

Topic 10 WIPO File

Front-Office & Back-Office Portals Dar es Salaam, August 26 to 30, 2019

WIPO Industrial Property Business Solutions Division (IPOBSD)

WIPO FOR OFFICIAL USE ONLY

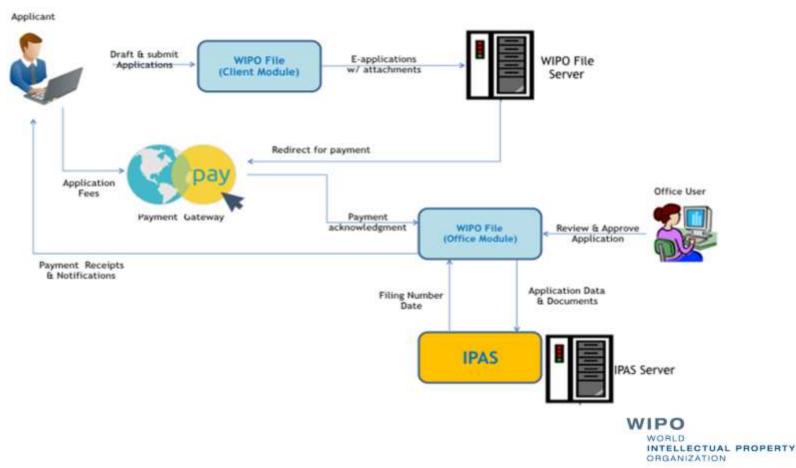
Agenda

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

WIPO File

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



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.

Deployment Customization PrerequisitesPublic subdomain should be reserved for the online agent

- 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

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

VIZATION

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

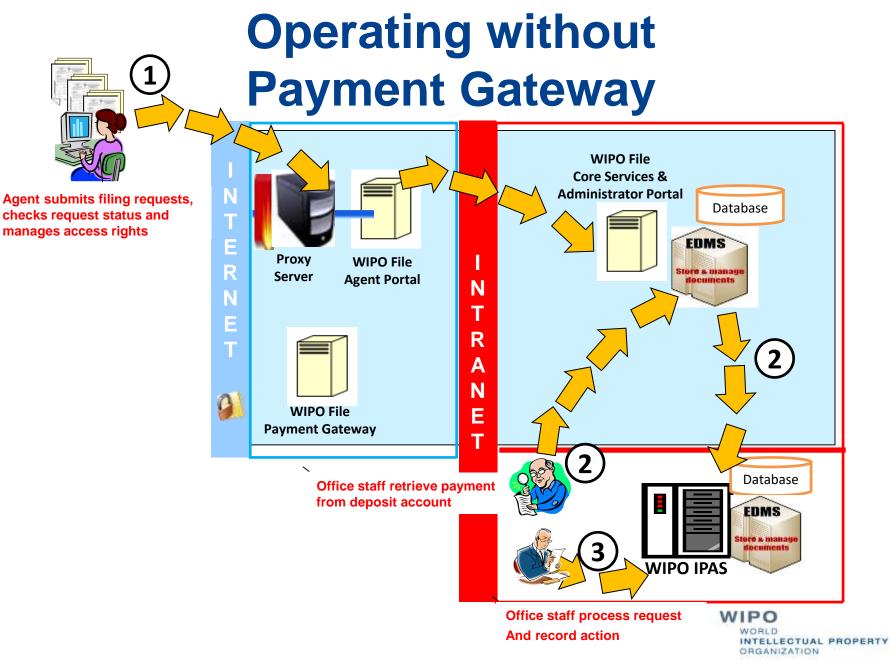
IPAS / Fee Conditions and Calculation

Conditions

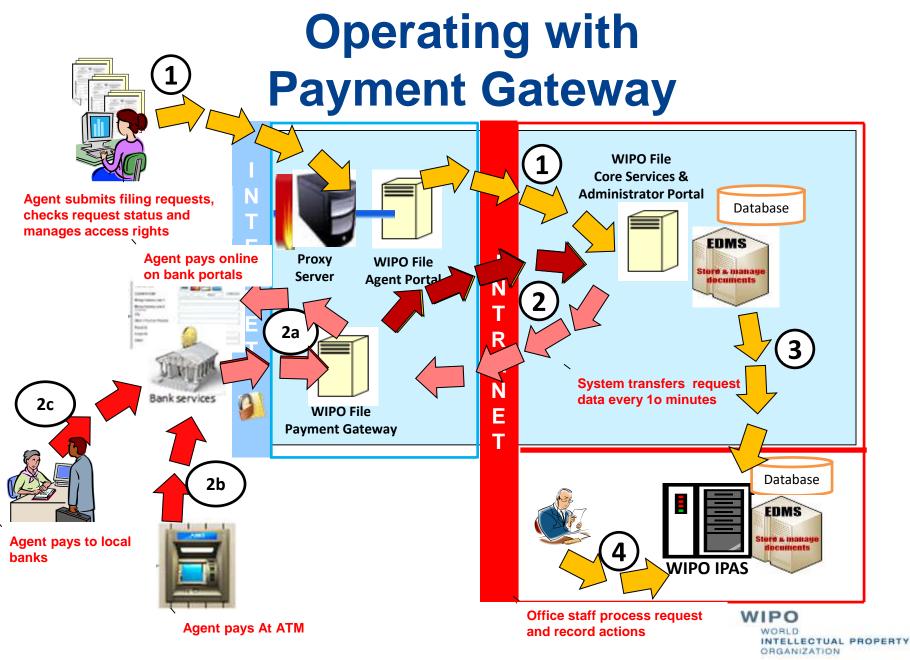
- Number of Nice classes for Trademark applications, renewals and registration fees.
- Number of claims and description pages for patent application
- Number of design units for industrial design application
- Number of Affected files
- Each condition has applicable basic fees, extra fees and one possible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

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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Front-Office Portal Account Profile Details

Login Id *		
User Name ·		
Password *		
Confirm Password *		
Do you want to use your profile data as representative data		
Is Company		
AgentCode	4	
Agent Identification Number		
User email		
Address Street		
City Name		
Zip Code		
Phone Nor		
Representative Type	Select	~
Nationality Country	Select	~
Residence Country	Select	~
State Code	Select	~
Enter Captona *	in sources	
	11	
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New Patent Application Form

	WPO File ×		_		- a x * @ :
	VIPO File Patent Application				KONSULTANZE About Logout ()
WORKE	Add		8	Add	8
WIPOF Applicato Primary	Individual C Organization Name *	Country *Select Nationality Country *Select Phone Nbr *		 Individual Organization Name * agent Agent Agent Identification Email * agent@gmail.com Country * Address Street * House No. 54, Street 45, Sangkat 	•
Number Main Dra	Priority Details	Zip Code	8	Boeung Kak 1, Khan Tuol Kork, Nationality Country Cambodia	*
Apple Priority		ielect 💌		Document Type: Select Notes:	•
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New Trademark Application Form

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Priority Details Edit Office Code		Renv 1 C Delete Selected Notes No records to view
	Number of Descriptions : Save Save Save Cancel	WIPO WORLD INTELLECTUAL PROPERTY ORGANIZATION

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

Fee Calculation and Offline Payment

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

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Filte	er	+)								
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		2	p.	Ð		WFP2014000007		22 Oct 2014 13:19:28		Ready for Reception	second title
1	1		P			WFP2014000006				Draft	Invention
	4	a (p.	F		WFP2014000005		22 Oct 2014 12:31:08		Ready for Reception	Invention
0 >	1		P.	四		WFP2014000002		22 Oct 2014 12:35:08		Submitted	This is a triple SIM card phone

Assign Portfolio: Select Portfolio 🔹 🚺 Ok

Offline Payment without Fee Calculation

Submissions and follow-up (submitted, <u>accepted/rejected</u>, ready for reception, received)

Reception at IP Office with payment receipt

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Online Payment with Fee Calculation

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

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	•	1	P			WFP2014000006				Draft	Invention
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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

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

Step 2 : After customer identify the payment method then "Proceed"



You are purchasing services at MOCBR for KHR 40000.00 Fee Charge USD 1.0 Payment session will expire in 179 seconds. Select Payment Option ACLEDA ACLEDA C ACLEDA Unity ACLEDA Internet Bank Bank Account ACLEDA ATM Cards **Cancel Transaction** Proceed Enter Account Details Enforce Strong Authentication(OTP) Transaction Result For any inquiries, please kindly contact our Call Center (24/7): Tel: +855 (0)23 994 444 Email : inquiry@acledabank.com.kh +855 (0)15 999 233 Website : www.acledabank.com.kh

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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 OTP2. Software OTP3. Hardware OTP



Fee Charge USD 1.0 Payment session will expire in 3586 seconds.				
ount Number				
16				
ncel Transaction				
0				

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Examples of Request and Receipt Template Forms



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

Tanda Terima Permohonan Kekayaan Intelektual Online Tagihan Pembayaran

Refe					
Tanj	icog	Pe	ng	aju	an
Kod					

WFU2016001164 2016-10-25 \$20161025219415

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

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

Data Permohonan (A	plication)
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 Kadaluarea Date of Expired	: 2016-11-11

Rincian Merek (D	escription of Mark)
Nama Merek Name of Mark	I SAMIRONO
Arti Meaning	: SAMIRONO = Merupakan suatu penamaan.
Warna Colors	: Hitam, putih.
Kelas Nice Nice Classes	3 43, Jasa-Jasa dibidang penyediaan makanan (restaurant), restaurant swalayan, kedal kopi, kafetaria, warung kopi, jasa boga rumah makan, pelayanan ruang minum, jasa hotel dan motel, pesanggrahan/wisma.

uasa/Konsultan KI (Representative/IP Consultant)

** **n	Alamat	Email/Telepon
nige Parament	Jl. Gajah Mada No. 123 Kel Bugel, Kec. Karawaci Tangerang, 15113	yoga prihastomo@gmail.com 0215587519

Lampiran (Attachments)

Actual Size

Gambar

Surat Pernyataan Penggunaan Merek

Fotokopi Sertifikat

Jakarta, 2016-10-25 ignature No Pemohon / Kuasa Applicant / Representative



Tanda tangan / Signature Nama lengkap / Full Name Yogo 1

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Workbench Filter and Portfolios

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⁷ Assign Portfolio: Select Portfolio

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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

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

User Management

Manage agent user accounts

WORKBENCH	Configuration data import 👻	USER MANAGEMENT 🔫	PAYMENT -	MY PROFILE 🗵			
Agent	Select	- C			User Name		
User email *					Phone Nbr		
Status	Active						
		Re-send verification	Save				

Manage office user accounts

WORKBENCH	CONFIGURATION DATA IMPORT	USER MANAGEMENT 👻	PAYMENT - MY PROFILE -		
Login Id *			Password *		
User Name			User email *		
Phone Nbr			Status	Active	•
	Save				



Manage e-filing Services 1/5

Administrator workbench

Workbench / Dashboard			
Last U	Import Static Configuration	Efiling Configuration	
Needs	User Document Configuration For New Filing	User Document Configuration For Post Filing Needs to update status	

Import IPAS configuration after stopping the Agent portal



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Manage e-filing Services 2/5

Enable or disable filing of applications (subtypes)

New Filing	File Type	Application Sub Type	Service code
•	Industrial Design	DI UMKM	10
	Industrial Design	DI Non UMKM	10
	Patent	PCT/ID Non UMKM	10
	Patent	Rahasia Dagang UMKM	10
	Patent	Sederhana (Perubahan) Non UMKM	10
	Patent	Paten UMKM	10
	Patent	Sederhana (Perubahan) UMKM	10
	Patent	PCT National Phase Non UMKM	10
	Patent	Paten Perubahan UMKM	10
	Patent	Paten Pecahan Non UMKM	10
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Manage e-filing Services 3/5

Enable or disable filing of applications (subtypes)

New Filing	File Type	Application Sub Type	Service code
×	Industrial Design	DI UMKM	10
	Industrial Design	DI Non UMKM	10
۲	Patent	PCT/ID Non UMKM	10
	Patent	Rahasia Dagang UMKM	10
	Patent	Sederhana (Perubahan) Non UMKM	10
	Patent	Paten UMKM	10
	Patent	Sederhana (Perubahan) UMKM	10
	Patent	PCT National Phase Non UMKM	10
	Patent	Paten Perubahan UMKM	10
	Patent	Paten Pecahan Non UMKM	10
	ra <a 1<="" page="" td=""><td>of3 -> + 10 -</td><td>View 1 - 10 of 2</td>	of3 -> + 10 -	View 1 - 10 of 2

Customize service code if required by external payment gateway system

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Manage e-filing Services 4/5

Enable or disable supporting documents for new applications

w Appli	cation DI UMKM +			
	IPAS User Document ±	WIPO File User Document	Mandatory	Scope
	01. Pengajuan Keberatan atas Permohonan DI yang Diumumkan	01, Pengajuan Keberatan atas Permohonan DI yang Diumumkan		A:01
10	01. Pengambilan Sertifikat Merek	01. Pengambian Sertifikat Merek	-8-	A:01
a ::	01. Perpanjangan Jangka Waktu Perlindungan Merek/Merek Kolektif (10M)	01. Perpanjangan Jangka Waktu Perlindungan Mereli/Merek Kolektif (IDM)		A:01
8	01. Tambahan Biaya Deskripsi Permuhonan > 30 Halaman	01. Tambahan Blaya Deskripsi Permohonan > 30 Halaman	10	A:01
	02. Pengajuan Keberatan atas Permohonan Nerek/Merek Kolektif/IG	02. Pengajuan Keberatan atas Permohonan Merek/Merek Kolektif/IG		A:01
9	02. Pengambilan Sertifikat Desain Industri	02. Pengambilan Sertifikat Desain Industri	0	A:01
9	02. Permohonan Petikan Daftar Umum Desain Industri	02. Permohonan Petilian Daftar Umum Desain Industri	0	A:01
9	02. Tambahan Biaya Setiap Klaim	02. Tambahan Baya Setiap Klaim		A:01
	03. Denda Terhadap Keterlambatan Pemenuhan Persyaratan Permuhonan	03. Denda Terhadap Keterlambatan Pemenuhan Persyaratan Permohonan	(0)	A:01
	03. Pengambilan Sertifikat Paten	03. Pengambilan Sertifikat Paten	0	A:01
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Manage e-filing Services 5/5

Enable or disable subsequent filing of user documents

	User Doc	ument *	01. Pengambilan Settifikat M	erek				•	nfigure	
_	IPAS User Document	WIPO File User Documen	t Owner Change	Repr Change	Renewal	Annuity Nbr	Annuity	SME	AllowSuppDoc	Scope

Including supporting documents

ser Document 01	. Pengajuan Keberatan atas Permohonan OI yang Diumumkan 🔹	
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8	01. Perpanjangan Jangka Waktu Pertindungan Merek/Merek Kolektif (IDM)	Ð
0	01. Tambahan Biaya Deskirpsi Permohonan > 30 Halaman	U .
0	02. Pangajaan Kebaratan atas Permohonan Merek/Merek Kolektif/IIS	U
0	02. Pengambilan Settifikat Decan Industri	0
10	02. Permohonan Petikan Daftar Unium Desain Industri	0
*	02. Tarohahan Brava Settar Klaim	10 10
0	03. Denda Terhadap Keterlambatan Pemeruhan Pemparatan Permohiman	
0	113. Pergambilan Settfikat Pater	
	Page 1 of 13 10 .	View 1 - 10 of 122

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Manage Filing fees

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

1		CREATE FEE IT	EM				
Service Type : ALL	•	FEETTEM FEE CONDITIO	Exclusiveness:	-Select-	•		
Fee Condition							
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	вотн
Industrial Design	New design applciation fee with limited number of images	1111	1	Basic fee Item	FC_BSODI	FC_EXD01	АРР
Industrial Design	Additional fee for exceeding number of design images	1003	1	Extra fee Item	FC_EXDDI		APP

E-filing Requests in IPAS

Close | New action | View mark | Other process | Set filter | Other mark | Tree mode | Refresh | Add manual sub process | Edit | Save changes

Edit process data

Evente

File:74342 - Ice Mountain - Fraser and Neave, Limited - TM Pending for Dept. Decision

Events	Status	Frozen By	Freezing				
Туре		C)ate	Description	Notes	Action 1	Action 2
I	e-doc	1	15/06/2017	Foreign Trademarks	Content certified on 15/06/2017 by KHDIPMOC		PDF
I	Action	1	15/06/2017	(automatic) New online application		Details	
I	User Doc.		17/07/2017	Userdoc:UD Receiving Original Document (Doc 2017/9432) File:74342 - Ice Mountain - Fraser and Neave, Limited	UD Received (09/08/2017).		PDF
I	Note	2	25/07/2017	TM Update Status* [deleted]		Details	
I	Action	2	25/07/2017	TM Assign Examiner		Details	
I	Action	(04/09/2017	TM Recommend Provisional Refusal (Examiner)	Different Address	Details	i
I	Action	(07/09/2017	TM Recommend Provisional Refusal (Bureau)		Details	

System Health Check

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nalkani Sangiafte	mark_partnership.itec	money, template, multiplement, accept, template and	4
15. Perpanjangan Jangka Visits Perintungan Heral, Harak Kalakid	post films, twoppate, dol	invesce, template doctoryment, recept, template doc	
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15. Permahanan Perahatan Data Permahanan	ansk_Ming_terralisis.doc	brooks_broglabi.ikm/parriesh_recept_benglabs.dok	
 Perpaisjangan Inngka Walita Pertudungan Herek/Helek Kalektr 2004) 	press_flives_terranste.mut	encers_banglida.iku/jan/her0_jeceg4_5enialite.iku	*
12. Yambahan Biana Settap Klaim	anost, Minig, Sampling, dos	errorise, templake des (source), juscept, template des	
12. Pangaguan Kalimistan alas Permahanan Herak/Herak Kalend/201	west_Hong_template.alex.	mona_template.doc/payment_tecept_template.dox	16
12. Pangapan Kalenatan atas Asimultanan Merek/Harek Kolekti/201	event, Wing, terrenits. doc	imanca, tamalata disciparment, recept, templata doc	**
13. Permishwat Esinamen Presian Desite Tulati	proid_flong_terreplate.also	servers_benglata.do/portrord_recept_brinatate.dox	
04. Pancatatan Panatahan Name desilatan Manut Pelolik Narah	inset, fliving, tertarists. doc	Involia, tampièle derigsiveent, Jacape, templata, doc	44

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Processing top We

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

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Import IPAS configuration in case of changes