

ANNEX O

SUMMARY OF TASK FORCE DISCUSSIONS ON
“UPDATING OF IPC TRAINING EXAMPLES” (NOVEMBER 25, 2003)

1. Discussions were based on the following three items:
 - (a) Categories of training examples;
 - (b) Future activities of the Task Force;
 - (c) Task Force meeting next year.
2. The Task Force discussed the categories of training examples based on the EPO proposal in the annex to Annex 3 to project file WG 093.
3. It was noted that the training examples should be studied in conjunction with the following documents:
 - (a) The eighth edition of the IPC (IPC-2005)
 - (b) The Catchword Index to the IPC
 - (c) The Guide to the IPC
 - (d) The Guidelines on:
 - “Where to Classify”
 - “What to Classify”
4. The Task Force recommended the following categories to be used to select examples:

Category I: Introductory Examples

 - (a) Group Hierarchy
 - (b) Classifying in Core or Advanced Level

Category II: Examples Selected to Illustrate Certain Aspects of the IPC

- (a) Notes and References
 - References limiting the scope
 - Informative references
- (b) Priority Rules
 - Common Rule
 - Standardized Sequence
 - Last Place Priority Rule
 - First Place Priority Rule
- (c) Multi-Aspect Classification in Places Where Explicitly Multi-Aspect Classification Rules Apply
- (d) Secondary Classification Schemes
- (e) Indexing Schemes

Category III: Examples Which are Difficult to Classify

- (a) What to Classify
- (b) Invention Information versus Additional Information
- (c) Function-Oriented Places/Application Places

5. It was noted that examples of Category I should not be complete patent documents, but abridged versions thereof, including only parts that should be classified. In some cases, artificial examples could be created. In Category II, invention information should be highlighted in the example, or simplified documents, as in Category I, containing necessary parts and claims could be applied. In Category III, real patent applications should be used. It was agreed that examples for each category should be available in English, French and German languages.

6. It was also agreed that classification instructions for both core and advanced level should be provided. The user of the IPC tutorials may choose at the beginning at which level he/she wants to classify.

7. The International Bureau (IB) was invited to submit to the e-forum (IEF) all the existing training examples in one Word file. Regarding future actions of the Task Force, it was agreed that the IB would act as coordinator of the Task Force. Furthermore, the IB was invited to review the existing examples, to determine which are still useful, as to which category they belong and make the results available to the IEF by January 30, 2004. The Task Force members were also invited to carry out a similar review from their collections and to submit to the IEF, before that date, patent documents that could be considered. Based on the available material and the above categories, the IB will ask Task Force members to provide missing examples by March 15, 2004.

8. The Task Force agreed that a Task Force meeting would be necessary for detailed discussion in next Spring and accepted, with gratitude, an invitation made by the Delegation of Germany to host the meeting of the Task Force at the German Patent and Trade Mark Office (GPTO), Munich, in May 2004.

[Annex P follows]