Topic 9 WIPO IP Office Suite

IPAS 3.6 & IPAS 4

Dar es Salaam, August 26 to 30, 2019
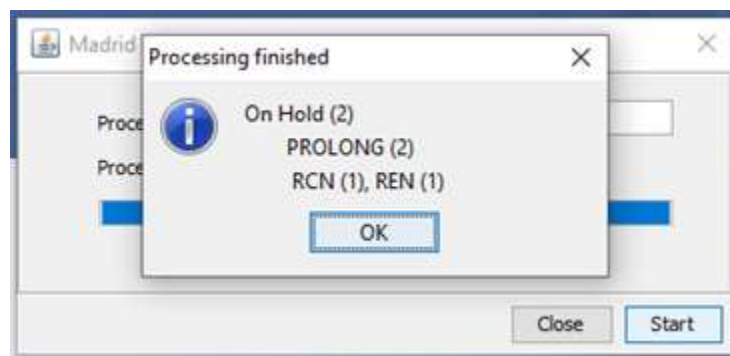
WIPO Industrial Property Business Solutions Division (IPOBSD)

Agenda

■IPAS 3.6 in 2019

■IPAS 4 in 2020

■Expected business benefits of IPAS 4

■IPAS 4 architecture and system changes

■New features and release plan of IPAS 4

■Questions and answers

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IPAS 3.6 Release in Q4 2019

- Handling of error in processing notifications relating to an IRN without BIRTH (On-Hold concept)

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IPAS 3.6 Release in Q4 2019

■ Support for multilingual nice terms

IPAS 3.6 Release in Q4 2019

■ Support for multilingual nice terms

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IPAS 3.6 Release in Q4 2019

■ Display all owners related to the mark in search screens of the trademark

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IPAS 3.6 Release in Q4 2019

■ Display class status in search results

Edit phonetic similarity list   Filter Selection (+)

Reference mark: BEL AIRE
321 items found, displaying 1 to 15.

|◄◄ 1, 2, 3, 4, 5, 6, 7, 8 ►►|

Selected	Percent	File nbr	Reg nbr	Filing date	Mark name	Classes	Owner name	Status
☐	98	000000377		09/01/2019	BEL AIRE BEL AIRE	NCL(0-0) 10 15 16 17 20 37 4 40 5 8	Schweppes Zim Ltd [BG],Early's of Witney's PLC [JP],Henkel Kommandgesellschaft Auf [SU]	Impedimento cadastrado
☐	98	000001749		09/01/2019	BEL AIRE BEL AIRE	NCL(0-0) 1 12 17 20 25 26 27 38 39 44 8	Terodo Ltd [AW],The Timken Company [ES],Suchard Chocolate (SA) Ltd [VC]	Impedimento cadastrado
☐	98	000001758		09/01/2019	BEL AIRE BEL AIRE	NCL(0-0) 19 26 28 36 37 4 5 6	Seco Tools Aktiebolag [KZ]	Impedimento cadastrado
☐	98	000001985		09/01/2019	BEL AIRE BEL AIRE	NCL(0-0) 12 20 27 29 35 38 40	E.K. Green & Company Ltd [EP],CAPS Pvt Ltd [SC],Parke Davis And Company [JE]	Impedimento cadastrado
☐	98	000002182		09/01/2019	BEL AIRE BEL AIRE	NCL(0-0) 11 12 13 16 2 21 34 4 42	Parke Davis & Company Ltd [SI]	Impedimento cadastrado

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IPAS 3.6 Release in Q4 2019

■ Update the file number to use a configured prefix

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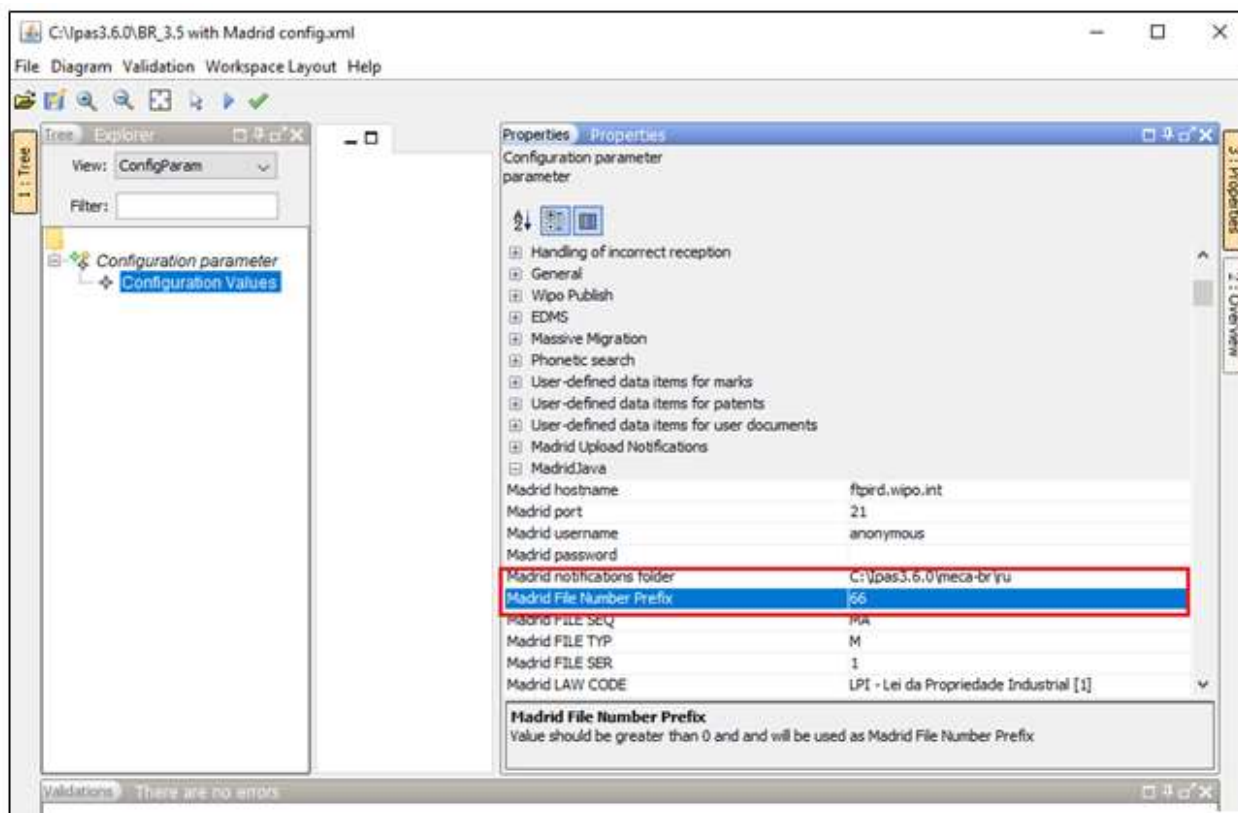
IPAS 3.6 Release in Q4 2019

■ Monitoring of Madrid Notifications

IPAS 3.6 Release in Q4 2019

■ Notification of Madrid Decisions

IPAS 3.6 Release in Q4 2019

■ Office document printing tool

IPAS 4 2019-2020 Development Plan

■ Development of the new version IPAS 4 with proper functional support in the following order:

❑ Trademark

❑ Patent

❑ Industrial Design

❑ Generic Registry
(Copyright, Commercial Names, Geographical Indications, etc.)

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Expected Business Benefits of IPAS 4

- Reduced license costs with open-source database (e.g. Postgres) and operational costs by enabling paperless features (e.g. online filing, electronic work assignment, online publication) and through cloud-based infrastructures

- Increased operational efficiency by measuring process timelines, improving work assignments, monitoring of workload, optimizing existing and introducing new functions to support key business processes

- Improved service delivery, user experience to end-users and increased customer satisfaction

Expected Business Benefits of IPAS 4

- Improved quality and consistency of examination work by making use of checklists, guidelines, standardized written opinions and approval reviews

- Enhanced transparency in managment, securing and auditing of user operations by adopting a good security architecture and system auditing framework

- Secured critical business operations and support work from home initiatives by making use of two-factor user authentication method

Architecture and System Changes

- Business process and ST27 events

- Madrid decision forms

- Fee configuration

- Business process checklist

- Performance measurement and indicator

- Work assignment and physical delivery

- Proper support of 20 subsequent filing requests

- Supporting documents of new applications and post-filing requests

Architecture and System Changes

■ Grouping of workflow actions by business processes and mapping of WIPO ST27 events,
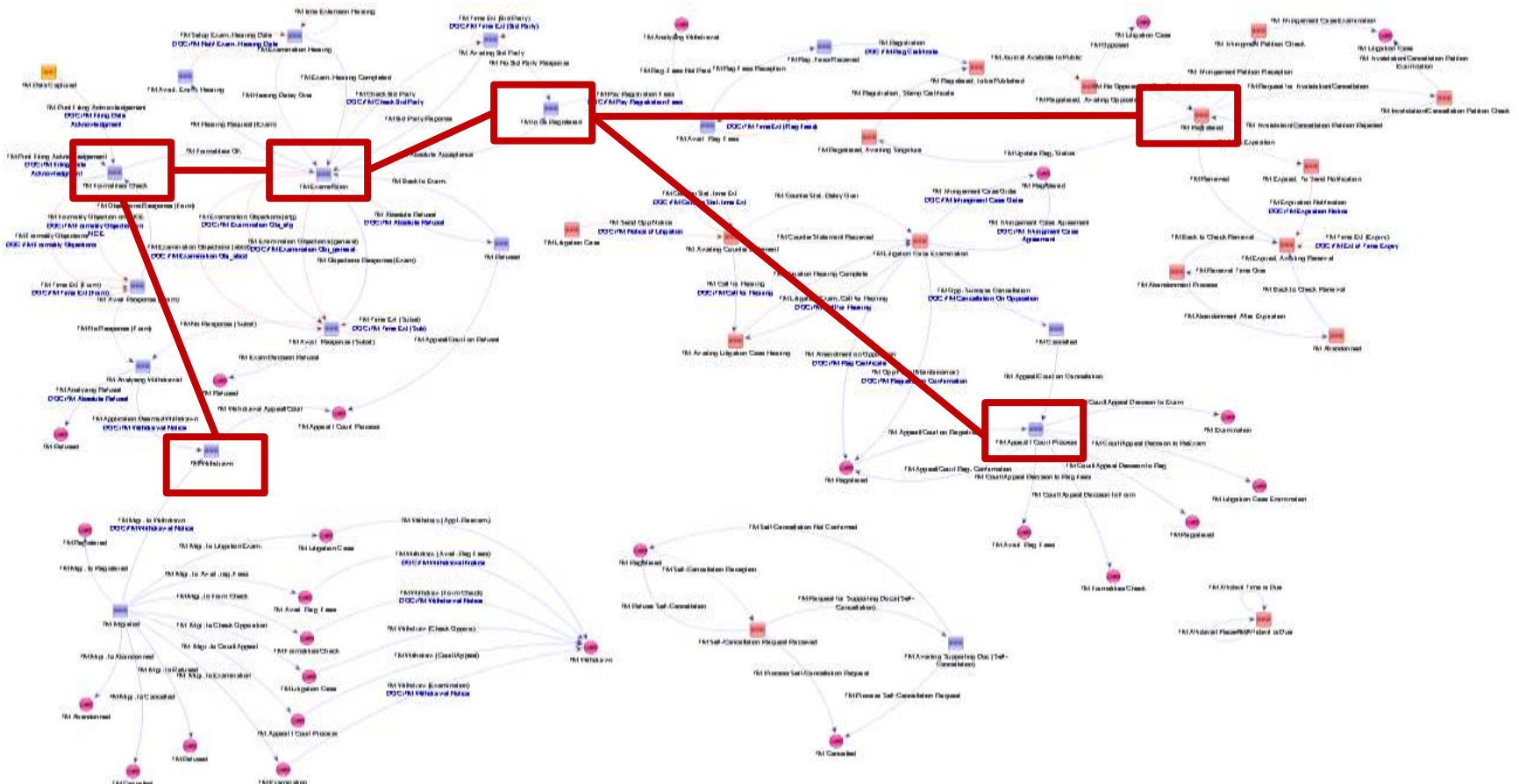
Architecture and System Changes

■ Automated update of online publication and registers

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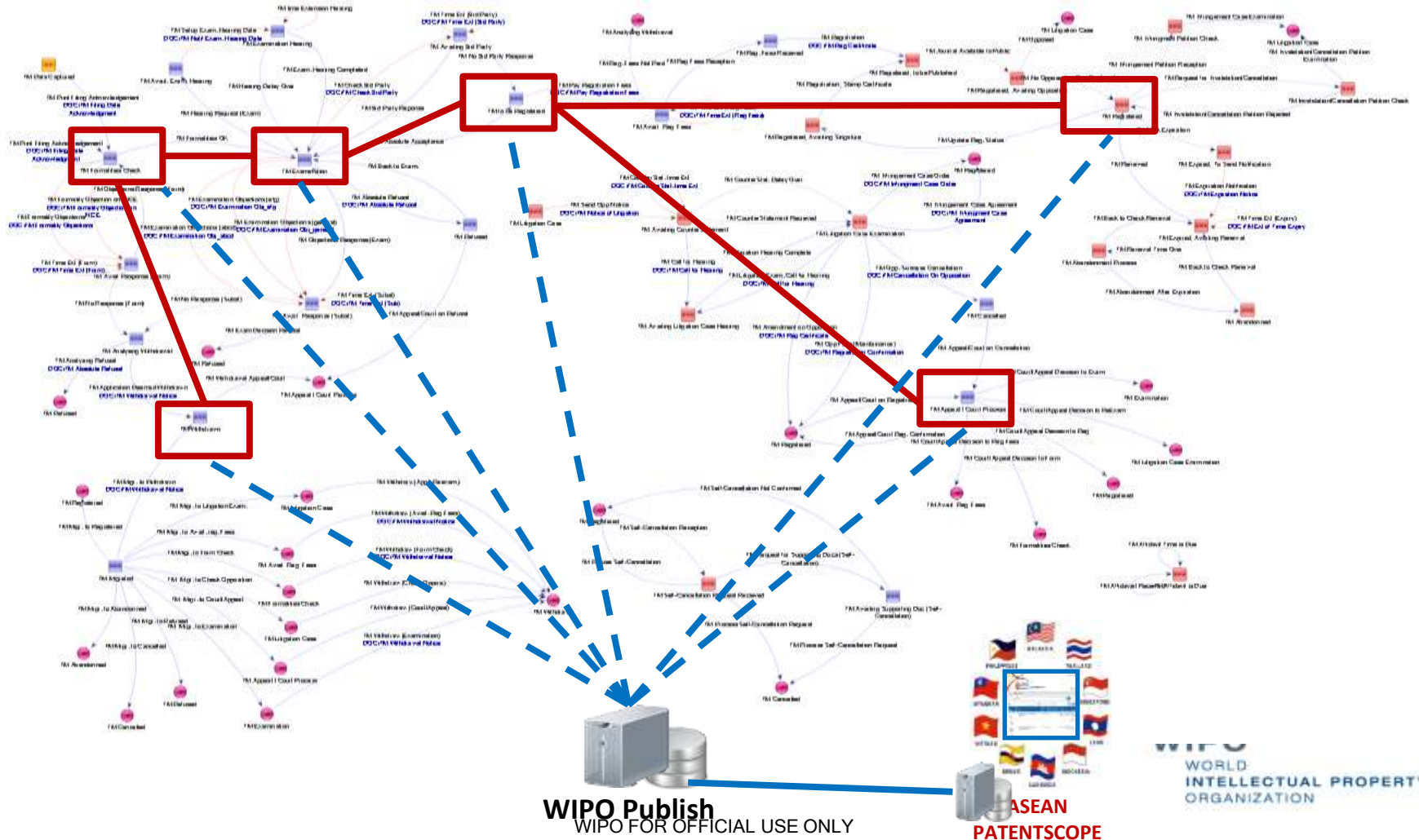
Architecture and System Changes

■ Integrate data lookup and search using solr

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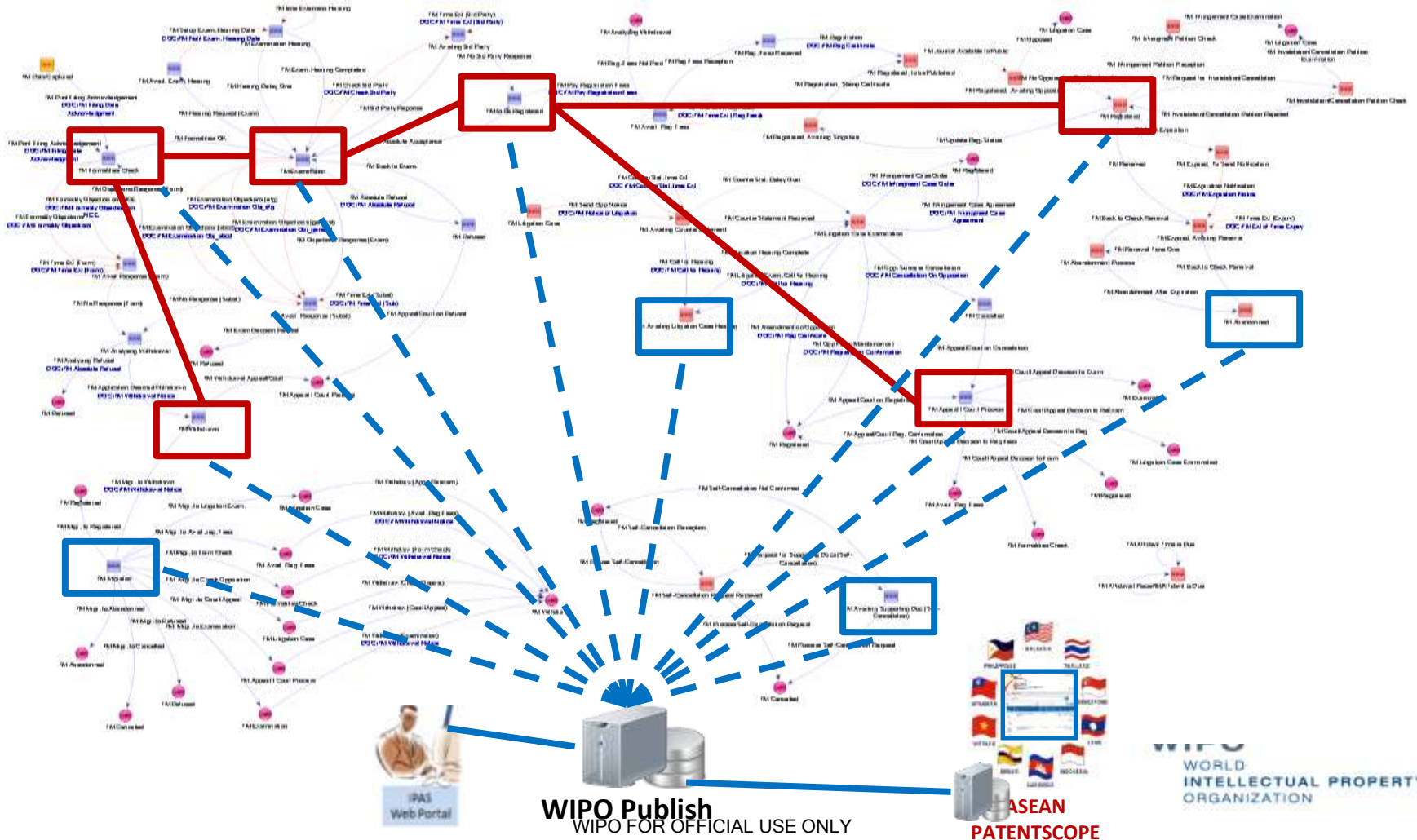
System Configuration Changes 1/ 7

- Import and export of IPAS environment will use ZIP package file in which the configuration of IPAS in XML format is included (mandatory)

- Process result should be marked as either: Pending, Active, Not active, Terminated (mandatory)

- Process result can be mapped to a office-specific business process / WIPO ST27 process stage (mandatory)

- Office-specific business processes should be defined (mandatory)

- Configuring sequence number for Reception batch (mandatory)

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System Configuration Changes 2/7

- Processing statuses should be defined for Nice class (mandatory)

- Auxiliary register type should have its own document sequence (mandatory)

- List of WIPO ST 27 events are made available (mandatory)

- Extension of user document type to other specific cases and mapping indicator for ease of processing at approval (mandatory)

- Clear definition of application type into 3 IP Types - Trademark, Patent and Design (mandatory)

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System Configuration Changes 3/7

- Special perspective view in Designer to group configuration parameters for Madrid (mandatory)

- Introduction of fee category in user document type (mandatory)

- Applicant type should be configured (mandatory)

- Two different indicators for direct PCT filings and PCT National Phase Entry requests (NPE) are available for configuration of application subtype (optional). Only one of these indicators should be used exclusively

System Configuration Changes 4/7

- Filing fees can be configured in Designer (optional)

- Introduction of publish patent document indicator in office document type to used it for generation of the content of published patent document (optional)

- Introduction of a service code in user document type for tracing in fee payment (optional)

- A restoration period can be configured for application subtype (optional)

- Creation of business checklist for business process or user document (optional)

System Configuration Changes 5/7

- Introduction of 'Show to public' indicator in office document (optional)

- Office document can be configured to use a XML template instead of WORD (optional)

- Introduction of irregularity indicator in action type (optional)

- Add specific publication due date condition in application subtype (optional)

- Add an indicator PhysicalDeliveryRequired in action to indicate movement of physical file or document (optional)

System Configuration Changes 6/7

- Introduction of 'Show to public' indicator in office document (optional)

- Introduction of an indicator allowing payment of multiple annuity year (optional)

- Introduction of an indicator allowing multiple design units in one applicant (optional)

- Introduction of document sections as supporting documents and applicable discount types (optional)

- Possibility to configure special action for upper process on reaching any status (optional)

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System Configuration Changes 7/7

- Possibility to configure Number sequence for Madrid application instead of using IRN (optional)

- Indicator for Document capture certification by different user than the capturing user (optional)

- Indicator to pickup Goods and Service translations instead of the ones captured in local language while doing extraction for Madrid outgoing (optional)

- indicator of RequireProcessingDueDate in user document type (optional)

- Mapping of action type to ST 27 event is optional (optional)

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Architecture and System Changes

- Tracking changes in person names and addresses by use of customer number to remove duplicate or orphan records

Architecture and System Changes

■ Enhance system security with use-role schemes and auditing user and system operations

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Business Functions based on User Roles and Permissions

Architecture and System Changes

■ Enhance system security with use-role schemes and auditing user and system operations

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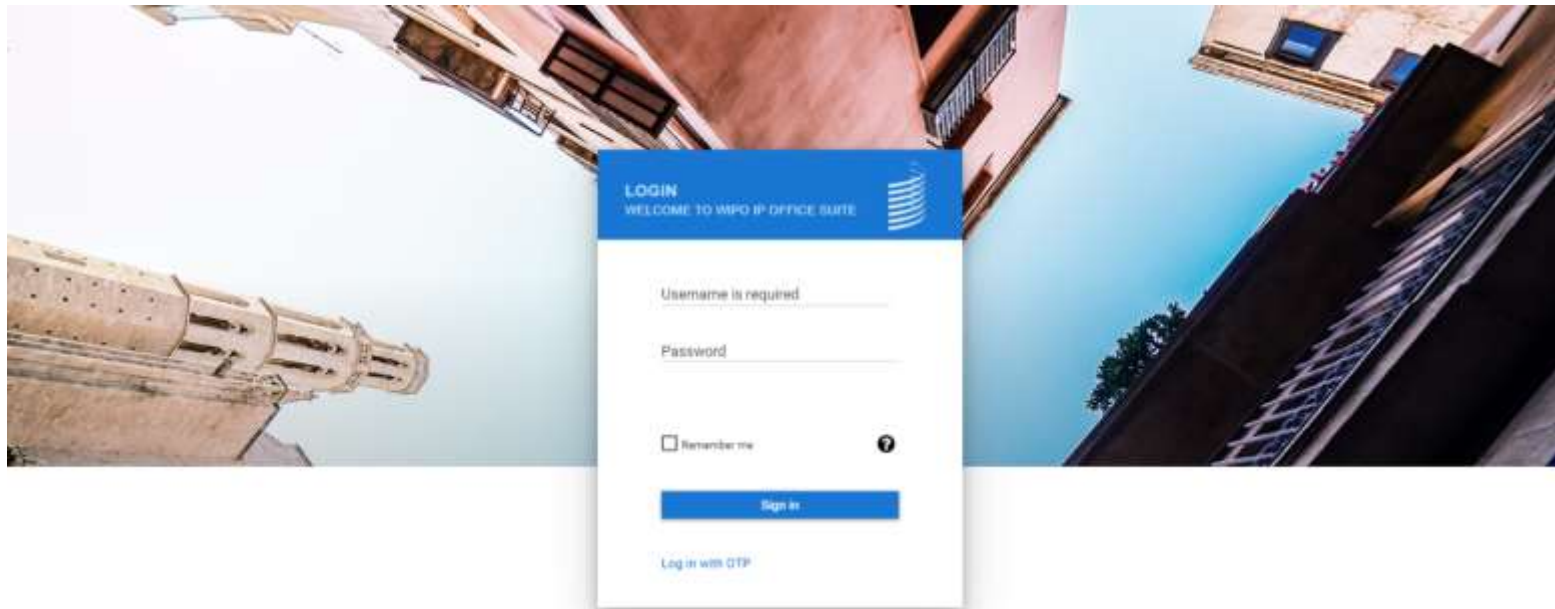
New Features for Madrid Processing

- Madrid Notification between WIPO and Madrid Member State Offices

  ❑ Pre-check of any data issues

  ❑ Make use of WIPO Central Services

  ❑ Monitoring notification through dashboards

  ❑ Fully automated two-way notifications

  ❑ Integration of WIPO MGS and related-translation services

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New Features for Madrid Processing

■ Madrid Notification Exchange
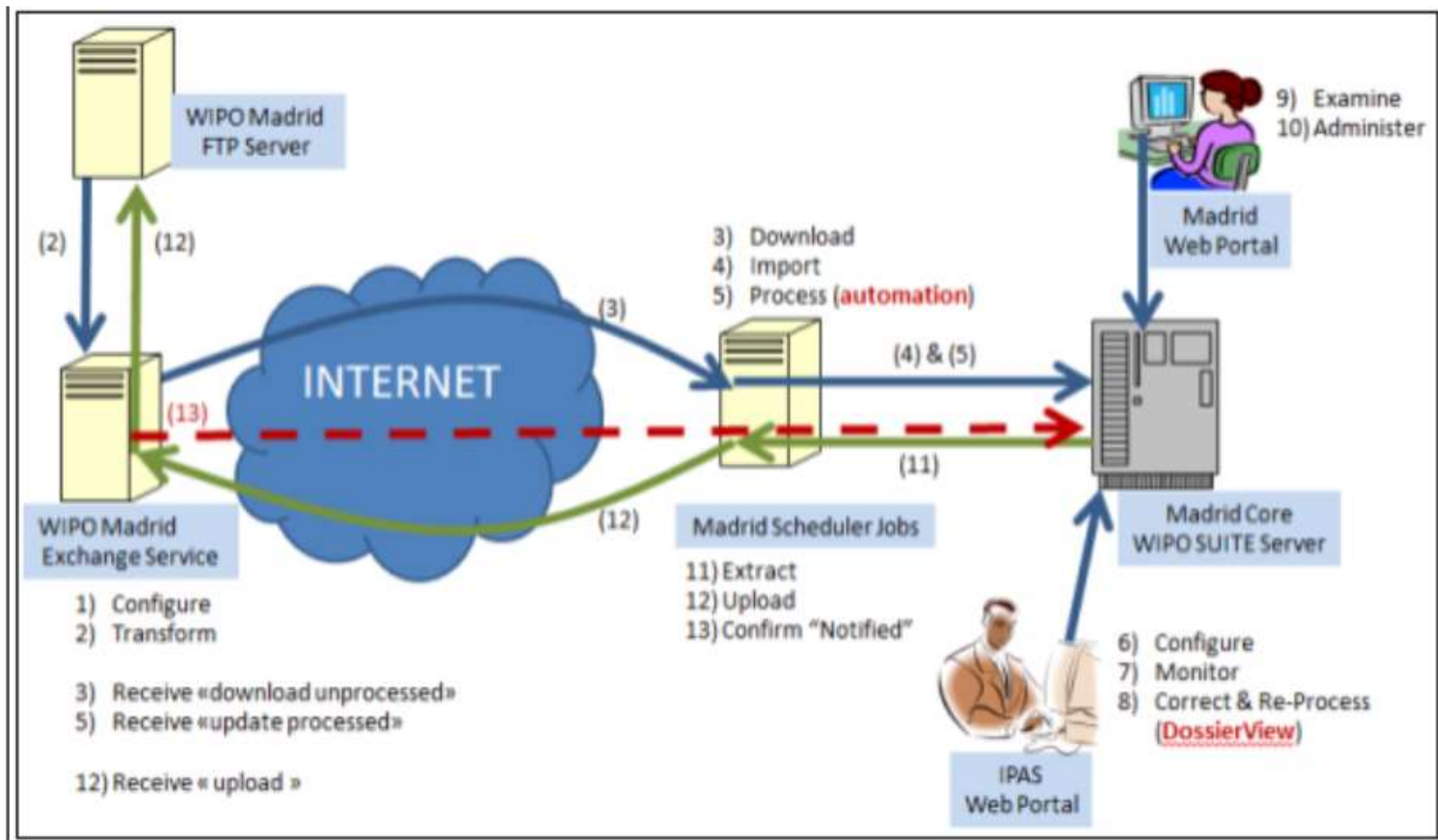
New Features for Reception

- Receive several requests of the same agent or applicant in one reception batch with single invoice for payment

- Fully customizable online reception forms

- Automated calculation of filing fees

- Self-service pre-filing portal / online filing function (preparation and transmittal)

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New Features for Data Capture

- Fully customizable data capture forms with data fields protected by user-roles

- Fully customizable view of application data

- Centralized data and document capture tasks in one workbench view

- Tracking changes of names and addresses to remove duplication of person details

- Document indexation and capture certification

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New Feature of Classification

- Easy upgrade to latest editions and versions of all classifications

- Lookup on class symbol by code or keywords

- Make use of WIPO Central Services

New Feature of File Content View

- Customizable checklists and guidelines for specific business process (e.g. formality, search strategy, substantive examination)

- Formulated examination decisions in structured format

- Quick summary view on file status

- Easy access to specific set of file data through different views

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Introduction of new features in Key Business Processes

- ■ Formality and substantive examination
    - ❑ Customizable checklists and guidelines
    - ❑ Formulated examination notes and decisions in a structured format

New Feature for Search

- Search capability and services powered by solr

- Common approach to similarity search for industrial designs, patents and trademarks

- Customizable trademark similarity search

- Capture search strategies for patent and industrial designs

New Feature for Publication

- Online journal publication and registers
- Monitoring of publications (early and delayed)

New Feature for Monitoring of Office Notifications

- Management dashboard
  - Pending Tasks (electronic work assignments, work load and performance analysis)
  - Renewals and annuity payments
  - PPH requests
  - Filing statistics

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New Feature for Work Monitoring

■ Management dashboard

❑ Pending Tasks (electronic work assignments, work load and performance analysis)

❑ Renewals and annuity payments

❑ PPH requests

❑ Filing statistics

New Feature for System Configuration

- Available configuration options to business users

- Generic online forms

- User preferences

- Mail-merge fields

New Feature for System Administration

- System health

- System audit and debugging mode

- Monitoring of scheduler jobs

- User and role management

New Feature for Transmittal of PCT RO Record Copies

■ Dashboard monitor for transmittals of PCT Record Copies

Integrated ARIPO Member State Exchange

- Dashboard Monitor for exchange of notifications between ARIPO and Member State Offices

Release Plan 2020 (1/2)

- Q4-2019

  - Selection of pilot IP Offices

- Q1-2020

  - System integration tests by WIPO

  - Evaluation with selected pilot IP Offices

- Q2-2020

  - User acceptance tests in selected pilot IP Offices

Release Plan 2020-2021 (2/2)

- Q3-2020

  - Production launches in selected pilot IP Offices (support for trademarks only)

- Q4-2020 / Q1-2021

  - Production launches in selected pilot IP Offices (support for industrial designs and patents)

  - Production launches in selected pilot IP Offices (support for other IP rights)

  - e-filing portal for industrial designs, patents and trademarks

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