# Topic 5: WIPO Online Tools and Services Operated by IP Offices
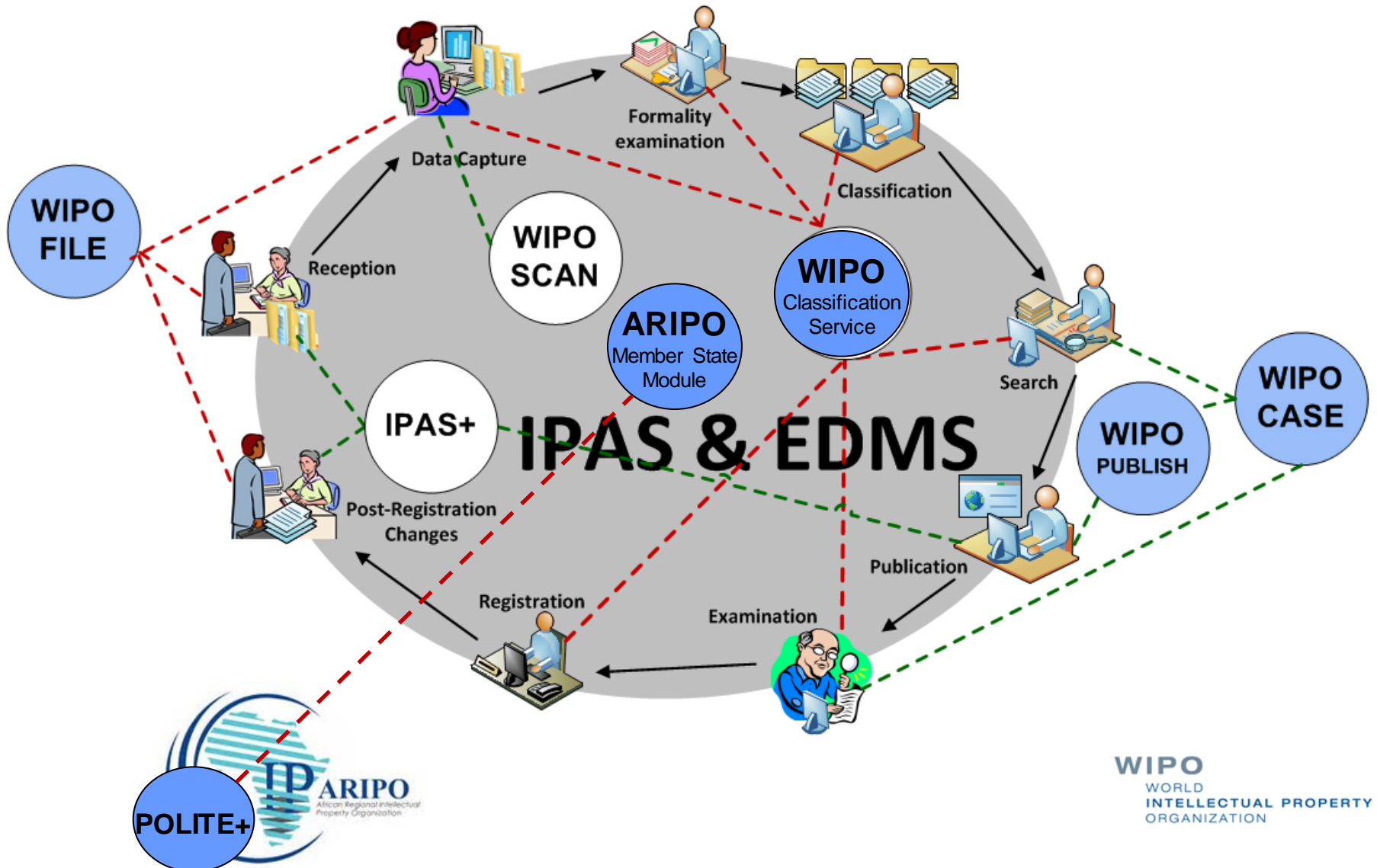
**WIPO Regional Training Workshop**

Harare, September 10-14, 2018

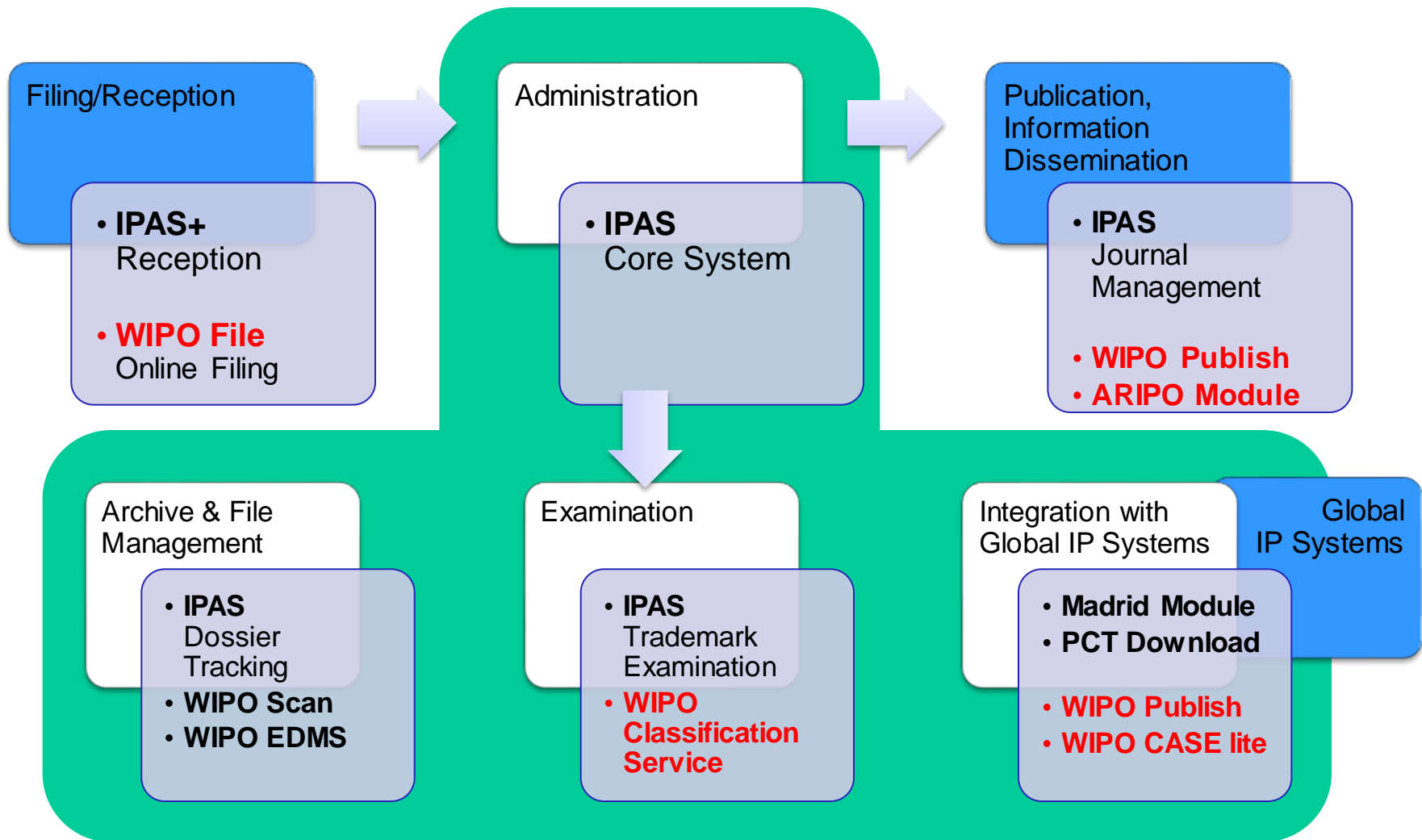WIPO Industrial Property Business Solutions Division (IPOBSD)

# Agenda

- WIPO IPOBSD online tools deployed in IP Office

- Requirement and prerequisites for deployment

- Problem domains

# WIPO IPOBSD Tools

# WIPO IPOBSD Online Tools

**Filing/Reception**

- **IPAS+** Reception
- **WIPO File** Online Filing

**Administration**

- **IPAS** Core System

**Publication, Information Dissemination**

- **IPAS** Journal Management
- **WIPO Publish**
- **ARIPO Module**

**Archive & File Management**

- **IPAS** Dossier Tracking
- **WIPO Scan**
- **WIPO EDMS**

**Examination**

- **IPAS** Trademark Examination
- **WIPO Classification Service**

**Integration with Global IP Systems**

- **Madrid Module**
- **PCT Download**
- **WIPO Publish**
- **WIPO CASE lite**

**Global IP Systems**

**Legend:** **Back-stage tools**  **Front-stage tools**

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# WIPO IPOBSD Online Front-Office Tools Operated by IP Offices

■ WIPO File, online services for filing of new industrial design, patent and trademark applications as well as post-filing requests, optionally integrated with local <u>fee calculation</u> and payment systems (<u>payment gateway</u>)

■ WIPO Publish, online services for data dissemination through national IP databases and through global IP databases (PATENTSCOPE, Global Brand Database, Global Design Database, etc.)

■ WIPO Classification Service for pre-validation of description of goods and services in trademark request forms

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# WIPO IPOBSD Online Back-Office Tools Operated by IP Offices

■ WIPO CASE lite, online services for sharing of patent dossier information to reduce examination workload, to improve patent search and quality of patent examination

■ ARIPO Member State Module, data notifications between ARIPO and its Member State Offices

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# Requirements and Prerequisites for Deployment and Operation 1/3

■ Build a IPO project team to take ownership of the tools for operation by including both business and IT staff

■ Prepare a rollout plan in phases including training for IPO project team and pilots end-users as necessary

■ Establish 1st level support procedure and IPO staff to liaise with WIPO IPOBSD project manager and support team

■ Setup and keep test environments ready for troubleshooting of operational issues, acceptance tests of changes and upgrades of tools

■ Revise existing administrative procedures when necessary to adopt standard business practices

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# Requirements and Prerequisites for Deployment and Operation 2/3

- 1st Level IPO recognized IT focal points.
    - Liaise with local systems users within IPO
    - Identify and help resolving operation issues encountered
    - Report issue to 2nd Level and if necessary directly to PM
- 2nd Level regional experts and WIPO support team.
    - Liaise with 1st Level and with PM
    - Analyze root cause and try to provide workable solutions
    - Escalate when necessary to 3rd Level

# Requirements and Prerequisites for Deployment and Operation 3/3

■ 3rd Level IPOBSD development team in charge of systems support and/or applications development

   ■ Liaise with product owner

   ■ Analyze possible bugs, create development task and specification

   ■ Create tools and work around solutions

# Problem Domain 1/4

- WIPO Publish and WIPO CASE lite are affected mostly by data quality issues, for example:

  - comprehensive data coverage

  - incorrect priority number formats

  - missing patent publication numbers and dates

  - missing PCT application numbers in PCT national phase entry applications

  - missing classification data

- IT infrastructure: server capacity sizing, good internet connections and bandwidth

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# Problem Domain 2/4

- WIPO Classification Service requires

  - ongoing translation of descriptions of goods and services in local language

  - established IPO procedure to maintain a list of descriptions of goods and services that are not accepted by IPO

  - Should provide training to local agents to adopt best practices and to use efficiently WIPO classification

  - defined procedure to incorporate new yearly classification editions and versions in IPO's examination process

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# Problem Domain 3/4

- WIPO File

    - revision of filing fees to introduce discounts as incentive to encourage online filing

    - standardization of filing request template forms

    - Engagement of local IT vendors with clear role and responsibility to implement local bank drivers for interoperability with WIPO File (if payment integration is needed, online or offline)

    - hands-on training to local agents

- IT infrastructure: server capacity sizing, good internet connections and bandwidth

# Problem Domain 4/4

- ARIPO Member State Module

  - Standardization of template forms and workflow to optimize the processing of ARIPO notifications in IPAS

  - Integration of ARIPO notifications in future IPAS to reduce software support costs at WIPO

- IT infrastructure: good internet connections and bandwidth

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