



PatXML

User guide

Version 1.33



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Copyright notice

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Preliminary notes

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Intended audience

This guide is intended for users of the **European Patent Office (EPO) PatXML** software. Only authorised users registered with the EPO may use the software.

The information presented here may change over time as services develop.

Prerequisite knowledge

Before you start using PatXML, you should know how to use the mouse, issue commands from menus, work with windows, and locate files using directory dialog boxes. If you are unfamiliar with these procedures or need more detailed information, please refer to your Windows® documentation or system administrator.

Contacts and help

For more information, visit the European Patent Office website at:

<http://www.epoline.org>.

If you experience difficulties in using the product, contact:

EPO Procedural and Technical Support

Open: Monday to Friday, 08.00 – 18.00 hrs CET

Tel.: +31 70 3404500

Fax: +31 70 3404600

e-mail: support@epo.org

Internet: www.epoline.org



Additional information

The *Appendix* provides supplementary information, eg a list of shortcut keys and answers to frequently asked questions.



Overview of PatXML

PatXML is a software tool which allows you to use Microsoft® Word® to create EP and PCT patent applications in XML (eXtensible Markup Language) format.

Benefits

You can prepare and import your patent applications in Microsoft® Word® and save them in software- and system-independent XML (based on a standard agreed by the EPO, JPO, USPTO and WIPO). No prior knowledge of XML is required.

PatXML creates a template within Word®, conforming to EPC/PCT articles and rules, which helps you to prepare your patent applications.

In addition to comprehensive help screens, PatXML also features "pop-up" screens to help you enter data such as patent citations.

You can copy, cut and paste or import text and images from existing documents (not only in Word® format) into PatXML. The data is converted to XML and all images are converted to a standard format with links inside the XML text data - all of this hidden from the user.

Using PatXML templates means that very little retyping or reformatting should be required for any subsequent procedures or applications of a similar nature.

You can preview the document in a *PDF viewer* (p 83).



Deployment

Hardware requirements

For you to be able to use PatXML in its full scope, your computer should meet the following requirements:

- § Processor: Celeron 500 MHz
- § FDD: 3 1/2-inch disk drive
- § CD-ROM drive (for CD installation only)
- § RAM: 64 MB
- § 20 MB of available hard disk space
- § Monitor: VGA
- § Mouse or other pointing device

Software requirements

To ensure that PatXML behaves consistently, the following software should be installed on your PC:

- § Internet Explorer 5.0+ (for appropriate version of Windows® components such as COM, Tree View)
- § Microsoft® Word® 97, 2000, 2002 or 2003
- § Adobe PDF (for viewing documents in portable document format)

The software will run on the following operating systems:

- § Microsoft® Windows® 98
- § Microsoft® Windows® 2000
- § Microsoft® Windows® ME
- § Microsoft® Windows® NT 4.0
- § Microsoft® Windows® XP

PatXML compatibility

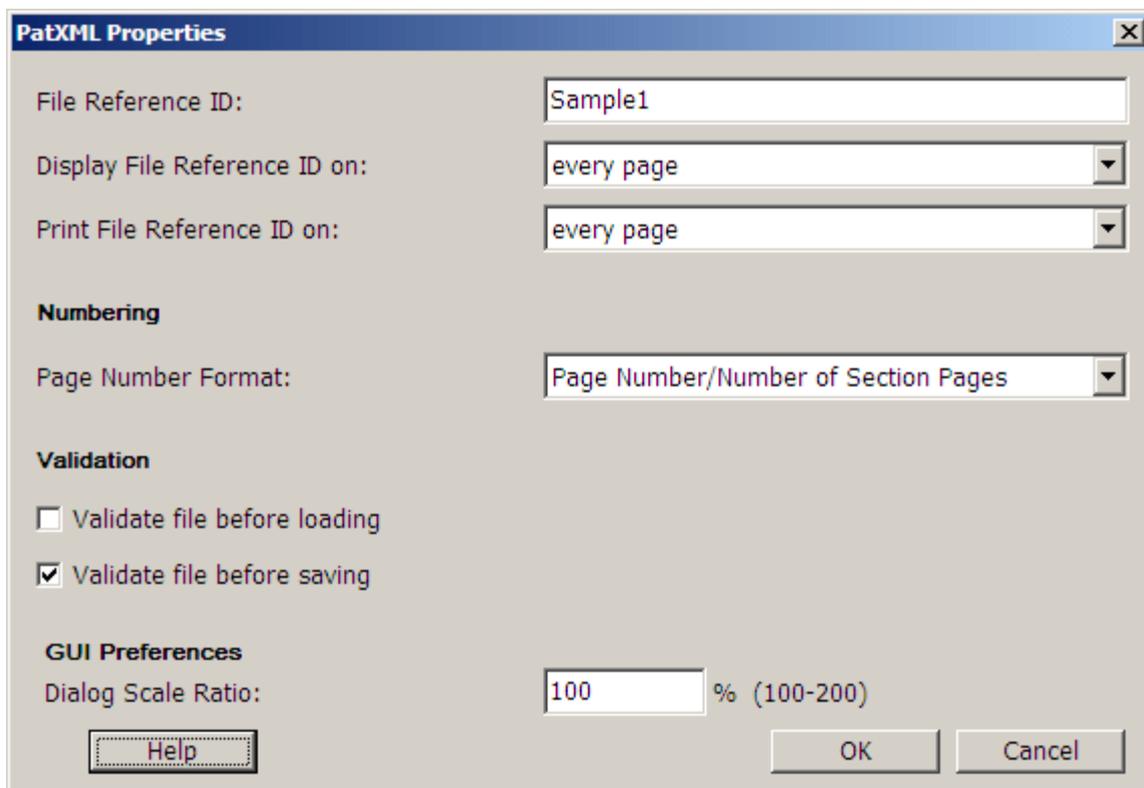
If you have already installed PatXML and wish to update it with a more recent version of the software, you will need to uninstall the older version first. (For more information see *Uninstalling PatXML* (p 17).) Installation over the existing software may cause incorrect behaviour of the uninstall process. Moreover, you will not be able to use the authoring functionality if you have two copies of the software installed in separate directories.

Using the software will not interfere with normal use of the MS Word® application, if both are running simultaneously. PatXML supports English, French and German versions of MS Word® and associated operating systems.

Note When updating your PatXML version you do not have to uninstall PatXML manually. The Installation Wizard will automatically uninstall the older version. To learn how to install a new version see *Standalone installation* (p 17).

PatXML properties

Click **File, PatXML Properties** in the PatXML Word® menu to access the options.



The screenshot shows the 'PatXML Properties' dialog box with the following settings:

- File Reference ID: Sample1
- Display File Reference ID on: every page
- Print File Reference ID on: every page
- Numbering**
 - Page Number Format: Page Number/Number of Section Pages
- Validation**
 - Validate file before loading
 - Validate file before saving
- GUI Preferences**
 - Dialog Scale Ratio: 100 % (100-200)

Buttons: Help, OK, Cancel



Figure 1. PatXML properties

| Option | Comments |
|--------------------------------------|--|
| File Reference ID | The field displays the file reference ID you have specified (if any). You can enter or change the file reference ID here. This field is optional and allows a maximum of 10 characters. |
| Display File Reference ID on: | To configure the display setting for your file reference ID , select an option from the drop-down list. |
| Print File Reference ID on: | To configure the print setting for your file reference ID , select an option from the drop-down list. |
| Numbering | To change the page number format, select an option from the drop-down list. |
| Validation | To indicate your preference, select a check box. The before loading option checks the correctness of the XML document before it is opened in PatXML. The before saving option opens the XML document without checking. The check is done when you save. You can also run validation manually in the <i>XML view</i> . |
| GUI Preferences | Enter a number up to a maximum of 200 (%). This option controls the size of the dialog pop-up windows, eg message windows and prompts. You can make these larger or smaller, depending on personal preference. |



Installation

PatXML standalone installation

The PatXML installation procedure does not require any special skills. All you have to do is run the PATXML.EXE file in the installation materials and a dialog window will open. Simply follow the instructions, and they will guide you through the installation procedure by way of a series of dialog boxes.

Note It is strongly recommended that you exit all Windows® programs before commencing installation.

During installation the PatXML program group is created. You can use this to start the program. The system will also automatically create a shortcut for the start-up file and place it on your Windows desktop.

As soon as installation is complete, two main catalogues are created:

§ software application folder

§ software installation folder

The software installation folder contains all the files required by the software (executables, libraries, resources, etc). The software application folder is the default for saving applications (documents) and related files. These two folders may be located on either the local hard drive and or the network drive, depending on what you specify in the installation dialog. The software installation folder may stay read-only for software running. The software end-user can read from and write to the software application folder.

Note These folders are defined during the installation process.

Uninstalling PatXML

If you no longer wish to use the PatXML software, or wish to replace an earlier version with a more recent one, you will need to uninstall the software. Use the Uninstall icon in the PatXML folder.

You can also uninstall PatXML from Control Panel >Add/Remove Programs>Uninstall App.

Note Manual uninstallation is not required if you are updating your PatXML version. The Installation Wizard will automatically uninstall the older version. To learn how to install a new version see *Standalone installation* (p 17).



Authoring patents

PatXML Wizard for new documents

PatXML opens with the PatXML Wizard, which guides you through the steps for preparing documents:

- § selecting the *application type*
- § defining the *document structure*
- § *completing* the Wizard

For information on using the PatXML Wizard to import an existing document, see *PatXML Wizard for imported documents*.



Selecting application type

- § Select the option to create a new application and then select the type (EP, PCT or US).
- § Click **Next** to define the document structure.

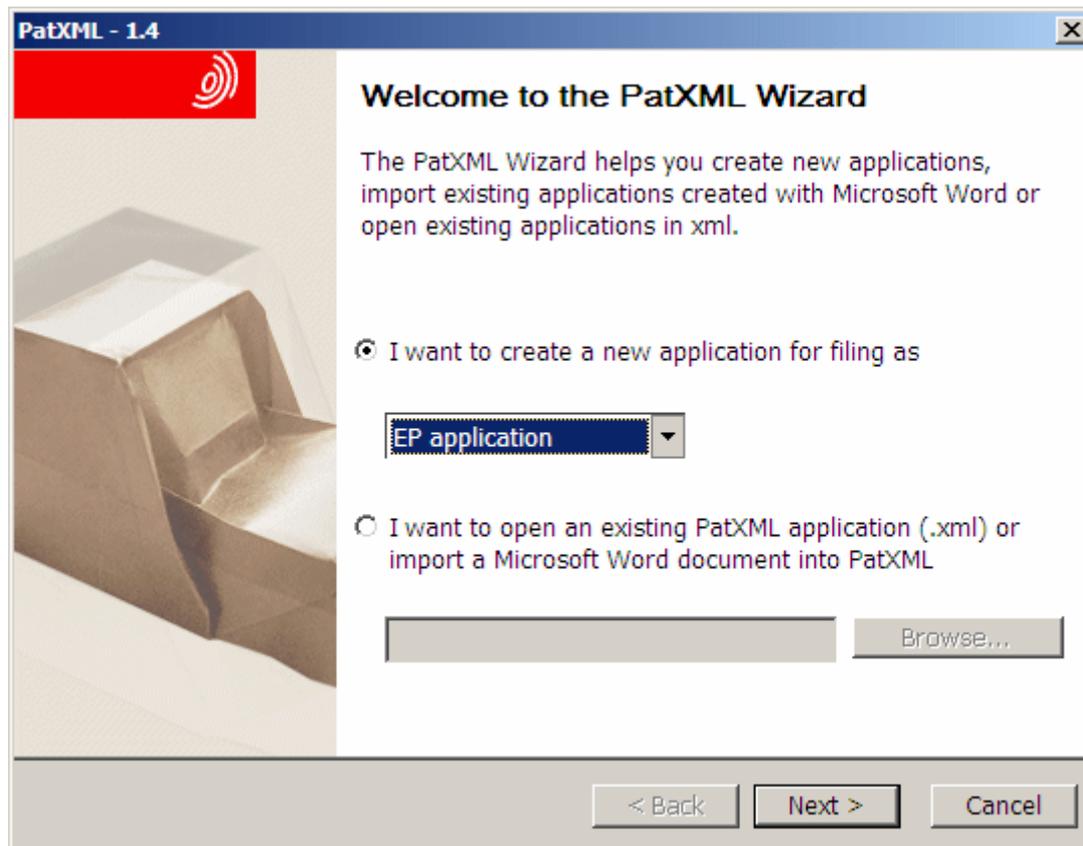




Figure 2. Opening screen

Defining document structure

§ Enter a file reference ID of up to 10 characters.

§ Select the sections and headers required for your PatXML document.

Mandatory sections and headers are ticked already.

Click the right pointer ▶ to expand and the down pointer ▼ to collapse the options.

Each section will start on a new physical page of a Microsoft® Word® document.

The contents can be changed later. For example, you may decide to add a **Drawings** section at a later stage. For more information see *Content management* (p 47).

The mandatory section names cannot be changed, but you may *customise the heading names*.

§ Click **Next** to *complete the Wizard*.

PatXML - 1.4

New EP application
Define the File Reference ID, language and the document structure

File Reference ID:

Show ID on:

Language:

Note: Click the headings you require; these are PCT headings and are not mandatory. The document structure can also be modified at a later point within the document content view.

- ✓ **Description**
 - Title (recommended)
 - (H1):Technical Field
 - (H1):Background Art
 - (H1):Disclosure of Invention
 - (H1):Brief Description of Drawings
 - (H1):Best Mode for Carrying Out the I
 - (H1):Mode(s) for Carrying Out the Inv
 - (H1):Industrial Applicability
 - (H1):Sequence Listing Free Text
- ✓ **Claims**
- ✓ **Abstract**
- Drawings**

2 of 3

< Back Next > Cancel



Figure 3. Sections and headers for a new EP application

| Option | Comments |
|--------------------------|--|
| File reference ID | <p>Enter your file reference ID and select its position from the drop-down list. This is not mandatory, but it is strongly recommended. The file reference ID field allows a maximum of 10 characters and, if specified, will be displayed in shadowed text in the top right-hand corner of the page.</p> <p>Once you have specified the file reference ID, the PatXML document is saved in a folder with the same name as the file reference ID.</p> <p>To change your file reference ID settings select File, PatXML properties in the PatXML Word® document.</p> |
| Description | <p>The Description option cannot be unchecked. It is a mandatory PatXML document section.</p> |
| Claims | <p>The Claims option cannot be unchecked. It is a mandatory PatXML document section.</p> |
| Abstract | <p>The Abstract option cannot be unchecked. It is a mandatory PatXML document section.</p> |
| Drawings | <p>The Drawings option may be selected if required. It is not mandatory.</p> |



Example

In this example, the file reference ID is Sample 1. We click the **Save** button in the Word® toolbar and a folder with the name Sample 1 is created automatically. We name our document "Combustion engine filter", and it is saved automatically in the new folder.

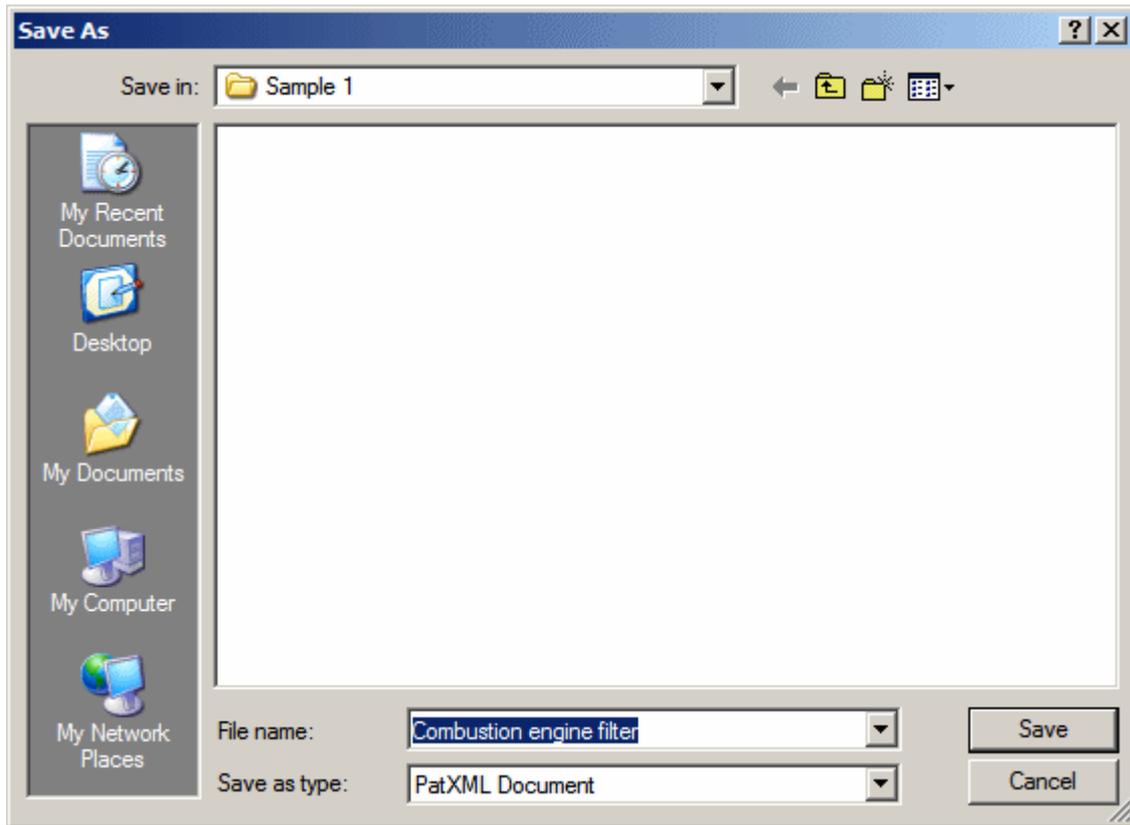




Figure 4: Directory name created automatically



Completing the PatXML Wizard for new documents

§ Read through the summary, and then click **Finish** to open the Word® document.

-OR-

Click **Back** to make any changes.

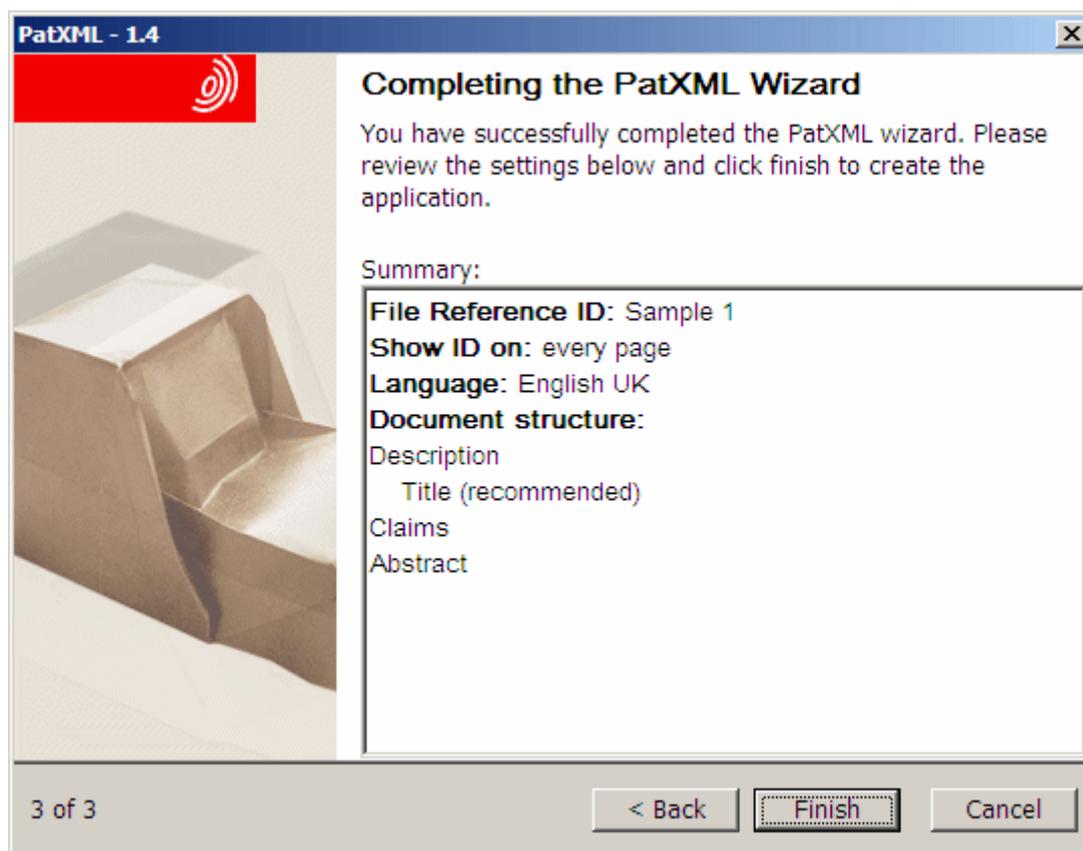




Figure 5: Completing Wizard

Working with Word®

PatXML allows you to work in the familiar interface of Microsoft® Word®.

The **section** and **header** names are displayed on a grey background in the body of the document. These correspond to the options you selected. The section name is read-only text that cannot be deleted or edited. Each section of the document (description, claims, abstract and any drawings or sequence listings) starts on a new physical page. You may also see **recommendations** on how to complete a section, eg "please enter the text for the heading below". These recommendations are displayed on a grey background.

The **file reference ID** you entered appears in the top right-hand corner. This can be changed in **PatXML properties**.

Each new paragraph is **numbered automatically**.

A set of customised *PatXML toolbars* is provided.

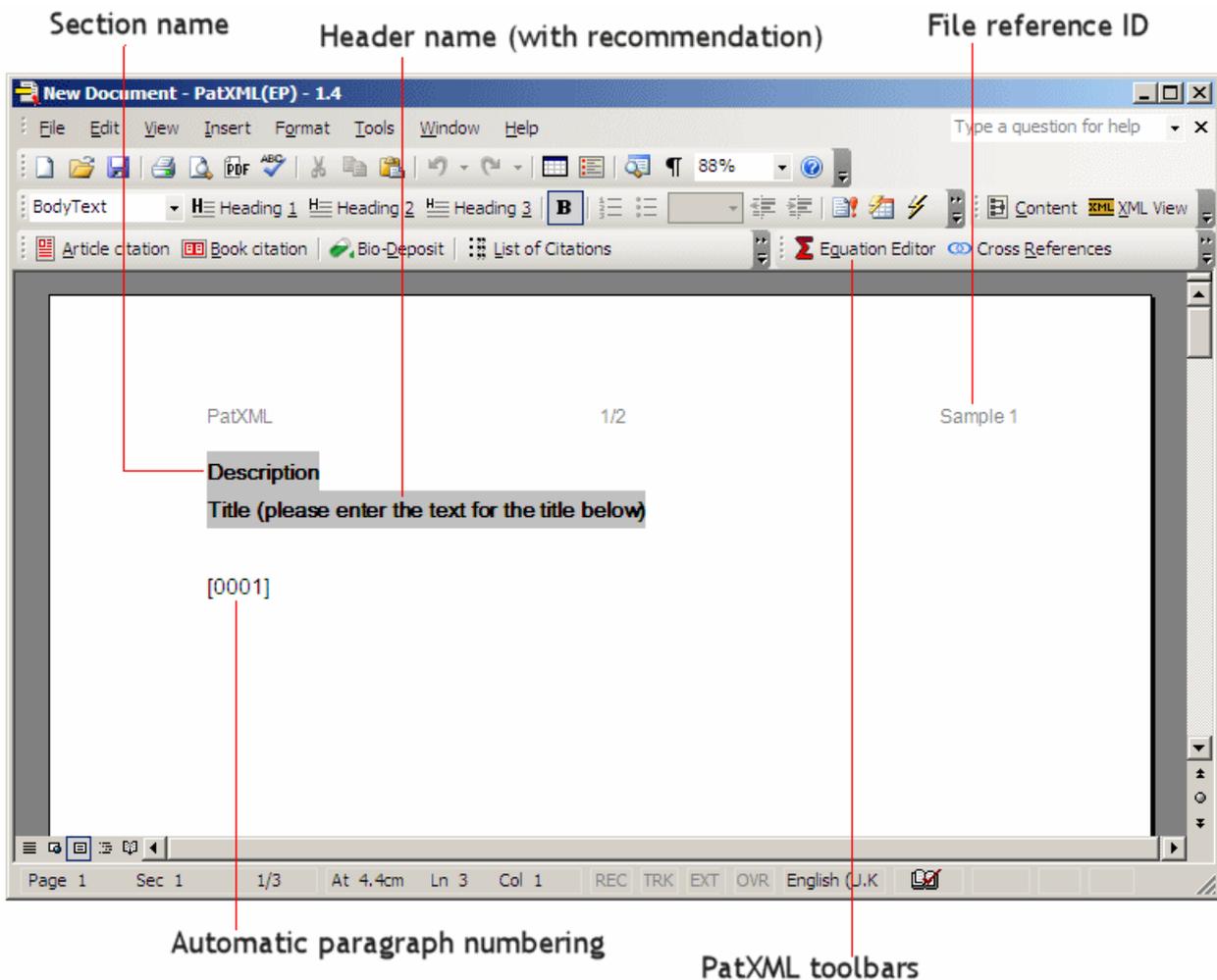




Figure 6. New document

Key differences to Word®

PatXML is designed to help you prepare a patent application that conforms to EPO and WIPO standards. It provides assurance that you are filing a valid patent in terms of the content elements required and the formatting structure. To do this PatXML provides a customised version of Microsoft® Word® for Windows. The key differences from standard Word® are these:

| Option | Comments |
|----------------------------|--|
| PatXML fields | Fields are sets of code that instruct PatXML to insert XML elements such as sections, headings, paragraph numbering, tables, graphics, citations and other material into a document automatically. |
| Required headings | Required headings are inserted as fields. As a minimum these include the description, the claims and the abstract. You can specify others as needed. You cannot remove or type over the heading field. |
| Paragraph numbering | Paragraphs are numbered automatically. Press ENTER to create a new paragraph. Press SHIFT+ENTER to create a new line within the same paragraph. |
| Formatting options | Formatting options are restricted to those allowable for filing a patent application. For example, you must use the font Arial Unicode MS, point size 12. If you import an existing Word® document into PatXML it will be reformatted to conform to this requirement. Font features are limited to bold , <i>italics</i> , <u>single underlined text</u> , _{subscript} , ^{superscript} and SMALL CAPITALS. Any special font effects are disabled, as is auto-text. |
| Customised toolbars | The standard Word® toolbars have been tailored to display the options relevant to preparing a patent application. A customised toolbar has been provided to help you add specific patent-related elements. |
| Shortcut menu | Options from the secondary mouse button, usually the right mouse button, are generally disabled. The choices appropriate to patent preparation are available from the menus, toolbars and shortcut keys. |

Customising header names

Header names are added either by selecting them as part of *defining document structure in the PatXML Wizard*, or by adding them subsequently in *Content Management*.

You may customise header names.

Example

In this example, we have added a section for "Brief Description of Drawings". We wish to change the name to "Description of Drawings".

| | | |
|--|-----|----------|
| PatXML | 1/2 | Sample 1 |
| Description | | |
| [0001] | | |
| [0002] | | |
| Heading 1 (please enter the text for the heading below) | | |
| Brief Description of Drawings | | |
| [0003] This is the text for the description of drawings. | | |

We select the word "Brief" and delete it. The heading name is changed.

Figure 7: Header with automatic name

| | |
|--|-----|
| PatXML | 1/2 |
| Description | |
| [0001] | |
| [0002] | |
| Heading 1 (please enter the text for the heading below) | |
| Description of Drawings | |
| [0003] This is the text for the description of drawings. | |



Figure 8. Header name changed

Formatting columns

You may wish to arrange your information in two or more columns. To do this *create a table* with the number of columns you require, and then add the information to the table. This ensures that the positioning will be correct. You can use either the **Insert Definition List** or the **Table** option in the *PatXML standard toolbar* (p 83).

Note Avoid using the TAB key to create columns of information.

Inserting tables

§ Position the cursor where you want the table to appear.

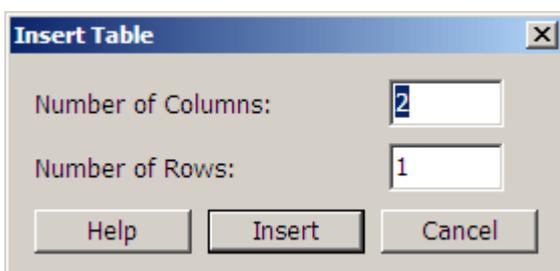
§ In the **PatXML menu** select **Insert, Table**.

-OR-

In the PatXML standard toolbar click the **Insert Table** button.



§ When prompted enter the number of rows and columns (a maximum of 63 for each).





Once the table is inserted, click **in** the table to display the *PatXML tables toolbar* (p 90). This will allow you to add or remove columns and rows or to apply additional options. You may also right-click in the table for a shortcut menu. To add a row at the end of the table, press **TAB** in the last cell.

Note The MS Word® Draw Table tool is disabled.

Tables cannot be inserted in the Title, Abstract (Problem and Solution) or Drawings sections, or within the document headers.

Table properties

Tables can be customised via the Table Properties window. To open the Table Properties window:

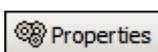
§ Double-click the table title.

-OR-

§ Right-click in a blank area of a table cell and select **Table Properties** from the shortcut menu.

-OR-

§ Click the **Properties** button in the *PatXML tables toolbar* (p 90).



Customising table titles

The table is inserted at the cursor location. An automatic title is added to it, eg "Table1".

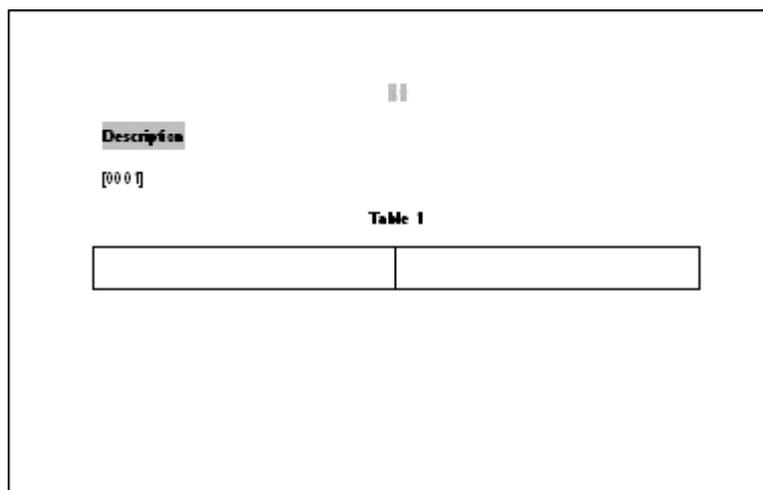


Figure 9: New Word® document with sample table

To change the title, double-click it. When the **Table Properties** window opens, enter the new text. You can also change the table title formatting. Select the text you wish to format, and then click a button to apply a formatting style to the selected text. You can apply more than one style. In this example both **bold** and *italic* have been applied.

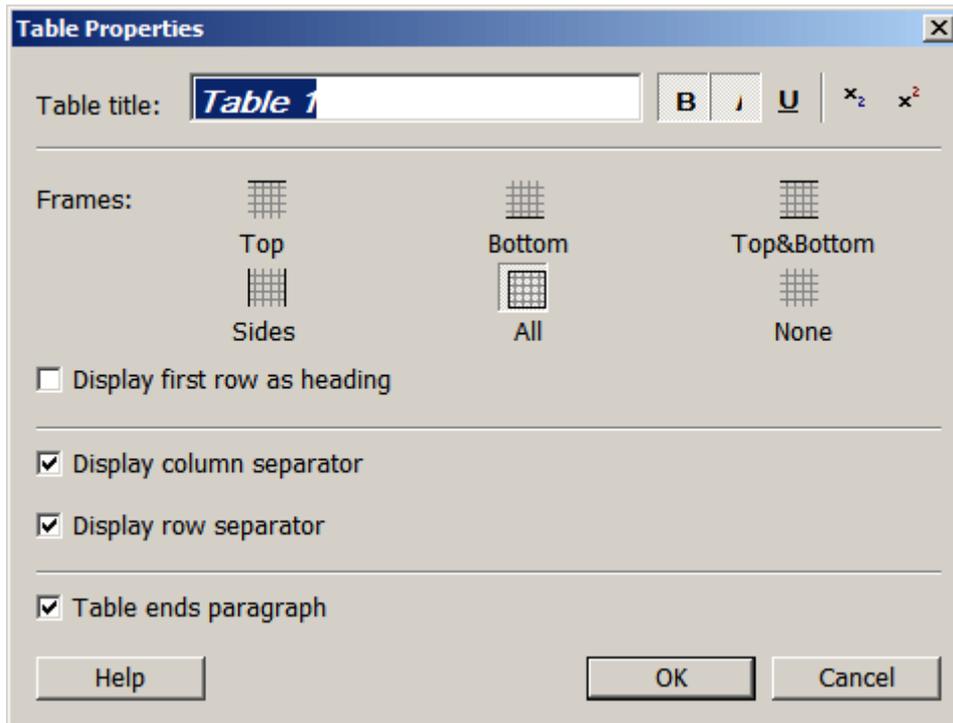




Figure 10. Table properties

| Button | Style | Example |
|--------|-------------|--------------------------|
| | Bold | Bold |
| | Italic | <i>Italic</i> |
| | Underline | <u>Underline</u> |
| | Subscript | X _{Subscript} |
| | Superscript | X ^{Superscript} |

Formatting table content

To format table content, select the data you wish to change, and then apply a style from the *PatXML formatting toolbar*.

For tables longer than one page, in the Table Properties window select the check box **Display first row as heading** to repeat the heading row on each new page.

You may apply a border style to the table.

| Option | Border style |
|-----------------------------|---|
| Frame visible | Select an option to apply an overall border style to the table. |
| Column separator | Select this check box to apply inside vertical borders. |
| Row separator | Select this check box to apply inside horizontal borders. |
| Table ends paragraph | Select this check box to indicate that the table ends the paragraph. This avoids blank lines below the table. |

Renumbering tables

To renumber all the tables in the document automatically, click the **Renumber Tables** button  in the PatXML formatting toolbar.

Inserting Images

Figures may be inserted in the **Drawings** section only. The Image button also works in the Description and Abstract sections; however, this is intended to allow you to insert externally prepared chemical formulae as images. (PatXML does not currently offer a chemical formula editor.)

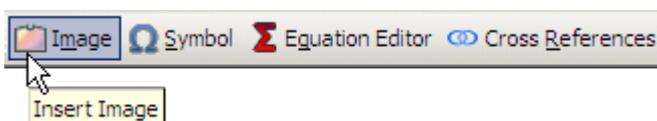
Note Any images inserted into the PatXML document are saved automatically in the directory for the current document, ie the folder with the same name as the *file reference ID* you entered. Each image is saved with an automatic number and a .TIF file extension. You may customise the numbers.

§ Position the cursor where you want the image to appear.

§ In the **PatXML menu** select **Insert, Image**.

-OR-

In the *PatXML insert toolbar* (p 89) click **Image**.



Note Images are inserted using TIFF Group 4 compression, that is, they are converted to **black-and-white** format.

§ Navigate to the file location and open it.

The Browse window provides a preview and allows you to set the **image attributes**.

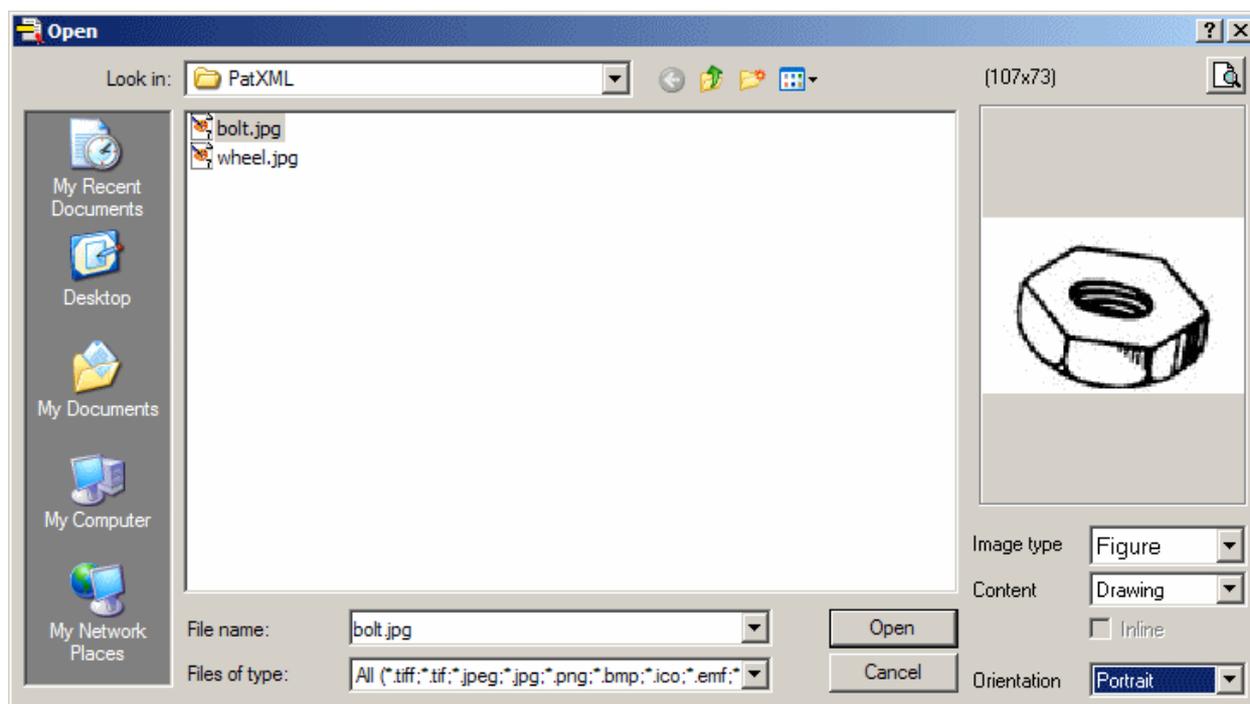




Figure 11. Image attributes

Image attributes

| Attribute | Comment |
|--------------------|---|
| Image Type | This set of options provides several types to define the image being inserted: Image, Maths, Chemistry, Table, Figure. Please specify the type of image to make your PatXML document easy to navigate and process. Depending on the selected type, the image will be given a corresponding caption and referred to a specific tab in the Content Manager. PatXML controls figure/image numbering and placement within the page automatically. |
| Content | Use this set of options to describe the image being inserted. This is optional. |
| Inline | Select the check box to insert the image at the beginning of the line, left-aligned. If the check box is not selected, the image will be inserted in the middle of the line. |
| Orientation | Use this option to select whether the image has portrait or landscape orientation. |

Image properties

Double-click the image in the document to open the **Image Properties** window, which contains these additional options:

| Property | Comment |
|--------------------------|--|
| Figure Number | Enter a number in the field. |
| Image Size | Specify the width and height of your image within the maximum limits. |
| Scale | Increase or decrease the percentage relative to the original size. Note If an image exceeds the maximum size of 26.2 cm x 17 cm , a warning message is displayed and the image is automatically resized to the permitted size. You are prompted to agree to this. |
| Lock aspect ratio | Select this check box to retain the actual aspect ratio of the image. The two values will be proportionally changed if Lock aspect ratio is checked. |

PatXML numbers figures automatically as Fig. 1, Fig. 2, etc. (If the figure caption is not visible, you can click the **Renumber Figures** button  in the PatXML formatting toolbar to update the display.) You can customise the figure numbering if you wish; in this case, automatic numbering is switched off for any subsequent figures and the numbers must be entered manually. You may revert to automatic numbering.

PatXML 1/1 Sample 1

Drawings (please insert a figure below)


Fig. 1

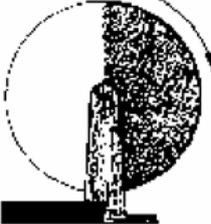

Fig. 2

Figure 12: Figure captions with automatic numbering

Example

In this example we double-click the inserted figure in the Drawings section to customise the figure numbering.

Drawings (please insert a figure below)


Fig. 1



Figure 13. Sample figure with automatically numbered caption

In the **Image Properties** window, we enter "1A" as the figure number.

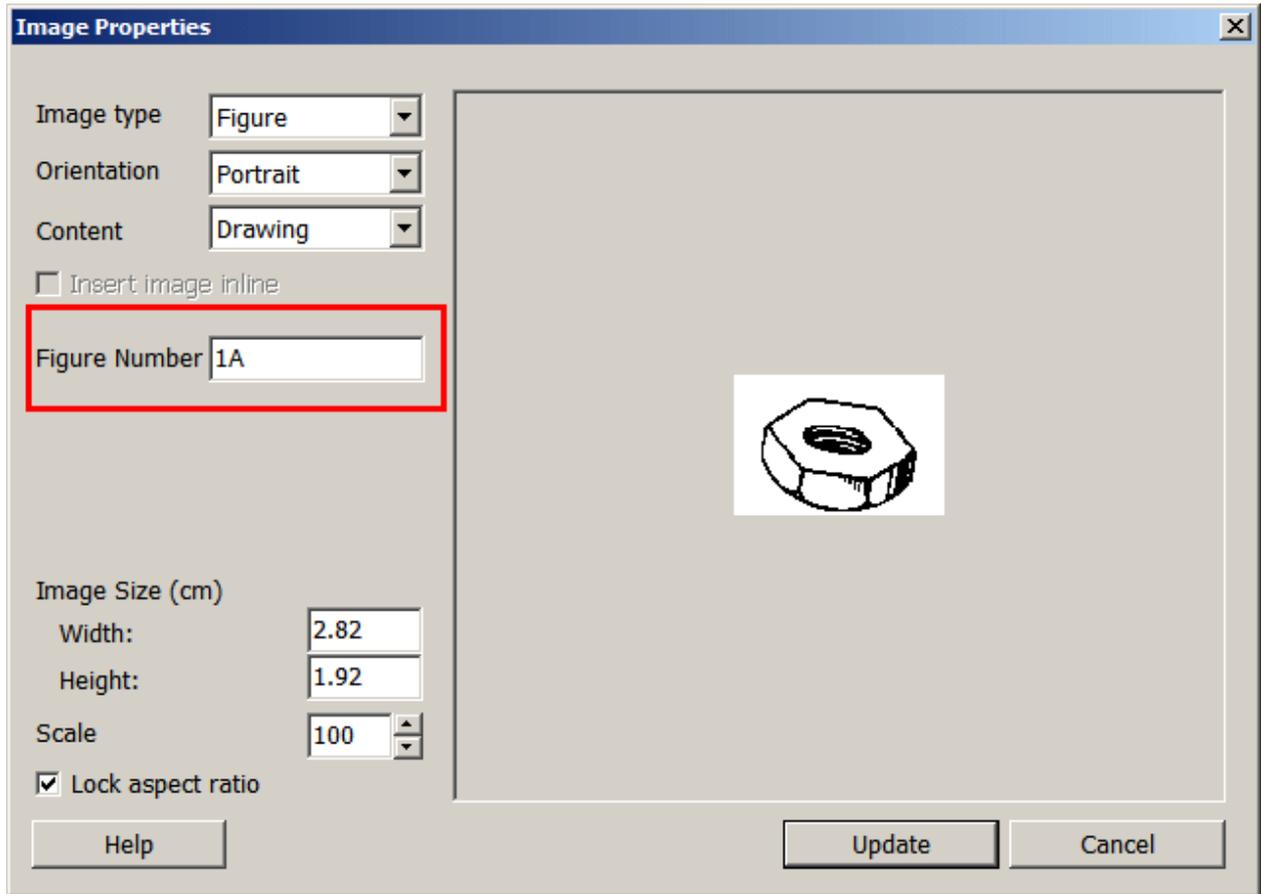
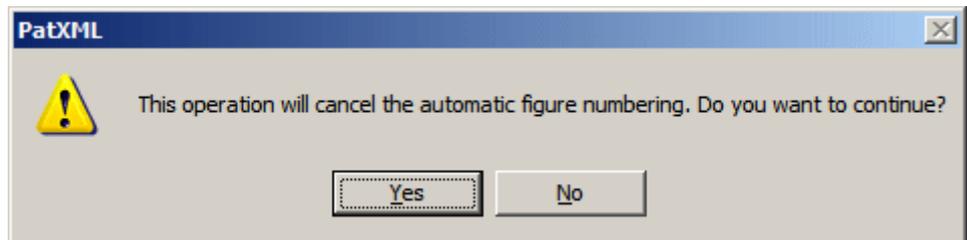


Figure 14: Image Properties window with figure number entered

A system prompt appears, warning that automatic numbering will be cancelled.



We click **Update** to proceed. The customised figure caption is displayed. Any previously numbered captions for other figures are unaffected.

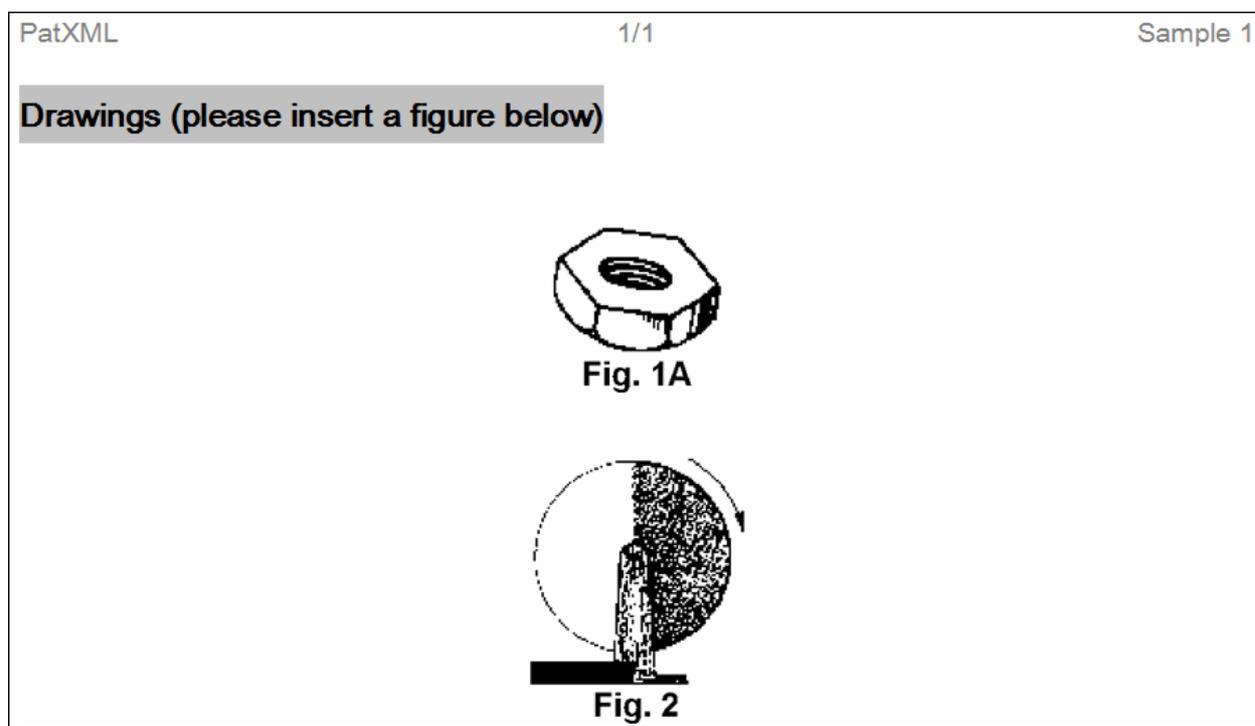


Figure 15: Figure with customised numbering

We repeat this process to renumber the second figure as Fig. 1B.

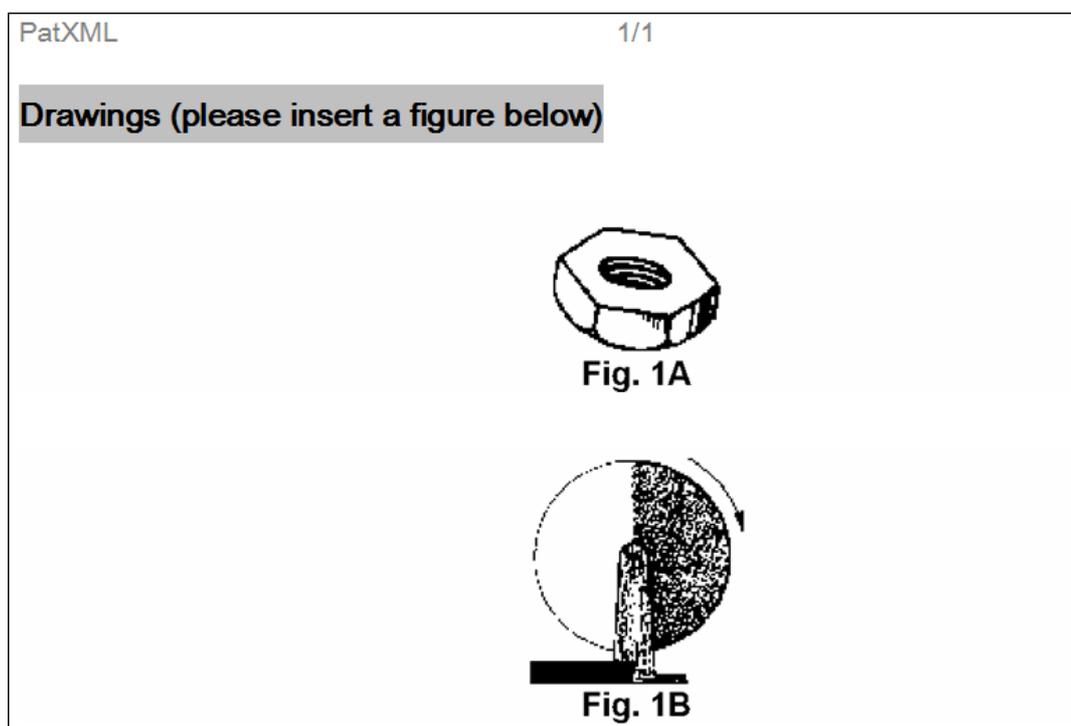




Figure 16. Second figure with customised caption

Any figures inserted subsequently are not automatically numbered.

PatXML

1/1

Drawings (please insert a figure below)



Fig. 1A



Fig. 1B





Figure 17: Subsequent figures no longer numbered automatically

Renumbering figures

To switch automatic numbering back on and renumber all the figures in the document automatically, click the **Renumber Figures** button  in the PatXML formatting toolbar. All customised figure captions will be lost.

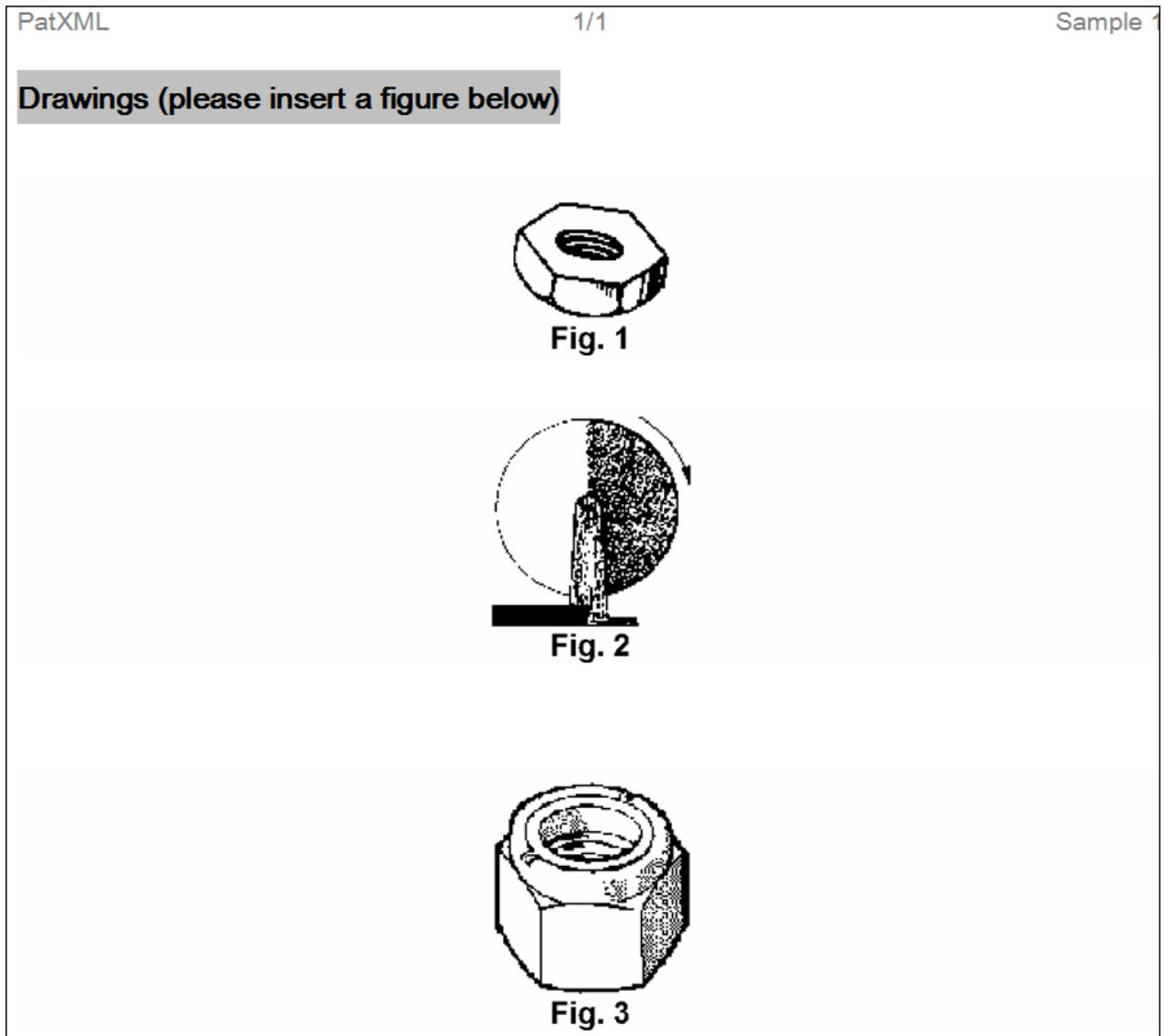


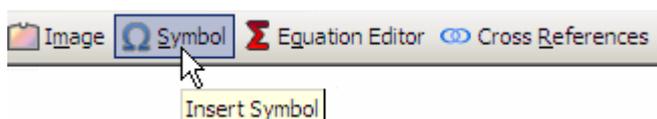
Figure 18: Automatic figure numbering restored

Inserting symbols

§ In the **PatXML menu** select **Insert, Symbol**.

-OR-

In the *PatXML insert toolbar* (p 89) click **Symbol**.



§ Select the symbol you require in one of three ways:

Symbols

Special Characters

From Image

Symbols

PatXML uses Arial Unicode MS to display Unicode characters correctly. These are grouped into various subsets in the Symbols tab.

§ Position the cursor where you want the symbol to be inserted.

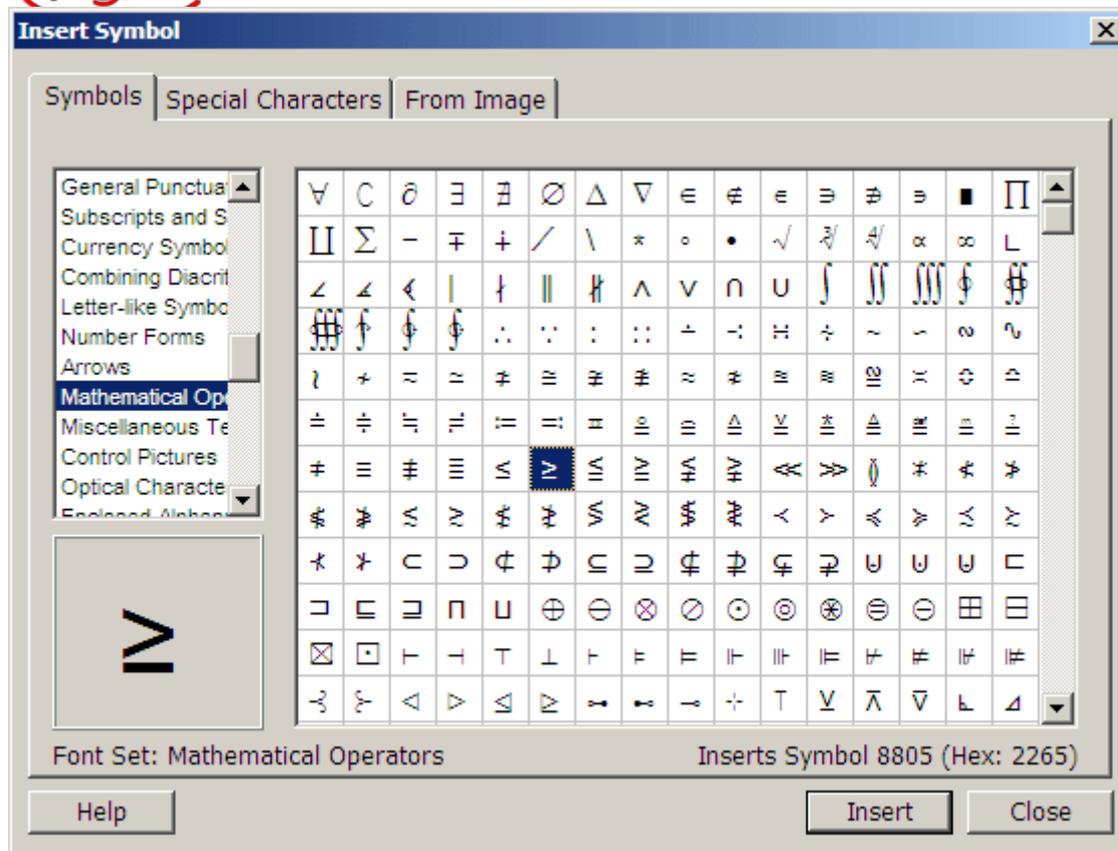
§ In the **Symbols** tab, scroll through the font sets on the left and select one.

If you do not select a font set, the **All Sets** option is displayed.

§ Select a symbol.

A preview is displayed in the lower left of the screen, and the code for the symbol is displayed in the lower right of the screen.

Click **Insert** to complete the operation.





*Figure 19. Inserting
symbol from
Mathematical Operators
font set*

Special Characters

§ Position the cursor where you want the special character to be inserted.

§ In the **Special Characters** tab select either **Optional hyphen** or **Non-breaking hyphen**.

Optional hyphens are typically used in the middle of a word, between syllables, to indicate where a word should be broken between lines, if the text editor deems it necessary. The optional hyphen does not appear on any printout unless it is actually used at the end of a line.

Non-breaking hyphens are used in compound words to indicate that both words and the hyphen should be treated as a single word when the text editor is forming lines. In this case, the compound word will never be broken over two lines.



- § Position the cursor where you want the image to be inserted.
- § In the **From Image** tab browse to the image location and select it.

The **Image type** is **Symbol**, the **Content** is **Character**, and **Inline** is selected. These options cannot be changed.

You can set the **Orientation** to **Portrait** or **Landscape**.

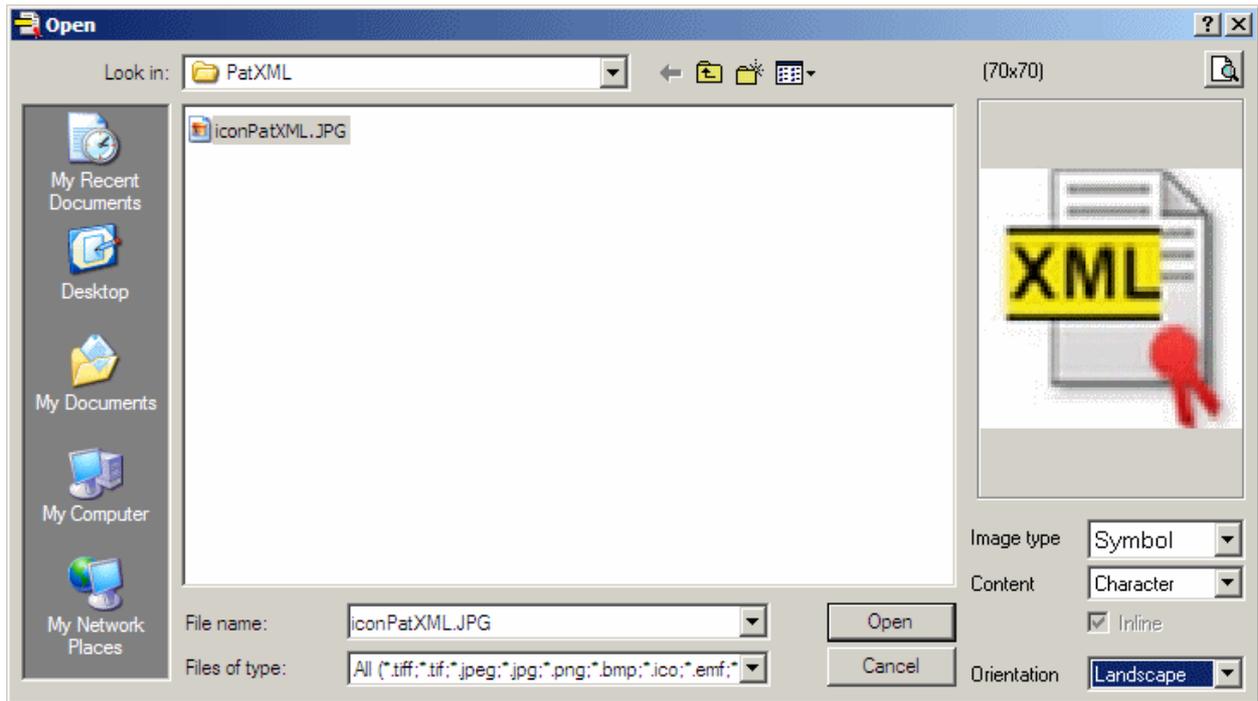




Figure 20. Inserting image as symbol

Inserting equations

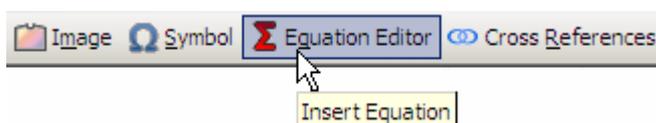
Please use the **PatXML Equation Editor** to provide mathematical formulae.

§ Position the cursor where you want the equation to appear.

§ In the **PatXML menu** select **Insert, Equation Editor**.

-OR-

In the *PatXML insert toolbar* (p 89) click **Equation Editor**.



According to Rule 35 of the **European Patent Convention**, mathematical formulae, as well as chemical formulae and other graphic characters and symbols, may be written by hand or drawn. However, the request for the grant of a European patent, the description, the claims and the abstract must be typed or printed.

Tables and chemical or mathematical formulae may be placed sideways on the sheet if they cannot be presented satisfactorily in an upright position thereon; sheets on which tables or chemical or mathematical formulae are presented sideways must be presented in such a way that the tops of the tables or formulae are at the left side of the sheet.

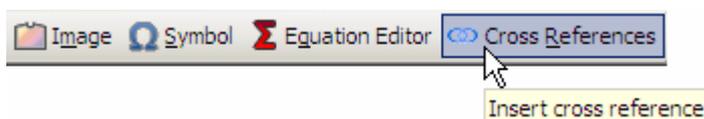
Inserting cross references

§ Position the cursor where you want the cross reference to appear.

§ In the **PatXML menu** select **Insert, Cross Reference**.

-OR-

In the *PatXML insert toolbar* (p 89) click **Cross References**.



§ Select **Figure, Claim** or **Table** from the drop-down list on the right.

A list of the items of the selected type appears on the left.

§ Click the required item, and then click **Insert**.

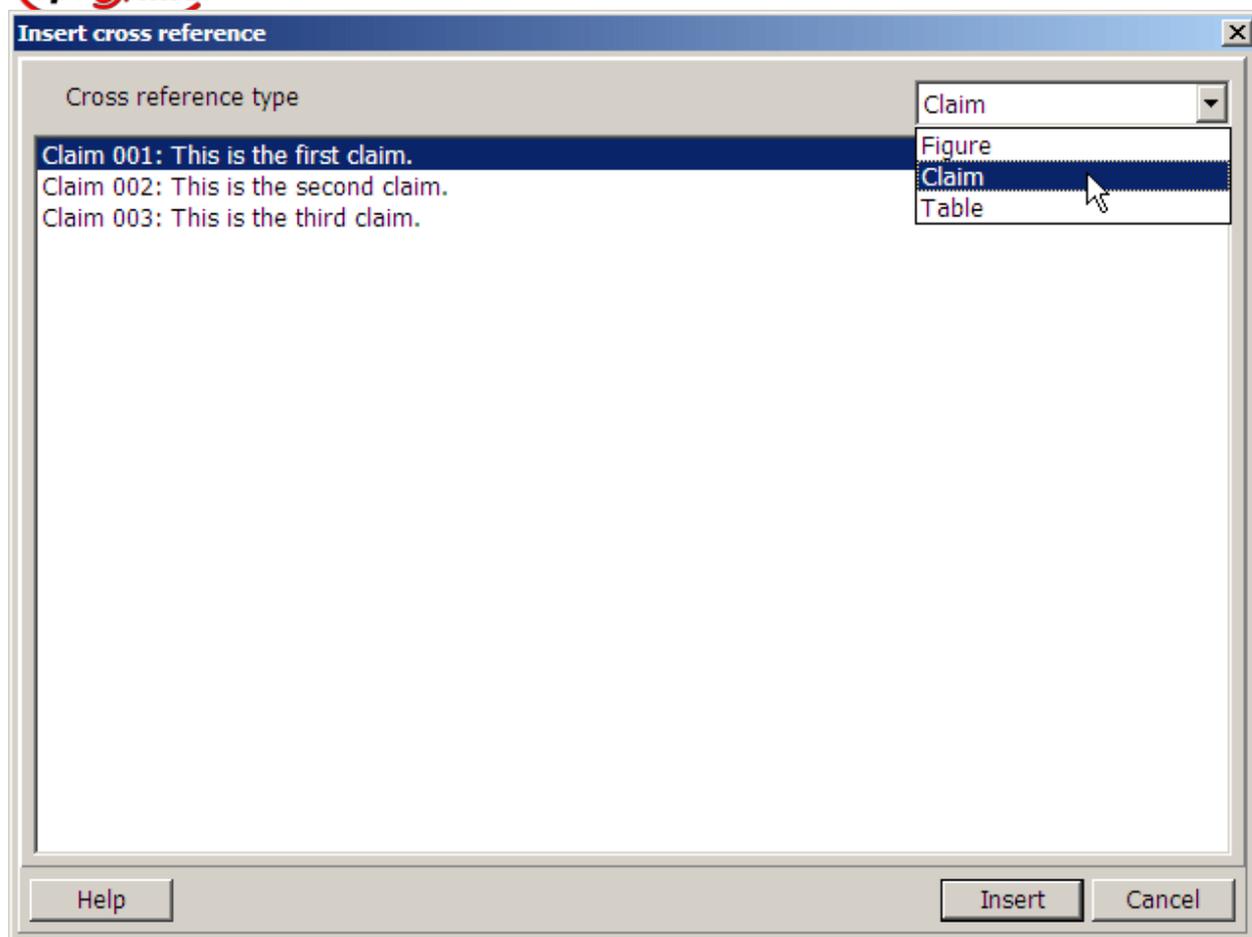


Figure 21: Inserting a cross reference

The cross reference is inserted as a numbered link where the cursor is positioned in the document. To jump to the item referenced, press **CTRL+Click** on the underlined link.

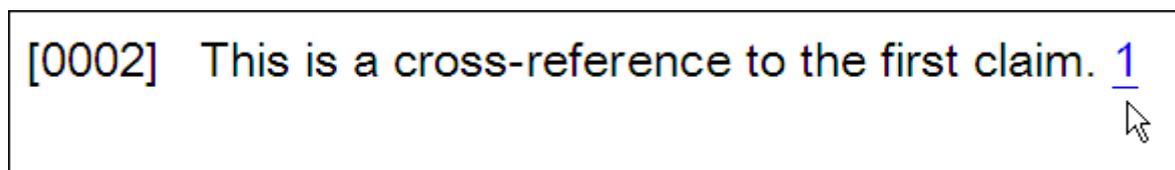




Figure 22. Cross-referenced link

Updating cross references

To update all fields in the document, including cross references, click the **Update Field** button  in the PatXML formatting toolbar.



PatXML content management

The **Content Management** window groups the different elements of your document into tabs called Sections, Figures, Tables, Citations and Maths.

It provides two modes to view and *navigate through the document structure*. Elements are presented in either:

Details view  or **List** view  (see example below).

You can also *add sections and headers* to your document or *delete them*.

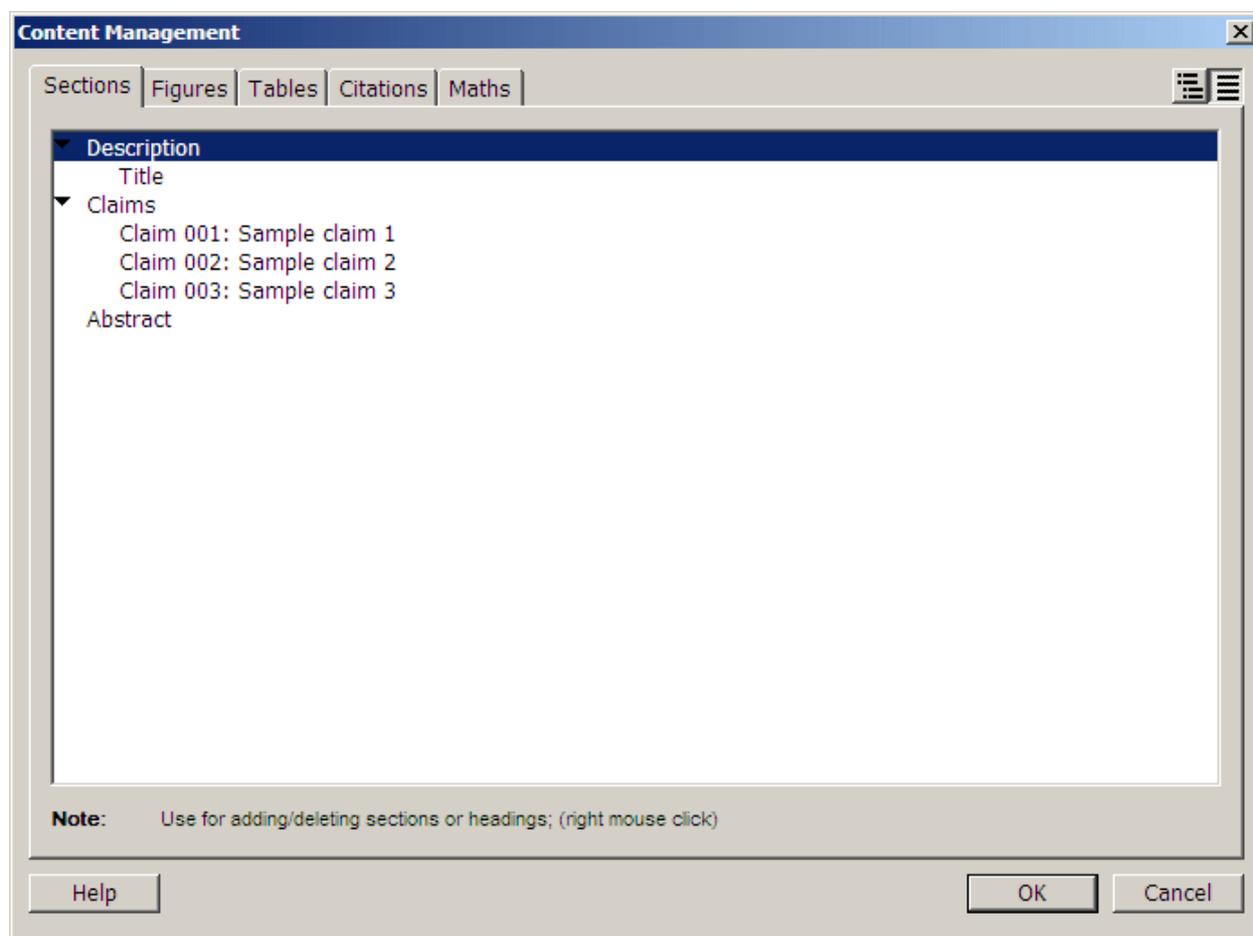


Figure 23: Content Management window

Option

Comments



| Option | Comments |
|---------------------------------|---|
| Sections | The Sections tab lists the document sections and headers. Right-clicking a section or header displays a shortcut menu of options appropriate to that item, eg adding missing sections, or adding, locating or deleting the selected section or header. |
| Figures | The Figures tab provides a list of all the inserted images with their attributes. |
| Tables, Citations, Maths | Other tabs permit the viewing of items in the order they appear in the document, either in Details view or in List view. |
| OK | The OK button applies changes (if any), closes the Content Management window and returns the user to the highlighted section or item. |
| Cancel | The Cancel button closes the window without applying the changes. |

Example

List view is selected in the Figures tab.

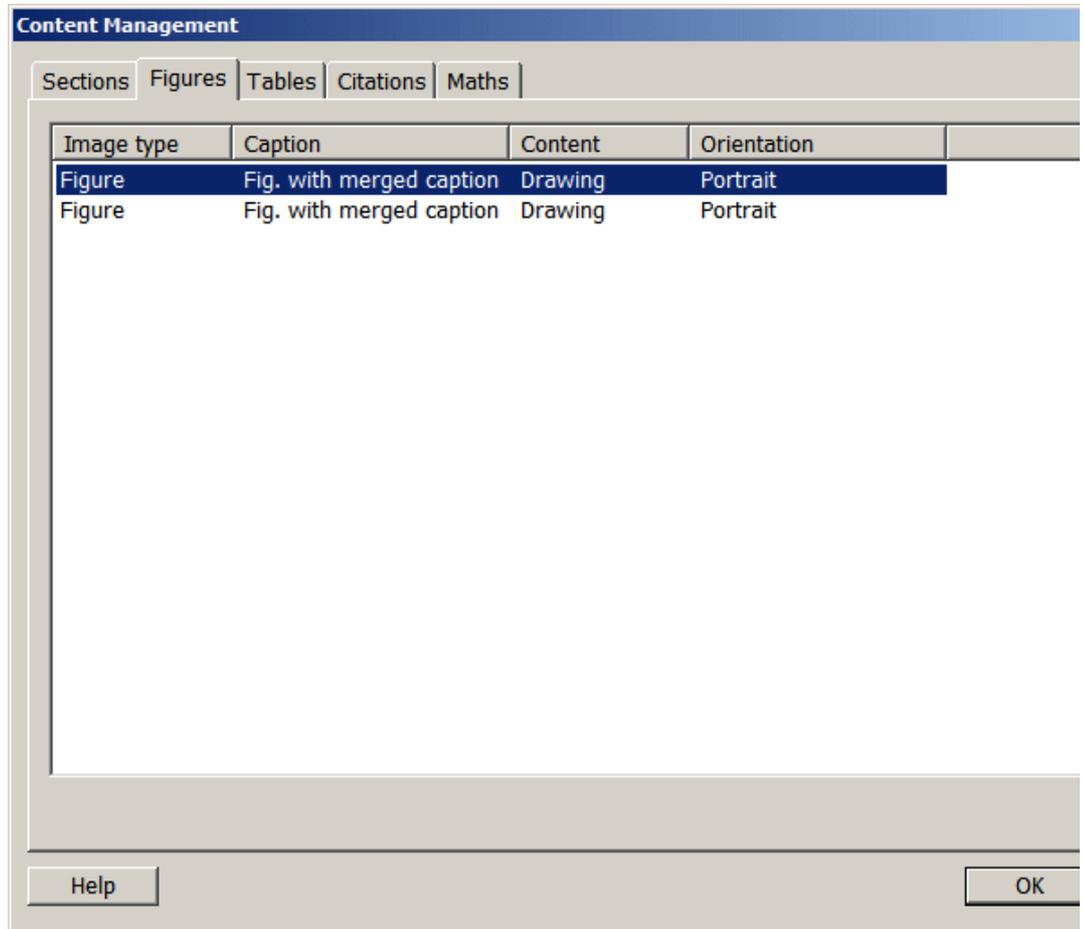


Figure 24: Figures in List view

Depict *line* selected in the Figures tab.

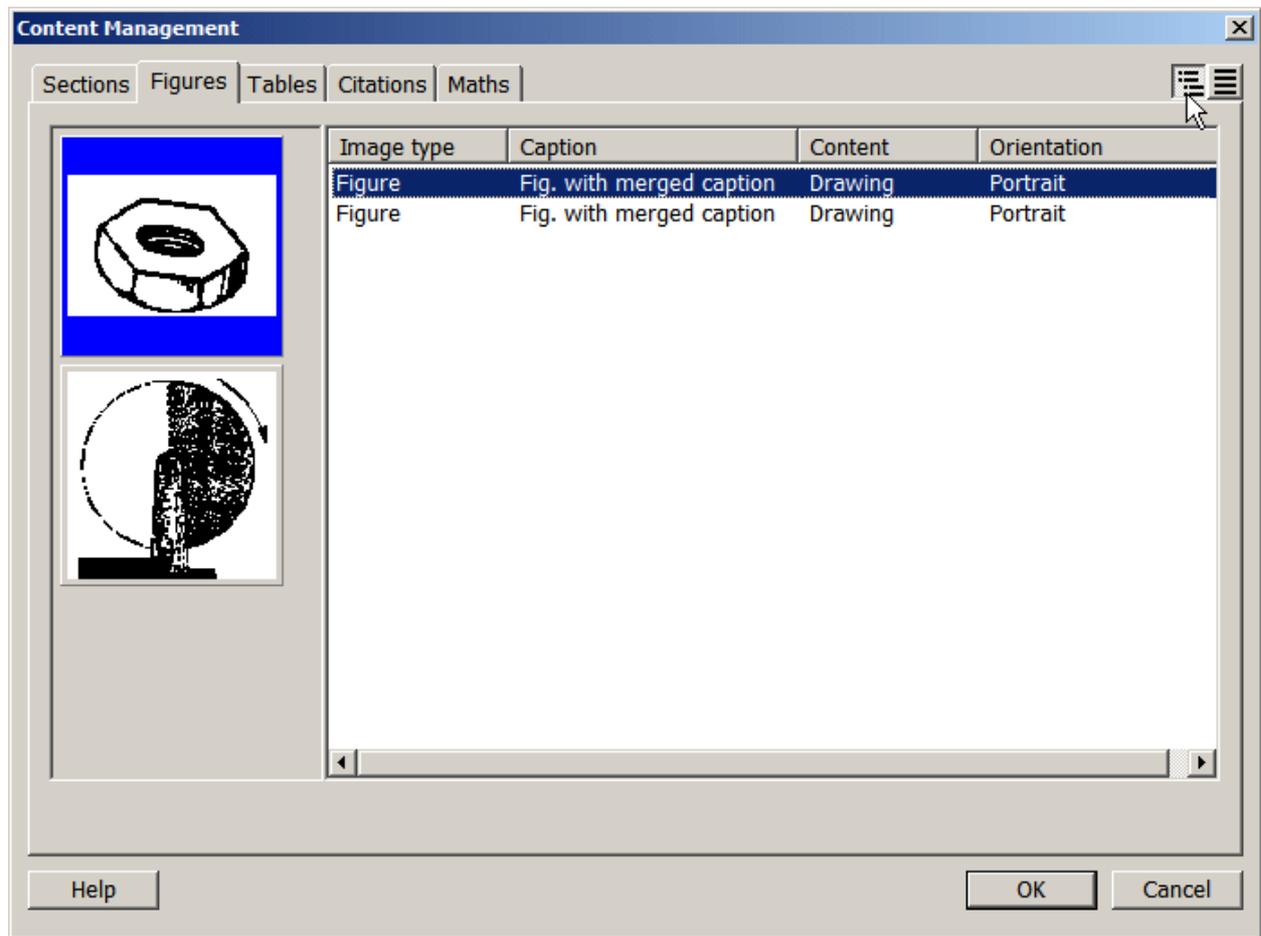




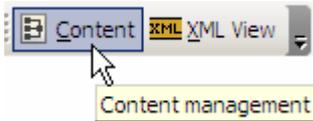
Figure 25. Figures in Details view

Content management navigation

§ In the **PatXML menu** select **View, Content**.

-OR-

Click **Content** in the *PatXML content toolbar* (p 90).



§ In the **Sections** tab, the current items are listed. Double-click an item in the list to jump to it.

Double-clicking an element will close the Content Management window and move you to the position in the document where the element is located.

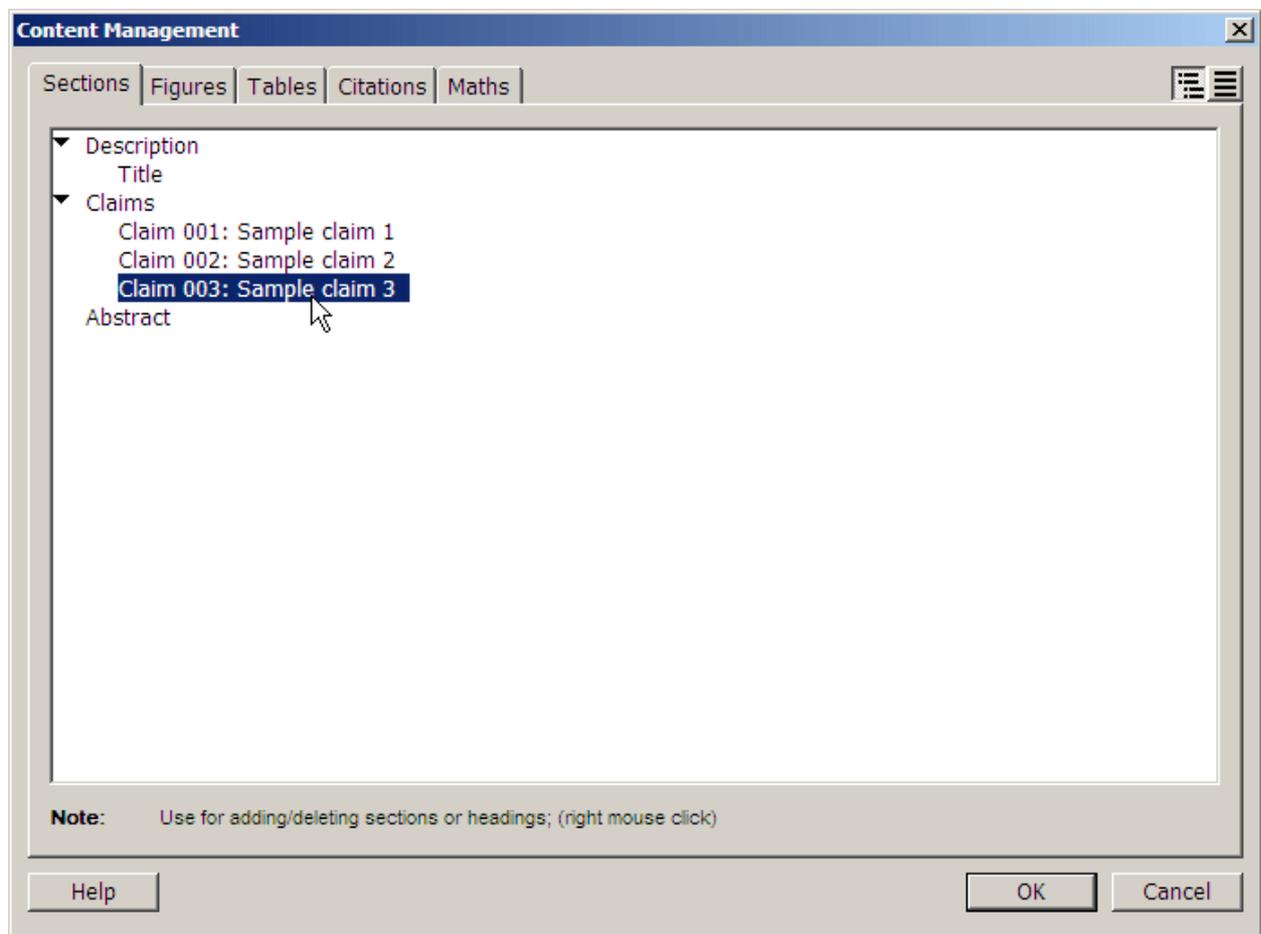




Figure 26. Jumping to Claim 003

Adding sections and headers

§ In the **PatXML menu** select **View, Content**.

-OR-

Click **Content** in the *PatXML content toolbar* (p 90).

§ In the Content Management window, right-click the appropriate item.

The shortcut menu changes depending on which item you click.

Example 1

In this example we right-click Claim 003. We can only add a claim before or after the selected item, or delete the selection.

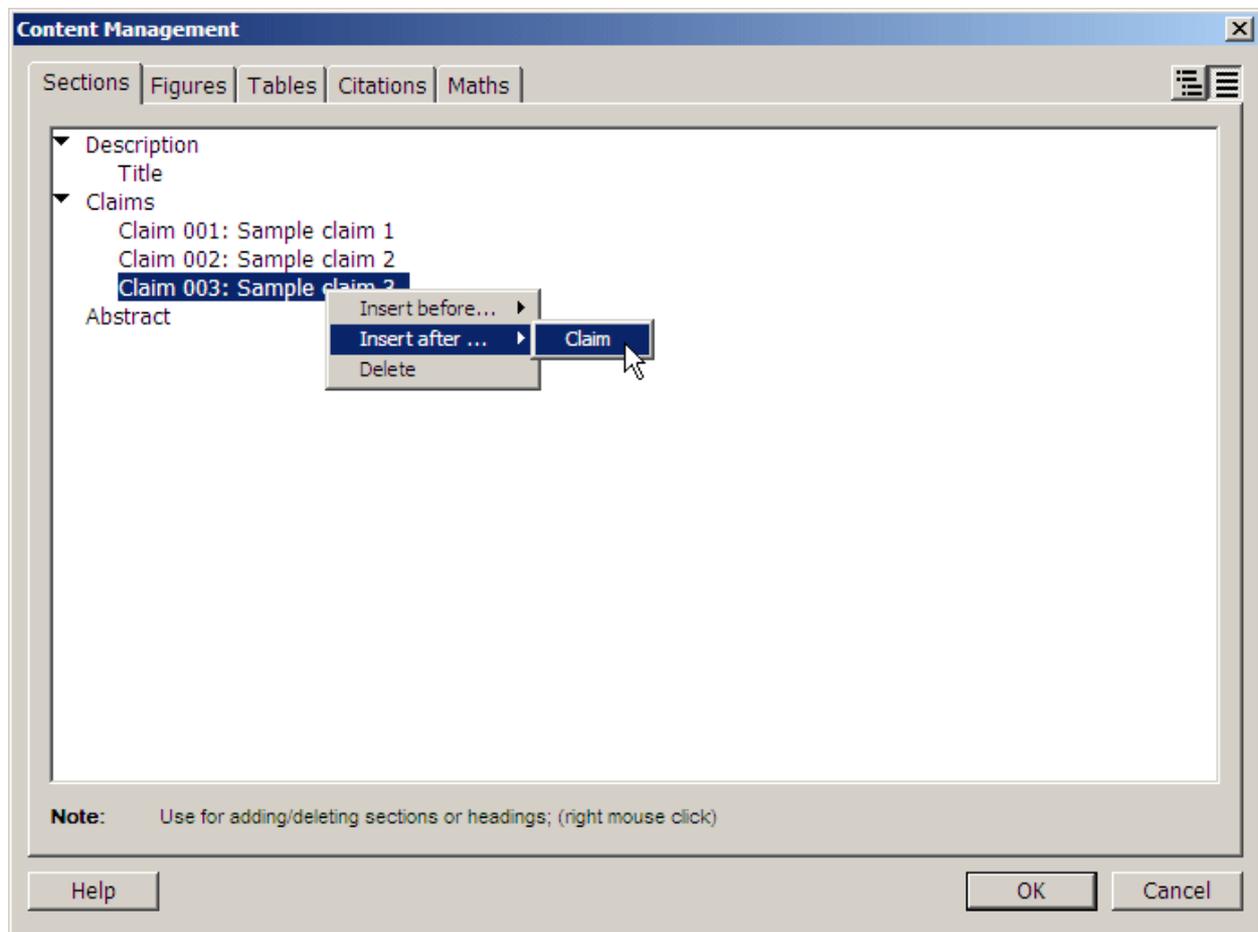




Figure 27: Shortcut menu with options for Claim

Example 2

In this example we right-click the **Abstract** section. We insert a **Drawings** section after the Abstract section. (The **Insert into** command offers the options **Paragraph** and **Problem/Solution**.)

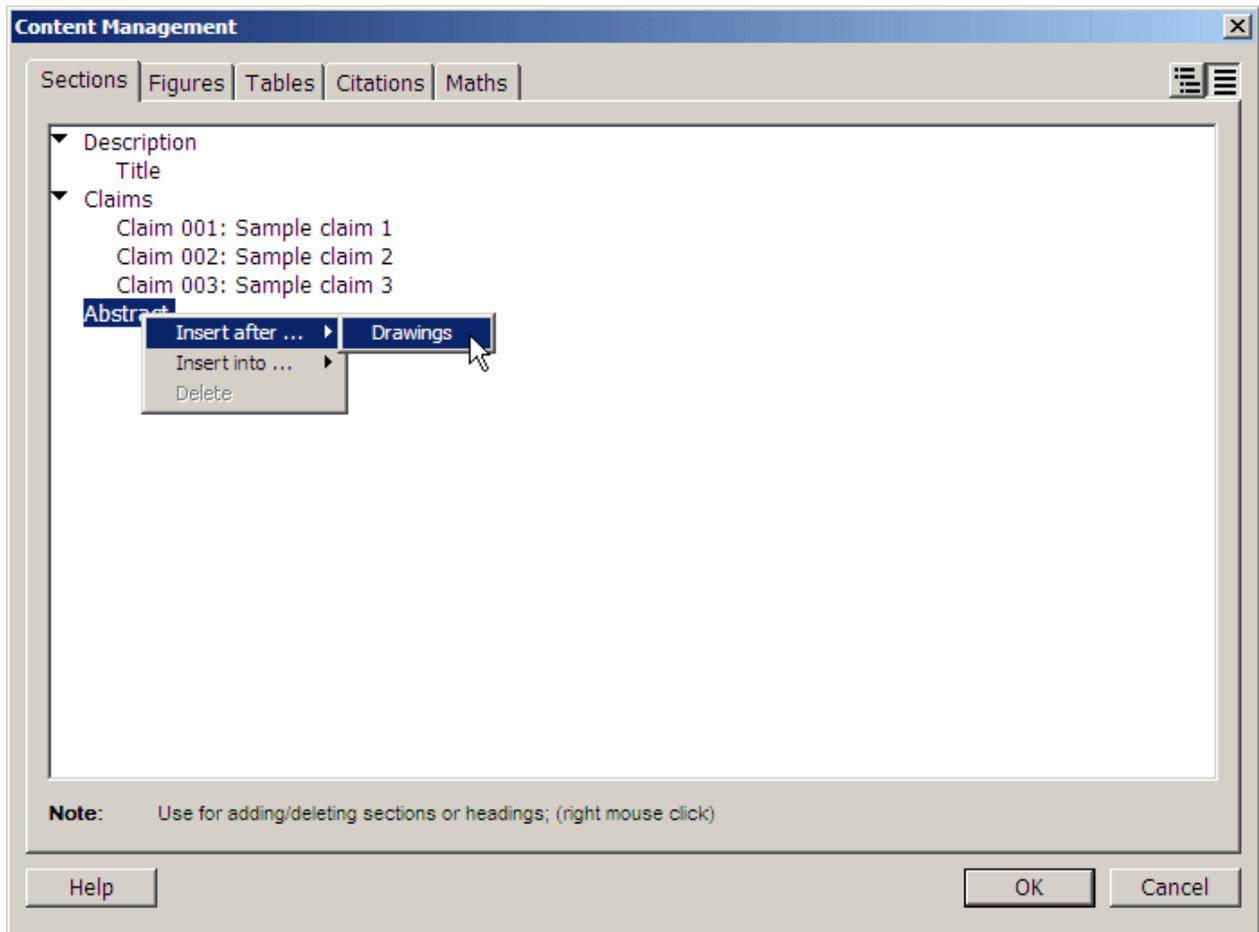


Figure 28: Shortcut menu for Abstract

Deleting sections and headers

The Content Management window can be used to delete section and header names and individual items such as numbered claims.

§ In the **PatXML** menu select **View, Content**.

-OR-

Click **Content** in the *PatXML content toolbar* (p 90).

 In the Content Management window, right-click the appropriate item, and then click **Delete**.

You cannot delete a mandatory section, ie Description, Claims or Abstract (see Example 1).

If you delete a non-mandatory header, you may choose to delete the header of the section only OR to delete the section WITH CONTENT, as appropriate. If you delete the header only, the content is repositioned under the preceding header or section name (see Example 2).

If you delete the Drawings section, you must also delete the content, ie the figures (see Example 3).

If you click **Delete** on an individual item, eg the document title or a numbered claim, the item is removed immediately with no second prompt to confirm the deletion. The item cannot be retrieved, and there is no Undo option (see Example 4).

Example 1

In this example, because the Abstract section is mandatory, the Delete option is unavailable.

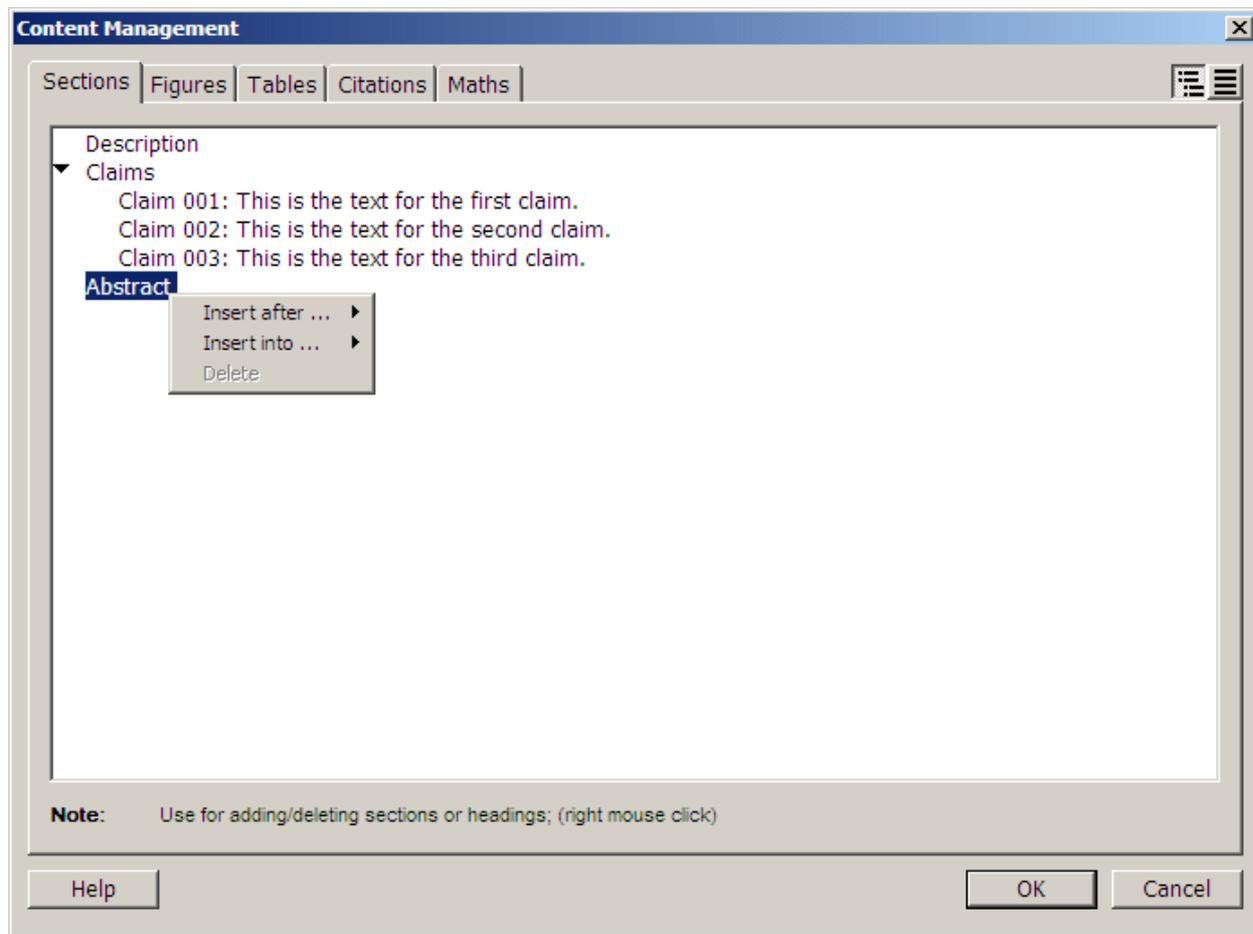




Figure 29: Delete option unavailable for mandatory section

Example 2

In this example, Problem and Solution header names have been inserted in the Abstract section. The content appears under each header.

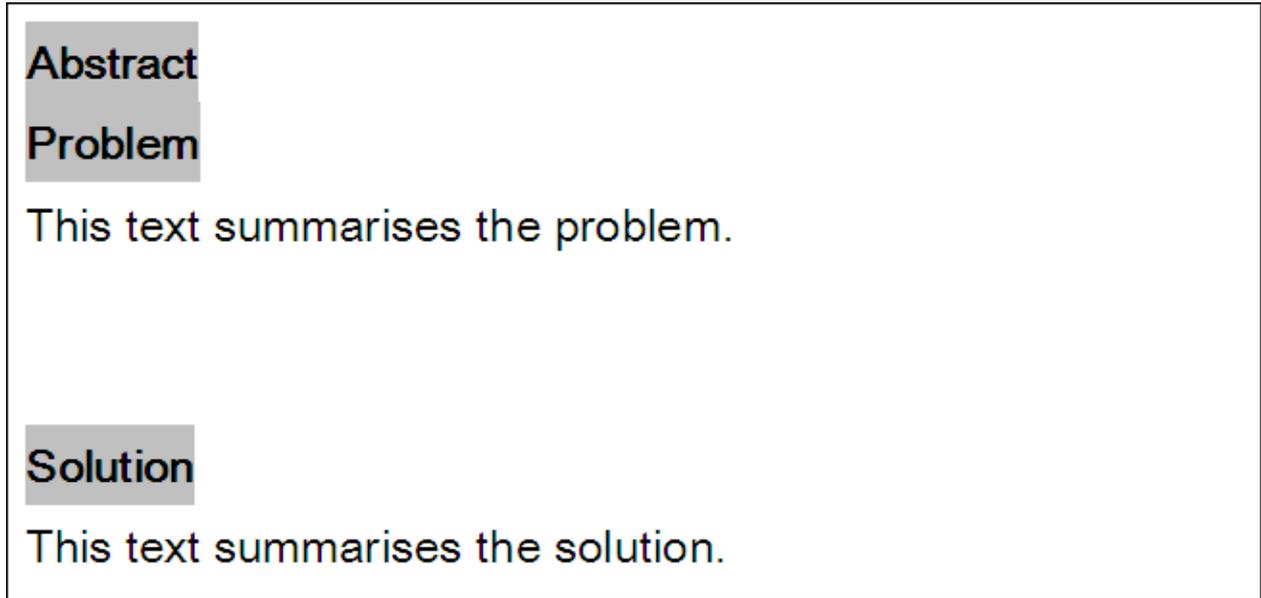


Figure 30: Problem and Solution headers with text

The Delete option is clicked for the Solution header.

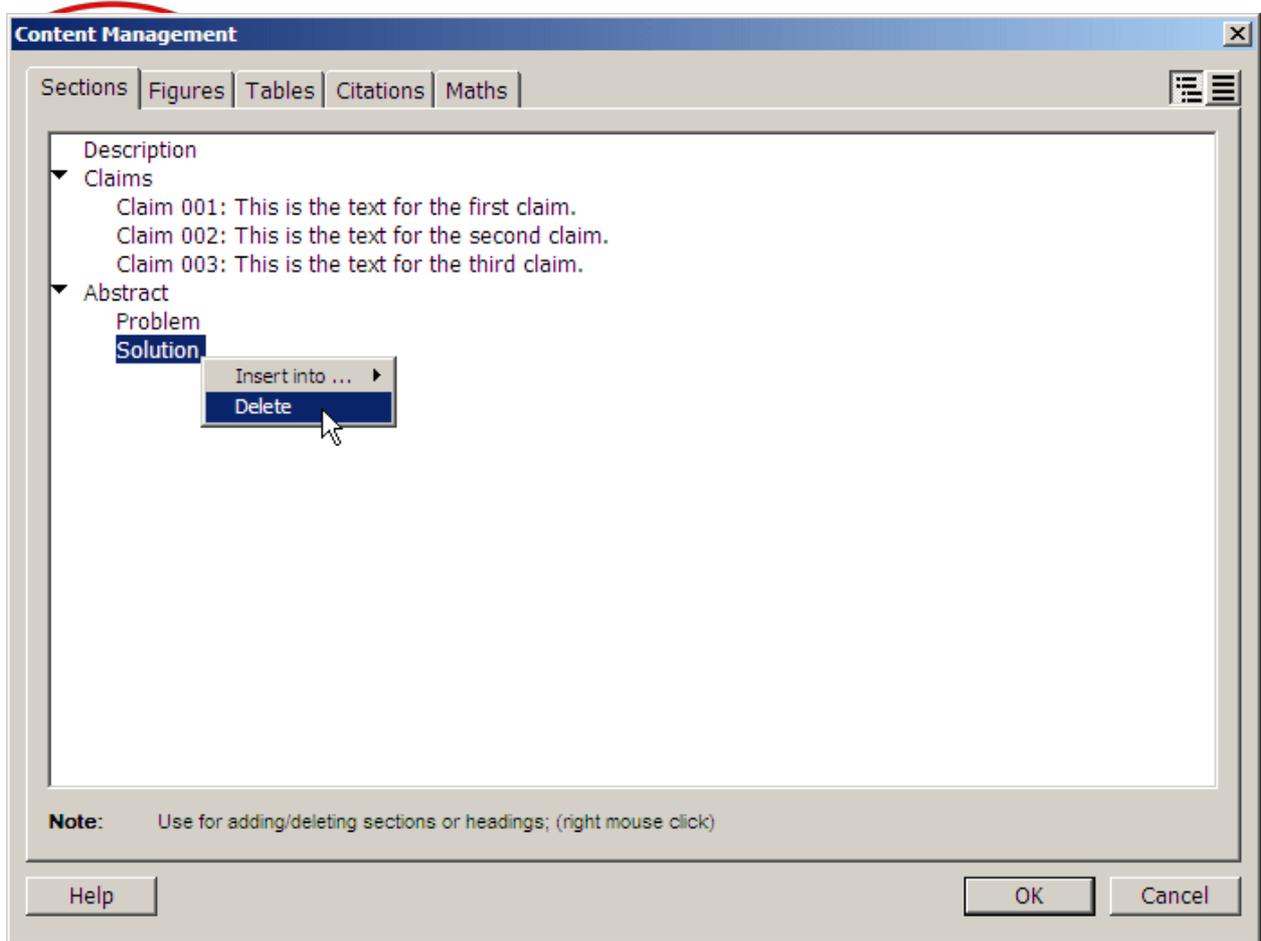
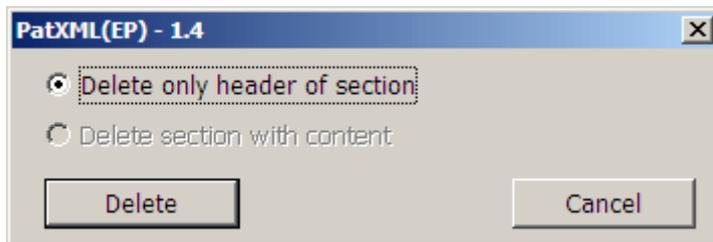




Figure 31: Deleting a header

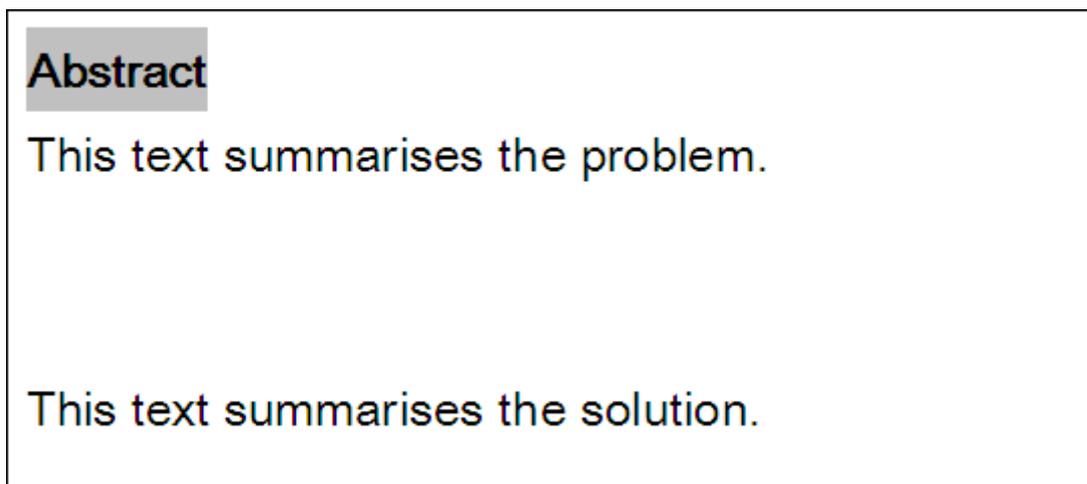
The **Delete only header of section** prompt is displayed.

Figure 32: Delete only header of section option



When **Delete** is clicked, both the **Problem** and **Solution** header names are removed and the content is displayed under the Abstract section name.

Figure 33: Header deleted, but content remains



In this example, there are two figures in the Drawings section.

Drawings (please insert a figure below)



Fig. 1



Fig. 2



Figure 34: Sample Drawings section

Because the Drawings section is non-mandatory, the Delete option is available.

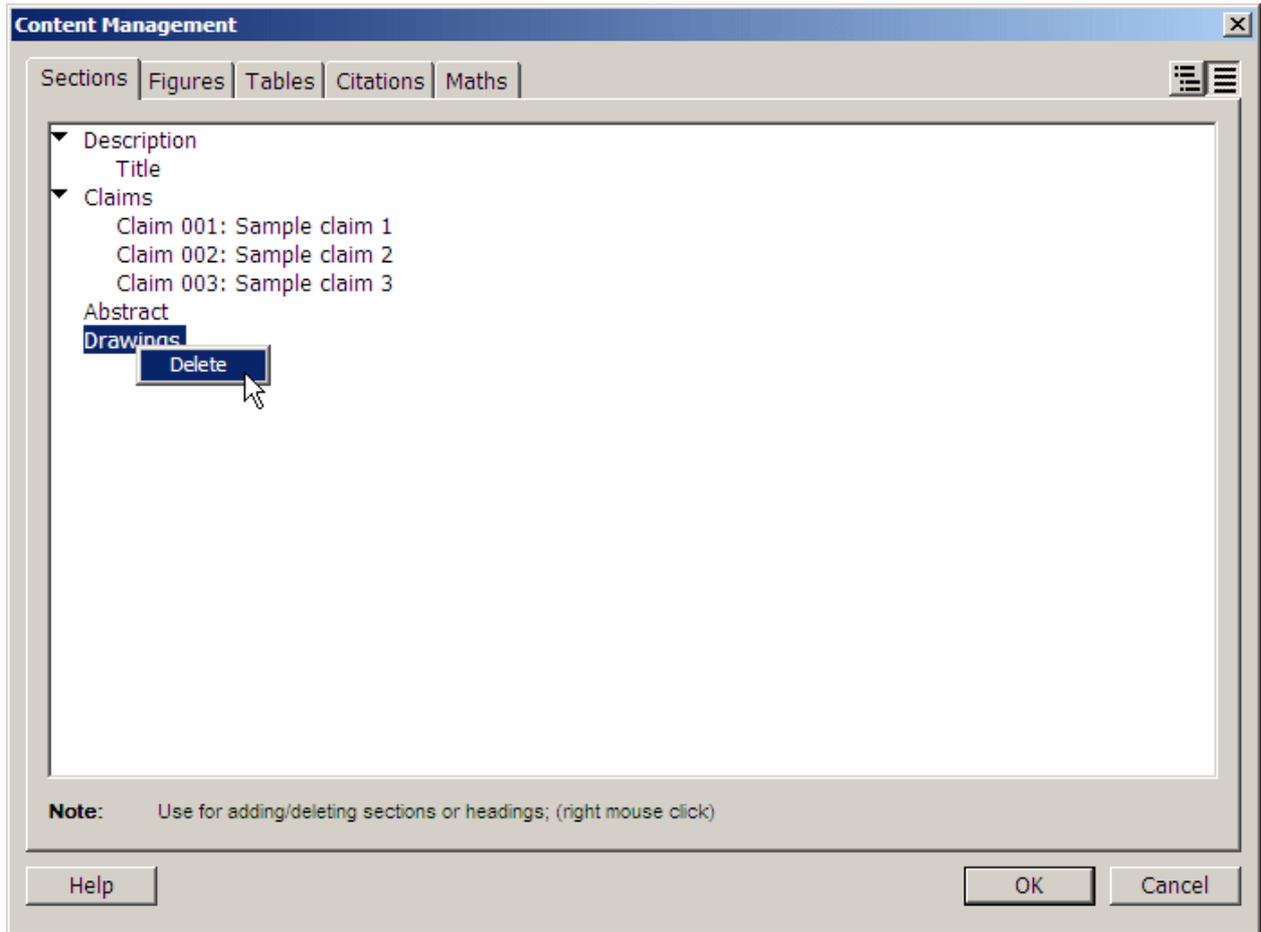


Figure 35: Deleting a non-mandatory section

The **Delete section with content** prompt is displayed.



Figure 36: Section with content to be deleted

When **Delete** is clicked, the Drawings section name AND the figures are removed.



In this example, the Delete option is clicked for Claim 003.

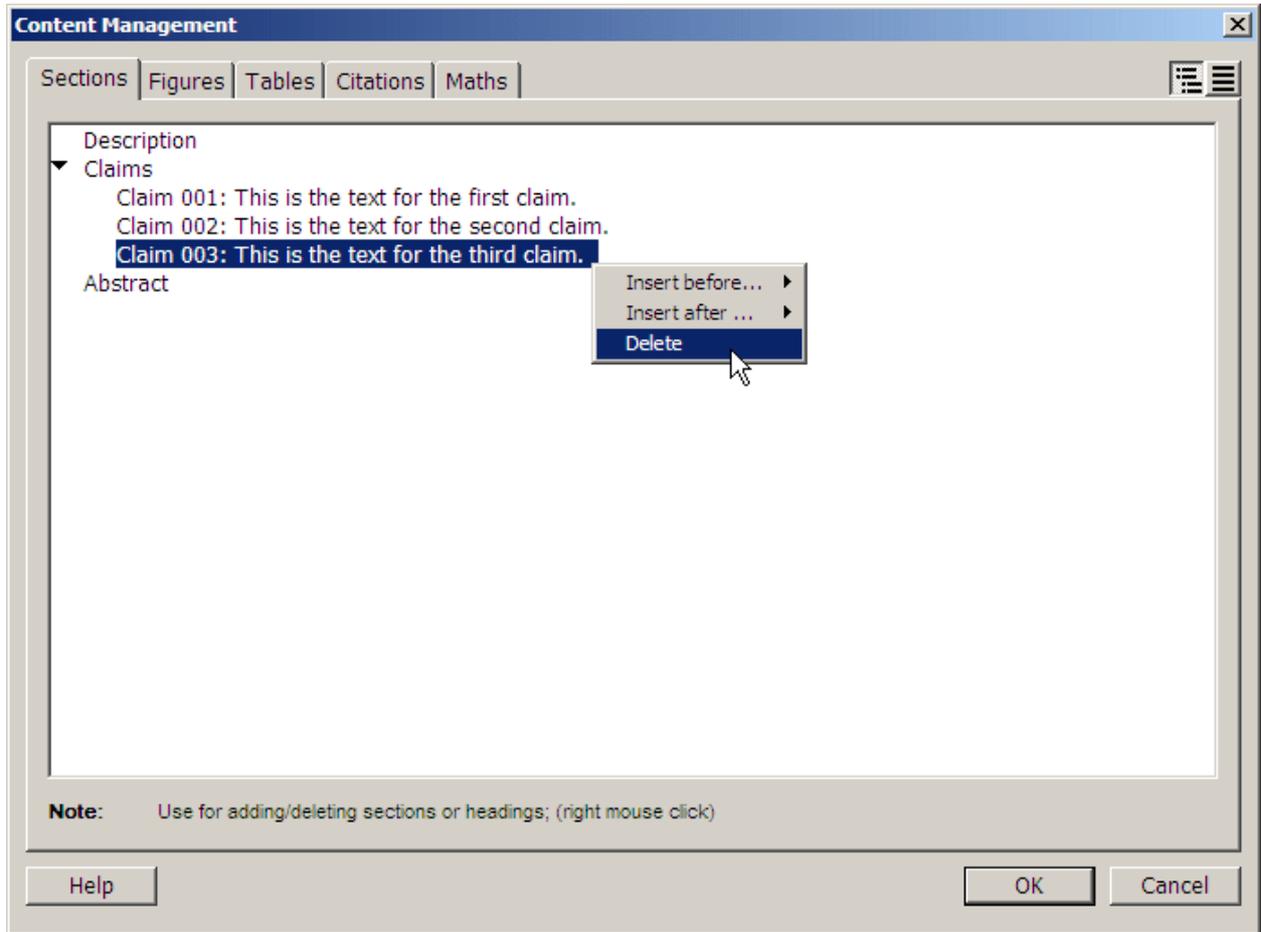




Figure 37: Deleting Claim 003

Claim 003 is deleted immediately.

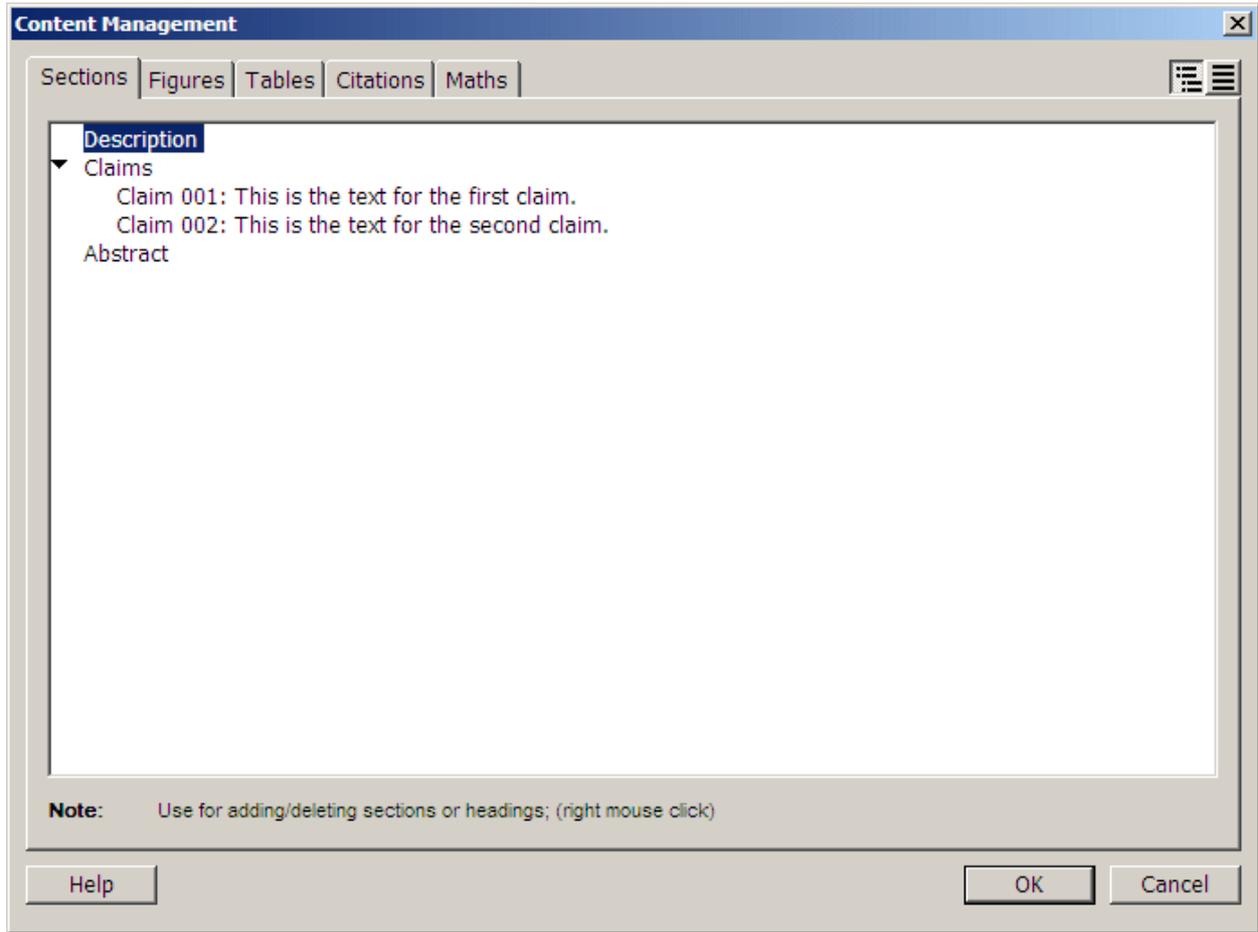


Figure 38: Claim 003 deleted

Sections

Additional information is provided below for the sections available when you right-click a heading in the **Content Management** window.

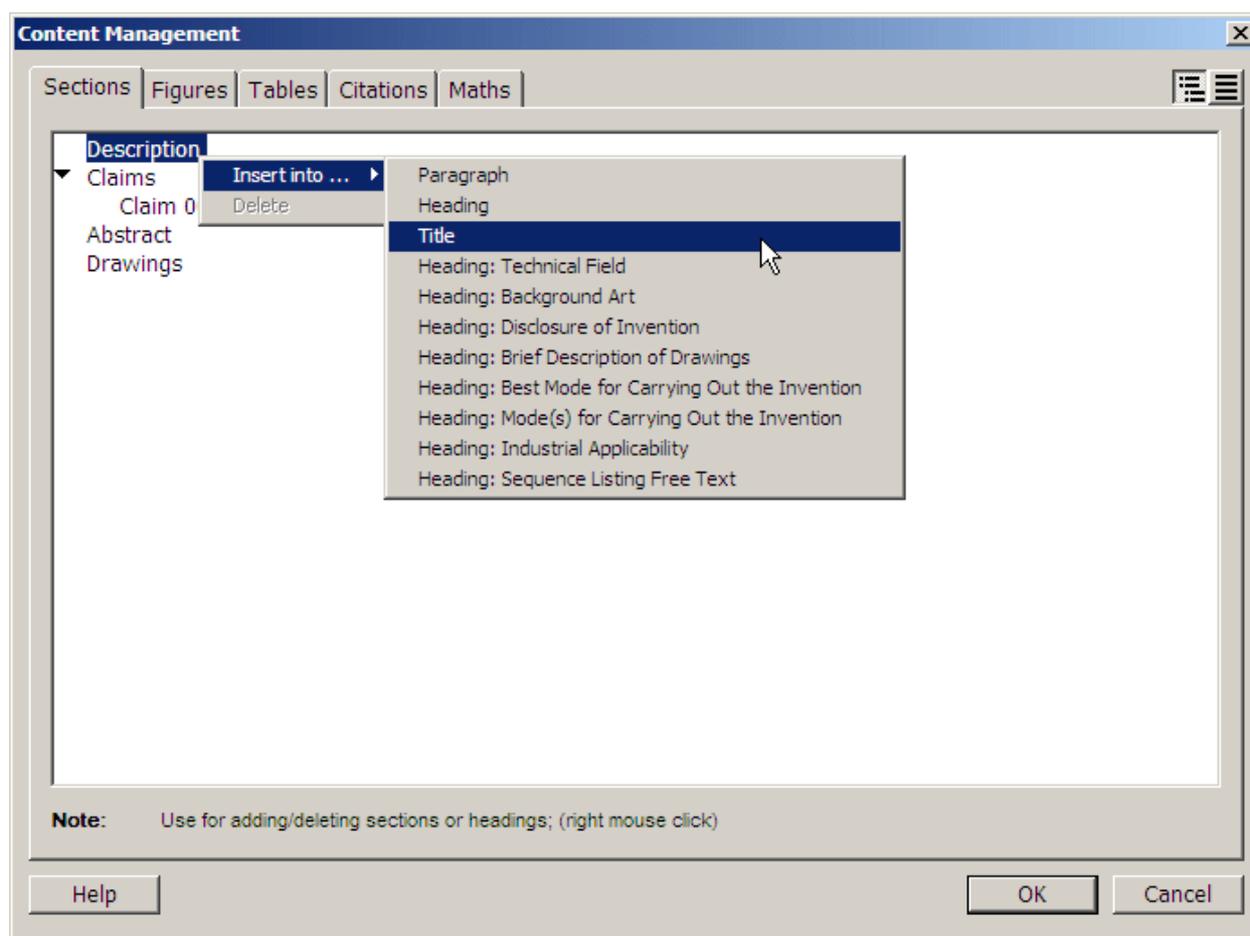


Figure 39: Content management options

Description

According to Rule 27 of the **European Patent Convention**:

"(1) The description shall:

(a) specify the technical field to which the invention relates;

(b) indicate the background art which, as far as known to the applicant, can be regarded as useful for understanding the invention, for drawing up the European search report and for the examination, and, preferably, cite the documents reflecting such art;

(c) disclose the invention, as claimed, in such terms that the technical problem (even if not expressly stated as such) and its solution can be understood, and state any advantageous effects of the invention with reference to the background art;

(d) briefly describe the figures in the drawings, if any;

(e) describe in detail at least one way of carrying out the invention claimed using examples where appropriate and referring to the drawings, if any;

(f) indicate explicitly, when it is not obvious from the description or nature of the invention, the way in which the invention is capable of exploitation in industry.

(2) The description shall be presented in the manner and order specified in paragraph 1, unless because of the nature of the invention, a different manner or a different order would afford a better understanding and a more economic presentation."

Note The Description section is mandatory and may contain optional subsections. For more information on document structure see *Defining document structure* (p 21) and *Importing documents* (p 93).

Invention title

The title should clearly and concisely state the technical designation of the application and should exclude elaborate names. The maximum number of characters allowed is 250. This is not a mandatory section, though it is strongly recommended.



Technical field

Specify the technical field to which the invention relates. This information is mandatory, but the header is optional.

Background art

Indicate the background art which, as far as known to the applicant, can be regarded as useful for understanding the invention, for drawing up the European search report and for the examination, and, preferably, cite the documents reflecting such art.

Disclosure of invention

Disclose the invention, as claimed, in such terms that the technical problem (even if not expressly stated as such) and its solution can be understood, and state any advantageous effects of the invention with reference to the background art.

See Article 83 of the **European Patent Convention**.

Brief description of drawings

Briefly describe the figures in the drawings, if any. For more information on including drawings see *Inserting images* (p 33).



Best mode for carrying out the invention/Mode(s) for carrying out the invention

Describe in detail at least one way of carrying out the invention claimed using examples where appropriate and referring to the drawings, if any.

Industrial applicability

Indicate explicitly, when it is not obvious from the description or nature of the invention, the way in which the invention is capable of exploitation in industry.

The description should normally be presented in the manner and order *specified*, unless, because of the nature of the invention, a different manner or a different order would afford a better understanding and a more economic presentation.



Sequence listing free text

Sequence listings may be included in the Description section in accordance with and for the reasons described in Rule 27a of the **European Patent Convention**, which reads:

"Requirements of European patent applications relating to nucleotide and amino acid sequences

(1) If nucleotide or amino acid sequences are disclosed in the European patent application the description shall contain a sequence listing conforming to the rules laid down by the President of the European Patent Office for the standardised representation of nucleotide and amino acid sequences.

(2) The President of the European Patent Office may require that, in addition to the written application documents, a sequence listing in accordance with paragraph 1 be submitted on a data carrier prescribed by him accompanied by a statement that the information recorded on the data carrier is identical to the written sequence listing.

(3) If a sequence listing is filed or corrected after the date of filing, the applicant shall submit a statement that the sequence listing so filed or corrected does not include matter which goes beyond the content of the application as filed.

(4) A sequence listing filed after the date of filing shall not form part of the description."

This section is optional.

Claims

This is a mandatory section.

Rule 29 of the European Patent Convention states:

"(1) The claims shall define the matter for which protection is sought in terms of the technical features of the invention. Wherever appropriate claims shall contain:

(a) a statement indicating the designation of the subject-matter of the invention and those technical features which are necessary for the definition of the claimed subject-matter but which, in combination, are part of the prior art;

(b) a characterising portion - preceded by the expression "characterised in that" or "characterised by" - stating the technical features which, in combination with the features stated in sub-paragraph (a), it is desired to protect.

(2) A European patent application may contain two or more independent claims in the same category (product, process, apparatus or use) where it is not appropriate, having regard to the subject-matter of the application, to cover this subject-matter by a single claim.

(3) Any claim stating the essential features of an invention may be followed by one or more claims concerning particular embodiments of that invention.

(4) Any claim which includes all the features of any other claim (dependent claim) shall contain, if possible at the beginning, a reference to the other claim and then state the additional features which it is desired to protect.

A dependent claim shall also be admissible where the claim it directly refers to is itself a dependent claim. All dependent claims referring back to a single previous claim, and all dependent claims referring back to several previous claims, shall be grouped together to the extent and in the most appropriate way possible.

(5) The number of the claims shall be reasonable in consideration of the nature of the invention claimed. If there are several claims, they shall be numbered consecutively in Arabic numerals.

(6) Claims shall not, except where absolutely necessary, rely, in respect of the technical features of the invention, on references to the description or drawings.

In particular, they shall not rely on such references as:

"as described in part ... of the description", or "as illustrated in figure ... of the drawings".

(7) If the European patent application contains drawings, the technical features mentioned in the claims shall preferably, if the intelligibility of the claim can thereby be increased, be followed by reference signs relating to these features and placed between parentheses.

These reference signs shall not be construed as limiting the claim."



See Article 84 of the **European Patent Convention**.

Abstract

This is a mandatory section. Article 85 of the European Patent Convention states.:

"The abstract shall merely serve for use as technical information; it may not be taken into account for any other purpose, in particular not for the purpose of interpreting the scope of the protection sought nor for the purpose of applying Article 54, paragraph 3".

Rule 33 of the European Patent Convention states:

"(1) While completing the Abstract section for EP applications, the abstract shall indicate the title of the invention.

(2) The abstract shall contain a concise summary of the disclosure as contained in the description, the claims and any drawings; the summary shall indicate the technical field to which the invention pertains and shall be drafted in a way which allows the clear understanding of the technical problem, the gist of the solution of that problem through the invention and the principal use or uses of the invention. The abstract shall, where applicable, contain the chemical formula which, among those contained in the application, best characterises the invention. It shall not contain statements on the alleged merits or value of the invention or on its speculative application.

(3) The abstract shall preferably not contain more than one hundred and fifty words.

(4) If the European patent application contains drawings, the applicant shall indicate the figure or, exceptionally, the figures of the drawings which he suggests should accompany the abstract when the abstract is published. The European Patent Office may decide to publish one or more other figures if it considers that they better characterise the invention. Each main feature mentioned in the abstract and illustrated by a drawing shall be followed by a reference sign, placed between parentheses.

(5) The abstract shall be so drafted that it constitutes an efficient instrument for purposes of searching in the particular technical field particularly by making it possible to assess whether there is a need for consulting the European patent application itself."

Note The text should be limited to 150 words.



Drawings

Rule 32 of the **European Patent Convention states:**

"(1) On sheets containing drawings, the usable surface area shall not exceed 26.2 cm x 17 cm. These sheets shall not contain frames round the usable or used surface.

The **minimum margins** shall be as follows:

| | |
|------------|--------|
| top | 2.5 cm |
| left side | 2.5 cm |
| right side | 1.5 cm |
| bottom | 1.0 cm |



(2) Drawings shall be executed as follows:

(a) Drawings shall be executed in durable, black, sufficiently dense and dark, uniformly thick and well-defined, lines and strokes without colourings.

(b) Cross-sections shall be indicated by hatching which should not impede the clear reading of the reference signs and leading lines.

(c) The scale of the drawings and the distinctness of their graphical execution shall be such that reproduction, obtained electronically or photographically, with a linear reduction in size to two-thirds would enable all details to be distinguished without difficulty. If, as an exception, the scale is given on a drawing, it shall be represented graphically.

(d) All numbers, letters, and reference signs, appearing on the drawings, shall be simple and clear. Brackets, circles or inverted commas shall not be used in association with numbers and letters.

(e) All lines in the drawings shall, ordinarily, be drawn with the aid of drafting instruments.

(f) Elements of the same figure shall be in proportion to each other, unless a difference in proportion is indispensable for the clarity of the figure.

(g) The height of the numbers and letters shall not be less than 0.32 cm. For the lettering of drawings, the Latin and, where customary, the Greek alphabets shall be used.

(h) The same sheet of drawings may contain several figures. Where figures drawn on two or more sheets are intended to form one whole figure, the figures on the several sheets shall be so arranged that the whole figure can be assembled without concealing any part of the partial figures. The different figures shall be arranged without wasting space, preferably in an upright position, clearly separated from one another. Where the figures are not arranged in an upright position, they shall be presented sideways with the top of the figures at the left side of the sheet. The different figures shall be numbered consecutively in Arabic numerals, independently of the numbering of the sheets.

(i) Reference signs not mentioned in the description and claims shall not appear in the drawings, and vice versa. The same features, when denoted by reference signs, shall, throughout the application, be denoted by the same signs.

(j) The drawings shall not contain text matter, except, when absolutely indispensable, a single word or words such as "water", "steam", "open", "closed", "section on AB", and, in the case of electric circuits and block schematic or flow sheet diagrams, a few short catch-words indispensable for understanding. Any such words shall be placed in such a way that, if required, they can be replaced by their translations without interfering with any lines of the drawings.

(3) Flow sheets and diagrams are considered drawings."

Citations

You may insert citations from the PatXML **Insert** menu, or from the *PatXML citations toolbar*.

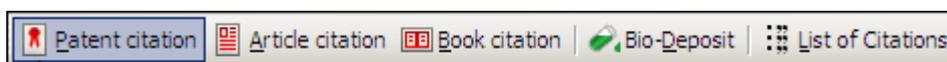
Patent citation

§ Position the cursor where you want the citation to appear.

§ In the *PatXML menu* select **Insert, Patent citation**.

-OR-

In the *PatXML citations toolbar* (p 89) click **Patent citation**.



§ Enter the information relating to the patent citation.



Figure 40: Sample patent citation

| Option | Comments |
|------------------|---|
| Country | Enter the two-letter country code of the patent document according to <i>WIPO Standard ST.3</i> , eg EP or JP or US. The full name of the country will be displayed in the second box. This data is mandatory. |
| Number | Select the number type from the drop-down list: Publication, Application or PCT No. Enter the patent document number. For certain countries the patent number may include a check digit. This data is mandatory. |
| Applicant | Enter the name of the applicant; eg SMITH or AGFA. This data is optional. |
| Kind | Select from the drop-down list the document kind code according to <i>WIPO Standard ST.16</i> . This data is optional. |



| <i>Option</i> | <i>Comments</i> |
|--------------------------|--|
| <i>Date</i> | Enter the date of publication of the patent document eg 02.05.2002, or use the calendar button  to select a date. This data is optional. |
| <i>Browse for Patent</i> | If you have an Internet connection, you can use this button to make sure that the details you have input are correct. The patent will only be displayed in your Internet browser if you have entered the <i>Country</i> and the <i>Patent Number</i> , as the link to the EPO's <i>esp@cenet</i> ® database is established depending on the number entered. At present, this only works for publication numbers, for example EP 1000000. |

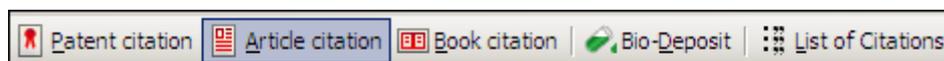
Notes

- § Click *Insert* to paste the citation into the document.
You will see that the citation is unavailable. Click on it to open the citation in the citation box for editing.
- § To *delete* the citation simply go to the end of it and backspace.

Entering this data into the citation pop-up allows a link to be built from the citation to the patent databases. As a result the document is much more useful for business users and patent examiners alike. Clicking on it will take you to the *esp@cenet*® database and the patent itself.
- § If citations are entered in the pop-up box they are presented in a standard format, and it is possible to create a list of references at the end of the description (if required).
- § You can, of course, enter patent citations without using the citation pop-up but it would then be much more difficult to build the links described above.
- § The patent citation order is based on the recommendations in *WIPO Standard ST.14*.

Article (periodical) citation

- § Position the cursor where you want the article citation to appear.
 - § In the **PatXML menu** select **Insert, Article citation**.
- OR-**
- In the *PatXML citations toolbar* (p 89) click **Article citation**.





§ Enter the information relating to the article citation.

Figure 41: Sample article citation

Periodical Article Citation

Author

Last-/First name: et al.

Title:

Periodical:

Publication Date: Vol.: Number: Pages:

| Option | Comments |
|---------------------------|--|
| Author, Last Name | Enter the author's last name: It will appear in UPPER CASE, eg SMITH. This data is mandatory. |
| Author, First Name | Enter the author's first name or initial(s), eg John or J.R. This data is not mandatory, but is strongly recommended. |
| et al | If there is more than one author select this check box. This is not mandatory, but is strongly recommended if there is more than one author. |
| Title | Enter the complete title of the article. This data is mandatory. |
| Periodical | Enter the name of the periodical. You may use standard abbreviations. In this field you can obtain help from a drop-down list containing the PCT minimum documentation . If the periodical is not in this list, simply type in the title. This data is mandatory. |
| Publication Date | Enter the date of publication of the article, eg 02.05.2002 or May 2002. This data is optional. |
| Vol. | If available, enter the volume number of the periodical. This data is optional. |



| Option | Comments |
|--------------|---|
| No. | If available, enter the (part) number of the periodical. This data is optional. |
| Pages | If available, enter the page numbers in the periodical, eg 112-5 or 112-115 or 12,13,15. This data is optional. |

Notes

§ Click **Insert** to paste the citation into the document. For example:

GRAMLICH, Gabriella, et al. Increased Antioxidant Reactivity of Vitamin C at Low pH in Model Membranes. J. Am. Chem. Soc. 25 September 2002, vol. 124, no. 38, p. 11252-11253.

You will see that the citation is unavailable. Click on it to open the citation in the citation box for editing.

§ To *delete* the citation simply go to the end of it and backspace.

Entering this data into the citation pop-up allows a link to be built from the citation to the databases. As a result the document is much more useful document for end users and patent examiners alike. For example, the above citation would be presented as:

GRAMLICH, Gabriella, et al. Increased Antioxidant Reactivity of Vitamin C at Low pH in Model Membranes. J. Am. Chem. Soc. 25 September 2002, vol. 124, no. 38, p. 11252-11253

§ If citations are entered in the pop-up box they are presented in a structured format, and it is possible to create a list of references at the end of the description (if required).

§ You can, of course, enter article citations without using the citation pop-up, but it would then be much more difficult to build the links described above, and they would not appear in the accepted standard form.

§ The article citation order is based on the recommendations in **WIPO Standard ST.14**. Some minor stylistic changes have been made to the way they are presented.

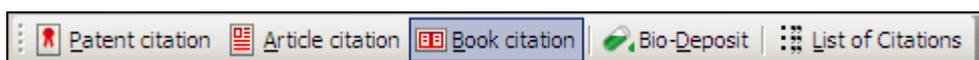
Book (monograph) citation

§ Position the cursor where you want the book citation to appear.

§ In the *PatXML menu* select **Insert, Book citation**.

-OR-

In the *PatXML citations toolbar* (p 89) click **Book citation**.



§ Enter the information relating to the book citation.

Book Citation

Author Person Company

Last-/First Name: et al.

Company:

Book Title: Edition:

Edited By:

Last-/First Name: et al.

Publisher

Place: Year:

Publisher Name: Pages:

ISBN: (E.g.: 0198611315)



Figure 42. Sample book citation

| <i>Option</i> | <i>Comments</i> |
|----------------------------------|--|
| <i>Author, Person</i> | For a person, enter the last name of the author. It will appear in UPPER CASE, eg SMITH. <i>This data is mandatory.</i> Enter the first name or initial(s) of the author, eg John or J.R. <i>This data is not mandatory, but is strongly recommended.</i> |
| <i>Author, Company</i> | Enter the company name. If any person information was entered, this option is unavailable. |
| <i>et al</i> | If there is more than one author click this box. <i>This is not mandatory, but is strongly recommended if there is more than one author.</i> |
| <i>Book Title</i> | Enter the complete title of the book plus any sub-title. <i>This data is mandatory.</i> |
| <i>Edition</i> | Enter the edition number only; eg 2 or 3. This data is optional. |
| <i>Edited By, Last Name</i> | Enter the last name of the editor. It will appear in UPPER CASE, eg BROWN. This data is optional. |
| <i>EditedBby, First Name</i> | Enter the first name or initial of the editor, eg David or D. This data is optional. |
| <i>et al</i> | If there is more than one editor click this box. This is optional. |
| <i>Publisher, Place</i> | Enter the place of publication, usually a city name; for example London or New York. This data is optional. |
| <i>Publisher, Year</i> | Enter the year of publication; eg 2002. This data is optional. |
| <i>Publisher, Publisher Name</i> | Enter the name of publisher; eg Macmillan or Springer Verlag. <i>This data is mandatory.</i> |
| <i>Publisher, Pages</i> | Enter the relevant page numbers of the cited passages within the book, eg 112-5 or 112-115 or 12,13,15. This data is optional. |
| <i>ISBN</i> | Enter the International Standard Book Number (ISBN). This consists of ten digits, eg 0198611315. This data is optional. <i>Note</i> This number is checked to see if it has been entered correctly. This data will be stored and displayed as one string of numbers. |



Notes

§ Click **Insert** to paste the citation into the document. For example:

WALTER, H. Sailboat Construction, London: Sweet and Maxwell, 1975. p.138 to 192

You will see that the citation is unavailable. Click on it to open the citation in the citation box for editing.

§ To **delete** the citation simply go to the end of it and backspace.

§ Entering this data in the pop-up box ensures that a standard style is used and makes it possible to create a list of references at the end of the description (if required).

You can, of course, enter book citations without using the citation pop-up, but such citations will not necessarily be consistent, and you will not be able to create the automatic reference list mentioned above.

At present, complex book citations such a multi-part, conference proceedings, web citations, etc. have to be entered manually. A pop-up functionality is planned for future implementation.

§ The book citation order is based on the recommendations in **WIPO Standard ST.14**. and **ISO 690:1987 Information and documentation -- Bibliographic references - Content, form and structure**.

Some minor stylistic changes have been made to the presentation.

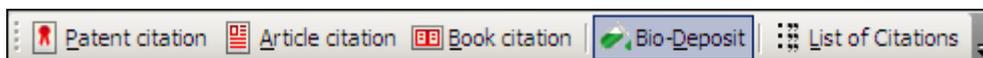
Bio-deposits

§ Position the cursor where you want the bio-deposit to appear.

§ In the **PatXML menu** select **Insert, Bio-Deposit**.

-OR-

In the **PatXML citations toolbar** (p 89) click **Bio-Deposit**.





§ Enter the information relating to the biological material.

Figure 43: Sample bio-deposit

| Option | Comments |
|-------------------------------|---|
| Depository Institution | Select an option from the Depository Institution list. |
| Name and Address | This field automatically displays the address of the depository institution selected above. This is a read-only field. |
| Accession Number | This field automatically displays the accession number of the selected depository institution, although it can also be edited manually. |
| Date of Deposit | Enter the date of deposit here following the predefined format, eg 02.05.2002, or use the calendar button  to select a date. This field is not mandatory, but is recommended. |



Note When providing biological material information, Rule 28 of the **European Patent Convention** applies:

"(1) If an invention involves the use of or concerns biological material which is not available to the public and which cannot be described in the European patent application in such a manner as to enable the invention to be carried out by a person skilled in the art, the invention shall only be regarded as being disclosed as prescribed in Article 83 if:

(a) a sample of the biological material has been deposited with a recognised depository institution not later than the date of filing of the application;

(b) the application as filed gives such relevant information as is available to the applicant on the characteristics of the biological material;

(c) the depository institution and the accession number of the deposited biological material are stated in the application, and

(d) where the biological material has been deposited by a person other than the applicant, the name and address of the depositor are stated in the application and a document is submitted satisfying the European Patent Office that the latter has authorised the applicant to refer to the deposited biological material in the application and has given his unreserved and irrevocable consent to the deposited material being made available to the public in accordance with this Rule.

(2) The information referred to in paragraph 1(c) and, where applicable, (d) may be submitted

(a) within a period of sixteen months after the date of filing of the application or, if priority is claimed, after the priority date, this time limit being deemed to have been met if the information is communicated before completion of the technical preparations for publication of the European patent application;

(b) up to the date of submission of a request for early publication of the application;

(c) within one month after the European Patent Office has communicated to the applicant that a right to inspect the files pursuant to **Article 128, paragraph 2**, exists.

The ruling period shall be the one which is the first to expire. The communication of this information shall be considered as constituting the unreserved and irrevocable consent of the applicant to the deposited biological material being made available to the public in accordance with this Rule.

(3) The deposited biological material shall be available upon request to any person from the date of publication of the European patent application and to any person having the right to inspect the files pursuant to **Article 128, paragraph 2**, prior to that date. Subject to paragraph 4, such availability shall be effected by the issue of a sample of the biological material to the person making the request (hereinafter referred to as "the requester").

 Said issue shall be made only if the requester has undertaken vis-à-vis the applicant for or proprietor of the patent not to make the biological material or any biological material derived therefrom available to any third party and to use that material for experimental purposes only, until such time as the patent application is refused or withdrawn or deemed to be withdrawn, or before the expiry of the patent in the designated State in which it last expires, unless the applicant for or proprietor of the patent expressly waives such an undertaking.

The undertaking to use the biological material for experimental purposes only shall not apply in so far as the requester is using that material under a compulsory licence. The term “compulsory licence” shall be construed as including ex officio licences and the right to use patented inventions in the public interest.”

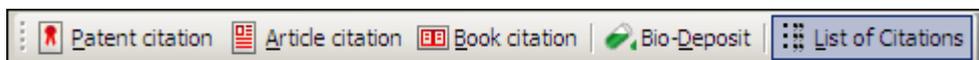
List of citations

§ Position the cursor where you want the list of citations to appear.

§ In the **PatXML menu** select **Insert, List of Citations**.

-OR-

In the *PatXML citations toolbar* (p 89) click **List of Citations**.



The list of citations is automatically entitled **References**

Any existing citations are automatically displayed in the list.

A prompt to change this text is displayed on a grey background.

§ To change the heading text, select it and type the new wording.

Heading 1 (please enter the text for the heading below)

References

[0007]

- **PCT/US US2003/00100 A (UNIVERSAL ENGINEERING) 02.05.2003**
- **GB EP1000000 A (BEHEERMAATSCHAPPIJ DE BOER) 17.05.2000**
- **JAMESON, Peter, et al.** Dynamics of combustion engines. *Engineering Survey Monthly*. May 2002, vol.10, no.5, p.112-115.
- **STEINER, Frederick, et al.** Combustion Engine Filtering Techniques. 2nd edition. Edited by HALLIWELL , Jonathan. Chicago: Muswell Press, 2001. ISBN 0198611315. p.150-250.



Figure 44. Sample list of citations



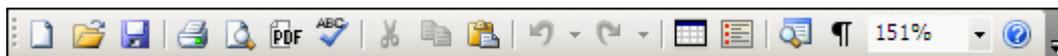
PatXML toolbars

The PatXML toolbars provide functionality related to completing a patent application. Use the toolbars to insert elements such as citations, equations and images.

Note You can only insert these elements in permitted sections. For example, a citation may be inserted in the description but not in the claims.

PatXML standard toolbar

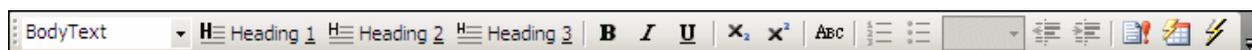
In addition to the normal Word® buttons, the **PatXML standard toolbar** provides options to assist you with listing definitions and navigating through the document.



| Option | Comments |
|--|--|
| PDF Preview  | Click this button to open the document in the Adobe Acrobat PDF viewer. The viewer provides a menu and toolbar with a range of options such as saving, printing and searching. |
| Insert Definition List  | Click this button to insert a two-column table into the document. You can use the table to create a list of definitions. Use the Tab key to add additional rows. |
| Document Map  | Click this button to see your list of patent application headings on the left-hand side of the screen. Each heading starts on a new page. Click a heading to move to that page. |

PatXML formatting toolbar

In addition to the normal Word® Bold, Italic and Underline buttons, the **PatXML formatting toolbar** provides the styles and formatting options appropriate to patent applications.



| Option | Comments |
|--|---|
| Styles list | <p>Select from the drop-down list of styles acceptable for a patent application. You can also click one of the heading buttons.</p> <p>When you select a heading style it is positioned for you in the current paragraph, marked by a grey field. Enter the text for the heading directly underneath as indicated.</p> <p>When you select the body text style, just start typing in the numbered paragraph.</p> |
| B, I, U | Use these buttons to apply bold , <i>italics</i> or <u>underlining</u> to the selected text. |
| Subscript and superscript | Use these buttons to lower or ^{raise} the selected text. |
| Small caps | Use this button to put the selected text in SMALL CAPS. |
| Numbered list | <p>Use this button to create a numbered list.</p> <p>To end the list and return to the main paragraph level, click the button again.</p> |
| Bulleted list | <p>Use this button to create a bulleted list.</p> <p>To end the list and return to the main paragraph level, click the button again.</p> <p>For a bulleted list you can apply either a bullet symbol or a dash (see example below).</p> |
| Decrease, Increase indent | Use these buttons to decrease (move to left) or increase (move to right) the indent level of the selected text. |
| Update fields  | Use this button to make sure the information in the document fields reflects the latest changes. |
| Renumber tables  | Use this button to set all captions of editable tables to the default, ie restart numbering from 1. Any <i>customised table names</i> will be lost. |
| Renumber figures  | Use this button to renumber figures automatically. Any <i>customised figure numbering</i> will be lost. |



In this example, three numbered paragraphs are created. The paragraph numbering is applied automatically by PatXML. With the cursor positioned in paragraph 0003, we click the **Numbering** button.

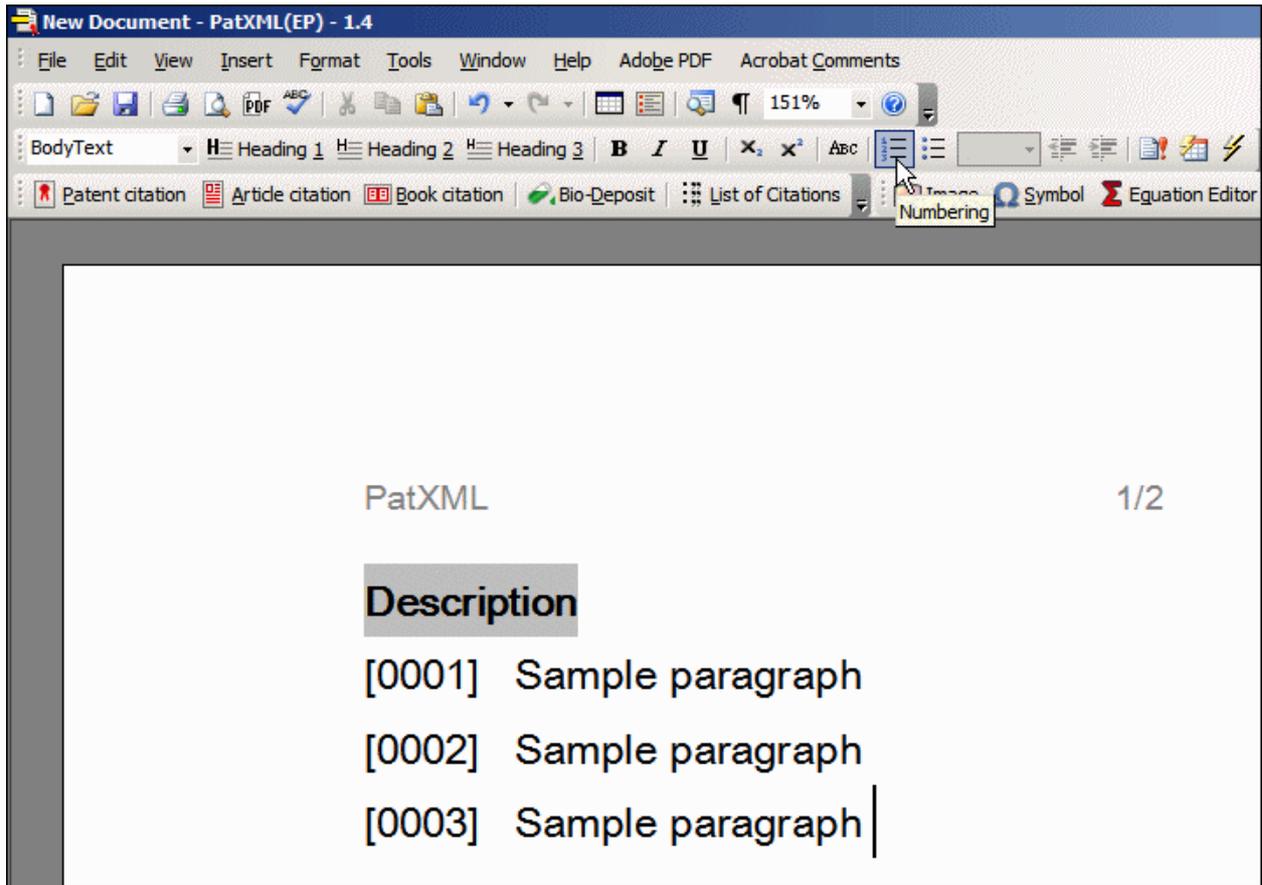




Figure 45: Paragraphs with automatic numbering

The text is indented to create a sub-paragraph, and it is numbered accordingly.

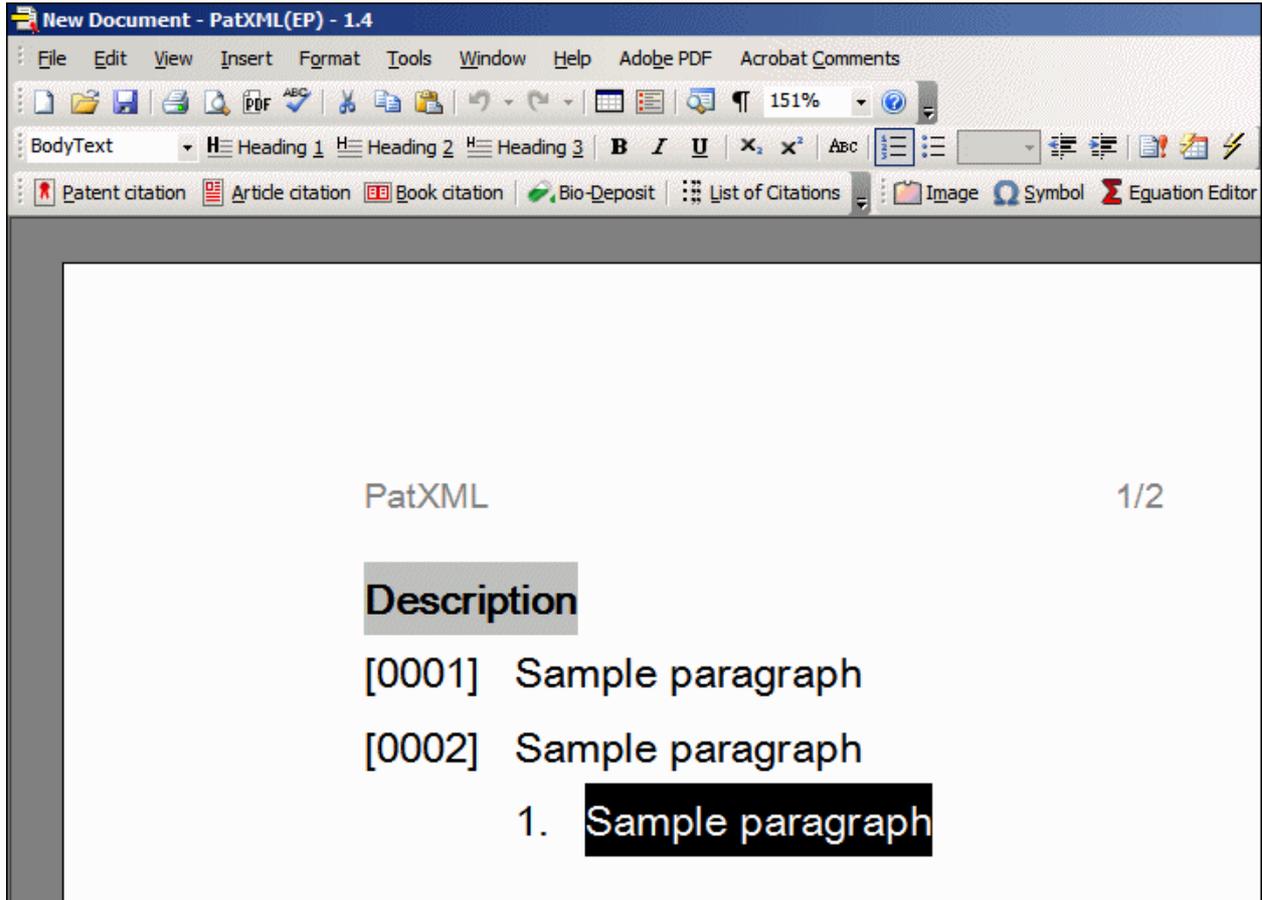


Figure 46: Sub-paragraph created and numbered

When we click the **Bullets** button, the sub-paragraph is bulleted rather than numbered.

The screenshot shows the PatXML(EP) - 1.4 software interface. The title bar reads "New Document - PatXML(EP) - 1.4". The menu bar includes File, Edit, View, Insert, Format, Tools, Window, Help, Adobe PDF, and Acrobat Comments. The toolbar contains various icons for file operations, editing, and formatting, with a zoom level of 151%. The ribbon includes sections for "BodyText" (with heading styles), "Bullets" (with a dropdown menu), "Patent citation" (with sub-sections for Article, Book, and Bio-Deposit), "List of Citations", "Insert", "Symbol", and "Equation Editor".

The document content is as follows:

PatXML 1/2

Description

[0001] Sample paragraph

[0002] Sample paragraph

- Sample paragraph



Figure 47: Sub-paragraph bulleted

The options to the right of the Bullets button then become available: a bullet or a dash symbol can be selected, or none. We select a dash.

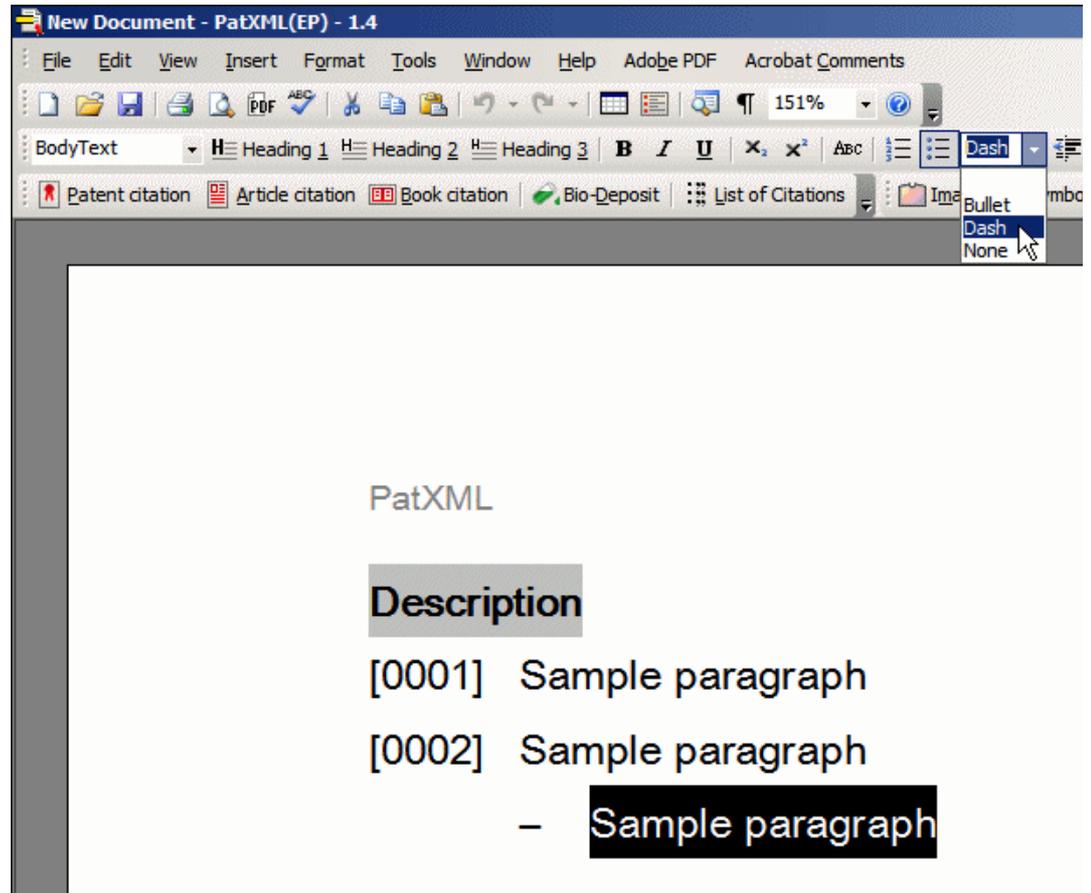




Figure 48. Selecting a dash

PatXML citations toolbar

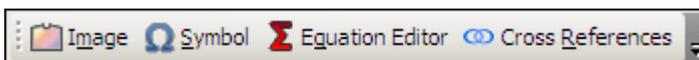
The **PatXML citations toolbar** provides buttons to assist you with entering references correctly in your document.



| Option | Comments |
|--------------------------|---|
| | <p>Make sure the cursor is in a section that allows you to enter this kind of reference.</p> <p>Click the citation button appropriate to your requirements. The citation window opens and you are prompted to complete the relevant information.</p> <p>Required fields are displayed in bold typeface.</p> <p>For detailed information on completing the citation, click the Help button in the open window.</p> <p>To open the window again, double-click the citation field in the document.</p> |
| Patent citation | Use this button to reference another patent. |
| Article citation | Use this button to reference a published article. |
| Book citation | Use this button to reference a published book. |
| Bio-Deposit | Use this button to reference a depositary institution for biological material. |
| List of Citations | Use this button to enter a reference list of all citations. |

PatXML insert toolbar

The **PatXML insert toolbar** provides buttons to assist you with adding non-textual elements to your document.



| Option | Comments |
|--------|---|
| | Make sure the cursor is in a section that allows you to enter this kind of element. |

| Option | Comments |
|-------------------------|---|
| Image | Use this option to add a TIFF image, eg of a chemical formula, to the current paragraph. Any colour images are converted to black and white. Double-click the image in the document to open the Image Attributes window. For detailed information on changing the image attributes, click the Help button in the open window. |
| Symbol | Use this option to insert a symbol into the document, either from the set provided in the Arial Unicode MS font or from an image. |
| Equation Editor | Use this option to open the Microsoft® Word® equation editor. |
| Cross References | Use this option to enter the details of a reference to another part of your document. |

PatXML content toolbar

The **PatXML content toolbar** provides buttons to assist you with viewing different elements of your document.



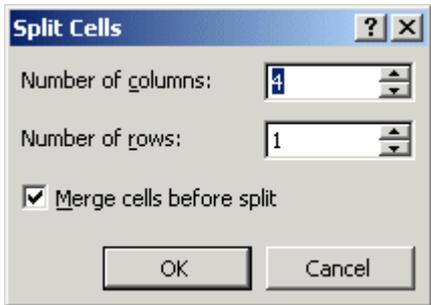
| Option | Comments |
|-----------------|---|
| Content | Select this option to open the Content Management window. Click the tabs to see a list of elements. |
| XML View | Select this option to see the XML application body. |

PatXML tables toolbar

The **PatXML tables toolbar** provides options to assist you with formatting the table. It only appears when the cursor is located in a table.



| Option | Comments |
|-------------------|---|
| Properties | Click this button to view the options for table properties. |

| Option | Comments |
|----------------------------|---|
| Insert row | Click this button to add a row above the current row. |
| Insert column | Click this button to add a column to the left of the current column. |
| Remove row | Click this button to delete the current row and its contents. This action cannot be undone. |
| Remove column | Click this button to delete the current column and its contents. This action cannot be undone. |
| Merge cells | Click this button to combine the selected cells into one cell. |
| Split cells | <p>Click this button to divide the selected cells into multiple cells. When prompted, select the options you require. To keep the current cell contents grouped, select the check box Merge cells before split.</p>  |
| Align left | Click this button to position the text at the left of the cell. |
| Centre horizontally | Click this button to position the cell text horizontally. |
| Align right | Click this button to position the text at the right of the cell. |
| Justify | Click this button to justify the text. |
| Align top | Click this button to position the text at the top of the cell. |
| Centre vertically | Click this button to centre the cell text vertically. |
| Align bottom | Click this button to position the text at the bottom of the cell. |



Importing documents

Using the *PatXML Wizard*, you can open an existing PatXML document or import an XML, Word® or RTF document.

PatXML Wizard for imported documents

PatXML opens with the PatXML Wizard, which guides you through the steps for importing documents:

- § *opening the document*
- § *specifying the document type*
- § *reviewing the document structure*
- § *completing the Wizard*



§ In the first screen of the *PatXML Wizard* select the option to open an existing PatXML application (.xml) or import a Microsoft® Word® document into PatXML.

§ Navigate to the file location and open it.

You can open files with the following extensions: .DOC, .RTF, .XML, and .PXML.

PatXML checks the file structure. Only files with the correct structure may be imported.

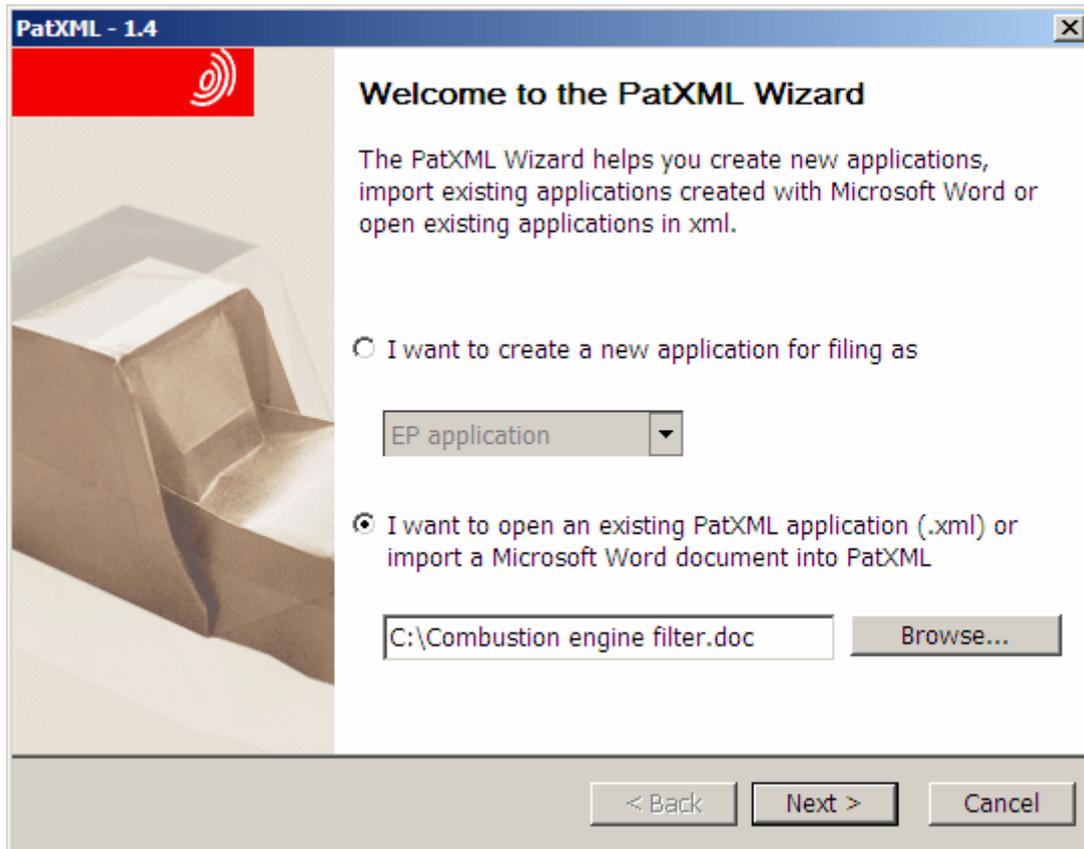




Figure 49. Importing documents

Specifying application type

- § In the second screen of the PatXML Wizard, select options from the **Application Type** and **Language of Filing** drop-down lists, and then click Next.

The application type may be EP, PCT or US.

A screenshot of the 'PatXML - 1.4' software window. The title bar reads 'PatXML - 1.4'. The main content area is titled 'Application Type' and includes the instruction 'Define the type of the application as well as the language'. Below this, there are two drop-down menus: 'Application Type' is set to 'EP application' and 'Language of Filing' is set to 'English UK'. At the bottom of the window, there are three buttons: '< Back', 'Next >', and 'Cancel'. The status bar at the very bottom shows '2 of 4'.



Figure 50. Import attributes

§ In the third screen of the PatXML Wizard, review the document structure.

PatXML detects the sections automatically. If there are any errors click **Open Document in Word®** and make the corrections, and then click **Restart Recognition**.

-OR-

If there are no errors, click **Next** to continue.

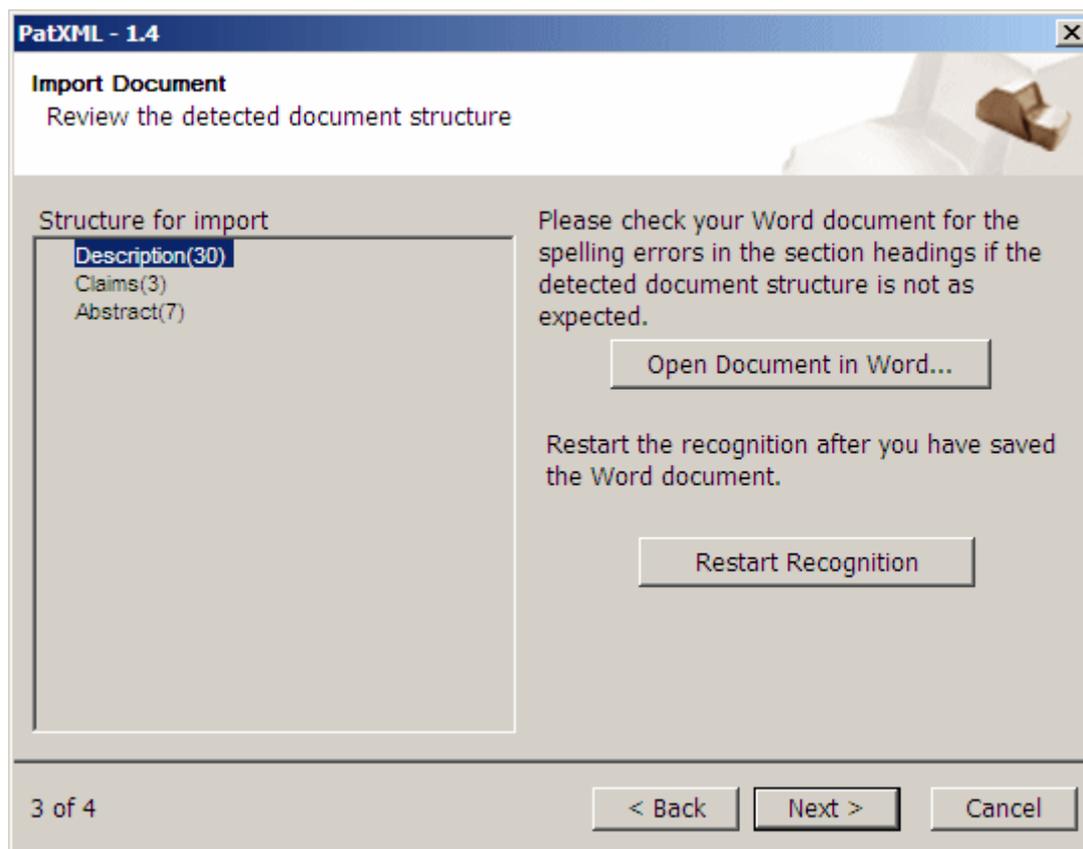




Figure 51. Reviewing document structure



Using the PatXML Wizard for importing documents

§ In the fourth screen read through the summary, and then click **Finish** to open the Word® document.

-OR-

Click **Back** to make any changes.





*Figure 52. Completing
the import*



Saving PatXML documents

§ Select **File, Save** in the PatXML Word® menu.

-OR-

Click **Save** on the **PatXML standard toolbar**.

§ When you save the document for the first time, enter a name for the document.

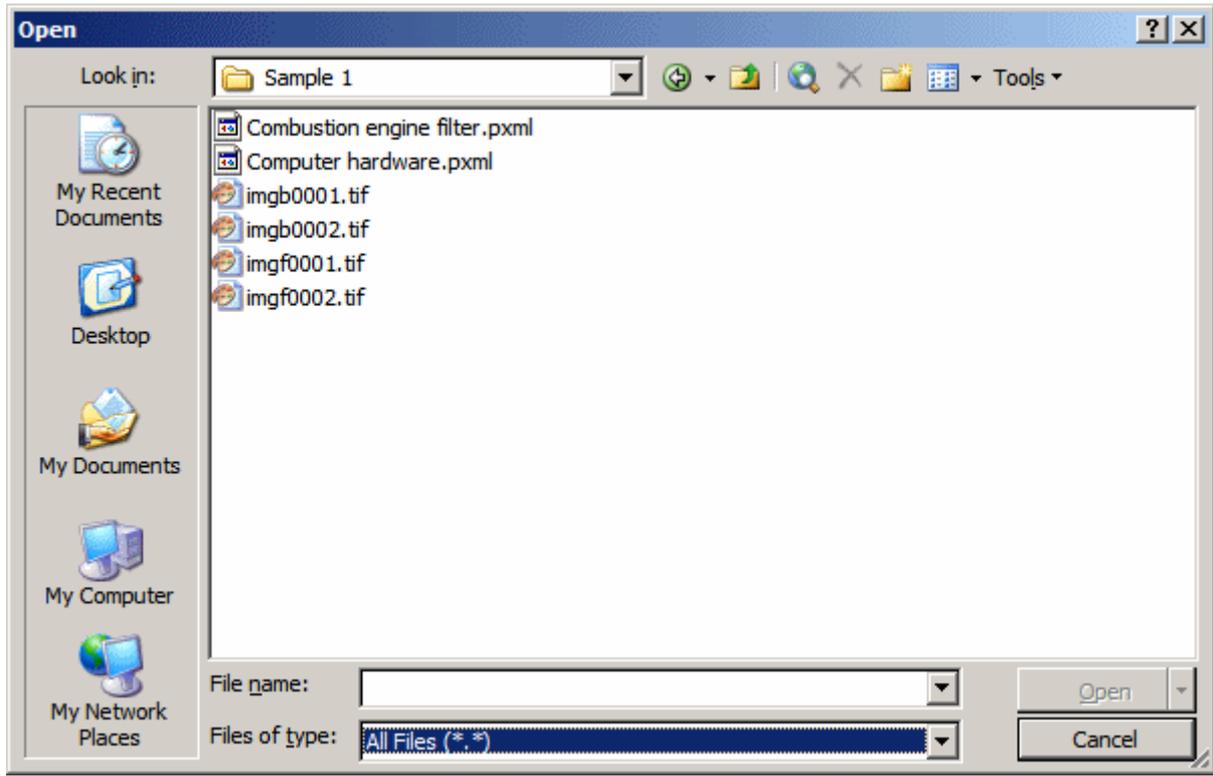
Note Saving as HTML/Web page is disabled.

The document is automatically placed in a directory with the same name as the file reference ID you entered as part of defining the document structure.

Note Any images inserted into the PatXML document are named automatically with a .TIF file extension, and saved in this directory.



In this example the same file reference ID, Sample 1, is used for two different documents saved in PatXML. Both documents are filed in the same directory. The images from each document are named automatically and given the .TIF file extension.





*Figure 53. Contents of
Sample 1 directory*

Naming your document

The file name can be from one to eight characters long, followed by an optional full stop and a file name extension of between one and three characters. The default extensions supplied by Word® are .DOC, .RTF and PXML.

You can use any characters except spaces and the following: * ? [] + = \ / : | < >. You cannot use a full stop except to separate the file name from the extension.



Printing PatXML documents

The procedure for printing PatXML documents is the same as in Word®.

| Option | Comments |
|----------------------|--|
| Print Preview | To preview a document before you print, select File, Print Preview in the PatXML menu, or click Print Preview on the <i>PatXML standard toolbar</i> (p 83). Note The page size is set to A4. |
| Page margins | The page margins are fixed and cannot be modified: Top: 3cm Left side: 3 cm Right side: 2 cm Bottom: 2cm |
| Print | To print a document, select File, Print in the PatXML menu, or click Print on the PatXML standard toolbar . |

For more information please refer to your Microsoft® Word® documentation.



Integration with epoline®

The software generates a submission package in accordance with EPO requirements. To integrate it with the *epoline*® Online Filing software you should:

- 1 Prepare the submission package (including images and sequence list data).
- 2 Open the *epoline*® Online Filing client and point to the software-generated package.
- 3 The *epoline*® Online Filing client reads the submission package data. At this stage you can include additional information and complete all the forms required to file online.
- 4 Submit the wrapped and signed submission package to the filing office via *epoline*®.



PatXML advanced features

Importing XML

Online Filing now provides a way of importing (XML) data from patent management systems into *epoline*®. The data (such as names, addresses, title of invention, etc.) must first be converted to an XML standard format based on the WIPO E-PCT standard (Administrative Instructions, Part 7, Annex F).

epoline® also helps system developers and programmers write programs to convert data from patent management systems (PMS) and the like for import into the *epoline*® Online Filing client (version 3.0).

There are a number of different patent management systems available. Some, such as the CPi system and NetsPat, are “off-the-shelf”, while others have been developed in-house. It would be very difficult, if not impossible, for the EPO to write conversion programs for all the different systems. Fortunately there is a common denominator to which all these systems can convert, and that is a standardised set of XML tags (elements) based on an internationally agreed standard.

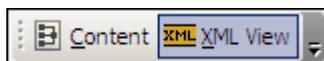
Detailed instructions are available from the *epoline*® website at <http://www.epoline.org>.

XML view and document validation

§ In the **PatXML menu** select **View, XML View**.

-OR-

Click **XML View** in the *PatXML content toolbar* (p 90).



The left-hand pane shows the structure of the document tags. Click the selection boxes to expand/collapse sections or use the **Expand** and **Collapse** buttons at the bottom to show/hide the whole tree.

Select a section to view its attributes and their associated values. Clicking on the Text tag shows the text it contains. Images and figures are previewed below.

Use the **Validate** button to check the XML structure for DTD compliance. As soon as the validation process has finished, the results (parser error notes) are displayed in the **Preview** pane.

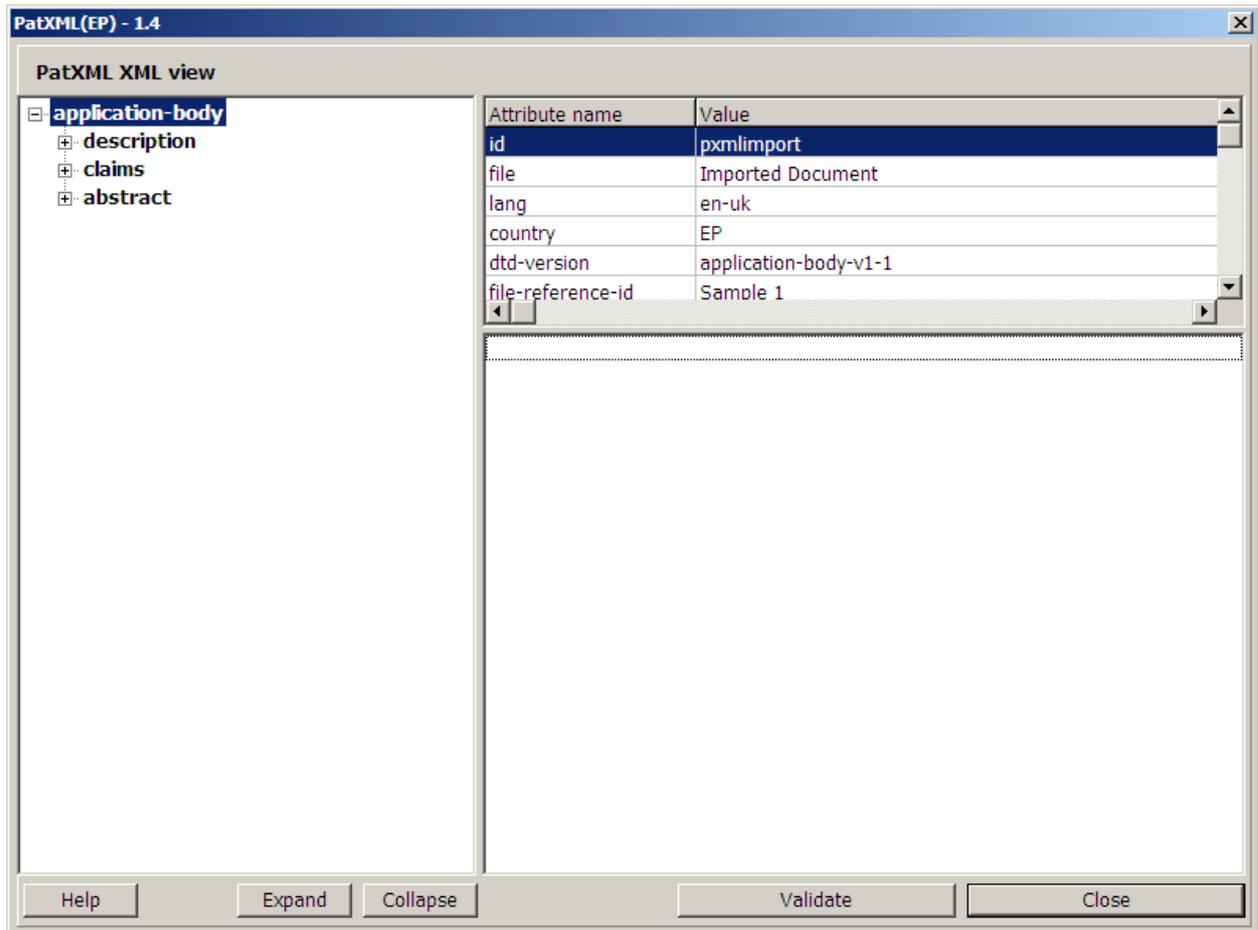




Figure 54. XML view



Appendix

Known issues and workarounds

Note: For updates please see the release notes accompanying the latest version on the installation CD or in the online file.

1. It is not possible to insert two empty paragraphs at the end of a section.
2. A conflict arises when several DLLs required by the PatXML software exist with the same name in the system path variables (the one that is found first is loaded by the operating system into the memory; if it implements different functions than those required by the software the behaviour is unpredictable).
3. Printing is only possible via the **Print Preview** function.
4. The **Undo** functionality is very restricted in order to avoid document structure violation.
5. When closing PatXML, in Word® 2000 and Word® 2002 a message sometimes appears asking whether the user wishes to overwrite the global Normal.dot template. A solution has not yet been found to this problem. One workaround is to click on **No**. Word® then closes without overwriting the Normal.dot file.
6. Users may sometimes lose their preferred toolbar setup. There is no solution to this problem at the moment because of the interoperability between PatXML and MS Word®. PatXML is based on MS Word®.
7. When using **Document Map** for navigation purposes an error is raised after the following order of operations:
 - § use **Document Map** go to the **Abstract** section
 - § enter some text
 - § after a brief wait (about 0.5 sec) use **Document Map** to go to the **Drawings** section.

This Microsoft® Word® 2000 error is still found even in Service Pack 3.



8. Cross reference links inserted after a title or heading do not work when you click on the beginning (on the first symbol). This problem is caused by a feature of Microsoft® Word® which means that when the cross reference follows hidden text it does not jump to the required location.

9. If you copy text from the beginning of a paragraph or table cell to the clipboard, the paragraph number is also copied. This causes inconsistency when the text is pasted into the **Application Number** field of the **Patent Citation** dialog or when it is copied into the **Table Caption** field in the **Table Properties** dialog. This copy functionality is required to transfer data correctly to another instance of PatXML.

Workaround: correct the pasted information manually.

10. "Insert table column to the left" and "insert table column to the right" are not supported by Word® 97.

11. Paragraph numbering is created based on the number listing functionality of MS Word®. Thus paragraphs numbered 100 and above have five-digit numbers (eg 00100). For print preview and printing out, however, this format is converted to four-digit numbers to satisfy EPC requirements.

12. Sometimes, when a lot of processes are running, PatXML dialogs are displayed in the background instead of on top of the other windows.

Suggestion: switch to another application and back to PatXML using the **Alt+Tab** keys.

13. In Microsoft® Word® the spelling language sometimes changes when text is entered in several different languages, but after the document is reopened only the language of proceedings is used. This happens because PatXML does not store information about the spelling language.

14. The **Import** functionality currently has a rather primitive logic mechanism. It is due to be improved so as to provide more heuristics during automatic recognition, such as merging duplicated sections and disabling content according to DTD restrictions.

15. Microsoft® Word® handles the table header row differently depending on what version is being used. Tables like this

| | | |
|-------|-------|-------|
| (1;1) | (1;2) | (1;3) |
| | (2;2) | (2;3) |
| (3;1) | (3;2) | (3;3) |

behave incorrectly when cells (1;1), (1;2) and (1;3) are marked as headers. Moreover, this situation is wrong from the XML point of view. According to the XML table specification the header should contain cells (1;1), (1;2), (1;3), (2;2) and (2;3). For Word® 2000, XP (2002) and 2003 PatXML resolves this issue via print preview, printing, reloading the XML document or renumbering tables. Under Word® 97 the problem can only be resolved by reloading the document.

Suggestion: before finally printing out or submitting a PatXML document containing tables we recommend reloading the document in order to correct any possible misinterpretation of table headers.

16. The **Table Properties** pop-up dialog box does not always appear when you click the table title with the mouse.



Workaround: click within the table and then click the **Table Properties** icon in the toolbar.

17. If a reference is inserted to a claim or figure and the referenced item is then deleted, the reference is not automatically updated (references are updated under **Print Preview, Save or Update Field**).

Suggestion: when you delete a figure or claim press the **Update Field** button.

18. If ISIS drawings are used and the ISIS software is not installed on your computer these drawings will be deleted during the import operation.

Suggestion: in order to import an ISIS drawing, save the drawing in the ISIS software as an image (TIFF,BMP, JPEG) and import this image into PatXML.

PatXML shortcut keys

| <i>Area</i> | <i>Command</i> | <i>Shortcut</i> |
|-------------------------------|----------------------|---------------------------------|
| Application Management | Maximise Application | ALT+F10 |
| | Restore Application | ALT+F5 |
| | Close or Exit | ALT+F4 |
| Document Management | Open | CTRL+O; CTRL+F12; ALT+CTRL+F2 |
| | Save | CTRL+S; SHIFT+F12; ALT+SHIFT+F2 |
| | Close Document | CTRL+W; CTRL+F4 |
| | Maximise Document | CTRL+F10 |
| | Move Document | CTRL+F7 |
| | Restore Document | CTRL+F5 |
| | Document Size | CTRL+F8 |
| | Split Document | ALT+CTRL+S |
| Text Formatting | Apply Heading 1 | ALT+CTRL+1 |
| | Apply Heading 2 | ALT+CTRL+2 |
| | Apply Heading 3 | ALT+CTRL+3 |
| | Apply List Bullet | CTRL+SHIFT+L |
| | Bold | CTRL+B; CTRL+SHIFT+B |
| | Italic | CTRL+I; CTRL+SHIFT+I |
| | Underline | CTRL+U; CTRL+SHIFT+U |
| | Word Underline | CTRL+SHIFT+W |



| <i>Area</i> | <i>Command</i> | <i>Shortcut</i> |
|-----------------------------------|-------------------|------------------------------------|
| | Subscript | CTRL+= |
| | Superscript | CTRL+SHIFT+= |
| <i>Text Editing</i> | Copy | CTRL+C; CTRL+INSERT |
| | Copy Text | SHIFT+F2 |
| | Cut | CTRL+X; SHIFT+DELETE |
| | Paste | CTRL+V; SHIFT+INSERT |
| | Undo | CTRL+Z; ALT+BACKSPACE |
| | Redo | ALT+SHIFT+BACKSPACE |
| | Repeat | CTRL+Y; ALT+ENTER |
| | Delete Word | CTRL+DELETE |
| <i>Find and Replace</i> | Find... | CTRL+F |
| | Repeat Find | SHIFT+F4; ALT+CTRL+Y |
| | Replace... | CTRL+H |
| <i>Help</i> | Help | F1 |
| <i>Document Navigation</i> | Word Right | CTRL+RIGHT ARROW |
| | Word Left | CTRL+LEFT ARROW |
| | Word Right Extend | CTRL+SHIFT+RIGHT ARROW |
| | Word Left Extend | CTRL+SHIFT+LEFT ARROW |
| | Show All | CTRL+SHIFT+8 |
| | End of Column | ALT+PAGE DOWN; ALT+SHIFT+PAGE DOWN |
| | Previous Window | CTRL+SHIFT+F6 |
| | Next Window | CTRL+F6; ALT+F6 |
| | Select All | CTRL+A |
| | Bookmark | CTRL+SHIFT+F5 |
| <i>Print</i> | Print... | CTRL+P |
| | Print Preview | CTRL+F2; ALT+CTRL+I |



Glossary of terms

B

Browser

Internet software that lets the user view HTML documents and access files and software related to them.

C

Check box

A small square box that is selected or cleared to turn an option on or off. When an option is selected, an x or a check mark appears in the box. Where there are several check boxes in a set, more than one can be selected.



Click

Press the primary mouse button once without moving the mouse. The primary mouse button is the more frequently used button. This is generally the one on the left. Clicking selects or deselects an item.

D

Double-click

Press and release the mouse button twice without moving the mouse. The first click selects a program or program feature and the second activates it.

Drop-down

A set of options that appears when you click the **drop-down arrow**.



The menu remains open without further action until you close it or choose a menu item.

DTD

Document Type Definition is a file containing a specific set of rules governing how an XML document should be structured and how the elements of the document relate to each other.

G

Grey-scale

A sequence of shades ranging from black to white, used in computer graphics to add detail to images.

H

HTML

Hypertext Markup Language. The markup language used to format documents so that they can be interpreted and rendered by an Internet browser.

O

Option button

Appears as a small circle. Used to select one of a group of options. When an option is selected it has a smaller, filled circle inside it. In a set of options, only one can be selected at a time.





R

Right-click

Press and release the secondary mouse button. Typically displays a shortcut menu of options.

RTF

Rich Text Format. Document formatting that can be recognised and transferred between applications running on different platforms, eg between IBM and Macintoshes.

S

SGML

Standard Generalised Markup Language. An information management standard intended to provide platform- and application-independent documents that retain formatting, indexing and linked information.

T

TIFF

Tagged Image File Format. A standard file format commonly used for scanning and storing grey-scale images. TIF files may be used for scanned signatures.

U

UTF

Unicode Transformation Format (UTF) is an algorithmic mapping from Unicode code point to a unique byte sequence.

X

XML

The eXtensible Markup Language is a document-processing standard officially recommended by the World Wide Web Consortium and widely accepted throughout the Internet community. It provides a way to define and manage information. It can be used to check the accuracy and quality of documents.



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