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PatXML version 1.3.8

Quick reference guide
Creating, completing and saving a document

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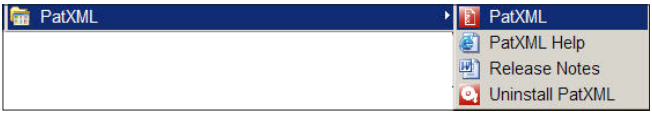
Using the PatXML Wizard to create your patent document

– Start the PatXML software:
  Start > All Programs > PatXML > PatXML



The PatXML Wizard opens

In the PatXML Wizard, select the type of application you want to create from the drop-down list (EP, PCT or US applications)

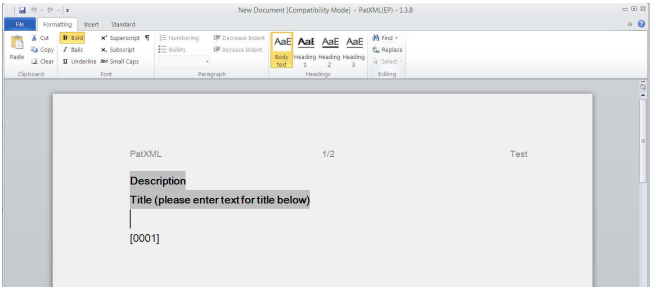
– Click Next to proceed to the next step.
– Click Back to return to the previous step to make changes.
– Enter a reference number of your choice.
– Choose the preferred language.
– Select the sections and headers required for your document.

Mandatory sections and headers are selected by default. These sections cannot be changed but you may customise heading names.

– Click Next to proceed to the next step.
  A summary of your choices appears.
– Check it and click Finish.
  A template is installed in Microsoft® Word.

Completing your document

PatXML allows you to work in the familiar Microsoft® Word interface. 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 (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. PatXML may also display *recommendations* on how to complete a section, e.g. “please enter the text for the heading below”. These recommendations are displayed on a grey background.



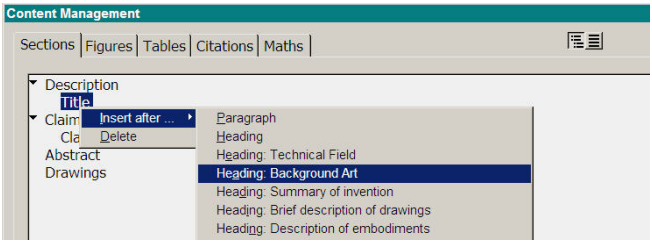
– Draft your document, keeping within the different sections
  OR
– Copy and paste text from other sources into the different sections.

The *ENTER* or *RETURN* key starts a new paragraph; use *SHIFT*+*ENTER* instead to insert a line break.

Inserting and deleting document sections

Sections that are missing when document creation starts can be inserted and unnecessary sections can be removed. Caution should be exercised, however, when using this option.

To insert a section:
– Click the Content button.
– Right-click the section that precedes the one you want to add.
– Point to Insert after and select the required section heading.

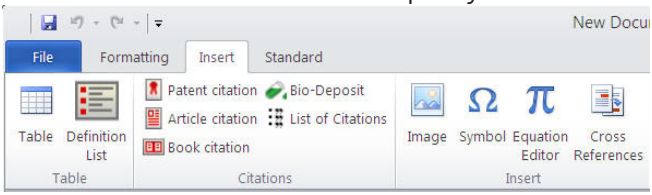


To delete a section:
– Follow the same procedure as above, but this time point to Delete.

Inserting reference information and figures (images)

With PatXML, you can insert various types of reference information such as *citations*, *tables, equations, images* and *bio-deposit* information.

– Click the relevant button on the toolbar
OR
– Click Insert and select the reference option you want.



Saving your document

– Select File > Save in the File menu.
  PatXML offers the reference number entered followed by "*-spec*" as the file name.
– Click Save.

The reference number is also used as the name of a default folder where the created document is saved.

Checking that your document is complete (validation)

PatXML has a number of advanced features that check your document for completeness and ensure that no referenced items are missing.

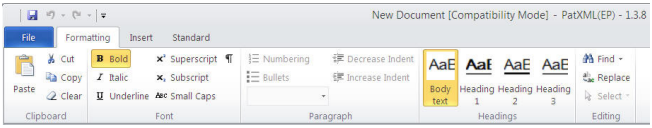
– Click the XML View button in the document.
– Select application-body and click Validate.
– Click Close if no error messages appear.
– If errors are reported, check the individual sections for more details.
– Correct the problems.

Formatting a document

PatXML uses Microsoft® Word features for the purpose of formatting its documents.

To format your patent document text:

– Click the relevant button on the Formatting toolbar
  OR
– Highlight the text, click Format and select the required option.



Importing an existing Microsoft® Word document

An existing patent document can also be imported into PatXML and saved as an XML file.

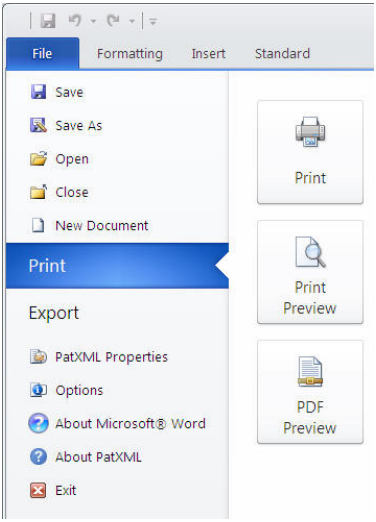
– Select I want to open an existing application in the PatXML Wizard.
– Click Browse to select the document you want to import.

The following types can be imported: **Word documents**, **RTF documents** and **XML documents**.
– Select the type of application and language of filing.
– Click Next to start the import process.
– Check the result, then click Next.
– Click Finish to complete the import process.

Previewing a document

Documents in PatXML can be previewed on screen either before printing or in PDF format (for filing).

To preview a document before printing:
– Click File > Print Preview



To preview a document in PDF format:
– Click File > PDF Preview

Exporting a document and converting to other applications

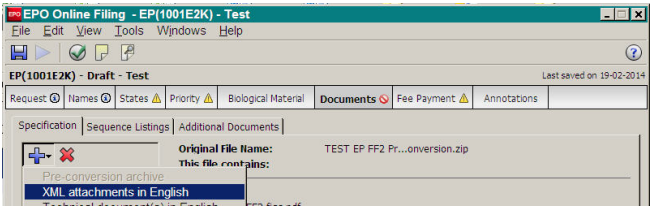
PatXML supports exports to other formats.
– Click File > Export to Word to create a regular Microsoft® Word document.
– Click File > Export to PatXML to convert from EP to PCT and vice versa.

Attaching PatXML documents in EPO Online Filing

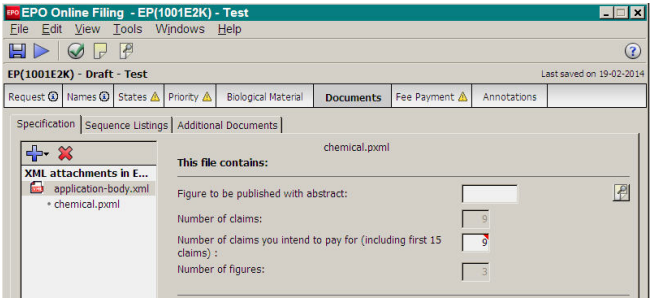
PatXML documents are ultimately technical documents that can be attached in the EPO Online Filing software.

Go to the *Documents* tab of Form EP(1001E2K), for example.

– Click the Add button and select Technical documents in English (XML).



– Navigate to the folder where the PatXML document is saved and click Open to attach the document.
The file name changes to *Application-body.xml*.



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