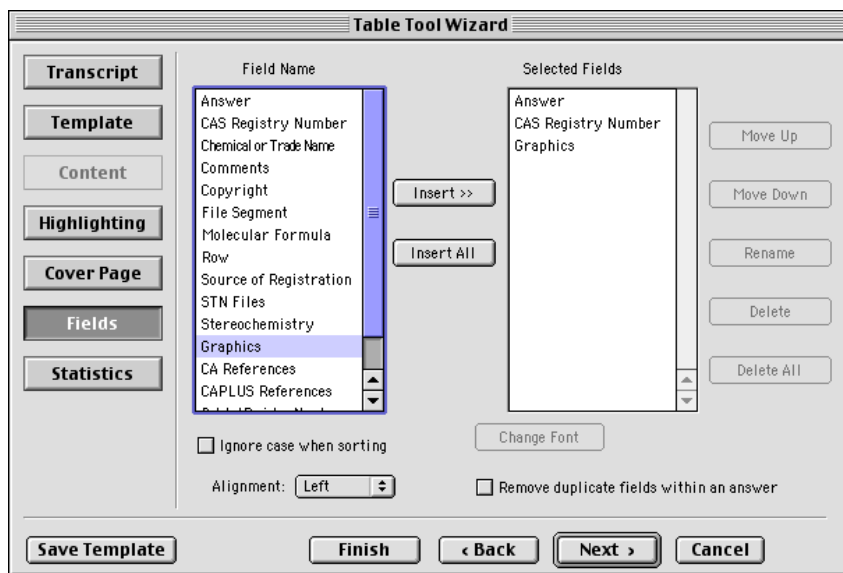
| <b>Button</b> | <b>Function</b>   |
|---------------|---|
| Save Template | To save a template for tables.  |
| Finish        | To produce the table after all selections for content and style have been made. |
| Back          | To go back to a previous screen.  |
| Next          | To select the next screen.  |
| Cancel        | To cancel the selections on a screen.   |

## Selecting Table Tool Buttons

Selecting any of the **Table Tool** buttons results in the same type of interaction as that produced by the same button of the Report Tool. Refer to the section on *Creating Custom Reports* in this chapter for details.

## Fields

The following example shows only the **Fields** screen of the Table Tool, followed by an example of a table that was created.

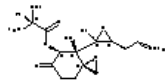
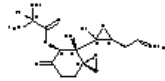
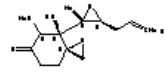
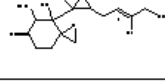
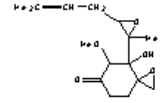


Selecting the **Row** field results in each row being numbered.

If you choose **Answer** for the **Selected Fields**, answer numbers from search results will be included in the table.

## Generating Tables

Click **Finish** when you are done. The table is displayed for you to use.

| Answer           | CAS Registry Number  | Graphics   |
|------------------|----------------------|--|
| 1 OF 13 REGISTRY | 256391-67-0 REGISTRY |  |
| 2 OF 13 REGISTRY | 256391-66-9 REGISTRY |  |
| 3 OF 13 REGISTRY | 220509-38-6 REGISTRY |  |
| 4 OF 13 REGISTRY | 207567-62-2 REGISTRY |  |
| 5 OF 13 REGISTRY | 137490-44-9 REGISTRY |  |

## Editing Tables

You may edit tables by:

- Editing cells
- Copying cells
- Deleting rows
- Sorting columns

Double-click on the cell, row, or column that you want to modify. Select the operation from the displayed menu of options. For example, select **Delete row** to delete the row.

## Resizing the Columns

To resize the columns in the table:

1. Place your cursor on a column separator.
2. When your cursor changes to resemble a ladder, with left-right pointing arrows, hold down the mouse key and drag the column separator to the desired position.
3. Release your mouse button.



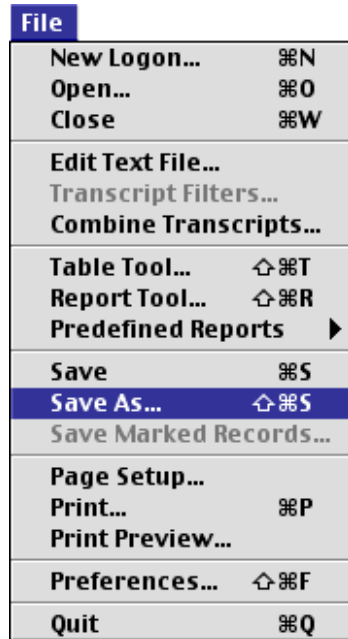
## Saving Tables

You may save tables in the following formats:

- Excel
- Table
- Rich Text Format
- ASCII Text
- HTML

Follow these steps:

1. Select **Save As** from the **File** menu.



- The Save: STN Online dialog box is displayed. Type the name of the file in the **Name** box. In the **Format** box, choose the format for the tables to be saved. Click **Save**.

