Topic 10 WIPO File

Front-Office & Back-Office Portals

Dar es Salaam, August 26 to 30, 2019

WIPO Industrial Property Business Solutions Division (IPOBSD)

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Agenda

- Online filing by local Agents
- Deployment Prerequisites
- Technical Arrangements for Integration with IPAS
- Operational Modes
- Front-Office Agent Portal
- Back-Office Administrator Portal
- Questions and answers

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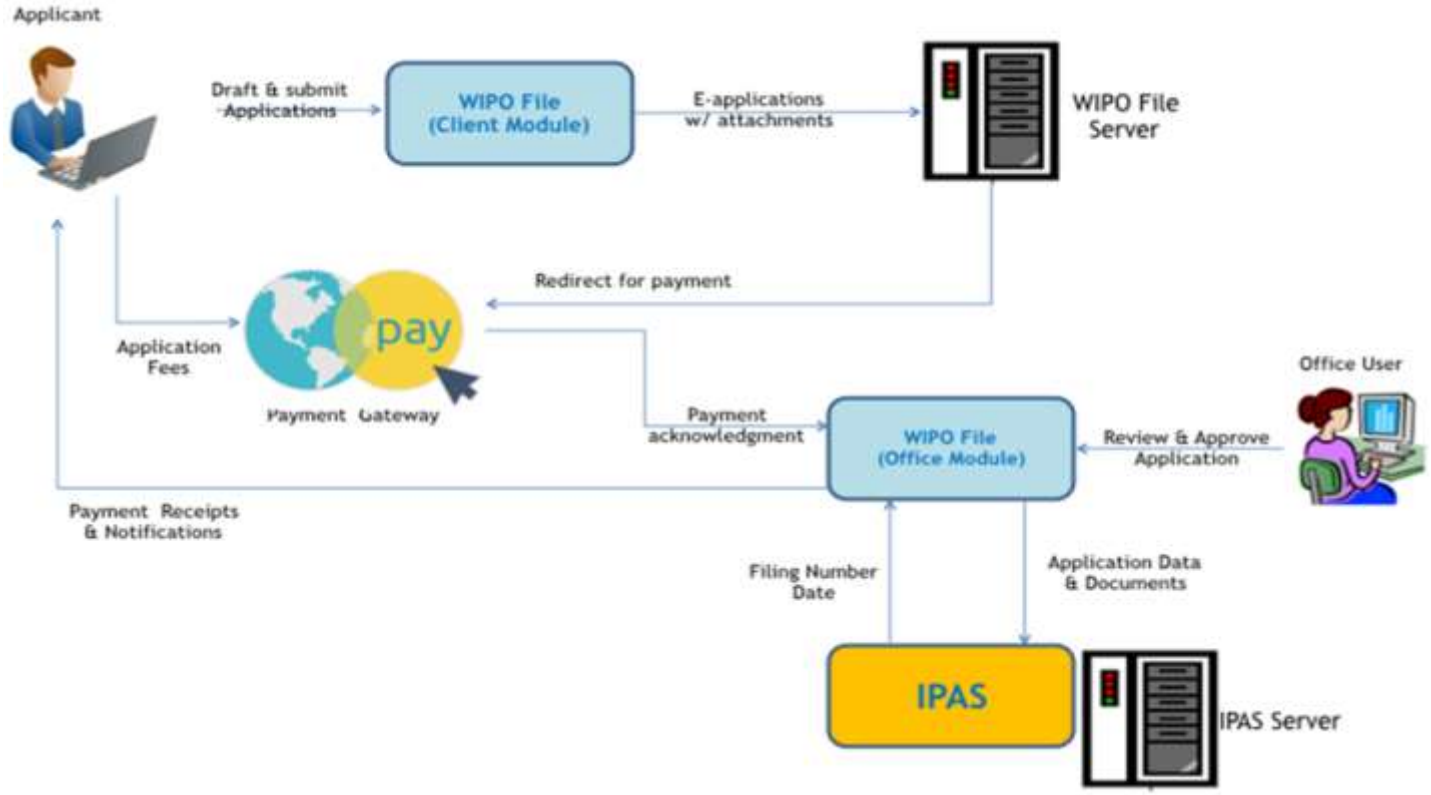
WIPO File

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



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Online Filing Services for Local Agents

- Drafting and submission of new application of industrial designs, patents and trademarks, with required supporting documents
- Post-filing requests including renewal, payment of annuities, change of owner, change of representatives, amended claims, description, etc.
- Viewing, filtering, management of e-filing requests in portfolios and workbench
- Possibility to receive online Office correspondences in response to e-filing requests.

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Deployment
Customization Prerequisites

- Public subdomain should be reserved for the online agent demo and production portals
- Adopt your office website look and feel (e.g. IP Office's logo)
- Make sure that the demo and production portals are distinctive
- Localize the web pages and messages in your local language
- Put your Office's disclaimer text and helpdesk contact details
- Enable the efiling services as per your operational plan and strategy

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Deployment
Operation Prerequisites

- Access to the Agent Portal requires individual accounts using username and password and linked to end-user emails
  - Minimum password length to be customized by System Administrator
  - End-user emails should be confirmed
- Prepare and publish your own efiling user guide
- Filing fees are configured and tested as per office's fee regulations
- Helpdesk team and procedure are in place for 1st level end-user support and to liaise with internal IPAS business and operation support team

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IPAS / Technical Arrangements

- Application document is created by merging request form and supporting documents in single PDF file per filing request
- Logos for trademarks and drawings for designs and patents are transferred to IPAS database but not IPAS EDMS
- Payment and transmission receipts are stored in WIPO FILE
- Copies of online filing requests are stored in WIPO File EDMS but can be deleted
- Lookup on existing IPAS File numbers, registration numbers, expiration dates and annuities

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IPAS / Fee Conditions and Calculation

- Conditions
  - Number of Nice classes for Trademark applications, renewals and registration fees.
  - Number of claims and description pages for patent application
  - Number of design units for industrial design application
  - Number of Affected files
- Each condition has applicable basic fees, extra fees and one possible discount
- Fixed fees for specific requests

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IPAS / Configuration Changes

- Enable EDMS support in IPAS
- Create online reception office (new e-filing document origin)
- Define online filing services based on application types, and subtypes or user document types
- Define new user documents to be used as supporting documents for e-filing requests (e.g. patent description, patent claims, SME certificate)
- If needed, adjust workflow process to dispatch online requests received in IPAS with separate workflow actions
- If needed, create additional payment receipt types
- Implement office document workflow changes to support online notification through WIPO File

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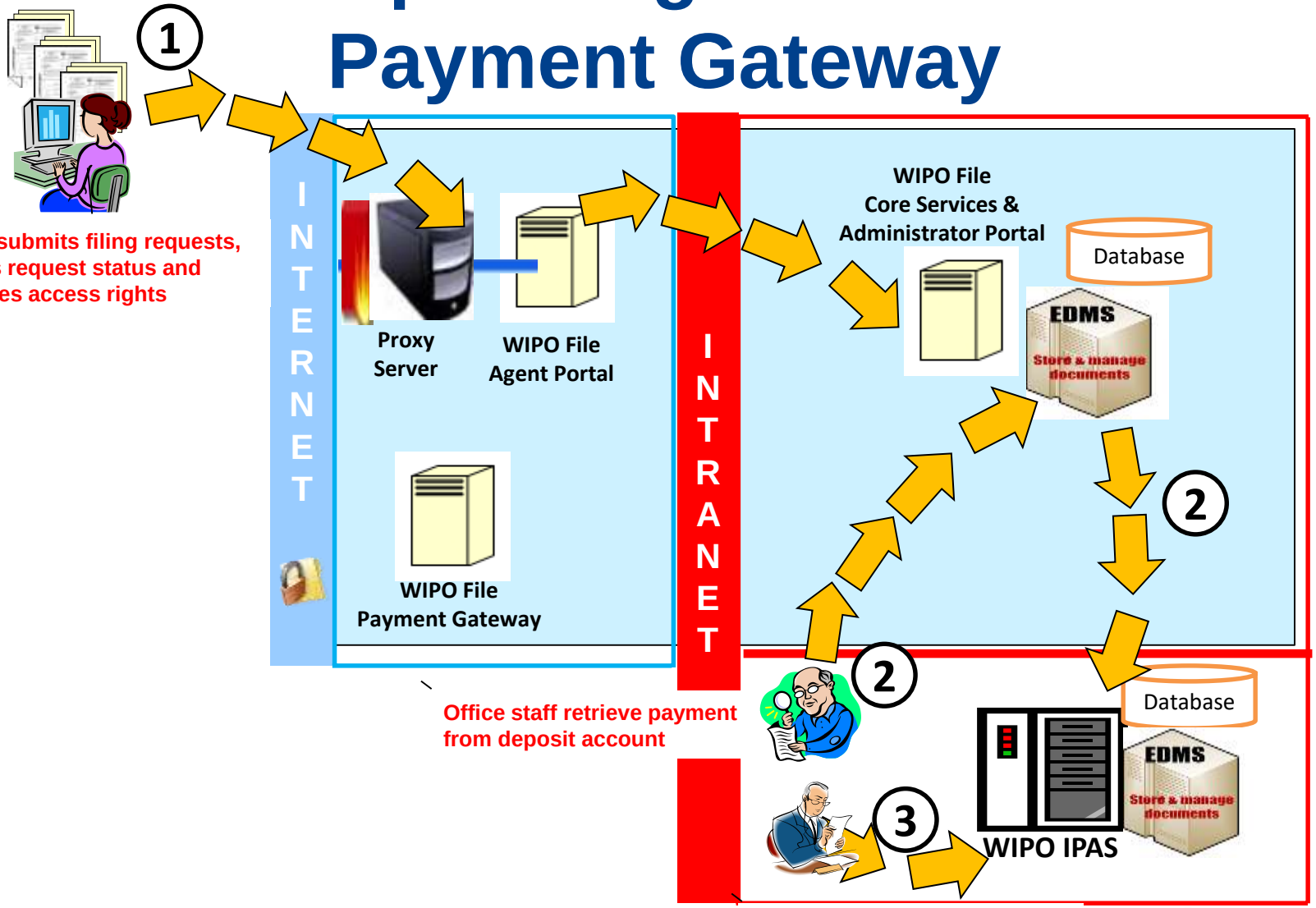
Operating without Payment Gateway



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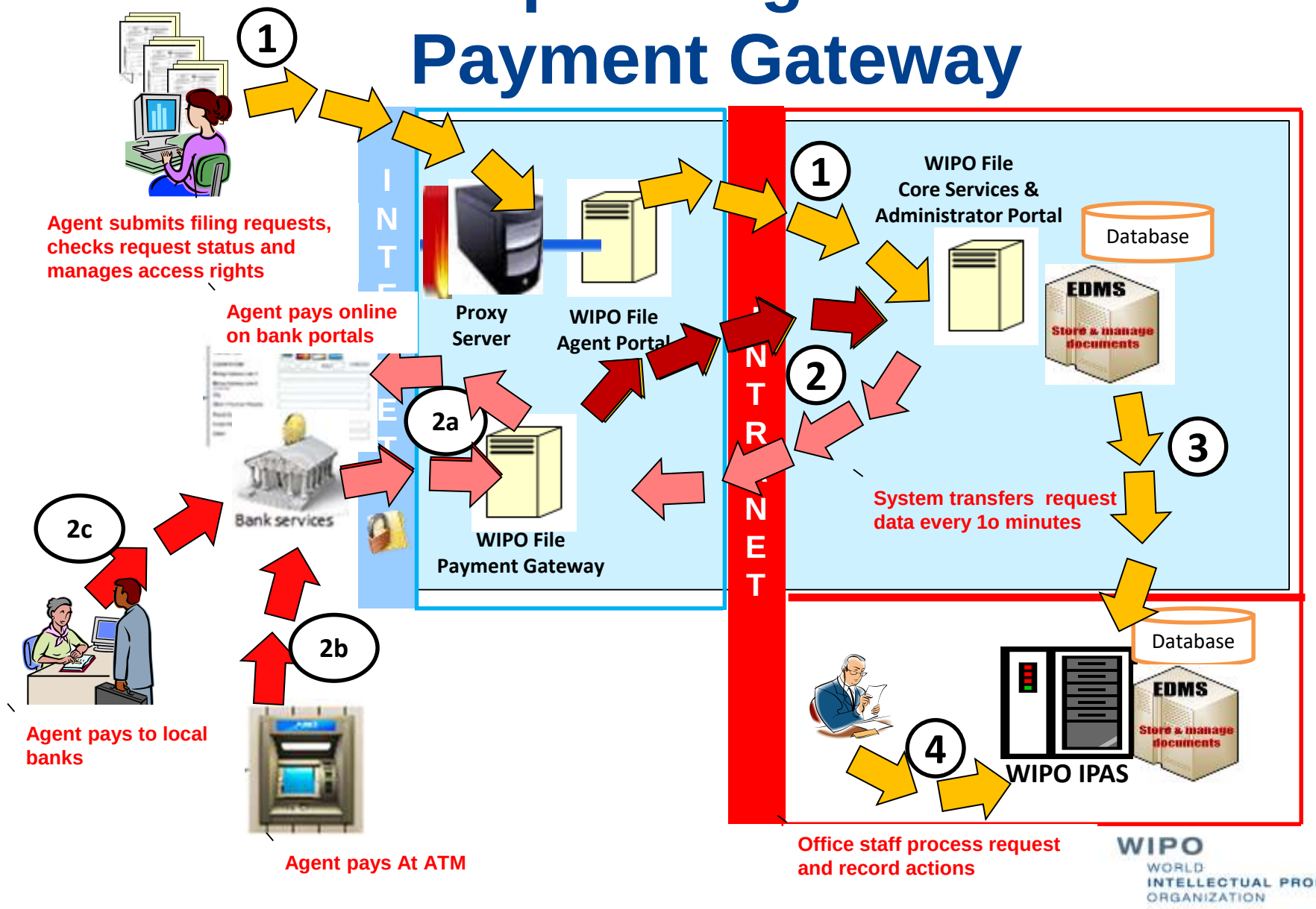
Operating with Payment Gateway



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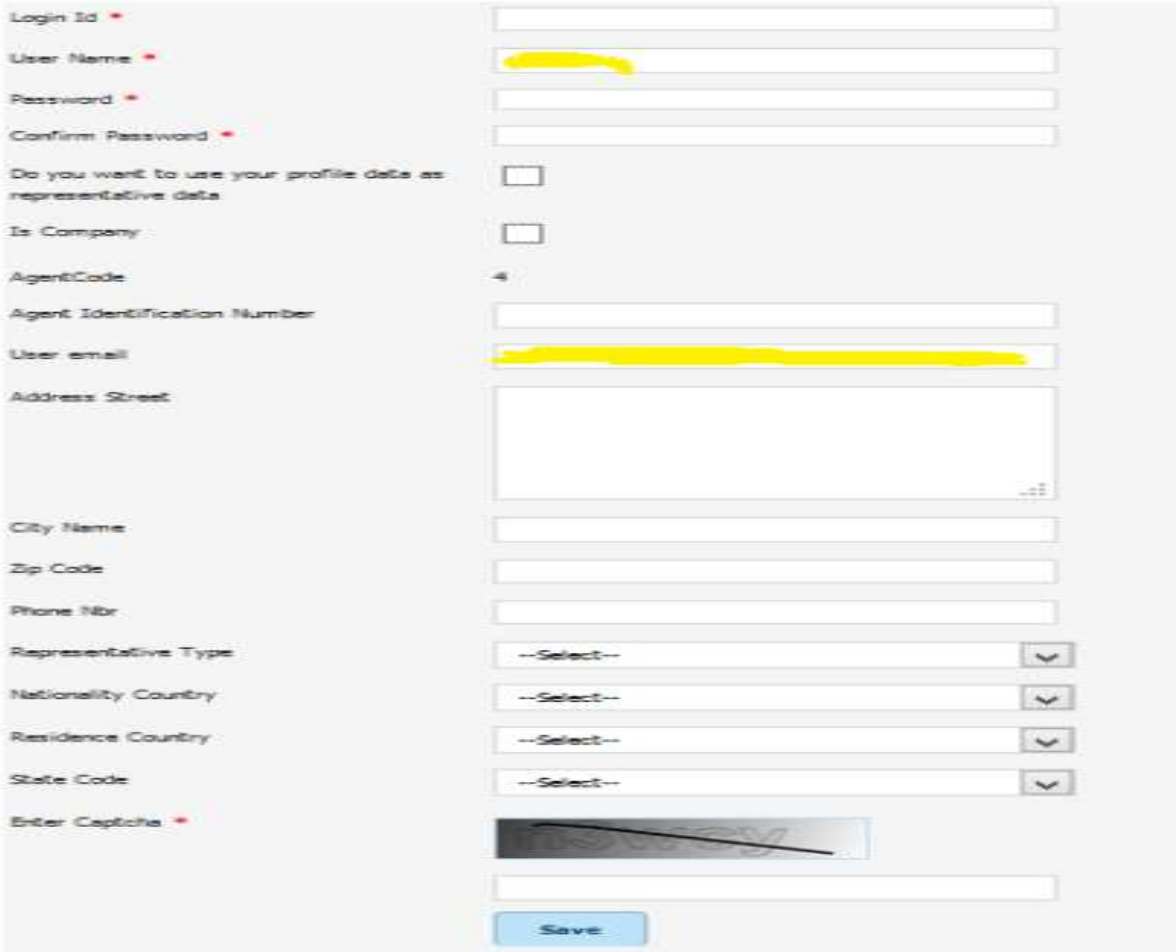
Front-Office Portal
Account Profile Details



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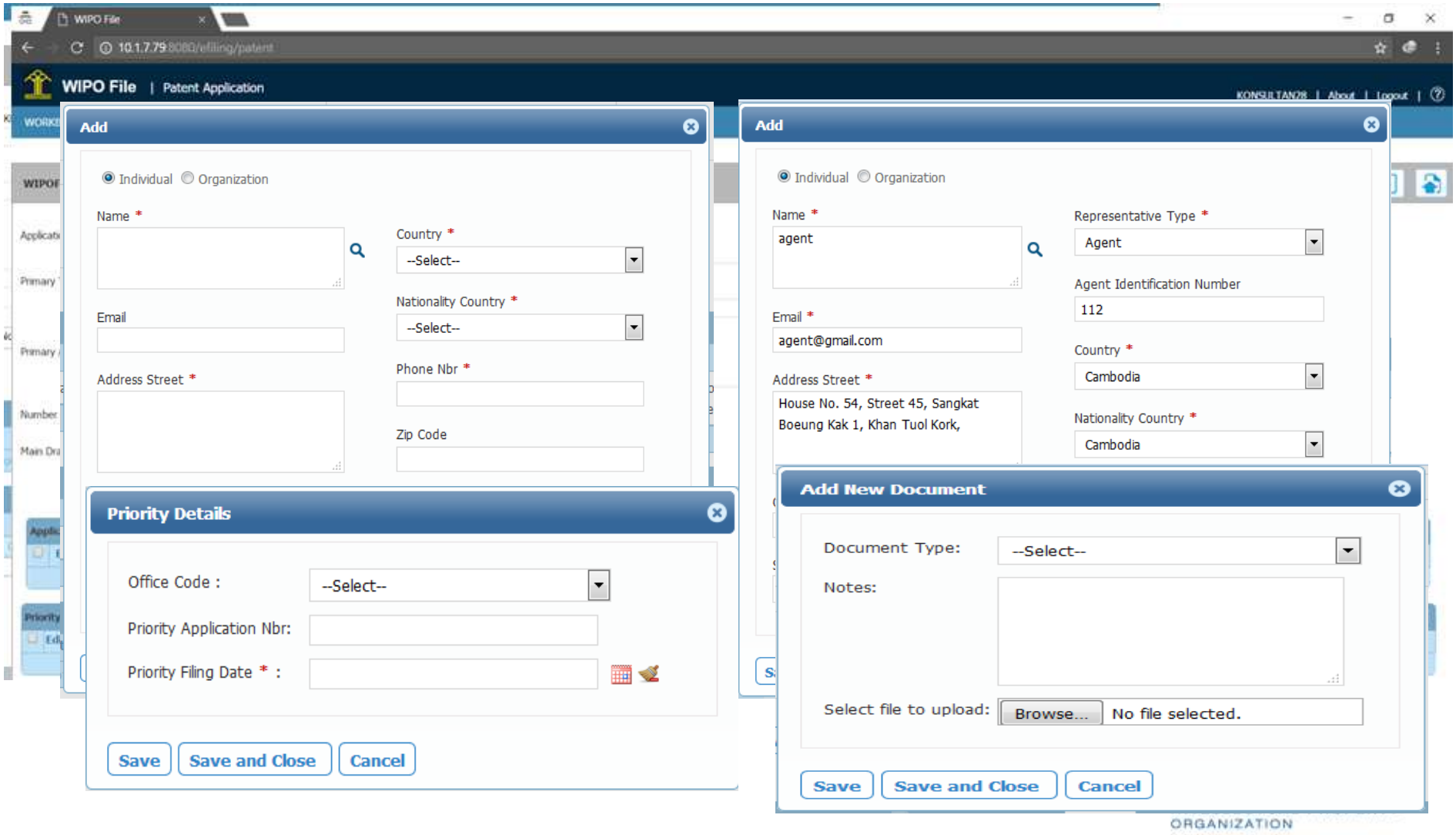
New Patent Application Form



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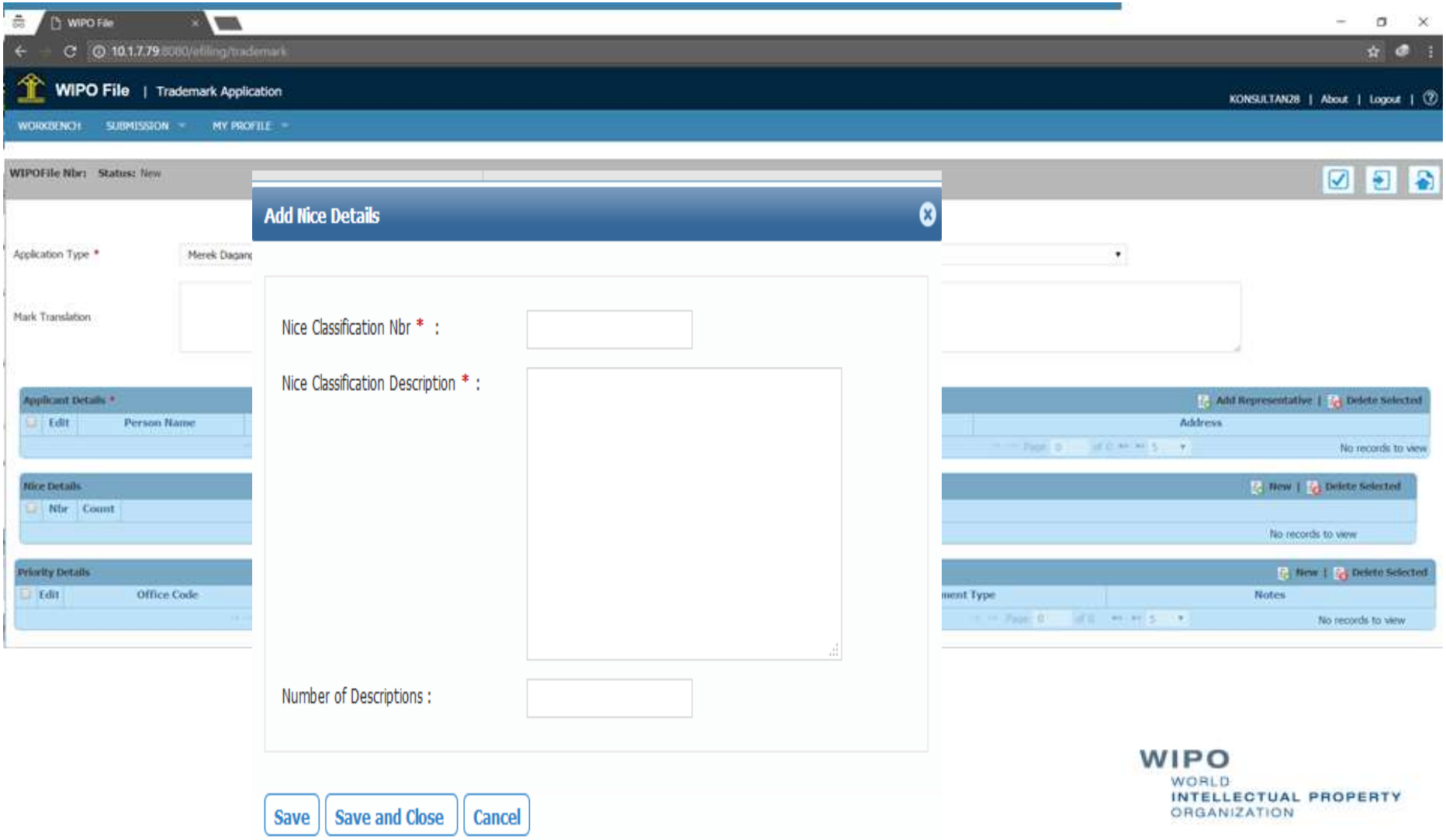
New Trademark Application Form



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From Drafting to Submission

- 1 – View data summary
- 2 – View fee summary
- 3 – Validate filing request data
- 4 – Save filing request
- 4 – Discard filing request
- 6 – Submit filing request

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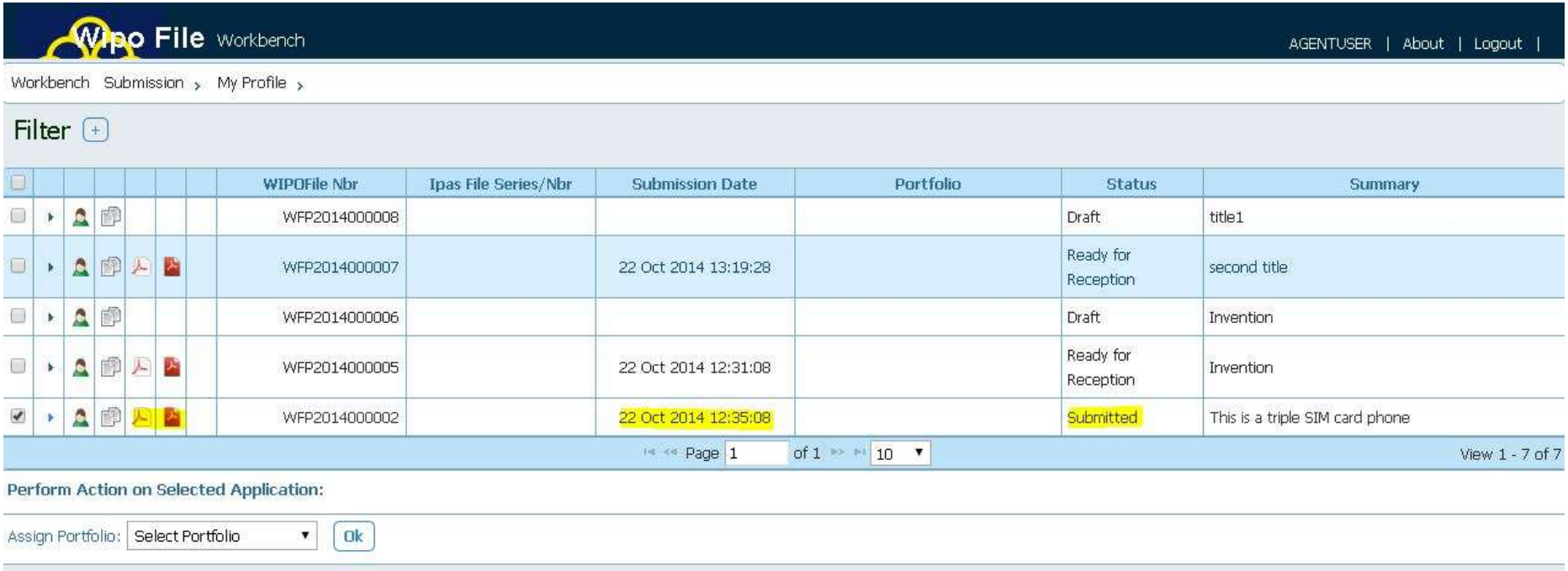
Fee Calculation and Offline Payment

- Submissions and follow-up (submitted, accepted/rejected, pending payment, ready for reception, received)



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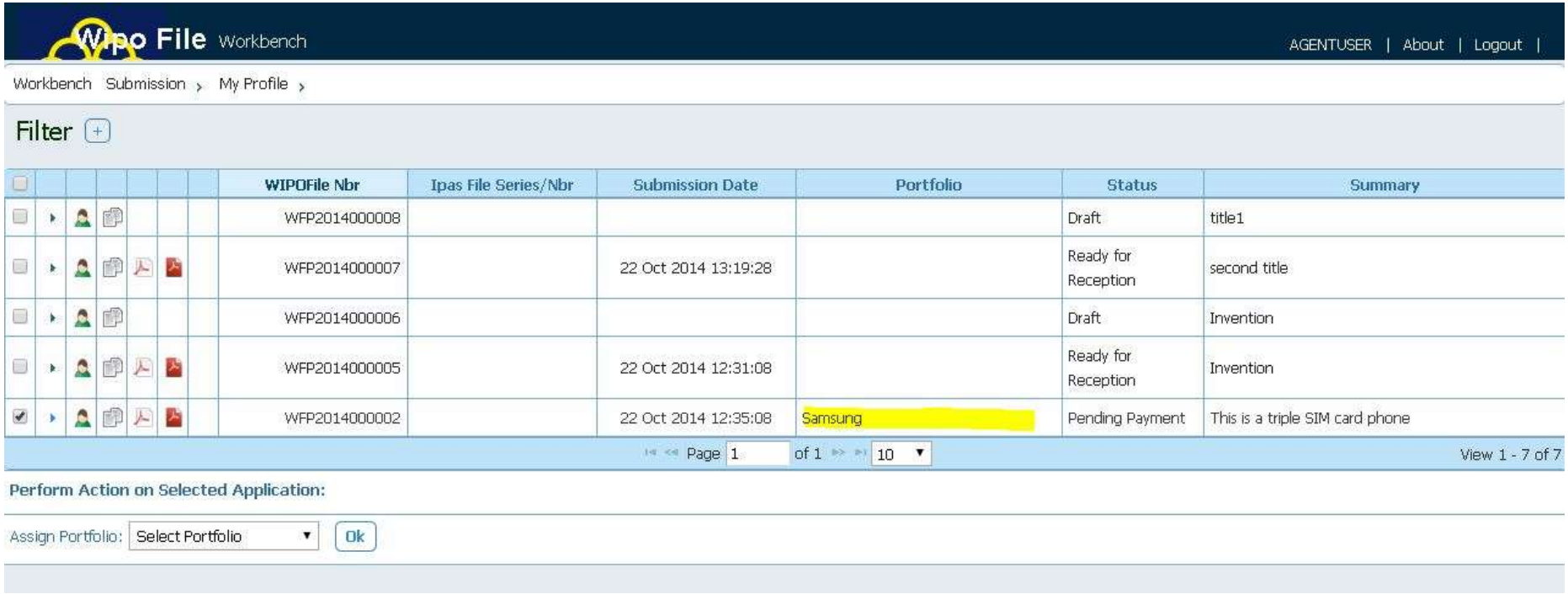
Offline Payment without Fee Calculation

- Submissions and follow-up (submitted, accepted/rejected, ready for reception, received)
- Reception at IP Office with payment receipt

Online Payment with Fee Calculation

- Submissions with payments and request follow-up (draft, submitted, accepted/rejected, pending payment, ready for reception, received)



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An example of Online Payment with Acleda Bank in Cambodia 1/3

Merchant payment page will redirect to XPAY gateway for process the step of payment which is handling by ACLEDA bank PLC customer. Customer shall get the standard payment page of ACLEDA Bank.

ACLEDA Bank's customer will select the payment option which available as 4 options in the following step:

Step 1 : Customer identify payment method.

1. CASA Account Number
2. Debit Card Number
3. Mobile Banking Users
4. Internet Banking Users

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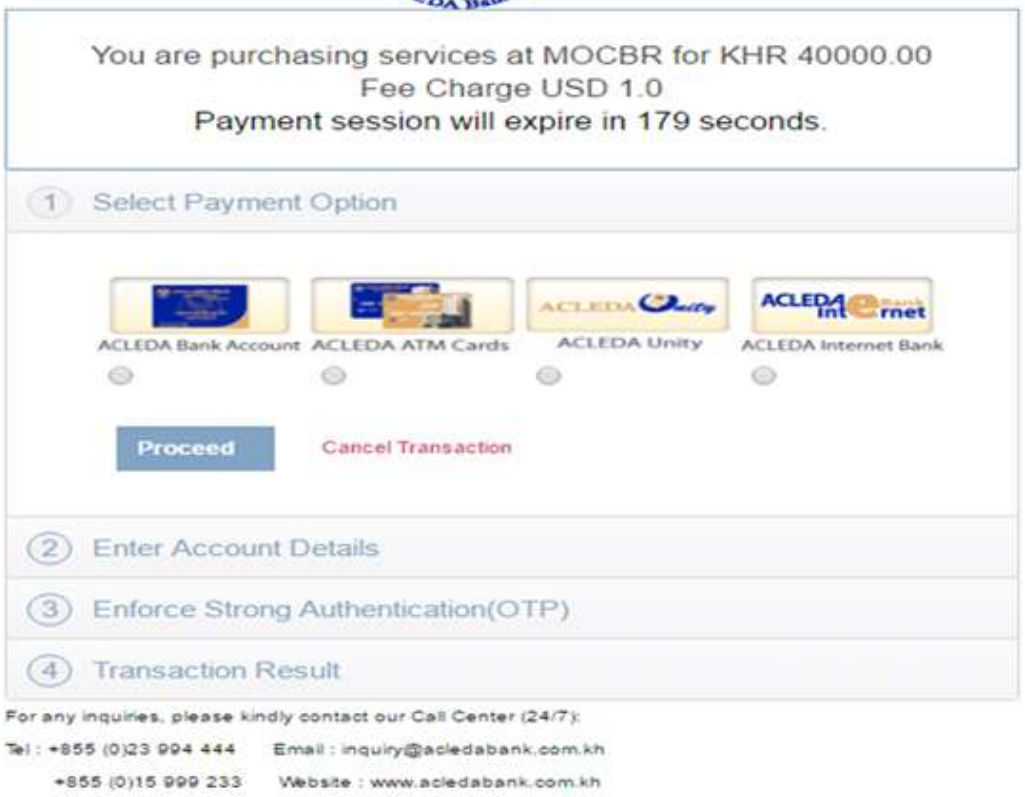
An example of Online Payment with Acleda Bank in Cambodia 2/3

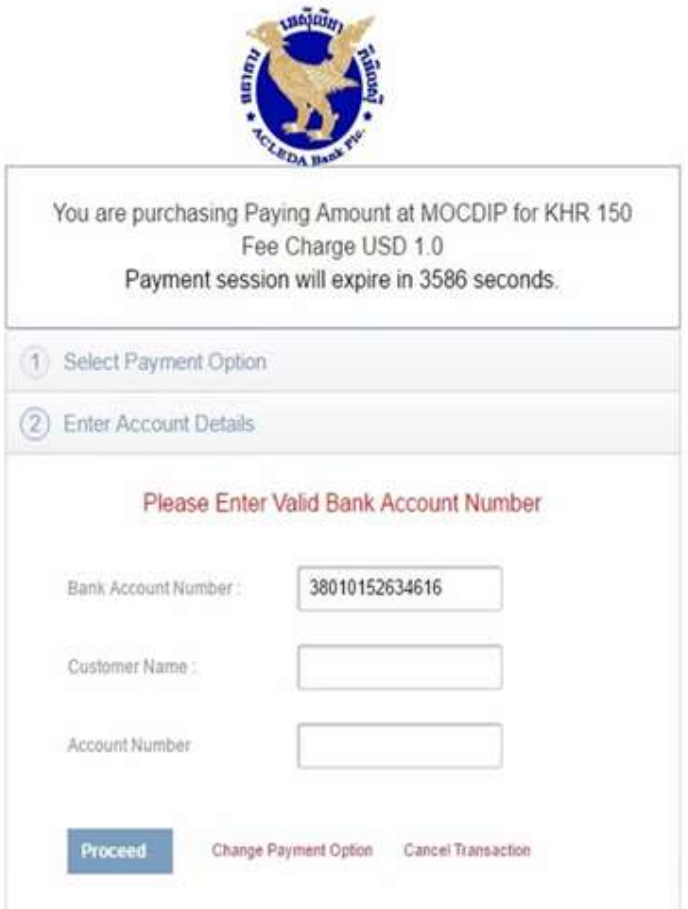
- Step 2 : After customer identify the payment method then “Proceed”



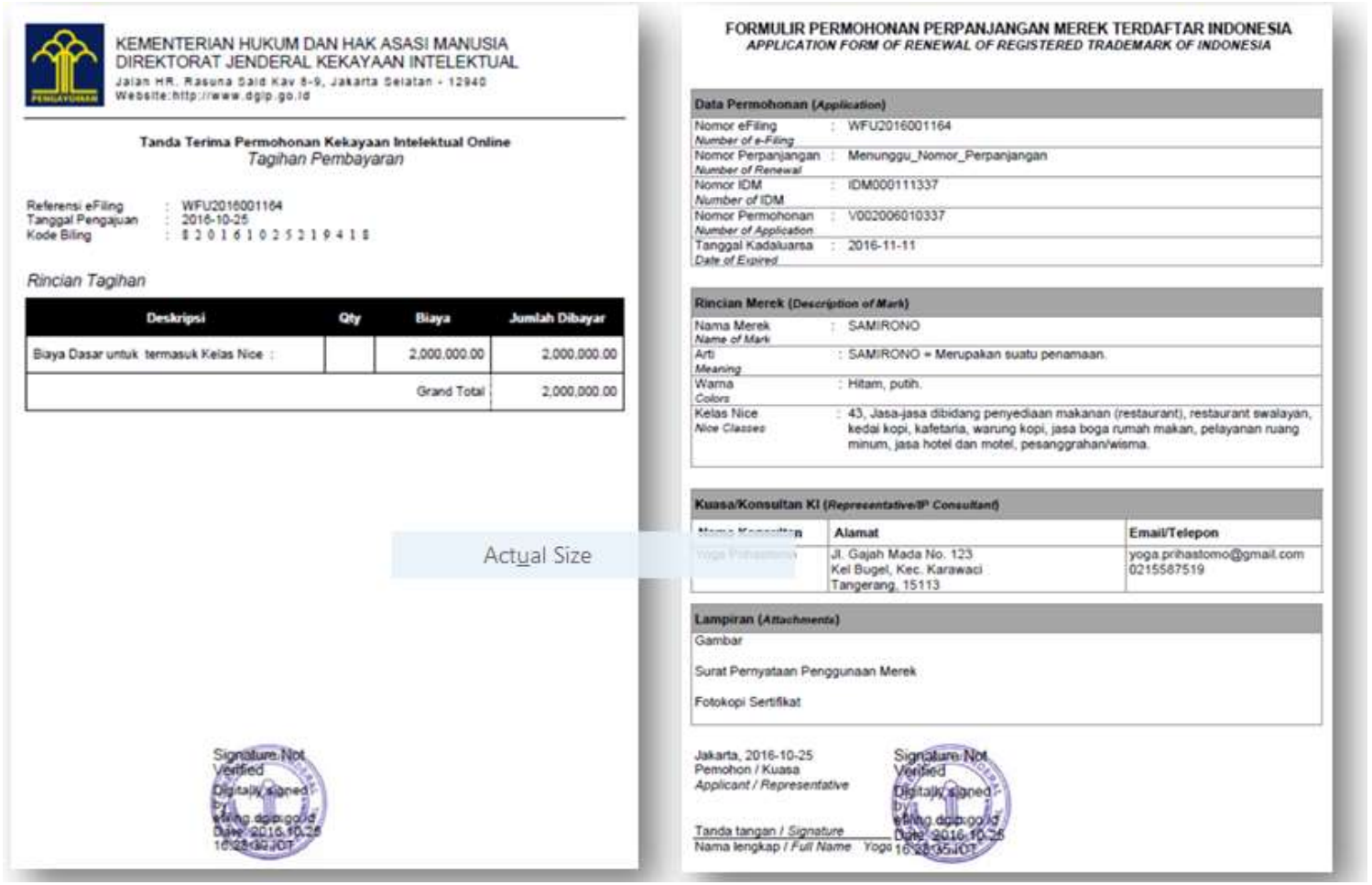
An example of Online Payment with Acleda Bank in Cambodia 3/3

- Step 3 : After the account number validation, customer should receive OTP for entering in the payment page.

OTP options are:
1. SMS OTP
2. Software OTP
3. Hardware OTP



Examples of Request and Receipt Template Forms



KEMENTERIAN HUKUM DAN HAK ASASI MANUSIA
DIREKTORAT JENDERAL KEKAYAAN INTELEKTUAL
Jalan HR. Rasuna Said Kav 8-9, Jakarta Selatan - 12940
Website:http://www.dgip.go.id

Tanda Terima Permohonan Kekayaan Intelektual Online
Tagihan Pembayaran

Referensi eFiling : WFU2016001164
Tanggal Pengajuan : 2016-10-25
Kode Biling : 8 2 0 1 6 1 0 2 5 2 1 9 4 1 8

Rincian Tagihan

Deskripsi	Qty	Biaya	Jumlah Dibayar
Biaya Dasar untuk termasuk Kelas Nice :		2,000,000.00	2,000,000.00
		Grand Total	2,000,000.00

Signature Not Verified
Digitally signed by ...
Date: 2016.10.25 16:28:40 JOT

Actual Size

FORMULIR PERMOHONAN PERPANJANGAN MEREK TERDAFTAR INDONESIA
APPLICATION FORM OF RENEWAL OF REGISTERED TRADEMARK OF INDONESIA

Data Permohonan (*Application*)

Nomor eFiling *Number of e-Filing*	:	WFU2016001164
Nomor Perpanjangan *Number of Renewal*	:	Menunggu_Nomor_Perpanjangan
Nomor IDM *Number of IDM*	:	IDM000111337
Nomor Permohonan *Number of Application*	:	V002006010337
Tanggal Kadaluarsa *Date of Expired*	:	2016-11-11

Rincian Merek (*Description of Mark*)

Nama Merek *Name of Mark*	:	SAMIRONO
Arti *Meaning*	:	SAMIRONO = Merupakan suatu penamaan.
Warna *Colors*	:	Hitam, putih.
Kelas Nice *Nice Classes*	:	43, Jasa-jasa dibidang penyediaan makanan (restaurant), restaurant swalayan, kedai kopi, kafetaria, warung kopi, jasa boga rumah makan, pelayanan ruang minum, jasa hotel dan motel, pesanggrahan/wisma.

Kuasa/Konsultan KI (*Representative/IP Consultant*)

Nama Konsultan	Alamat	Email/Telepon
Yoga Prihastomo	Jl. Gajah Mada No. 123 Kel Bugel, Kec. Karawaci Tangerang, 15113	yoga.prihastomo@gmail.com 0215587519

Lampiran (*Attachments*)

Gambar

Surat Pernyataan Penggunaan Merek

Fotokopi Sertifikat

Jakarta, 2016-10-25
Pemohon / Kuasa
Applicant / Representative

Tanda tangan / *Signature*
Nama lengkap / *Full Name* Yoga

Signature Not Verified
Digitally signed by ...
Date: 2016.10.25 16:28:35 JOT

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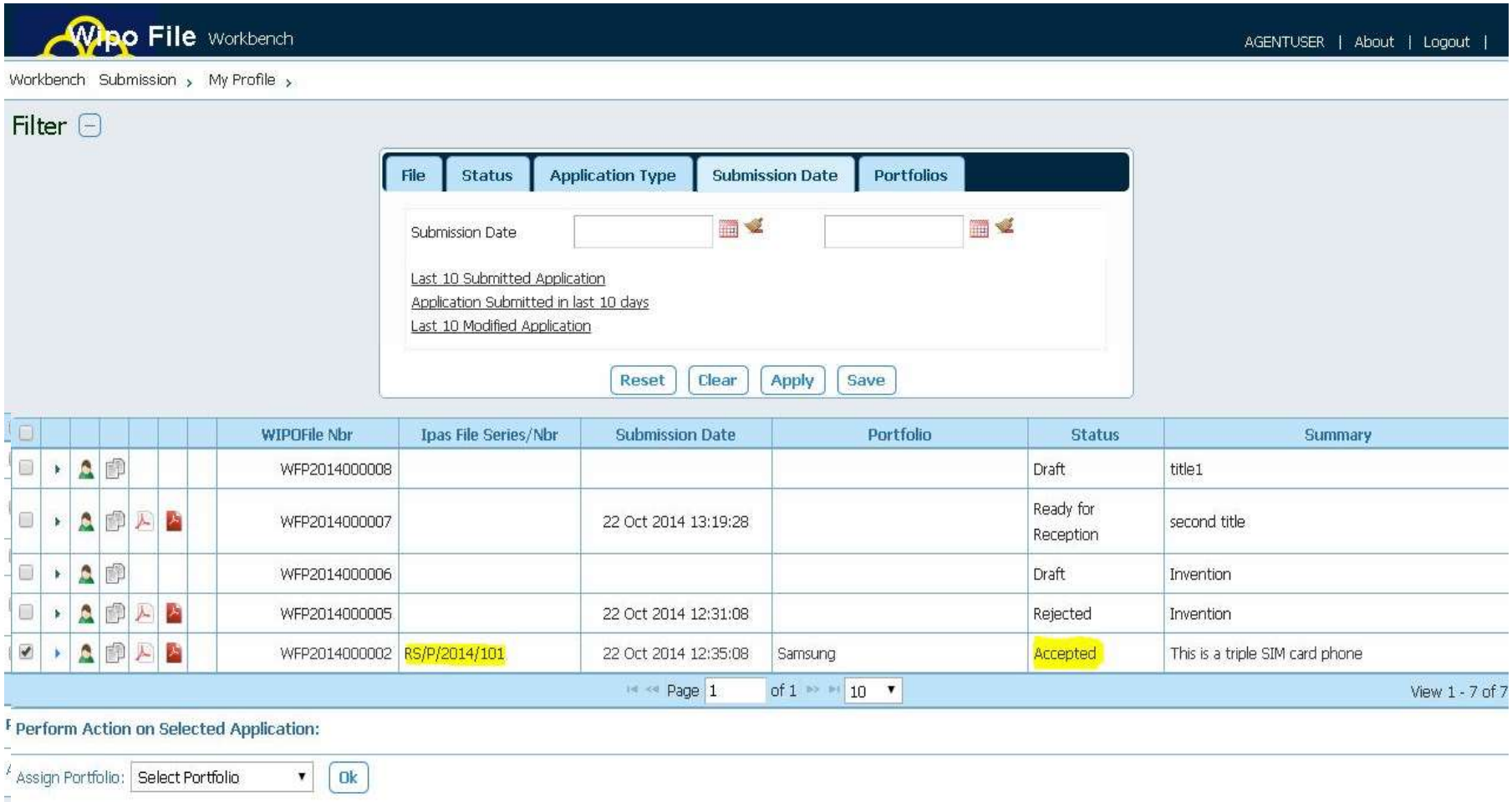
Workbench Filter and Portfolios



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Back-Office Portal
Operation Prerequisites 1/2

- Access to the Administrator Portal requires the System Administrator account (only one). Administrator password should be changed after installation
- Access to the Administrator Portal should be restricted to the Office's intranet
- All configurations changes to support online filing should have been done in IPAS
- It is compulsory to upgrade IPAS to the latest release 3.5.0 for New WIPO File deployment
- Customize IPAS file and registration number formats used in subsequent filing forms

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Back-Office Portal
Operation Prerequisites 2/2

- Disable or enable fee calculation (recommended)
- If fee calculation is enabled, disable or enable payment reference number generation by WIPO File or external system
- Configure office logo and digital certificate used in request forms and receipt forms
- Configure file workflow status conditions to accept filing of certain types of use documents

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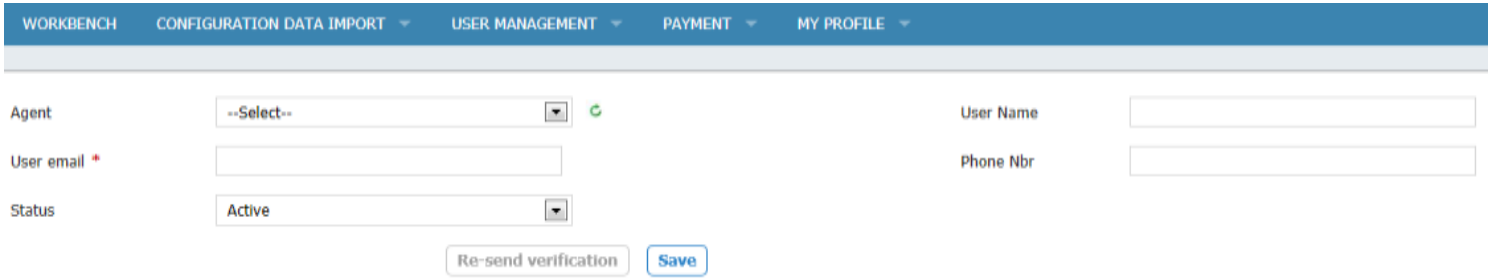
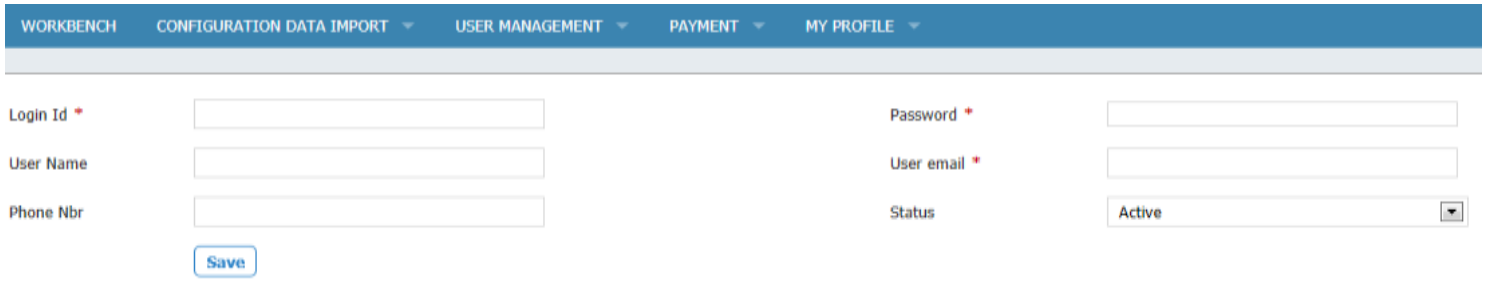
User Management

- Manage agent user accounts



- Manage office user accounts



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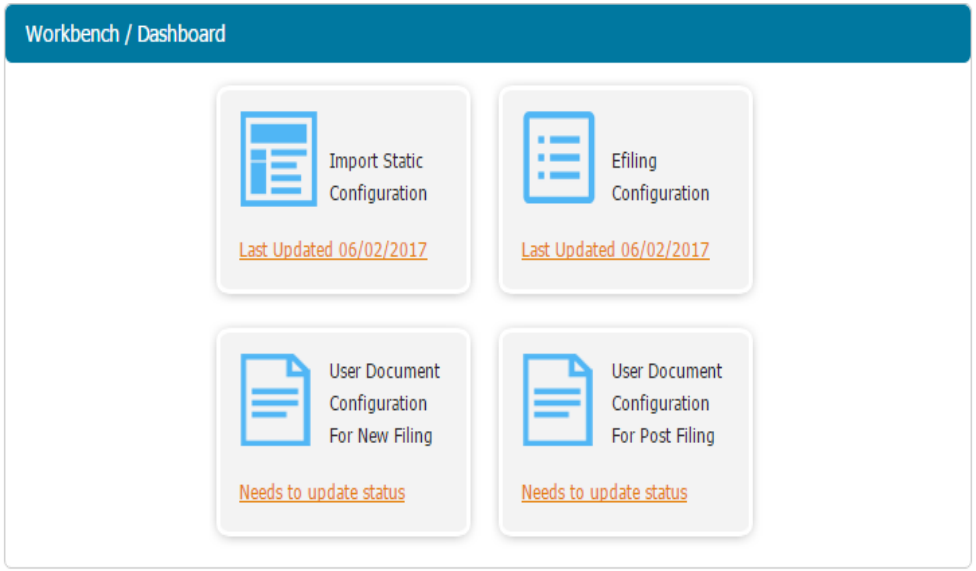
Manage e-filing Services 1/5

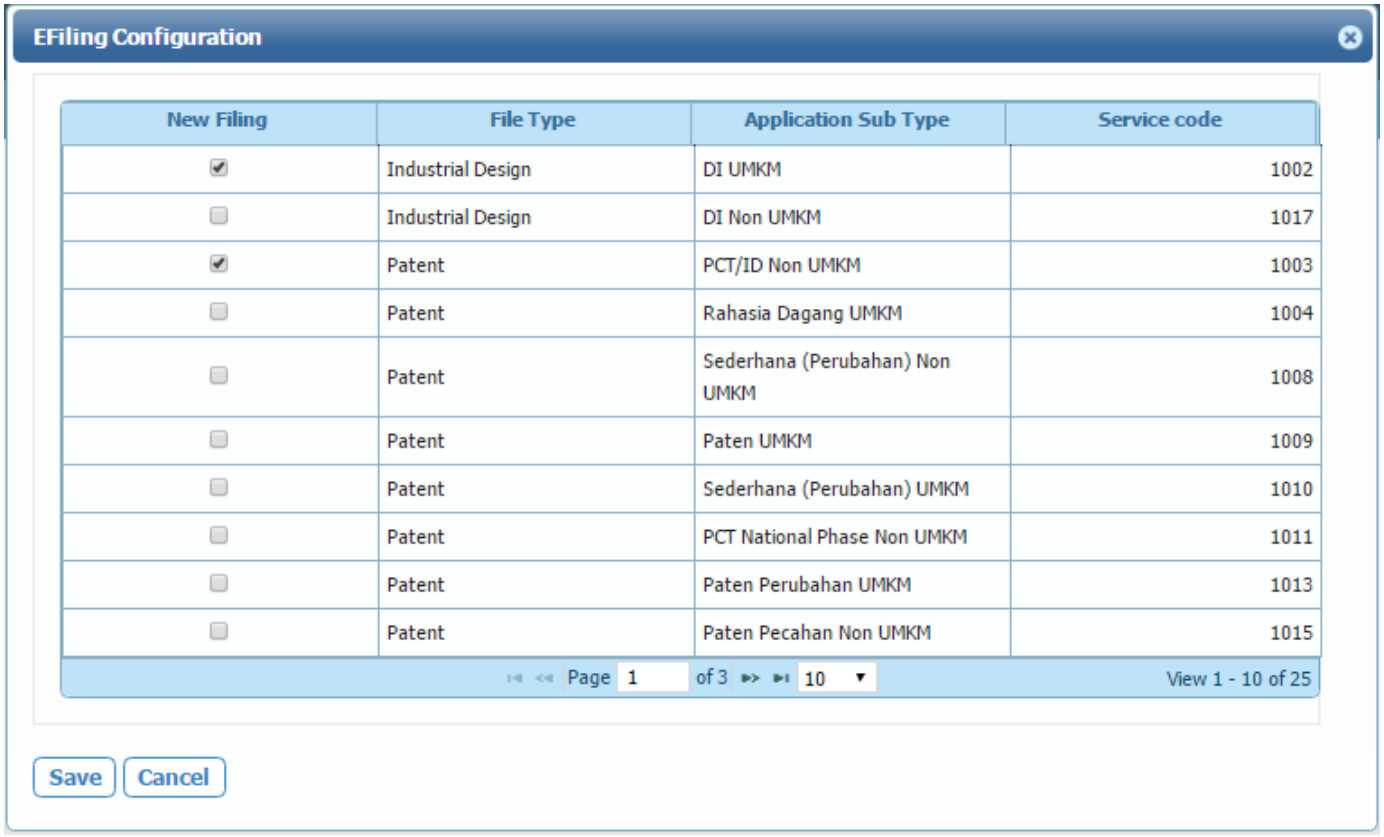
- Administrator workbench



- Import IPAS configuration after stopping the Agent portal

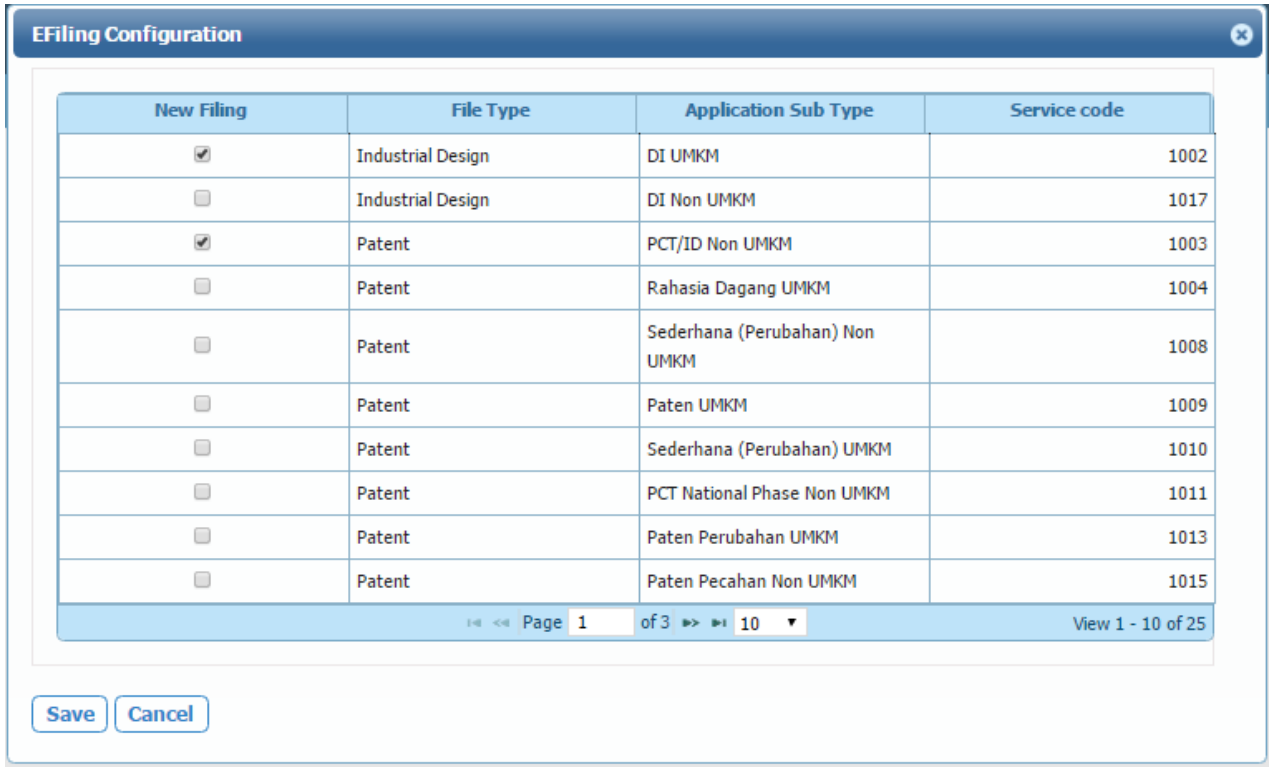
Manage e-filing Services 2/5

- Enable or disable filing of applications (subtypes)



Manage e-filing Services 3/5

- Enable or disable filing of applications (subtypes)



- Customize service code if required by external payment gateway system

Manage e-filing Services 4/5

- Enable or disable supporting documents for new applications

Manage e-filing Services 5/5

- Enable or disable subsequent filing of user documents

Including supporting documents

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Manage Filing fees

- Configure fee items for each application or user document and customize fee conditions

Basic Ip Rights	Condition Description	Service code	Data Value	Exclusive	Condition Id	Extra Conditions	Fee Type
ALL	Fee for limited number of affected files	1111	2	Basic fee Item	FC_BSFIL	FC_EXFIL	DOC
ALL	Additional fee for exceeding number of affected files	1004	2	Extra fee Item	FC_EXFIL		DOC
ALL	Fee for electorincally filing	1013	2	Any fee Item	FC_EFILE	FC_EFILE	BOTH
Industrial Design	New design applciation fee with limited number of images	1111	1	Basic fee Item	FC_BSDDI	FC_EXDDI	APP
Industrial Design	Additional fee for exceeding number of design images	1003	1	Extra fee Item	FC_EXDDI		APP

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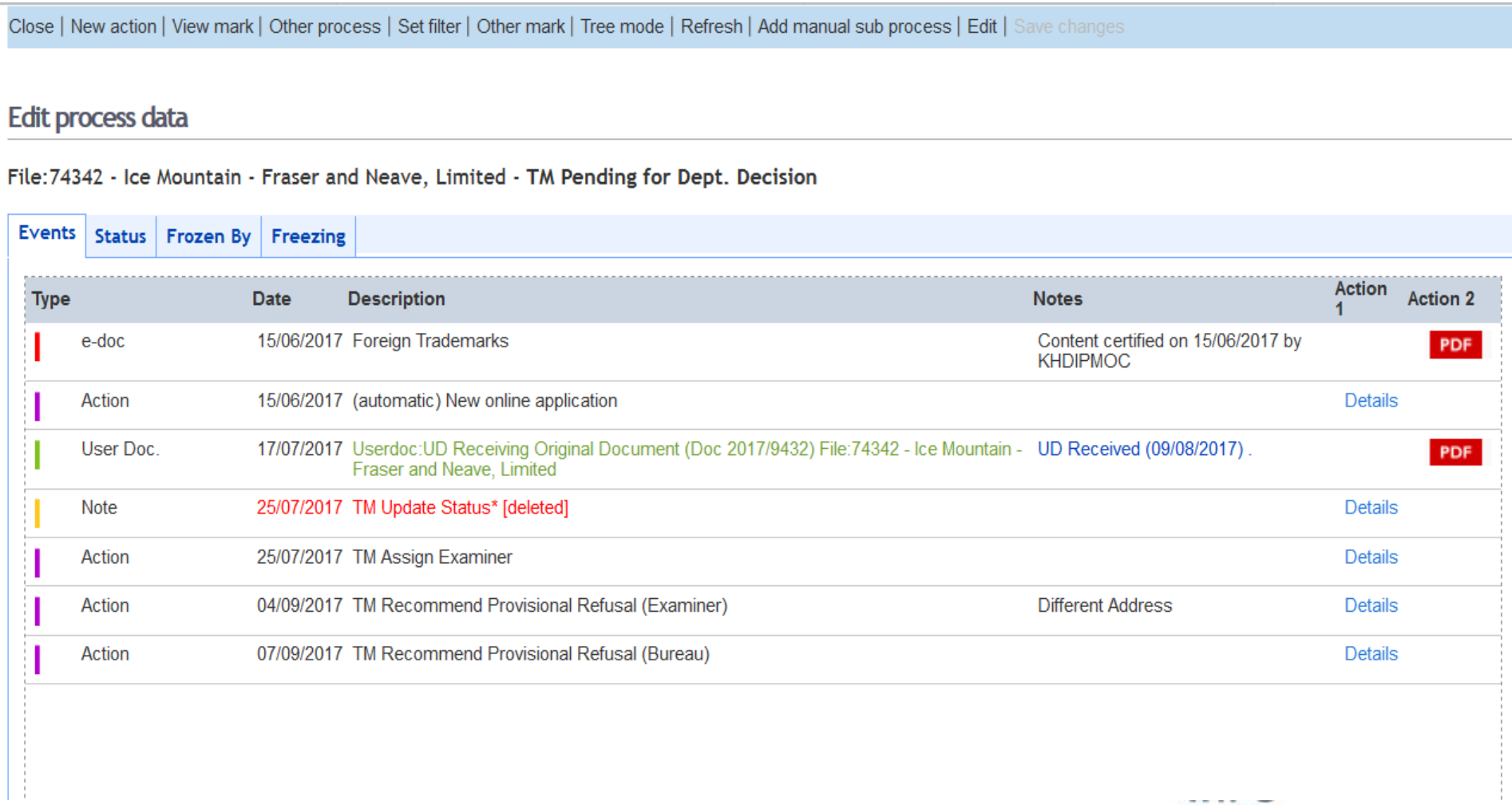
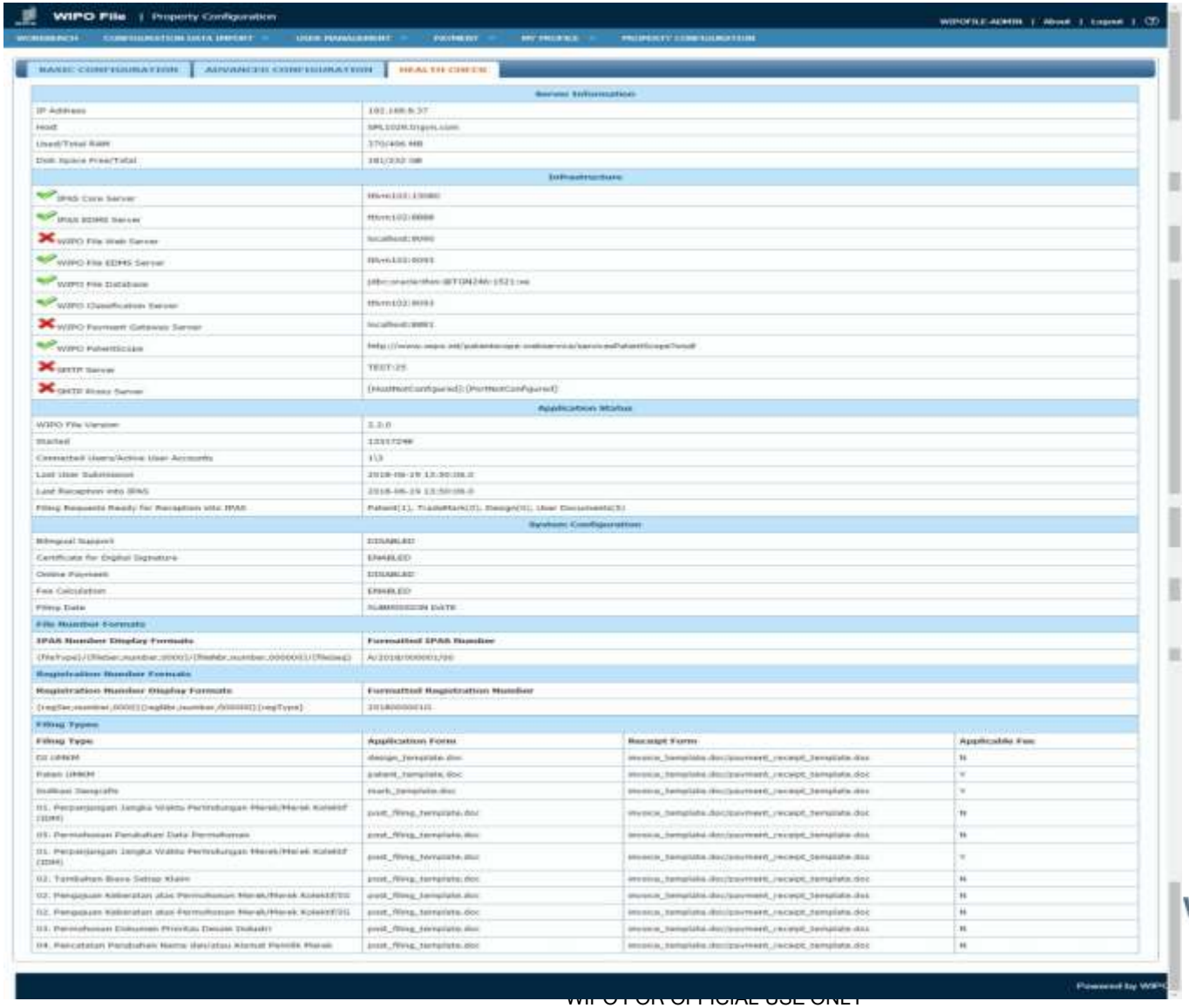
E-filing Requests in IPAS



System Health Check



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Monitoring and Troubleshooting

- Daily backup of WIPO File database and data folder of WIPO File EDMS
- Use of utility program to decrypt data packages stored in WIPO File EDMS if needed
- Archive old data package files to free up disk space
- Regular transfer of e-filing data into IPAS (reception and data capture)
- Regular check for payment confirmation by local banks
- Renewals of SSL certificates and digital certificates for digital signature of forms
- Import IPAS configuration in case of changes affecting WIPO File

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