



Topic 2 WIPO File

Assessment and Deployment WIPO's Experience

Dar es Salaam, August 26 to 30, 2019

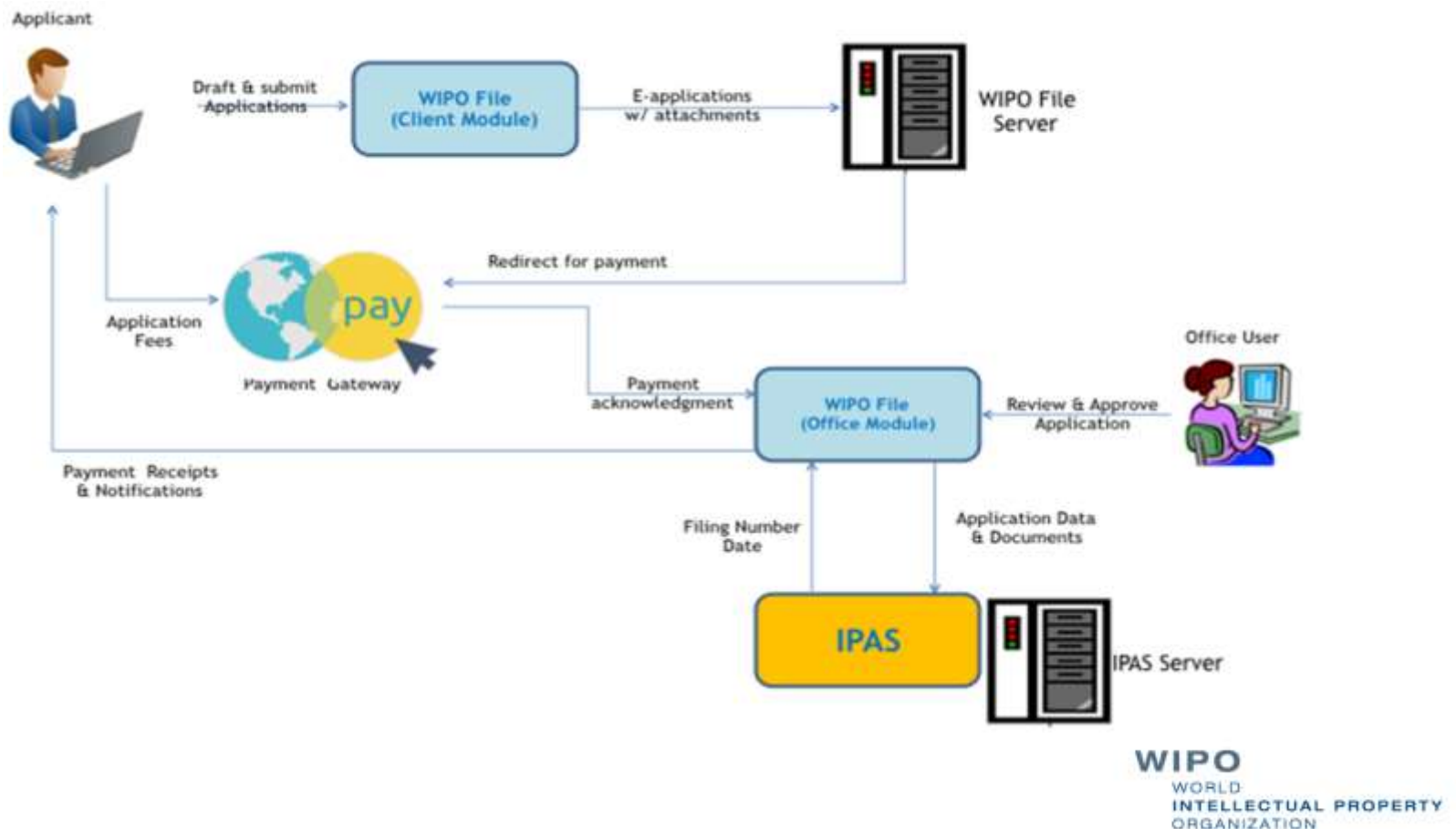
WIPO Industrial Property Business Solutions Division (IPOBSD)

Agenda

- What is WIPO File?
- Status of WIPO File deployments
- Deployment Checklist
- Payment Gateway
- Recommendations for successful deployments
- Questions and answers

WIPO File

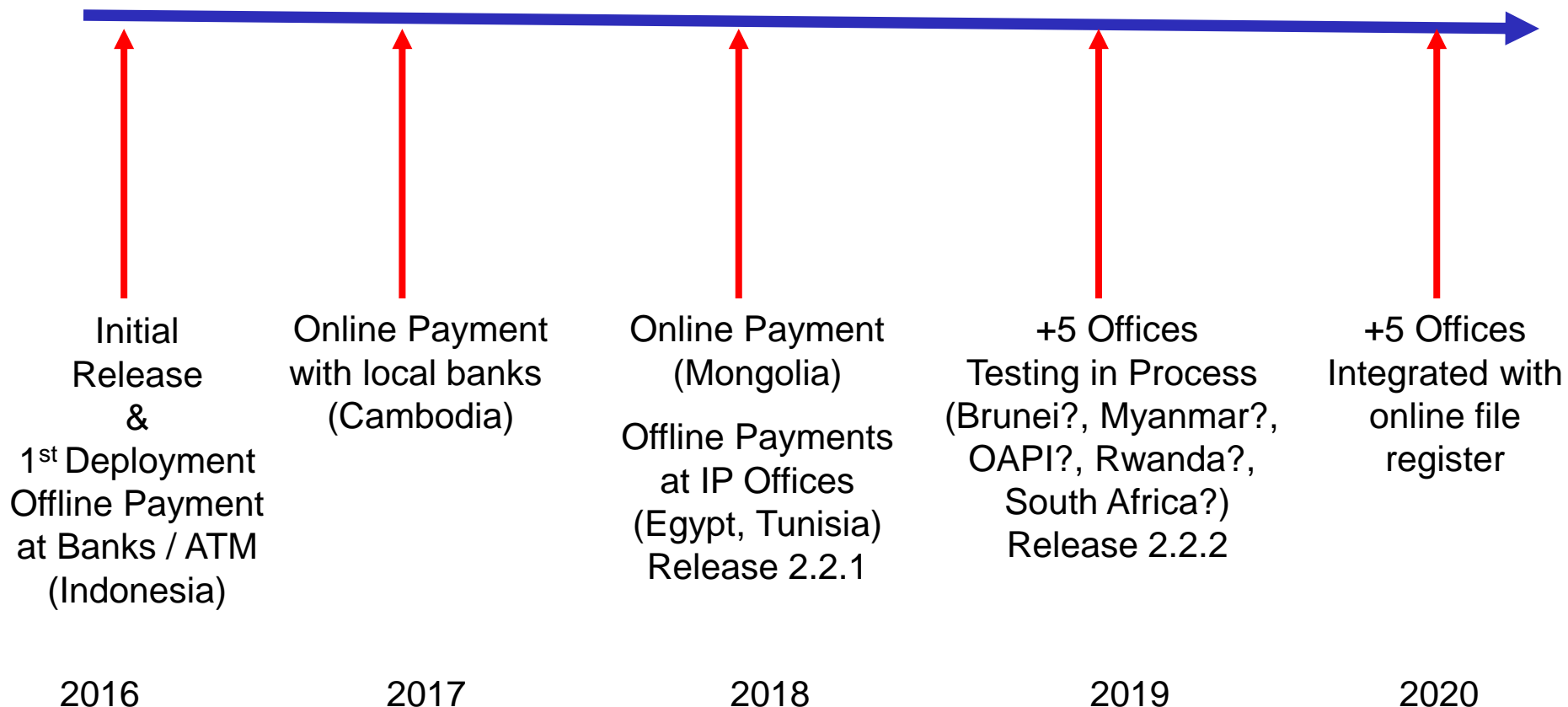
- Online filing by local agents of industrial design, patent and trademark applications and subsequent requests



Motivation

- Provide a scalable online service to reach larger and various number of offices with different legislative needs
- Help IP Offices to reduce file processing backlog and to deliver better services to their stakeholders through online services
- Offer applicants complete end-to-end e-filing experience from applications drafting up to instant update of its processing status

Background and Milestones



Deployment / Project Checklist

- Establish a project plan
- Discuss and agree on a business strategy plan to give incentives to encourage online filings
- Prepare a rollout plan to initiate and extend online filing services step by step
- Develop promotional and training materials
- Follow a soft launch approach to start with pilot groups of local agents in phases including training at IP Office so as to tailor the support procedure and structure
- Setup a support team to deal with first level business and technical support of your local agents

Deployment / IT Infrastructure Checklist

- Minimum server Capacities: Window 64bits, 16 GB RAM, 300 GB disk space
- Recommended server requirements: 3 production servers, 2 demo servers and 1 test server
- Public subdomains should be reserved for the online agent portals (demo and production)
- 1 or 2 SSL certificates (demo and production)
- 1 or 2 digital certificates to sign PDF forms
- WIPO File database (Oracle, MS SQL Sever or MySQL)
- SMTP Server
- Proxy Server (Apache, Ngix, Microsoft IIS), firewall port restriction wherever applicable and IP tracking

Deployment / Operation Checklist

- No integration of payment in WIPO File
- Offer offline payment, online payment or both
- Discuss and agree on possible discount schemes and document proof to be furnished at filing
- Applicable rule for reception date in IPAS (submission, payment, office's working day)
- Workflow statuses of files for which renewals and annuity payments can be made online
- Possible use of e-filing services by branch offices
- Setup daily and weekly backups of WIPO File database and EDMS

Integration of Local Payment Systems

- Engage local IT vendor to develop a system to interface WIPO File and local payment systems (i.e. bank driver for online banking or government billing/payment gateway)
- Require at least one test account by local system and dummy credit card numbers as needed
- Test bank drivers without WIPO File
- Test WIPO File with payment transactions as needed

Recommendations for Successful Deployment

- Build an 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
- Plan sufficient time for integration and testing with local payment systems (6 months minimum)
- Setup and keep test environments ready for troubleshooting of operational issues, acceptance tests of system upgrades
- Revise existing administrative procedures when necessary to adopt standard business practices