



Topic 15: WIPO File - System Administration

WIPO Regional Training Workshop

Harare, September 10-14, 2018

WIPO Industrial Property Business Solutions Division (IPOBSD)

Agenda

- Prerequisites for operation of the WIPO File Administrator Portal
- Features for system administrator
- Features for office users
- E-filing requests received in IPAS
- System health check
- Monitoring and troubleshooting
- Possible Improvements 2019-2020

Operation Prerequisites 1/2

- Access to the Administrator Portal requires the System Administrator account (only one). Administrator password should be changed after installation
- Access to the Administrator Portal should be restricted to the Office's intranet
- All configurations changes to support online filing should have been done in IPAS
- It is compulsory to upgrade IPAS to the latest release 3.5.0 for New WIPO File deployment
- Customize IPAS file and registration number formats used in subsequent filing forms

Operation Prerequisites 2/2

- Disable or enable fee calculation (recommended)
- If fee calculation is enabled, disable or enable payment reference number generation by WIPO File or external system
- Configure office logo and digital certificate used in request forms and receipt forms
- Configure file workflow status conditions to accept filing of certain types of use documents

User Management

Manage agent user accounts

WORKBENCH CONFIGURATION DATA IMPORT USER MANAGEMENT PAYMENT MY PROFILE

Agent

User email *

Status

User Name

Phone Nbr

Manage office user accounts

WORKBENCH CONFIGURATION DATA IMPORT USER MANAGEMENT PAYMENT MY PROFILE

Login Id *

User Name

Phone Nbr

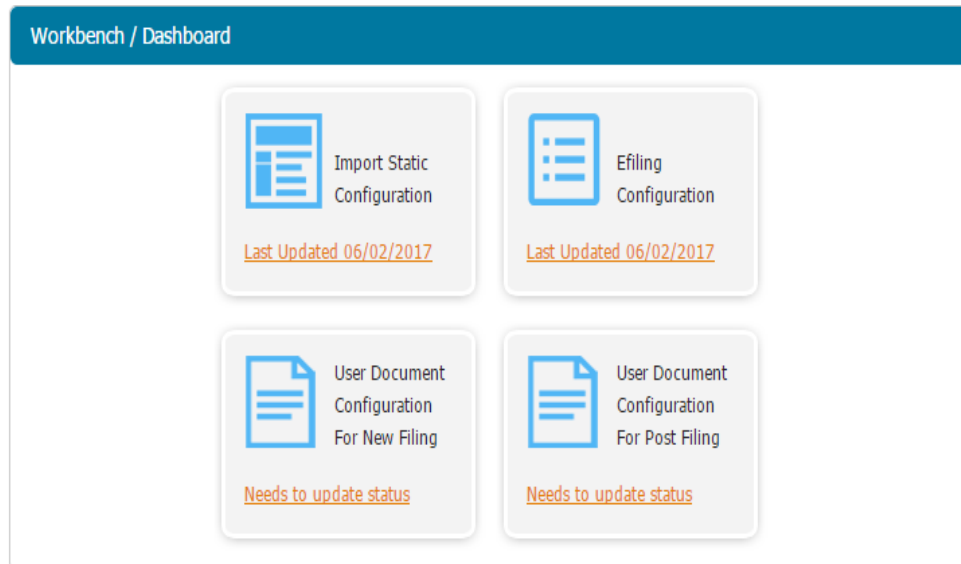
Password *

User email *

Status

Manage e-filing Services 1/5

Administrator workbench

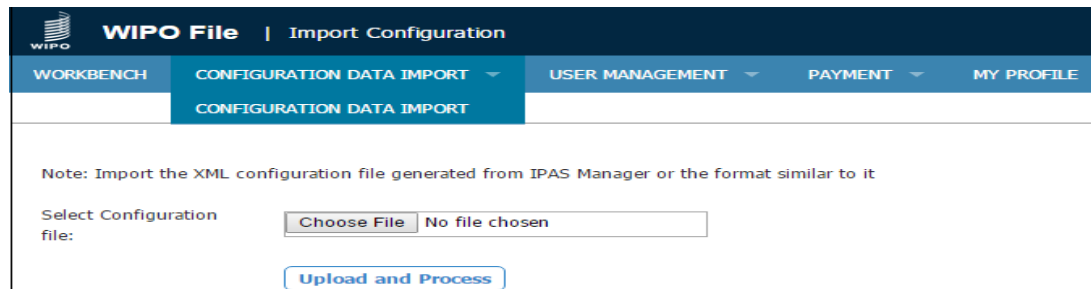


Workbench / Dashboard

The dashboard displays four configuration tiles:

- Import Static Configuration**: Last Updated 06/02/2017
- Efiling Configuration**: Last Updated 06/02/2017
- User Document Configuration For New Filing**: Needs to update status
- User Document Configuration For Post Filing**: Needs to update status

Import IPAS configuration after stopping the Agent portal



WIPO File | Import Configuration

WORKBENCH | CONFIGURATION DATA IMPORT | USER MANAGEMENT | PAYMENT | MY PROFILE

CONFIGURATION DATA IMPORT

Note: Import the XML configuration file generated from IPAS Manager or the format similar to it

Select Configuration file: No file chosen

Manage e-filing Services 2/5

- Enable or disable filing of applications (subtypes)

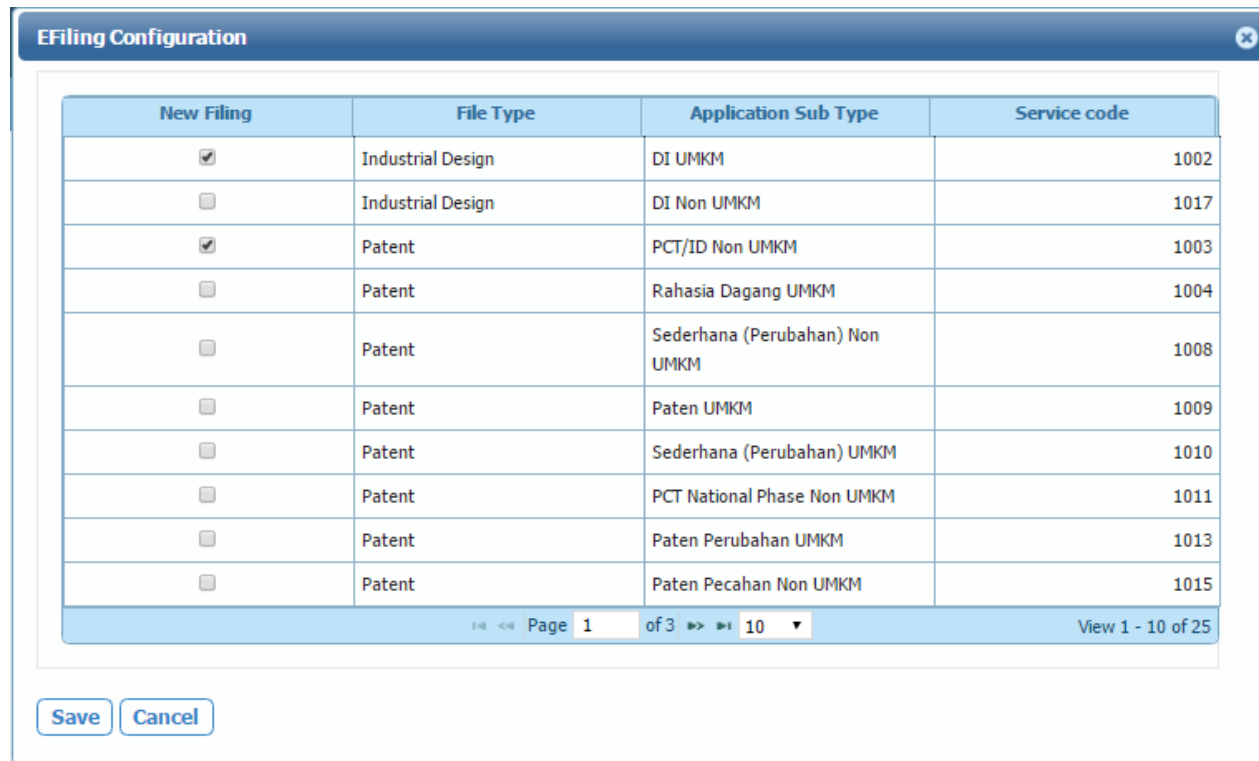
Efiling Configuration ✕

| New Filing | File Type | Application Sub Type | Service code |
|-------------------------------------|-------------------|--------------------------------|--------------|
| <input checked="" type="checkbox"/> | Industrial Design | DI UMKM | 1002 |
| <input type="checkbox"/> | Industrial Design | DI Non UMKM | 1017 |
| <input checked="" type="checkbox"/> | Patent | PCT/ID Non UMKM | 1003 |
| <input type="checkbox"/> | Patent | Rahasia Dagang UMKM | 1004 |
| <input type="checkbox"/> | Patent | Sederhana (Perubahan) Non UMKM | 1008 |
| <input type="checkbox"/> | Patent | Paten UMKM | 1009 |
| <input type="checkbox"/> | Patent | Sederhana (Perubahan) UMKM | 1010 |
| <input type="checkbox"/> | Patent | PCT National Phase Non UMKM | 1011 |
| <input type="checkbox"/> | Patent | Paten Perubahan UMKM | 1013 |
| <input type="checkbox"/> | Patent | Paten Pecahan Non UMKM | 1015 |

Page 1 of 3 View 1 - 10 of 25

Manage e-filing Services 3/5

- Enable or disable filing of applications (subtypes)



The screenshot shows a window titled "E-filing Configuration" with a close button in the top right corner. Inside the window is a table with four columns: "New Filing", "File Type", "Application Sub Type", and "Service code". The table contains 11 rows of data. The "New Filing" column has checkboxes, with the first two rows checked. Below the table is a pagination bar showing "Page 1 of 3" and "View 1 - 10 of 25". At the bottom left of the window are "Save" and "Cancel" buttons.

| New Filing | File Type | Application Sub Type | Service code |
|-------------------------------------|-------------------|--------------------------------|--------------|
| <input checked="" type="checkbox"/> | Industrial Design | DI UMKM | 1002 |
| <input type="checkbox"/> | Industrial Design | DI Non UMKM | 1017 |
| <input checked="" type="checkbox"/> | Patent | PCT/ID Non UMKM | 1003 |
| <input type="checkbox"/> | Patent | Rahasia Dagang UMKM | 1004 |
| <input type="checkbox"/> | Patent | Sederhana (Perubahan) Non UMKM | 1008 |
| <input type="checkbox"/> | Patent | Paten UMKM | 1009 |
| <input type="checkbox"/> | Patent | Sederhana (Perubahan) UMKM | 1010 |
| <input type="checkbox"/> | Patent | PCT National Phase Non UMKM | 1011 |
| <input type="checkbox"/> | Patent | Paten Perubahan UMKM | 1013 |
| <input type="checkbox"/> | Patent | Paten Pecahan Non UMKM | 1015 |

- Customize service code if required by external payment gateway system

Manage e-filing Services 4/5

- Enable or disable supporting documents for new applications

User Document Configuration For New Filing

New Application:

| <input type="checkbox"/> | IPAS User Document | WIPO File User Document | Mandatory | Scope |
|--------------------------|---|---|--------------------------|-------|
| <input type="checkbox"/> | 01. Pengajuan Keberatan atas Permohonan DI yang Diumumkan | 01. Pengajuan Keberatan atas Permohonan DI yang Diumumkan | <input type="checkbox"/> | A:01 |
| <input type="checkbox"/> | 01. Pengambilan Sertifikat Merek | 01. Pengambilan Sertifikat Merek | <input type="checkbox"/> | A:01 |
| <input type="checkbox"/> | 01. Perpanjangan Jangka Waktu Perlindungan Merek/Merek Kolektif (IDM) | 01. Perpanjangan Jangka Waktu Perlindungan Merek/Merek Kolektif (IDM) | <input type="checkbox"/> | A:01 |
| <input type="checkbox"/> | 01. Tambah Biaya Deskripsi Permohonan > 30 Halaman | 01. Tambah Biaya Deskripsi Permohonan > 30 Halaman | <input type="checkbox"/> | A:01 |
| <input type="checkbox"/> | 02. Pengajuan Keberatan atas Permohonan Merek/Merek Kolektif/IG | 02. Pengajuan Keberatan atas Permohonan Merek/Merek Kolektif/IG | <input type="checkbox"/> | A:01 |
| <input type="checkbox"/> | 02. Pengambilan Sertifikat Desain Industri | 02. Pengambilan Sertifikat Desain Industri | <input type="checkbox"/> | A:01 |
| <input type="checkbox"/> | 02. Permohonan Petikan Daftar Umum Desain Industri | 02. Permohonan Petikan Daftar Umum Desain Industri | <input type="checkbox"/> | A:01 |
| <input type="checkbox"/> | 02. Tambah Biaya Setiap Klaim | 02. Tambah Biaya Setiap Klaim | <input type="checkbox"/> | A:01 |
| <input type="checkbox"/> | 03. Denda Terhadap Keterlambatan Pemenuhan Persyaratan Permohonan | 03. Denda Terhadap Keterlambatan Pemenuhan Persyaratan Permohonan | <input type="checkbox"/> | A:01 |
| <input type="checkbox"/> | 03. Pengambilan Sertifikat Paten | 03. Pengambilan Sertifikat Paten | <input type="checkbox"/> | A:01 |

Page 1 of 13 | View 1 - 10 of 122

Manage e-filing Services 5/5

- Enable or disable subsequent filing of user documents

User Document *

| | IPAS User Document | WIPO File User Document | Owner Change | Repr Change | Renewal | Annuity Nbr | Annuity | SME | AllowSuppDoc | Scope |
|--------------------------|----------------------------------|----------------------------------|--------------------------|--------------------------|--------------------------|-------------|--------------------------|--------------------------|-------------------------------------|------------------------|
| <input type="checkbox"/> | 01. Pengambilan Sertifikat Merek | 01. Pengambilan Sertifikat Merek | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Rahasia Dagang UMKM |

Including supporting documents

Supporting Document Configuration

User Document

| | IPAS User Document | Mandatory |
|-------------------------------------|--|--------------------------|
| <input checked="" type="checkbox"/> | <u>01. Pengambilan Sertifikat Merek</u> | <input type="checkbox"/> |
| <input type="checkbox"/> | 01. Prolongation of Term of Protection of Trademark/Collective Trademark (IDM) | <input type="checkbox"/> |
| <input type="checkbox"/> | 01. Addition of Description of Application > 30 Pages | <input type="checkbox"/> |
| <input type="checkbox"/> | 02. Appeal of Opposition to Trademark/Collective Trademark (IG) | <input type="checkbox"/> |
| <input type="checkbox"/> | 02. Issuance of Trademark Design Certificate | <input type="checkbox"/> |
| <input type="checkbox"/> | 02. Application for General Design Trademark | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | <u>02. Addition of Fee per Item</u> | <input type="checkbox"/> |
| <input type="checkbox"/> | 03. Penalty for Non-compliance with Application Requirements | <input type="checkbox"/> |
| <input type="checkbox"/> | 03. Issuance of Patent Certificate | <input type="checkbox"/> |

Page 1 of 13 View 1 - 10 of 122

Manage Filing fees

- Configure fee items for each application or user document and customize fee conditions

WORKBENCH CONFIGURATION DATA IMPORT USER MANAGEMENT PAYMENT MY PROFILE

CREATE FEE ITEM

Service Type : ALL

Exclusiveness: --Select--

FEE ITEM

FEE CONDITION

| Basic Ip Rights | Condition Description | Service code | Data Value | Exclusive | Condition Id | Extra Conditions | Fee Type |
|-------------------|--|--------------|------------|------------------|--------------|------------------|----------|
| ALL | Fee for limited number of affected files | 1111 | | 2 Basic fee Item | FC_BSFIL | FC_EXFIL | DOC |
| ALL | Additional fee for exceeding number of affected files | 1004 | | 2 Extra fee Item | FC_EXFIL | | DOC |
| ALL | Fee for electronically filing | 1013 | | 2 Any fee Item | FC_EFILE | FC_EFILE | BOTH |
| Industrial Design | New design application fee with limited number of images | 1111 | | 1 Basic fee Item | FC_BSDDI | FC_EXDDI | APP |
| Industrial Design | Additional fee for exceeding number of design images | 1003 | | 1 Extra fee Item | FC_EXDDI | | APP |

E-filing Requests in IPAS

Close | New action | View mark | Other process | Set filter | Other mark | Tree mode | Refresh | Add manual sub process | Edit | [Save changes](#)

Edit process data

File:74342 - Ice Mountain - Fraser and Neave, Limited - TM Pending for Dept. Decision

Events | Status | Frozen By | Freezing

| Type | Date | Description | Notes | Action 1 | Action 2 |
|-----------|------------|--|---|-------------------------|---------------------|
| e-doc | 15/06/2017 | Foreign Trademarks | Content certified on 15/06/2017 by KHDIPMOC | | PDF |
| Action | 15/06/2017 | (automatic) New online application | | Details | |
| User Doc. | 17/07/2017 | Userdoc:UD Receiving Original Document (Doc 2017/9432) File:74342 - Ice Mountain - Fraser and Neave, Limited | UD Received (09/08/2017) | | PDF |
| Note | 25/07/2017 | TM Update Status* [deleted] | | Details | |
| Action | 25/07/2017 | TM Assign Examiner | | Details | |
| Action | 04/09/2017 | TM Recommend Provisional Refusal (Examiner) | Different Address | Details | |
| Action | 07/09/2017 | TM Recommend Provisional Refusal (Bureau) | | Details | |

System Health Check

| WIPO File Property Configuration | | WIPOFILE-ADMIN About Logout ? | |
|--|---|---|-----------------------|
| WORKBENCH | | CONFIGURATION DATA IMPORT | |
| USER MANAGEMENT | | PAYMENT | |
| MY PROFILE | | PROPERTY CONFIGURATION | |
| BASIC CONFIGURATION ADVANCED CONFIGURATION HEALTH CHECK | | | |
| Server Information | | | |
| IP Address | 192.168.8.37 | | |
| Host | SPL1029-trngyn.com | | |
| Used/Total RAM | 370/496 MB | | |
| Disk Space Free/Total | 181/232 GB | | |
| Infrastructure | | | |
| IPAS Core Server | ttvm102:13080 | | |
| IPAS EDMS Server | ttvm102:8888 | | |
| WIPO File Web Server | localhost:9090 | | |
| WIPO File EDMS Server | ttvm102:9093 | | |
| WIPO File Database | jdbc:oracle:thin:@TGN246:1521:xe | | |
| WIPO Classification Server | ttvm102:9093 | | |
| WIPO Payment Gateway Server | localhost:8881 | | |
| WIPO PatentScope | http://www.wipo.int/patentscope-webservice/servicesPatentScope?wsdl | | |
| SMTP Server | TEST:25 | | |
| SMTP Proxy Server | [HostNotConfigured];[PortNotConfigured] | | |
| Application Status | | | |
| WIPO File Version | 2.2.0 | | |
| Started | 13317248 | | |
| Connected Users/Active User Accounts | 1/3 | | |
| Last User Submission | 2018-06-19 13:50:06.0 | | |
| Last Reception into IPAS | 2018-06-19 13:50:06.0 | | |
| Filing Requests Ready for Reception into IPAS | Patent(1), TradeMark(0), Design(0), User Documents(5) | | |
| System Configuration | | | |
| Bilingual Support | DISABLED | | |
| Certificate for Digital Signature | ENABLED | | |
| Online Payment | DISABLED | | |
| Fee Calculation | ENABLED | | |
| Filing Date | SUBMISSION DATE | | |
| File Number Formats | | | |
| IPAS Number Display Formats | | Formatted IPAS Number | |
| {fileType}/{fileSer,number,0000}/{fileNbr,number,000000}/{fileSeq} | A/2018/000001/00 | | |
| Registration Number Formats | | | |
| Registration Number Display Formats | | Formatted Registration Number | |
| {regSer,number,0000}{regNbr,number,000000}{regType} | 2018000001G | | |
| Filing Types | | | |
| Filing Type | Application Form | Receipt Form | Applicable Fee |
| D1 UMKM | design_template.doc | invoice_template.doc/payment_receipt_template.doc | N |
| Paten UMKM | patent_template.doc | invoice_template.doc/payment_receipt_template.doc | Y |
| Indikasi Geografis | mark_template.doc | invoice_template.doc/payment_receipt_template.doc | Y |
| 01. Perpanjangan Jangka Waktu Perlindungan Merek/Merek Kolektif (IDM) | post_filing_template.doc | invoice_template.doc/payment_receipt_template.doc | N |
| 05. Permohonan Perubahan Data Permohonan | post_filing_template.doc | invoice_template.doc/payment_receipt_template.doc | N |
| 01. Perpanjangan Jangka Waktu Perlindungan Merek/Merek Kolektif (IDM) | post_filing_template.doc | invoice_template.doc/payment_receipt_template.doc | Y |
| 02. Tambahan Biaya Setiap Klaim | post_filing_template.doc | invoice_template.doc/payment_receipt_template.doc | N |
| 02. Pengajuan Keberatan atas Permohonan Merek/Merek Kolektif/IG | post_filing_template.doc | invoice_template.doc/payment_receipt_template.doc | N |
| 02. Pengajuan Keberatan atas Permohonan Merek/Merek Kolektif/IG | post_filing_template.doc | invoice_template.doc/payment_receipt_template.doc | N |
| 03. Permohonan Dokumen Prioritas Desain Industri | post_filing_template.doc | invoice_template.doc/payment_receipt_template.doc | N |
| 04. Pencatatan Perubahan Nama dan/atau Alamat Pemilik Merek | post_filing_template.doc | invoice_template.doc/payment_receipt_template.doc | N |

Monitoring and Troubleshooting

- Daily backup of WIPO File database and data folder of WIPO File EDMS
- Use of utility program to decrypt data packages stored in WIPO File EDMS if needed
- Archive old data package files to free up disk space
- Regular transfer of e-filing data into IPAS (reception and data capture)
- Regular check for payment confirmation by local banks
- Renewals of SSL certificates and digital certificates for digital signature of forms
- Import IPAS configuration in case of changes affecting WIPO File

Possible Improvements 2019-2020

- Administrator dashboard for system monitoring
- Automatic email notification to system administrator in case of unexpected errors during data transfer from WIPO File to IPAS