Topic 13: WIPO File

WIPO Regional Training Workshop

Harare, September 10-14, 2018

WIPO Industrial Property Business Solutions Division (IPOBSD)

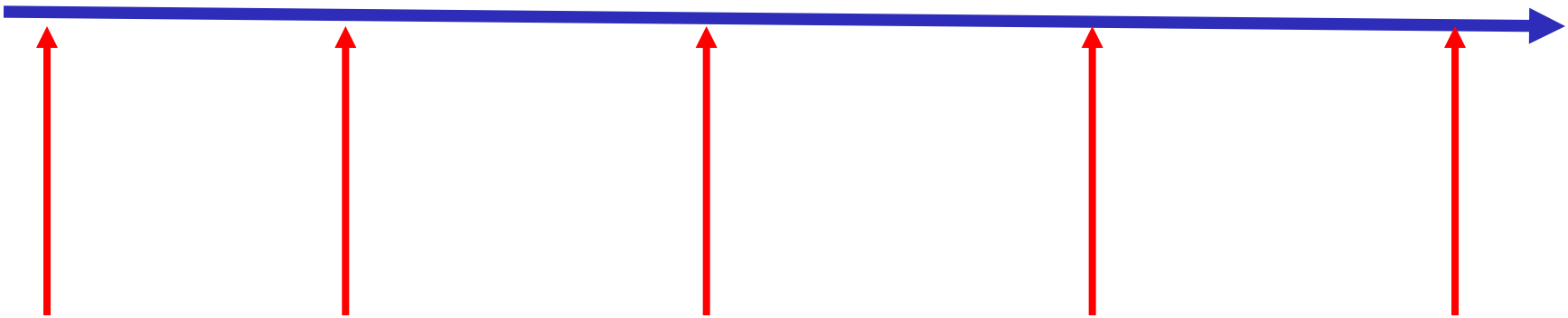
Agenda

- What is WIPO File?
- Background and Milestones
- System Architecture
- Operational Modes
- Online Filing Services for Local Agents
- Technical Arrangements
- Fee Calculation
- Deployment Prerequisites

What is WIPO File?

- A single online portal for local agents to file new patent, industrial design and trademark applications.
- It supports subsequent filing requests such as renewals, change of owners, etc.
- It can be configured to offer selectively online filing services in a step-wise approach
- It can be integrated with online and offline payment systems of local banks
- It includes an optional fee calculation feature

Background and Milestones



2016	2017	2018	2019	2020
Initial Release & 1st Deployment Offline Payment at Banks / ATM (Indonesia)	Online Payment with local banks (Cambodia)	Online Payment (Mongolia) Offline Payments at IP Offices (Egypt, Tunisia) Release 2.2.0	+5 Offices Single Payment for multiple filing requests	+5~10 Offices Integrated with online file register

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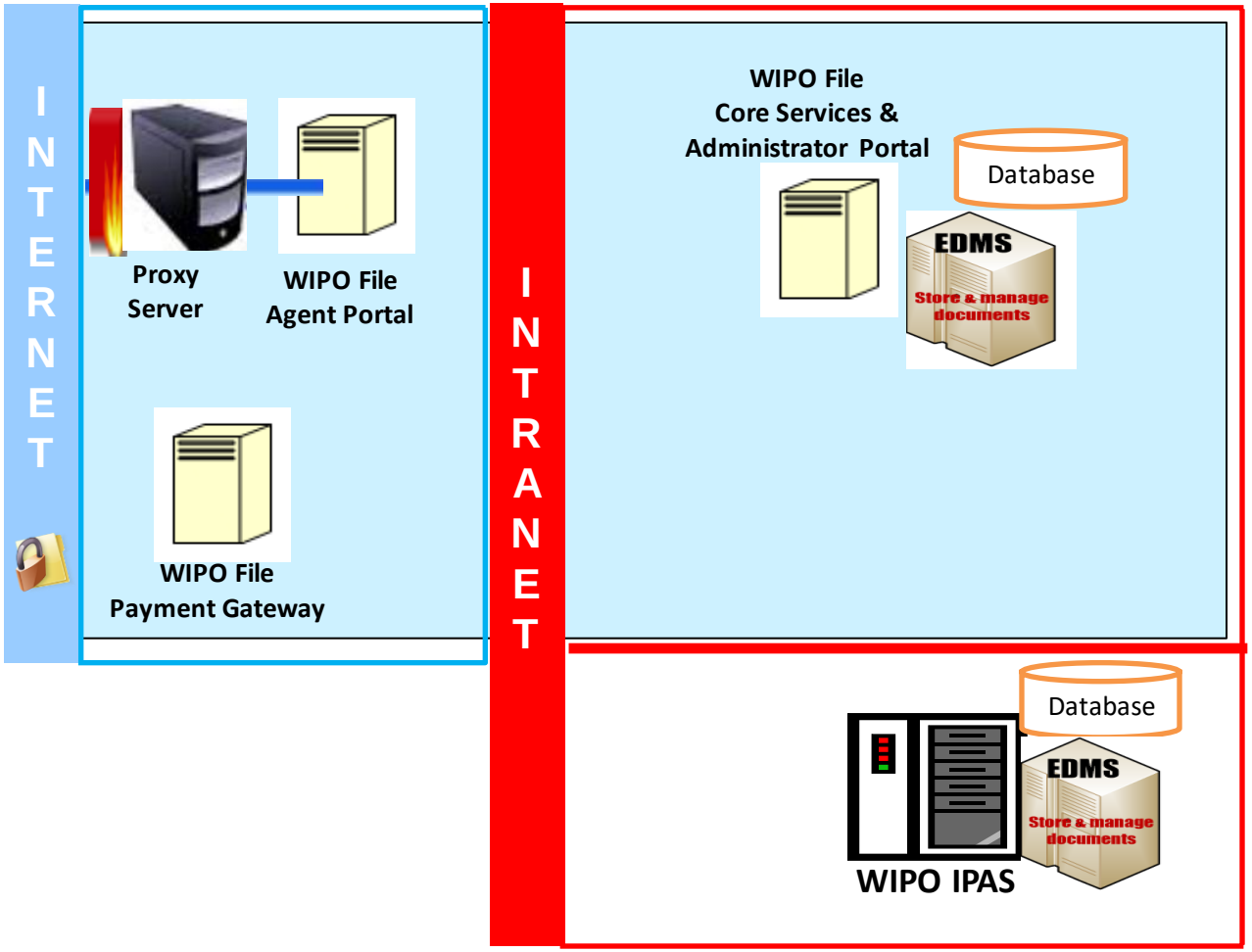
Motivation

- Provide a scalable online service to reach larger and various number of offices with different legislative needs
- Help IP Offices to reduce file processing backlog and to deliver better services to their stakeholders through online services
- Offer applicants complete end-to-end e-filing experience from applications drafting up to instant update of its processing status

System Architecture



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Installation Program

Quick Setup Guide

These are just guidelines, for a detailed document, please refer Installation User Guide.

Step 1: Ensure Pre-requisites are installed

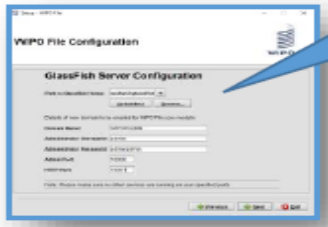
Install Pre-requisites

- 64 bit operating system
- JDK 1.7 64-bit with environment variable "Java_Home" set correctly
- Glassfish Server 3.1.x
- Oracle 11g / MySQL database for the initial release of WIPOFile 2.0.0
- WIPO-Publish- 1.0.4(x64) or later releases
- SMTP Server
- IPAS 3.1.1d or later releases
- Tomcat server 7

Core Module Installation:

Enter below Glassfish details

- Glassfish Home Path
- Domain Name
- Administrator User Name
- Administrator Password
- Admin Port
- HTTP Port



Step 2: Enter Glassfish Details

It's recommended to have a Domain Name same as the WIPO File Database User Account Name

Note: Ensure no other services are running on Admin & HTTP port specified

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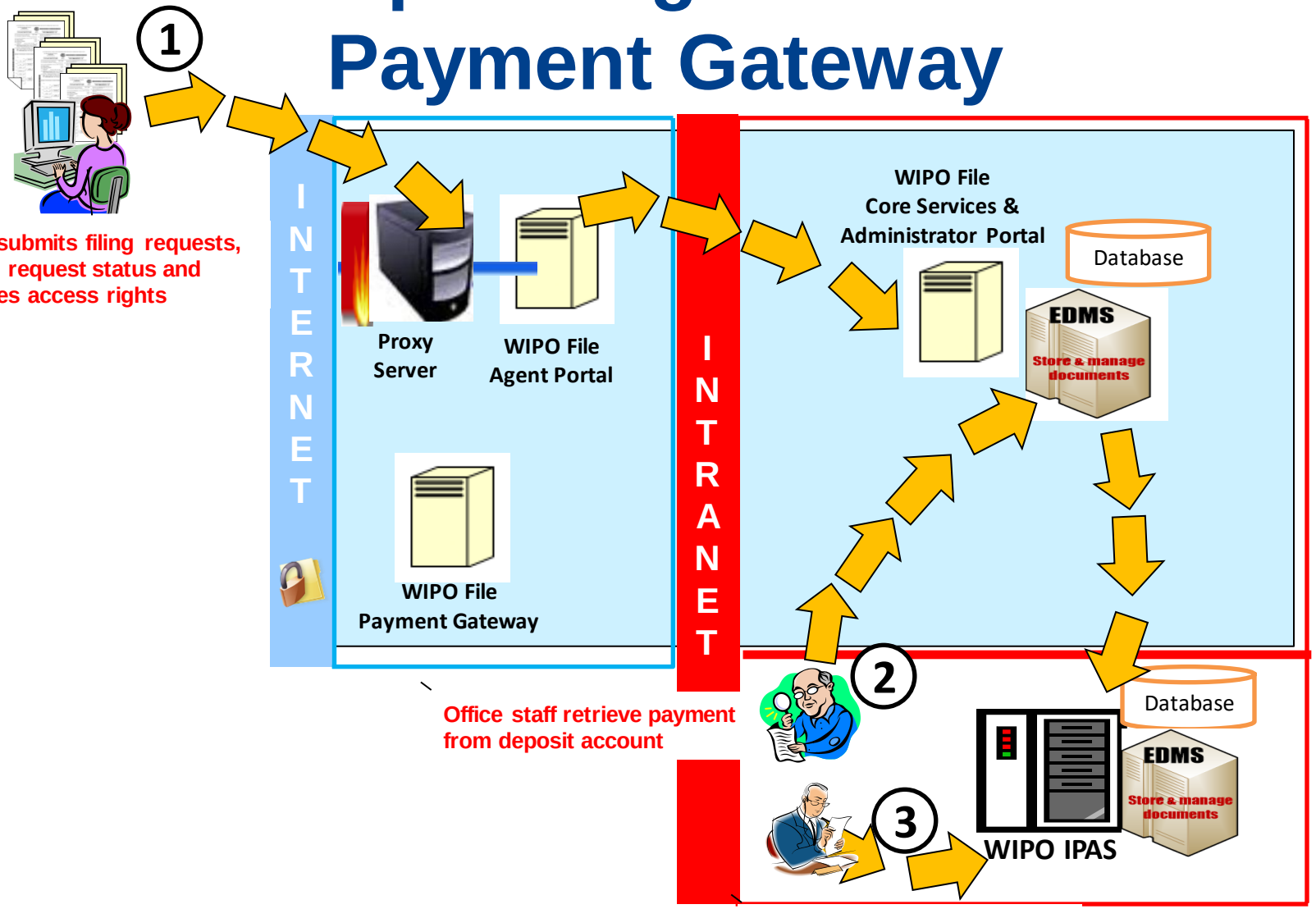
Operating without Payment Gateway



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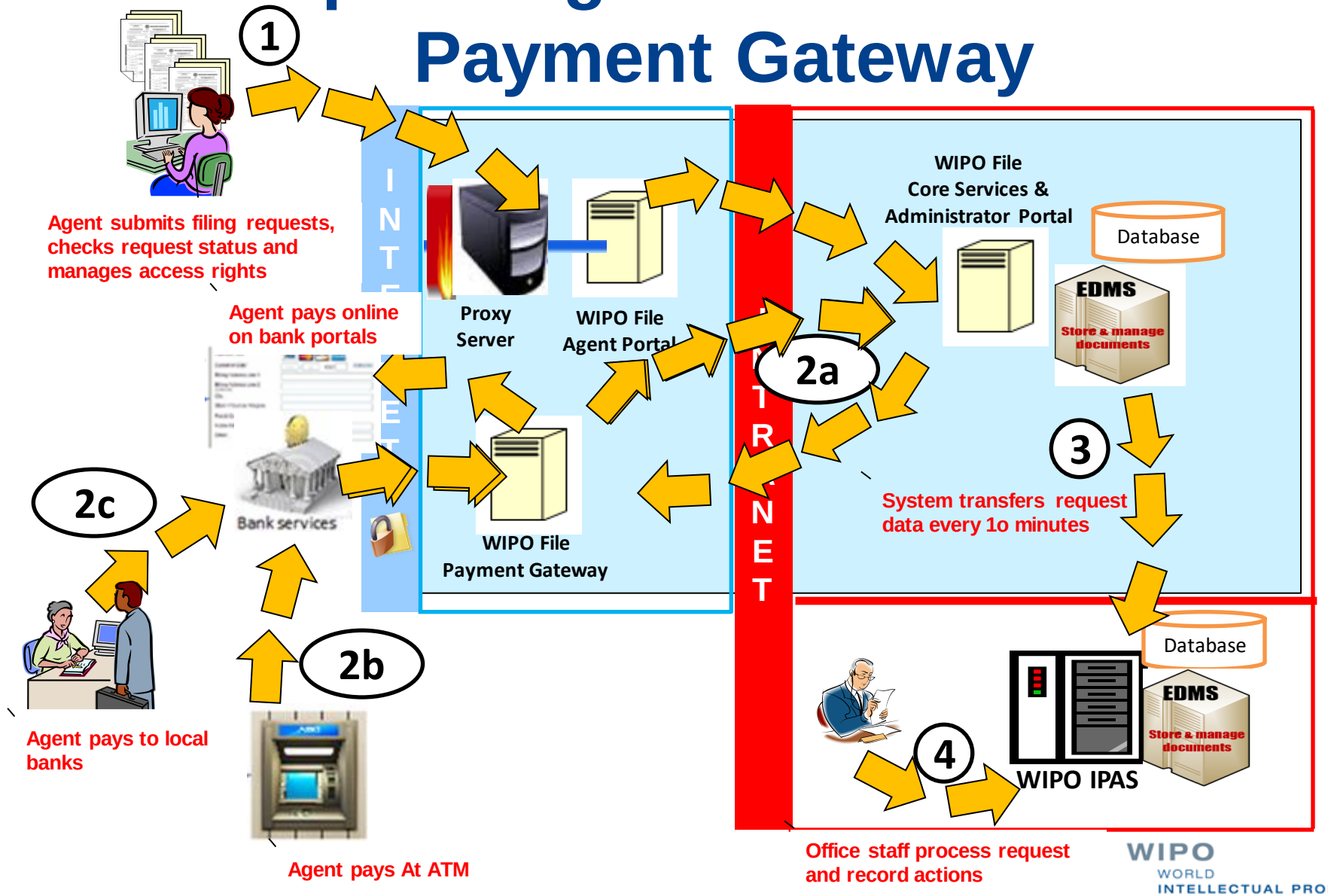
Operating with an External Payment Gateway



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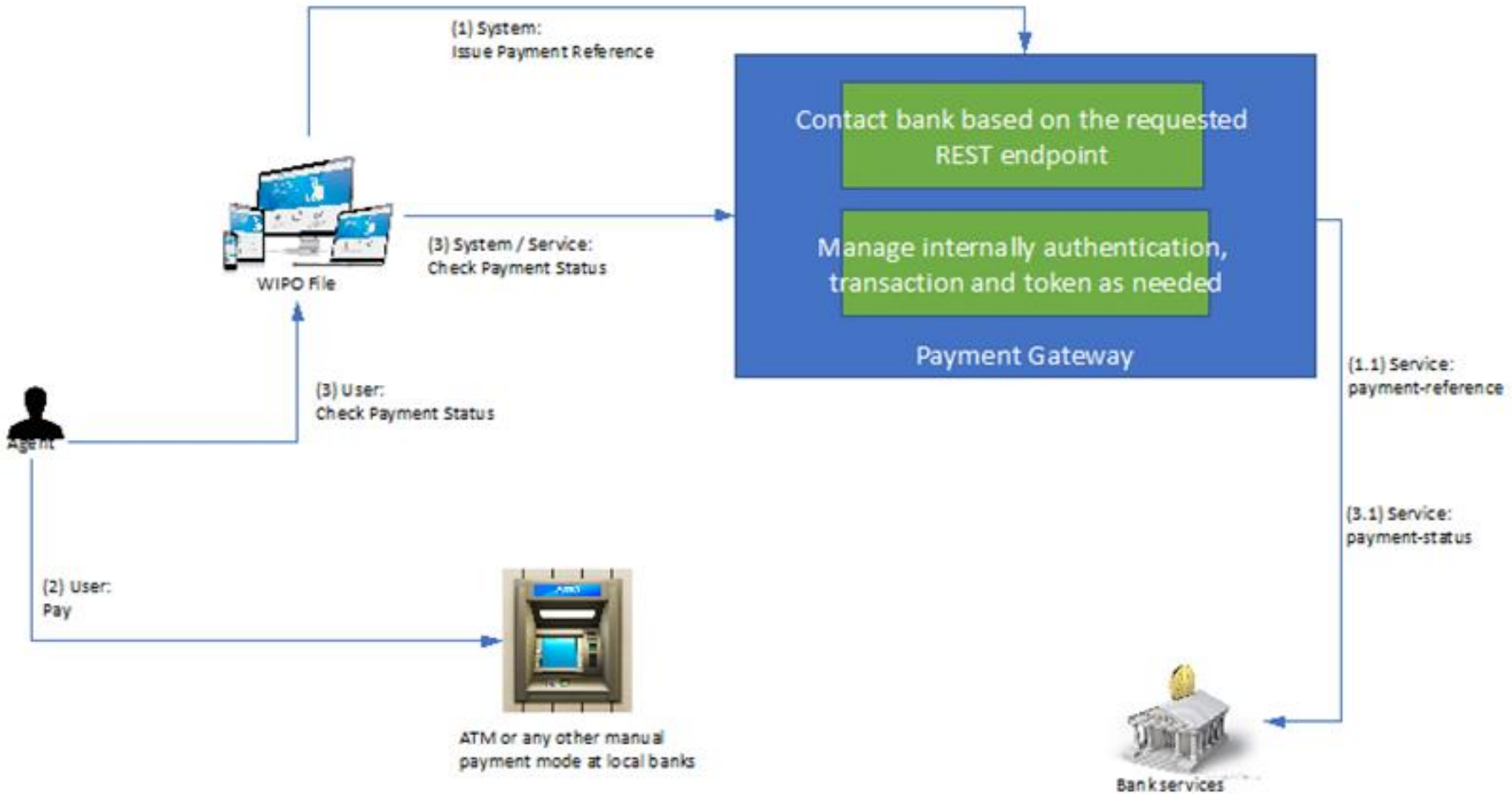
Operational Mode / Offline Payment
(without redirection to payment website)



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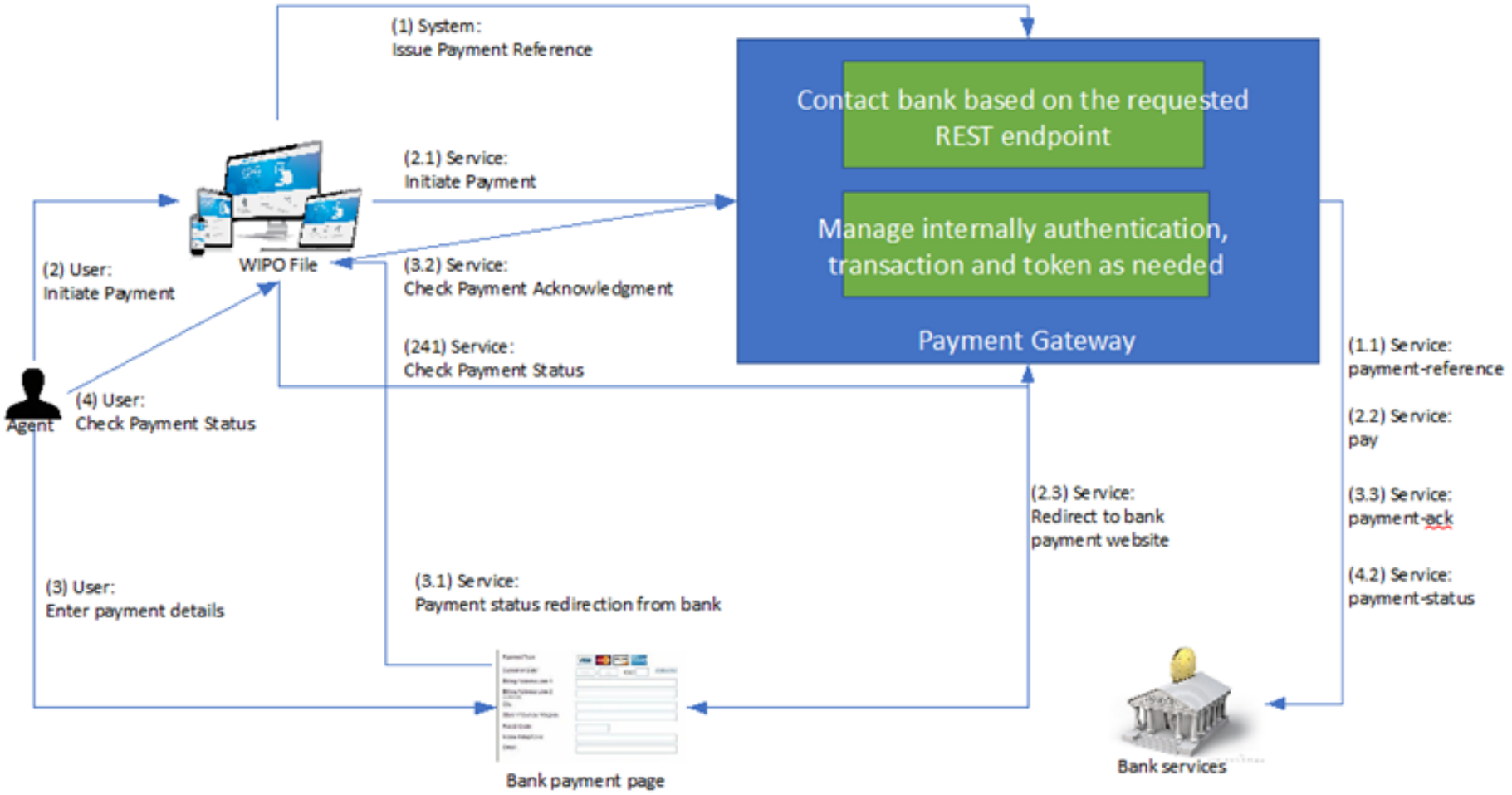
Operational Mode / Online Payment



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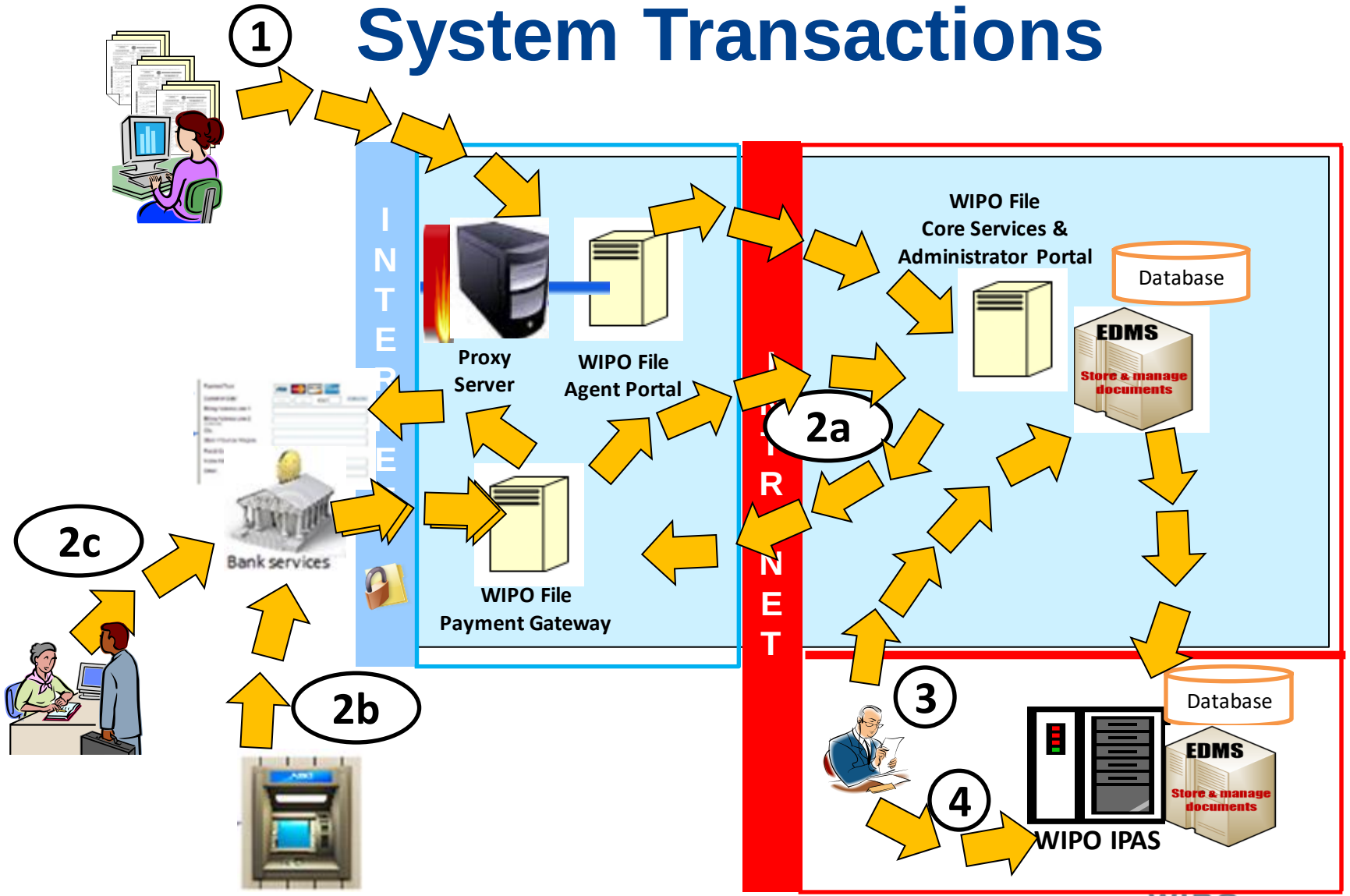
System Transactions



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Online Filing Services for Local Agents

- Drafting and submission of new application of industrial designs, patents and trademarks, with required supporting documents
- Post-filing requests including renewal, payment of annuities, change of owner, change of representatives, amended claims, description, etc.
- Viewing, filtering, management of e-filing requests in portfolios and workbench
- Possibility to receive online Office correspondences in response to e-filing requests.

Technical Arrangements

- Application document is created by merging request form and supporting documents in single PDF file per filing request
- Logos for trademarks and drawings for designs and patents are transferred to IPAS database but not IPAS EDMS
- Payment and transmission receipts are stored in WIPO FILE
- Copies of online filing requests are stored in WIPO File EDMS but can be deleted
- Lookup on existing IPAS File numbers, registration numbers, expiration dates and annuities

Fee Conditions and Calculation

- Conditions
  - Number of Nice classes for Trademark applications, renewals and registration fees.
  - Number of claims and description pages for patent application
  - Number of design units for industrial design application
  - Number of Affected files
- Each condition has applicable basic fees, extra fees and one possible discount
- Fixed fees for specific requests

Deployment / Project Checklist

- Discuss and agree on a business strategy plan to give incentives to encourage online filings
- Prepare a rollout plan to initiate and extend online filing services step by step
- Develop promotional and training materials
- Follow a soft launch approach to start with pilots groups of local agents in phases including training at IP Office so as to tailor the support procedure and structure
- Setup a support team to deal with first level business and technical support of your local agents using online filing services
- Setup a third party database and file system backup tool

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Deployment / IT Infrastructure Checklist

- Minimum server Capacities: Window 64bits, 16 GB Ram, 300 GB disk space
- Recommended server requirements: 3 production servers, 2 demo servers and 1 test server
- Public subdomains should be reserved for the online agent portals (demo and production)
- 2 SSL certificates (demo and production)
- 2 digital certificates to sign PDF forms
- WIPO File database (Oracle, MS SQL Sever or MySQL)
- SMTP Server
- Proxy Server (Apache, Ngix, Microsoft IIS), firewall port restriction wherever applicable and IP tracking

Deployment / Operation Checklist

- Offer offline payment, online payment or both
- Discuss and agree on possible discount schemes and document proof to be furnished at filing
- Applicable rule for reception date in IPAS (submission, payment, office's working day)
- Workflow statuses of files for which renewals and annuity payments can be made online
- Possible use of e-filing services by branch offices
- Setup daily and weekly backups of WIPO File database and EDMS

Deployment / IPAS Configuration Changes

- Enable EDMS support in IPAS
- Create online reception office (new e-filing document origin)
- Define online filing services based on application types, and subtypes or user document types
- Define new user documents to be used as supporting documents for e-filing requests (e.g. patent description, patent claims, SME certificate)
- If needed, adjust workflow process to dispatch online requests received in IPAS with separate workflow actions
- If needed, create additional payment receipt types
- Implement office document workflow changes to support online notification through WIPO File

Deployment / WIPO File Configuration

- If needed, specify SME certificate user document for fee discount
- Configure annuity payment user document, because this option is not available in IPAS
- Configure accepted supporting document types
- Design filing request templates and payment receipt templates in similar manner as office document templates in IPAS
- Configure fee conditions for automatic fee calculation