



Topic 9 WIPO IP Office Suite

IPAS 3.6 & IPAS 4

Dar es Salaam, August 26 to 30, 2019

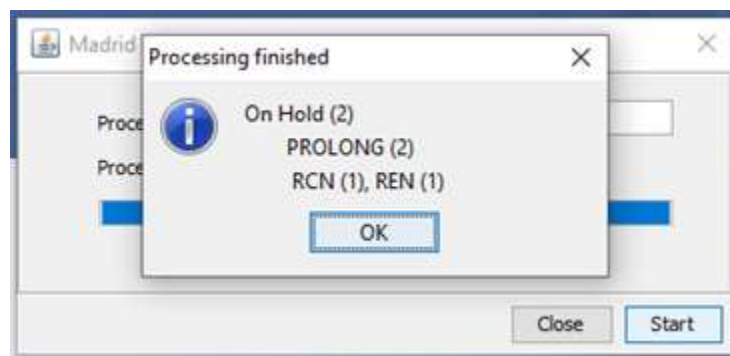
WIPO Industrial Property Business Solutions Division (IPOBSD)

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

IPAS 3.6 Release in Q4 2019

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



IPAS 3.6 Release in Q4 2019

■ Support for multilingual nice terms

The screenshot displays the IPAS 3.6 software interface. On the left, the 'Tree Explorer' shows a 'Configuration parameter' folder containing a sub-item 'Configuration Values'. The main 'Properties' window is open, showing a list of configuration parameters. The 'Enable Nice Desc Other Language' parameter is highlighted in blue and is currently unchecked. Below the list, a detailed description for this parameter is provided.

Configuration parameter	Value
Use Auxiliary Registers	<input checked="" type="checkbox"/>
Hide Unpublished Patents	<input type="checkbox"/>
Master Mode (Shows internal data)	<input checked="" type="checkbox"/>
Export Excludes Notes1 field in Actions	<input checked="" type="checkbox"/>
Reference country for WIPO statistics	RU
Journal Output Special Mode	<input checked="" type="checkbox"/>
User for IPAS Services Remote Access	
Store individual office document print images in d...	<input checked="" type="checkbox"/>
Enable editing of e-doc content	<input checked="" type="checkbox"/>
Use MSWord to render TXT content	<input type="checkbox"/>
Use PDF to render Word documents	<input checked="" type="checkbox"/>
Enable Bilingual Mode	<input checked="" type="checkbox"/>
Enable Nice Desc Other Language	<input type="checkbox"/>
Enable Nice highlighting on search	<input checked="" type="checkbox"/>

Enable Nice Desc Other Language
If this field is checked then the system allows to capture Nice description in two languages. During Madrid decision the description capture in Nice description in other lang would be extracted.

IPAS 3.6 Release in Q4 2019

■ Support for multilingual nice terms

New Deleted highlighted Update highlighted Initial description				
Status	Ed	Version	Nbr	Description
Deleted	10	0	1	Adhesives used in industry, especially for building purposes.
Deleted	10	0	8	Common metals and their alloys; metal building materials; transportable buildings of metal; non-electric cables and wires of common metal.
Deleted	10	0	7	Machines, namely machines for treatment of materials and for manufacturing, construction machines, roadway construction machines, road construction machines, concrete construction machines, construction vehicles, other than for transportation purposes, machines operated by compressed air, for inserting reinforcements with distance retainers, mechanical equipment for roofing domes; hand-held tools, other than hand-operated, parts, spare parts and accessories for the above-mentioned goods, included in this class, namely tools for machines, modular tools for machines, cutting tools for machines, abrading inserts for use with machines, die holders for use with machines, cutting discs for use with machines, abrasive bits for use with machines, disposable blades for use with machines, cutting tools for use with machines, sanding disks for use with machines, core cutters for use with machines, sanding belts for use with machines, abrading tools for use with machines, drill spacing instruments for use with machines, rubber tracks for use with crawlers on building machines, extensions for hand-held power tools, adapters for hand-held power tools, spindles for hand-held power tools, blades for hand-held power tools, drills for hand-held power tools, magnetic holders for hand-held power tools, ball-nips for hand-held power tools, cutting inserts for hand-held power tools, head attachments for hand-held power tools, discs for abrading for use with hand-held power tools, discs for cutting for use with hand-held power tools.
Deleted	10	0	8	Hand-operated tools, especially for sheeting and concrete reinforcing work, mortar injection syringes, coil chucks, hand-operated instruments for building construction, parts, spare parts for the above-mentioned goods, included in this class; accessories for the above-mentioned goods, included in this class, namely: dies for use with hand-operated tools, sugar bits for use with hand-operated tools, saw blades for use with hand-operated tools, cutting gauges for use with hand-operated tools, cutting discs for use with hand-operated tools, cutting inserts for use with hand-operated tools, die holders for use with hand-operated tools, sanding disks for use with hand-operated tools, saw guide rails for use with hand-operated tools, bits for hand-operated tools, diamond cutting tools for hand-operated tools, rotary drills for hand-operated tools, drill bits for hand-operated tools, diamond drill bits for hand-operated tools.
Deleted	10	0	17	Caulking and insulating material; sealing strips; gaskets for sealing structural components, expanding bands, hoses and expanding hoses for caulking structural components against moisture; rubber, gulls-parcels, gum, asbestos, mica and goods made from these materials, namely cords of rubber; rings of rubber; granules of tallow; wires of rubber; compositions of rubber; stuffing of rubber; stop.
Deleted	10	0	18	Building materials (non-metallic), non-metallic rigid pipes for building, asphalt, pitch and bitumen; erosion control sheeting of fabric for construction use; erosion control sheeting or fabrics for construction.
Deleted	10	0	20	Fittings of plastic, namely steel rods of plastics, door (hardware) gate (hardware) and window fittings of plastic; hooks and eye bolts of plastic for hanging purposes; pins, turnbuckles, anchors and dowels of plastic; accessories for hoses and expanding hoses, namely filling plugs of plastics for injection hoses; non-metallic caps; non-metallic joint retainers for floor filling rods; non-metallic screens for building; pipe clips of rubber; pipe clamps of rubber; clips of rubber for cables; steel rods; parts and spare parts for the above-mentioned goods, included in this class.
Deleted	10	0	30	Maintenance and repair work in relation to the goods of classes 6, 7, 8, 17, 18 and 20.

Details of highlighted Nice class	
Nice Class Edition *	10
Nice Class Version	0
Nice Class Nbr *	7
Nice Class Description:	MACHINES, namely machines for treatment of materials and for manufacturing, construction machines, roadway construction machines, road construction machines, concrete construction machines, construction vehicles, other than for transportation purposes, machines operated by compressed air, for inserting reinforcements with distance retainers; mechanical equipment for inserting domes; hand-held tools, other than hand-operated; parts, spare parts and accessories for the above-mentioned goods, included in this class, (part)
Nice Class Description in Other Lang	MACHINES, namely machines for treatment of materials and for manufacturing, construction machines, roadway construction machines, road construction machines, concrete construction machines, construction vehicles, other than for transportation purposes, machines operated by compressed air, for inserting reinforcements with distance retainers; mechanical equipment for inserting domes; hand-held tools, other than hand-operated; parts, spare parts and accessories for the above-mentioned goods, included in this class, (part)
Nice Class Status	Deleted

IPAS 3.6 Release in Q4 2019

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

Select trademark - Microsoft Edge

localhost:3080/ipasWeb/MarkEdit/SelectTrademarkViewAllOwners.do

IPAS - Industrial Property Administration System User: KR050_BH

[Back](#) | [Show logs](#) | [Report list](#) | [Excel list](#) | [Add all to process group](#) | [Home](#) | [Logout](#)

Select trademark Filter Selection (+)

Search criteria: all
5 items found, displaying all items.

Select	File No.	Novelty date	Mark name	Classes	Owner name	Status	Responsible
<input type="checkbox"/>	003901201	30/07/2012	hella 098	NCL(10-4) 8 10 11	United Initiators GmbH (LU)	Para extinguir registro de marca pela expiração do prazo de vigência	
<input type="checkbox"/>	003901203	30/07/2012	hella2 hella2	NCL(10-2016.01) 1 6 7 8 17 19 20 37	GIP Development Srl (LU)	Para extinguir registro de marca pela expiração do prazo de vigência	
<input type="checkbox"/>	003001202	30/07/2012		NCL(10-2016.01) 1 6 7 8 17 19 20 37	United Initiators GmbH (LU)	Para extinguir registro de marca pela expiração do prazo de vigência	
<input type="checkbox"/>	003901204	30/07/2014		NCL(10-2016.01) 1 6 7 8 17 19 20 37	GIP Development Srl (LU)	Para extinguir registro de marca pela expiração do prazo de vigência	
<input type="checkbox"/>	067901201	Prio: 25/08/2014 File: 17/05/2017	AMERICAN EAGLE INSTRUMENTS	NCL(10-4) 8 10 11	American Eagle Instruments, Inc. (LU), Alex Dao (AG)	Verificando pagamento	

5 items found, displaying all items.

[Toggle select flag](#) | [Select/Deselect All](#) | [Add to process group](#) | [View all owners](#)

[Help](#) | [Configuration](#)

IPAS 3.6 Release in Q4 2019

■ Display class status in search results

Edit phonetic similarity list

Filter Selection (+)

Reference mark: BEL AIRE

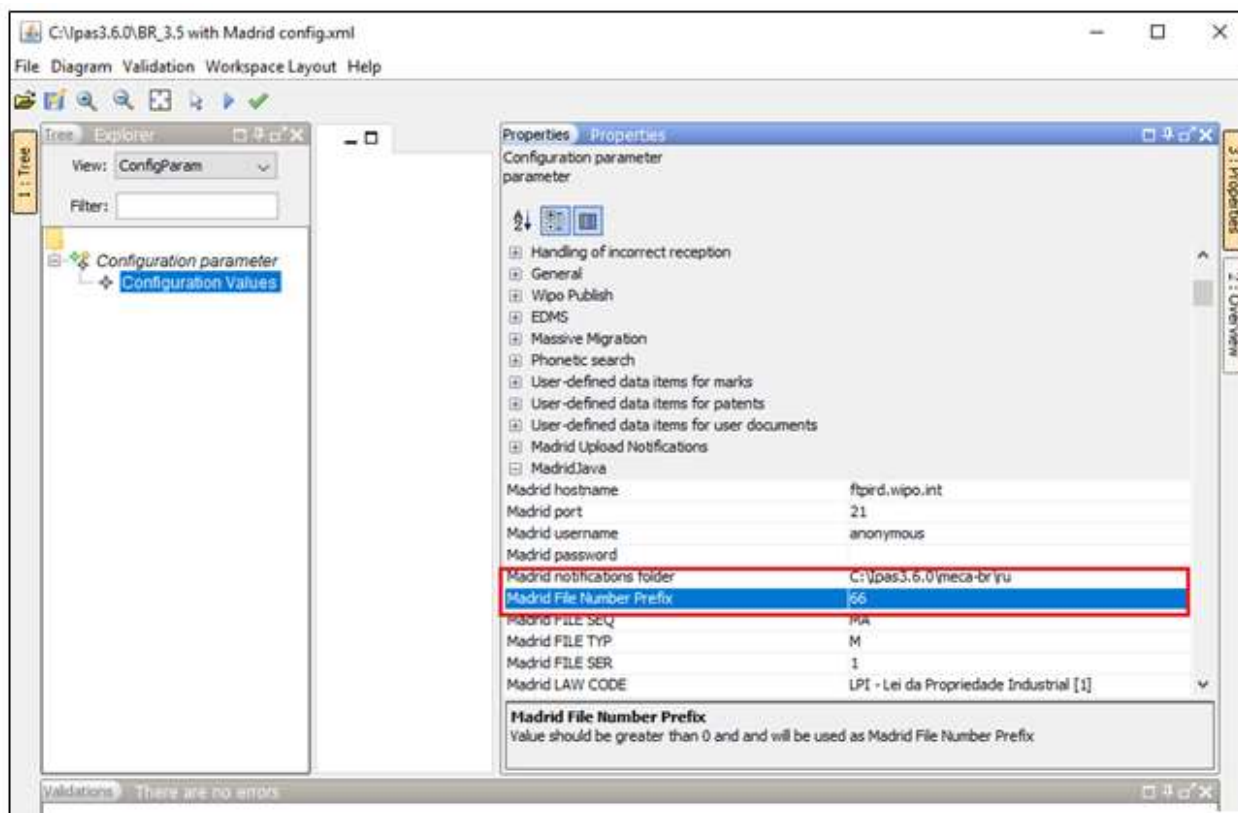
321 items found, displaying 1 to 15.

1, 2, 3, 4, 5, 6, 7, 8

Selected	Percent	File nbr	Reg nbr	Filing date	Mark name	Classes	Owner name	Status
<input type="checkbox"/>	98	000000377		09/01/2019	BEL AIRE BEL AIRE	NCL(0-0) 10 15 16 17 20 37 38 39 40 5 8	Schweppes Zim Ltd [BG], Early's of Witney's PLC [JP], Henkel Kommandgesellschaft Auf [SU]	Impedimento cadastrado
<input type="checkbox"/>	98	000001749		09/01/2019	BEL AIRE BEL AIRE	NCL(0-0) 1 12 17 20 25 26 27 38 39 44 46	Terodo Ltd [AW], The Timken Company [ES], Suchard Chocolate (SA) Ltd [VC]	Impedimento cadastrado
<input type="checkbox"/>	98	000001758		09/01/2019	BEL AIRE BEL AIRE	NCL(0-0) 19 26 28 36 37 4 5 8	Seco Tools Aktiebolag [KZ]	Impedimento cadastrado
<input type="checkbox"/>	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
<input type="checkbox"/>	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

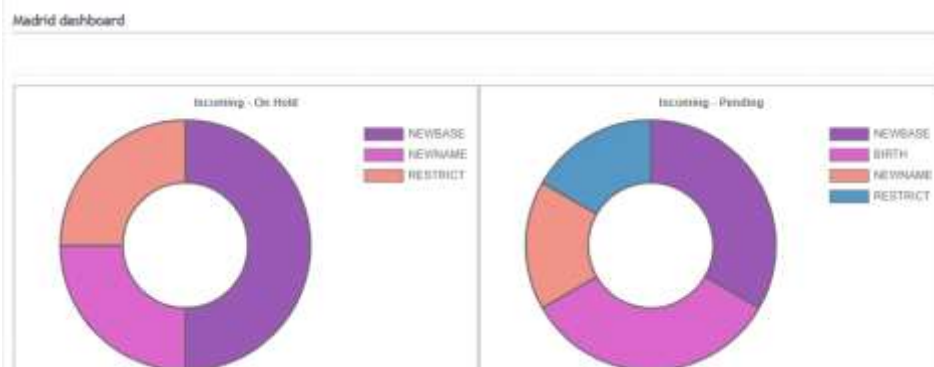
IPAS 3.6 Release in Q4 2019

- Update the file number to use a configured prefix



IPAS 3.6 Release in Q4 2019

■ Monitoring of Madrid Notifications



[Back](#) | [Set filter](#) | [Export Excel](#)

View madrid dashboard incoming

Search criteria: Notification -> Not Imported and Correction Required

11 items found, displaying all items.

ln	Gazette	File Id	Doc Id	Notification	Notified On	Imported On	Import Status	Correction Required
40000065	06/2011	040000065	400006502	NEWNAME-MTN	01/08/2014	27/08/2019	Fully Processed	<input type="checkbox"/>
40000063	05/2011	040000063	400006301	BIRTH-ENN	01/08/2014	27/08/2019	Fully Processed	<input type="checkbox"/>
40000062	05/2011	040000062	400006201	BIRTH-ENN	01/08/2014	27/08/2019	Fully Processed	<input type="checkbox"/>
40000060	06/2011	040000060	400006002	NEWNAME-MTN	01/06/2012	27/08/2019	Fully Processed	<input type="checkbox"/>
8410127	26/2014	00000/000000	420002001	NEWNAME-MTN			On Hold	<input type="checkbox"/>
40000092	09/2011	00000/000000	400009202	NEWBASE-DBN			On Hold	<input type="checkbox"/>
40000091	08/2011	00000/000000	400009102	NEWBASE-DBN			On Hold	<input type="checkbox"/>
40000018	18/2014	00000/000000	400001801	RESTRICT-CBNP			On Hold	<input type="checkbox"/>
81200013	41/2016	00000/000000	812001301	BIRTH-ENN			Not Imported	<input type="checkbox"/>
81200014	41/2016	00000/000000	812001401	BIRTH-ENN			Not Imported	<input type="checkbox"/>
40000072	05/2011	040000072	400007201	BIRTH-ENN	01/08/2014	27/08/2019	Partially Processed	<input checked="" type="checkbox"/>

11 items found, displaying all items.

IPAS 3.6 Release in Q4 2019

■ Notification of Madrid Decisions

Madrid dashboard

WIPO IPAS - Industrial Property Administration System User : IPCJ360MS

[Back](#) | [Set filter](#) | [Export Excel](#) | [Show Details](#) [Home](#) | [Logout](#)

View madrid dashboard outgoing

3 items found, displaying all items.

Selected	Idn	File Id	Over Due	Due Date	Sent On	Received On	Decision	Current File Status	Responsible User	Last Action	Last Action On
<input type="checkbox"/>	501501	MT/M/0001/501501	-55w	01/01/2018		01/01/2017	FORM1				
<input type="checkbox"/>	501502	MT/M/0001/501502	-108w	01/06/2017		01/06/2016	FORM2				
<input type="checkbox"/>	501503	MT/M/0001/501503	-211w	07/07/2015		07/07/2014	FORM3				

3 items found, displaying all items.

[Toggle select flag](#) | [Select/Deselect All](#)

[Help](#) [Configuration](#)

40000080	06/2011	040000000	40000802	NEWNAME-MTN	01/06/2012	27/08/2019	Fully Processed	
8410127	20/2014	00000000000	420002001	NEWNAME-MTN			On Hold	
40000092	09/2011	00000000000	400009202	NEWBASE-DBN			On Hold	
40000091	09/2011	00000000000	400009102	NEWBASE-DBN			On Hold	
40000018	18/2014	00000000000	400001801	RESTRICT-CBNP			On Hold	
81200013	41/2016	00000000000	812001301	BIRTH-ENN			Not imported	
81200014	41/2016	00000000000	812001401	BIRTH-ENN			Not imported	
40000072	05/2011	040000072	400007201	BIRTH-ENN	01/08/2014	27/08/2019	Partially Processed	

11 items found, displaying all items.

IPAS 3.6 Release in Q4 2019

Office document printing tool

Office Document Printing

Exit Search & Print Printer Configuration

Filter Criteria

Document Group: All Doc Type: All Print Status: Any

Generated Between: 1/6/2019 and 27/8/2019 Printed Date: Select Printed Date

Doc Seq No. File Id:

Filter Records Clear Filter

Filter Results Total: 26 Selected: 0

Status Desc	Approved By	Receiver Name	Agent Name	Agent Address
Printed	Approver5	Receiver3	abc	Mumbai
Printed				
Printed				
File does not exist!	Approver6	Receiver3	xyz	
File does not exist or is not a .pdf file!	Approver1	Receiver1	lmn	
File does not exist!	Approver2	Receiver2	abc	
File does not exist or is not a .pdf file!	Approver3	Receiver3	xyz	
File does not exist!	Approver4	Receiver1	lmn	
File does not exist or is not a .pdf file!	Approver5	Receiver2	pqr	

Print Selected Mark as Printed Export to Excel

Printer Status

Microsoft XPS Document Writer is Available
\\pieces\Canon IR2525/2530 UFR III LT is Available

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.)

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

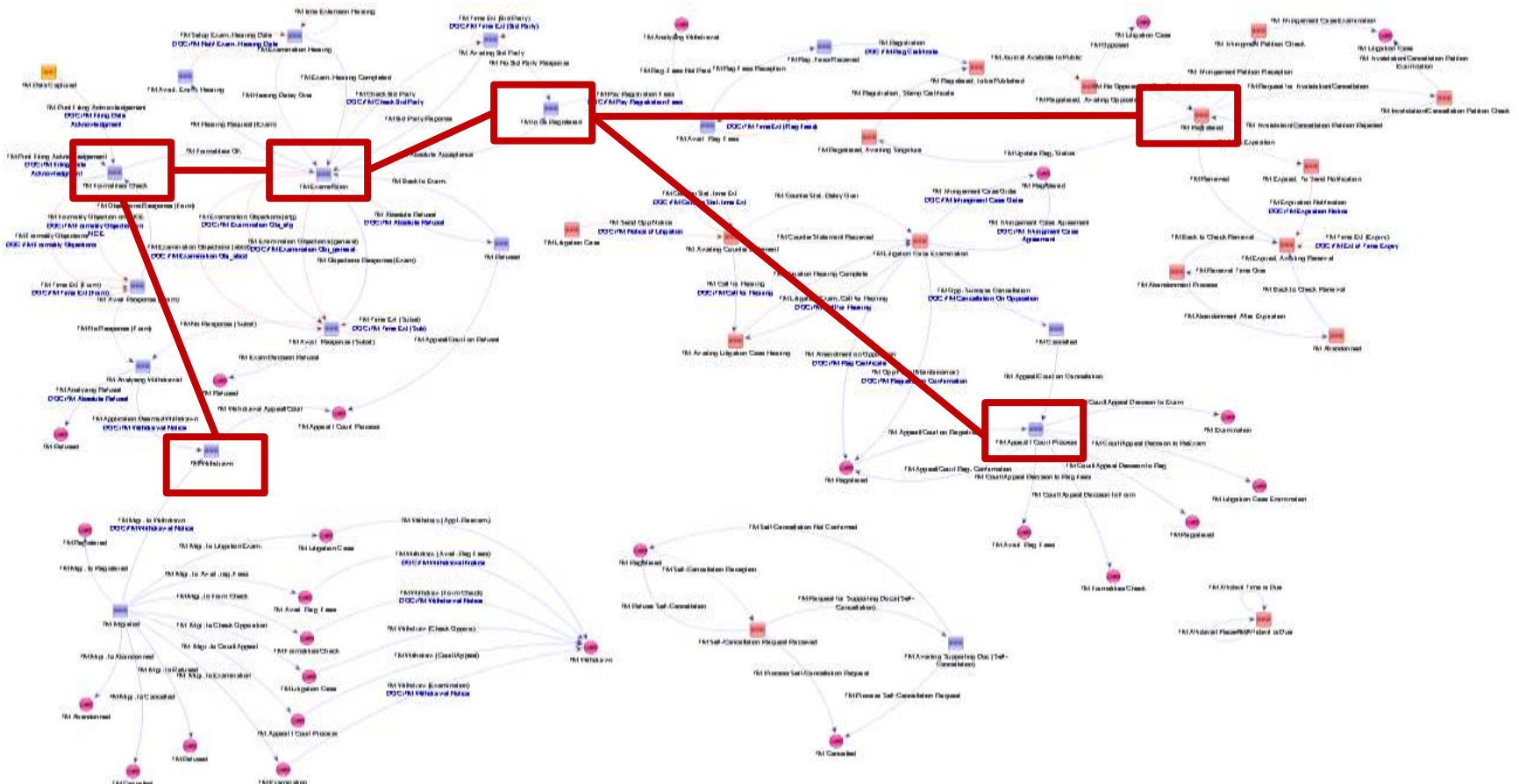
- Improved quality and consistency of examination work by making use of checklists, guidelines, standardized written opinions and approval reviews
- Enhanced transparency in management, securing and auditing of user operations by adopting a good security architecture and system auditing framework
- Secured 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

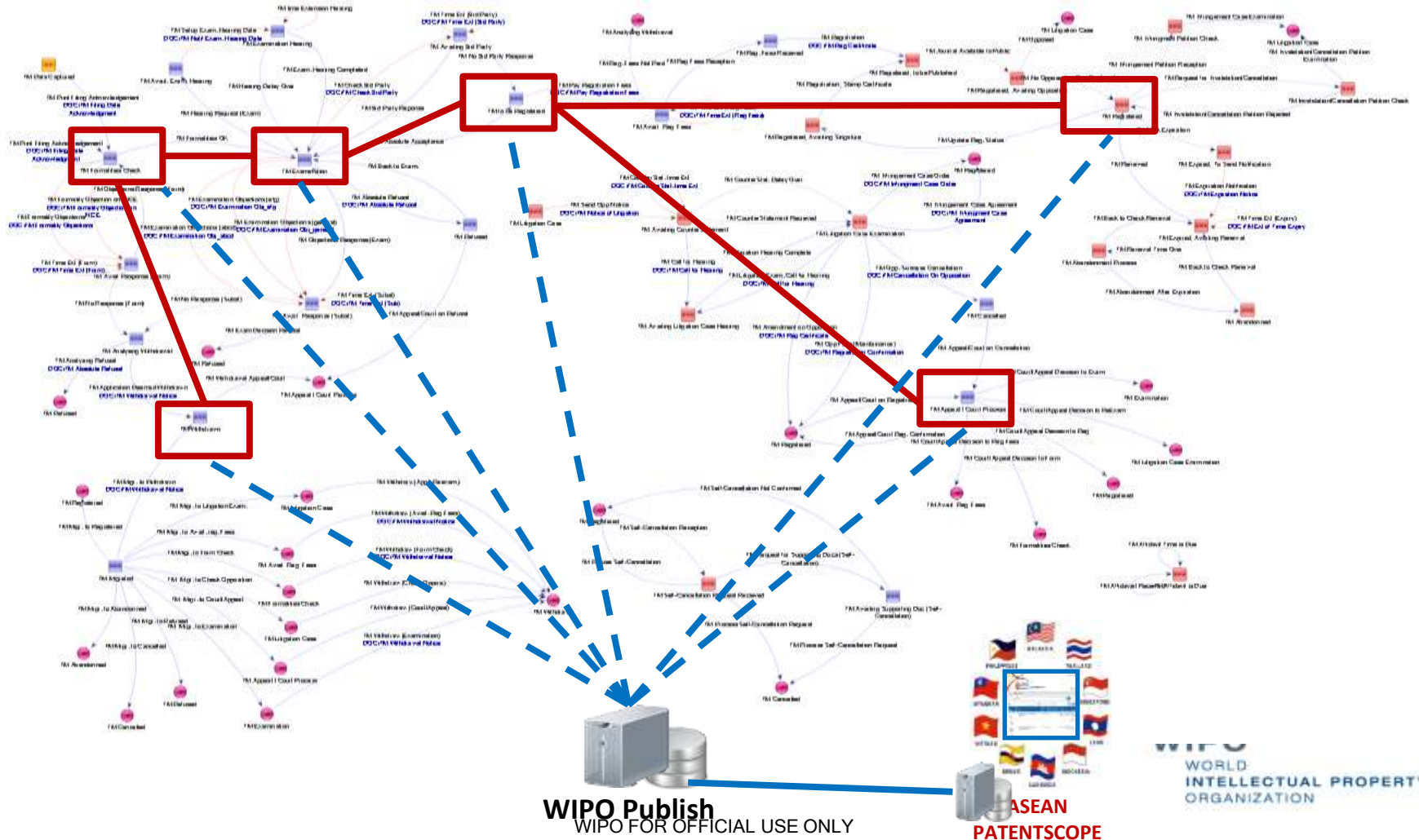
Architecture and System Changes

- Grouping of workflow actions by business processes and mapping of WIPO ST27 events,



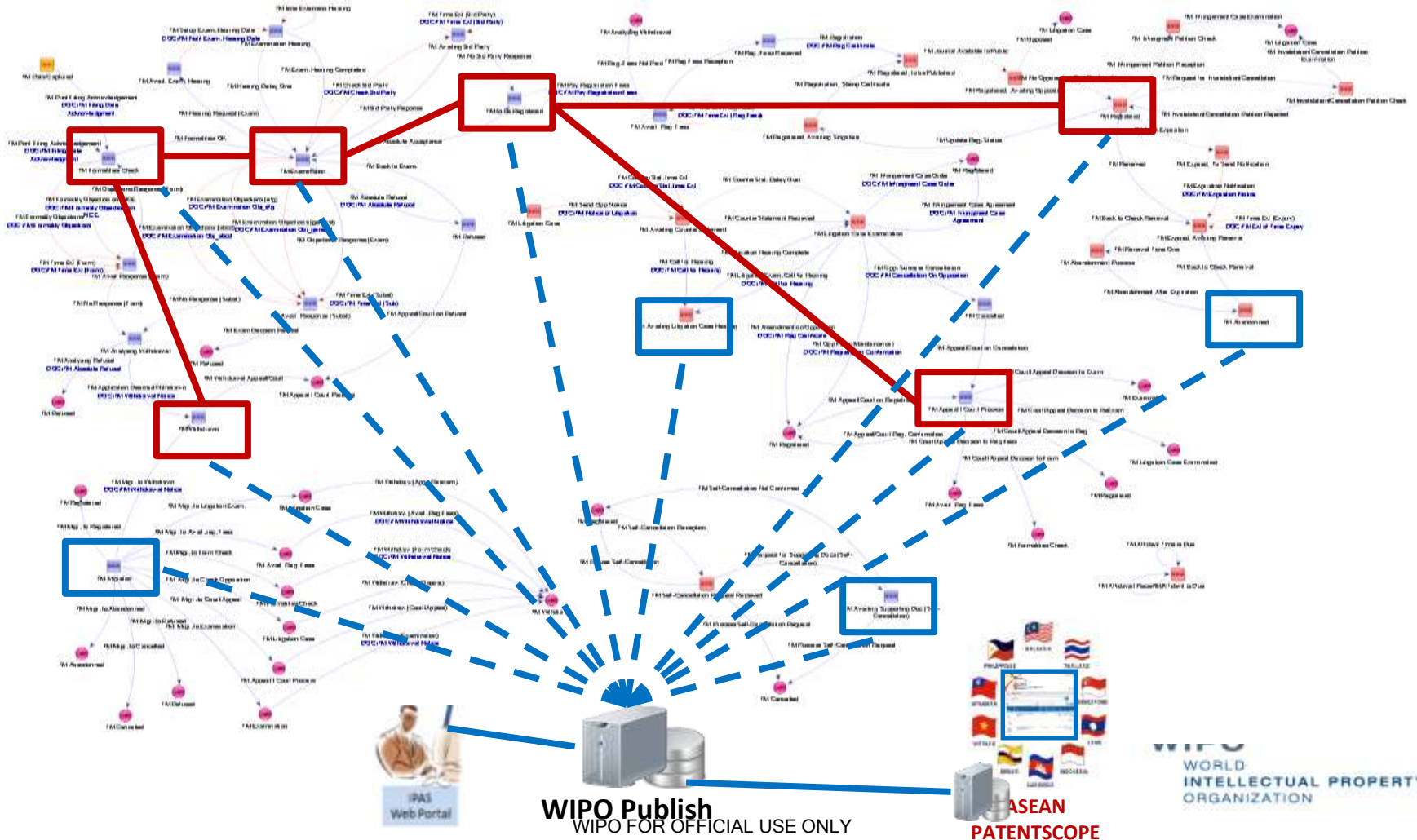
Architecture and System Changes

Automated update of online publication and registers



Architecture and System Changes

- Integrate data lookup and search using solr



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)

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)

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)

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)

Architecture and System Changes

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

View patent

Record 7/7

Application type	Utility Model
(219) Application Nbr	XX/U/2010/000001
(51)IPC	G 09F 21/04(2006.01), G 09F 15/00(2006.01)
Reception date	08/06/2010
(220) Filing date	08/06/2010
Novelty date	08/06/2010
Status	awaiting Response
(71) Applicant	1. BOMBARDIER TRANSPORTATION GMBH Incorporated in the Federal Republic of Germany, Fabrikstraße 41, Bautzen, 02625 [DE];

(71) Applicant

1 - BOMBARDIER TRANSPORTATION GMBH Incorporated in the Federal Republic of Germany , Schöneberger Ufer 1 , Berlin , 10785 , [DE] , Company ,Service ;
1 - BOMBARDIER TRANSPORTATION GMBH Incorporated in the Federal Republic of Germany , Fabrikstraße 41 , Bautzen , 02625 , [DE] , Company ,Service ;

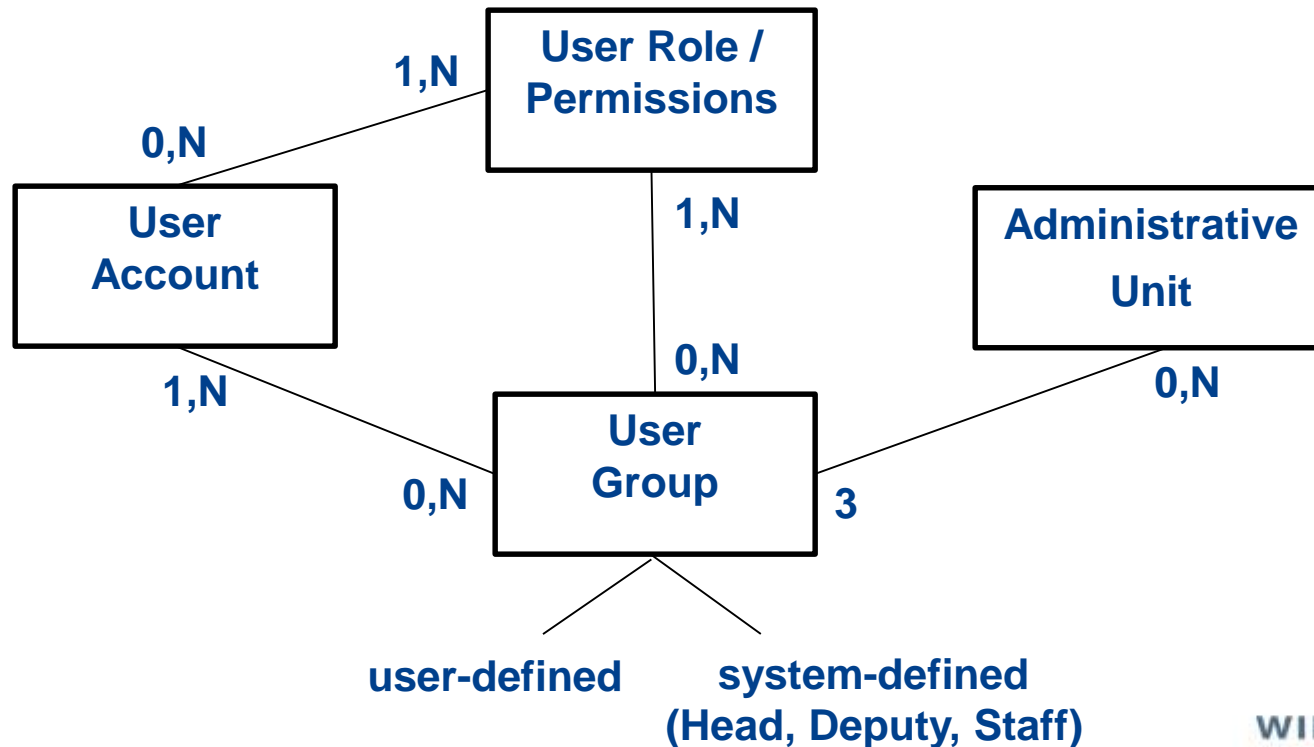
View patent

Record 7/7

Application type	Utility Model
(219) Application Nbr	XX/U/2010/000001
(51)IPC	G 09F 21/04(2006.01), G 09F 15/00(2006.01)
Reception date	08/06/2010
(220) Filing date	08/06/2010
Novelty date	08/06/2010
Status	awaiting Response
(71) Applicant	1. BOMBARDIER TRANSPORTATION GMBH Incorporated in the Federal Republic of Germany, Fabrikstraße 41, Bautzen, 02625 [DE];

Architecture and System Changes

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



Business Functions based on User Roles and Permissions



Pending Tasks
Pending Requests
Physical Deliveries



Register View
Stakeholders



New Reception
Pending Reception
Dashboard
Non Working Days



Pending Publication
Notifications



WIPO PCT
RO Dashboard



WIPO MADRID
DO Dashboard
Configuration



Pending capture
Doc capture



Annuities
Renewals
Performance
Statistics



System Configuration
Fee Configuration
User Management
Mailmerge Configuration



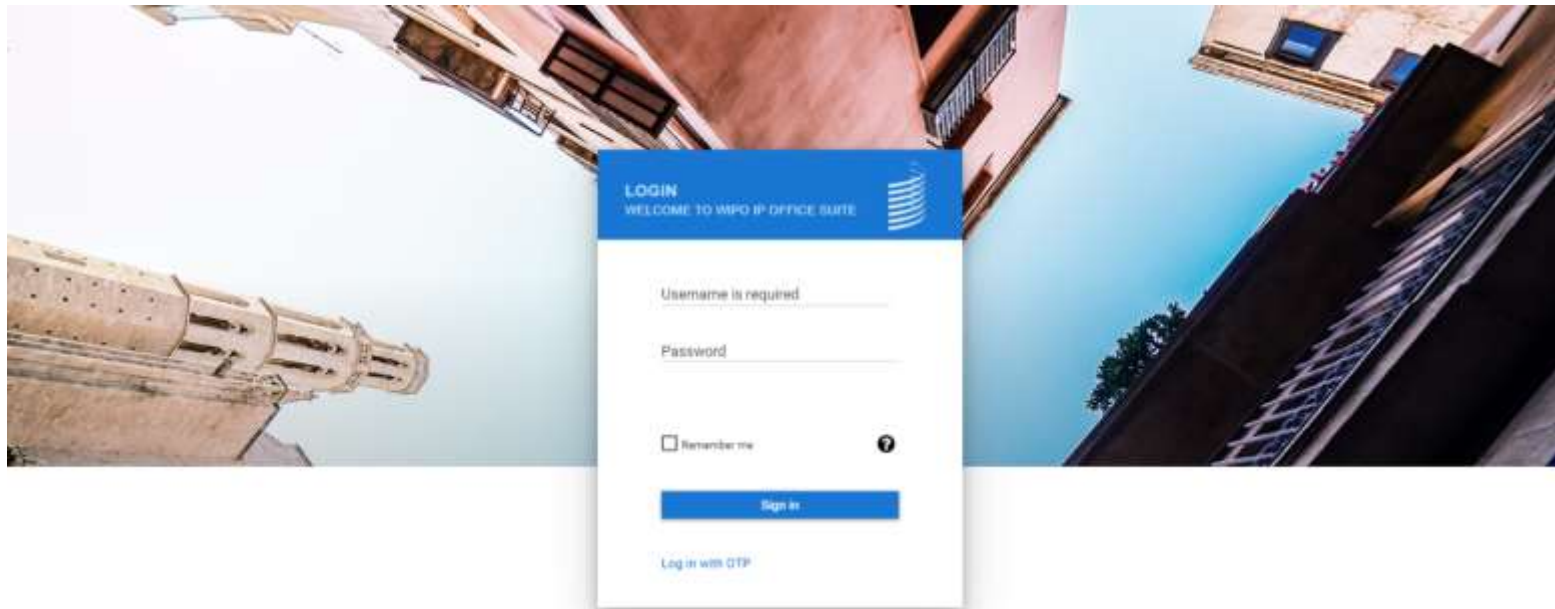
ARIPO
Dashboard
Configuration



Health Check
Job Scheduler
logs

Architecture and System Changes

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

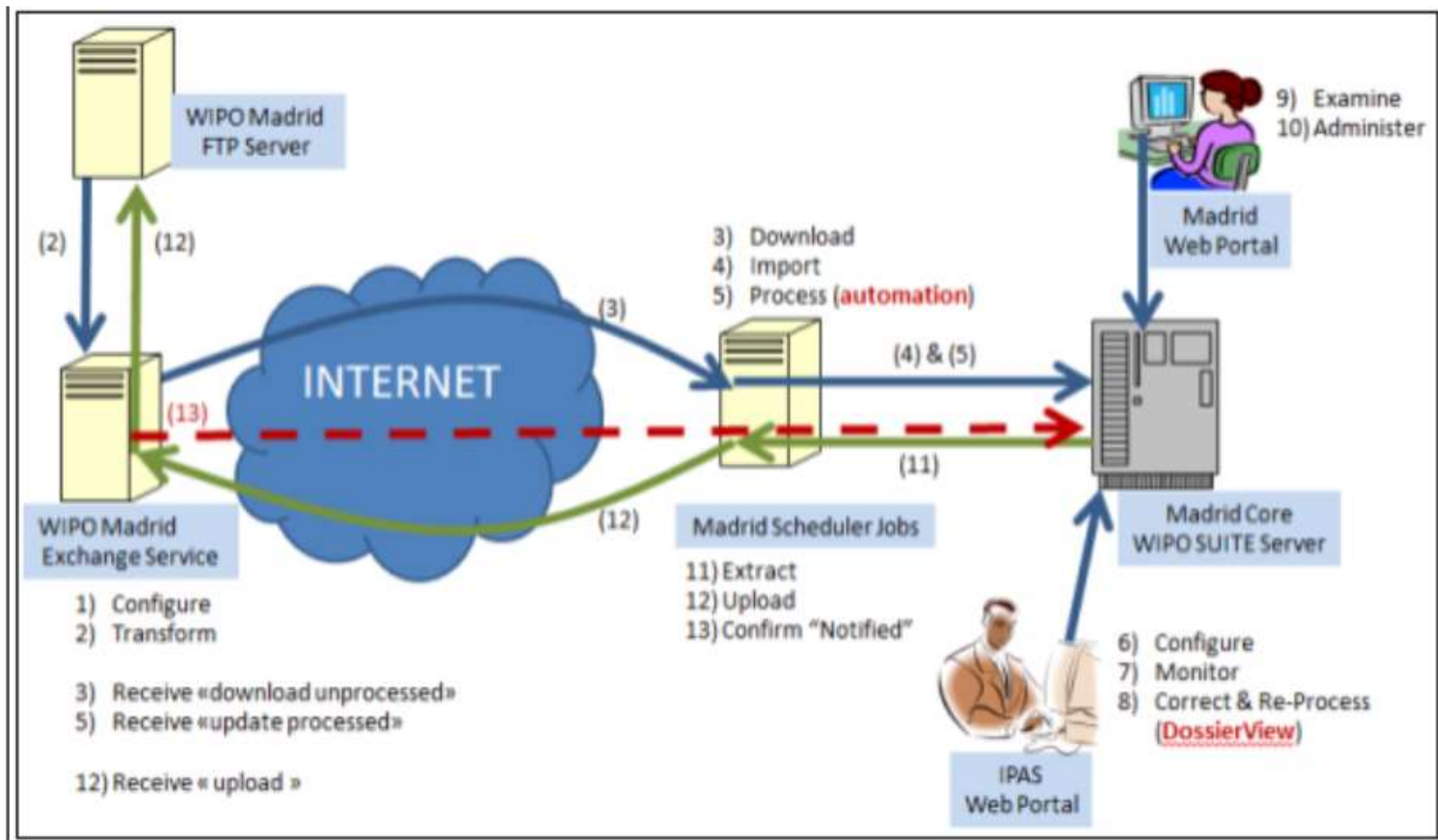


New Features for Madrid Processing

- 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

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)

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

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

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

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