

# ePCT – eHandshakes-Access Rights- eOwnership

<https://pct.wipo.int>



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# Contents

- eHandshakes
- Access Rights
  - Access Rights Groups
  - Managing Access Rights
  - Practical Advice
- eOwnership - Request Access Rights
  - Before Publication
  - For Published Applications
  - As Part of the Filing Process

# eHandshakes (1)

- First step in sharing access rights to PCT applications
- Association and trusted recognition between different WIPO User Accounts with strong authentication, before access rights can be shared
- eHandshakes do not directly result in shared access rights which have to be specifically assigned (default access rights options can be pre-defined)

<https://www.wipo.int/pct/en/epct/learnmore.html?N=695>

# eHandshakes (2)

- eHandshakes are managed within your WIPO account: select 'My WIPO Account' from the dropdown menu after clicking on your name in the navigation bar

The screenshot displays the WIPO IP Portal interface. At the top, the navigation bar includes 'WIPO IP PORTAL', 'MENU', 'ePCT [DEMO]', 'HELP', 'PASCAL PIRIOU' (with a dropdown arrow), and a notification bell icon. The user's name 'PASCAL PIRIOU' is highlighted with a red box. The dropdown menu is open, showing options: 'MY WIPO ACCOUNT' (highlighted with a red box), 'ADDRESS BOOK', and 'ACCESS RIGHTS GROUPS'. Below the navigation bar, the page shows 'GENEVA AUG 12, 2021 11:42 AM CEST' and 'CREATE NEW IA FIND IA OUT'. The main content area features a 'WORKBENCH' section with a dropdown arrow. Below this, the 'MY eHANDSHAKES' section is visible, containing the text 'Manage my eHandshakes [here.](#)' where the word 'here.' is enclosed in a red box.

# eHandshakes (3)

## ■ Request new eHandshake

- If you have the associate's customer ID, enter it in the corresponding field

**REQUEST NEW eHANDSHAKE**

Enter the Customer ID of the user to whom you want to send an eHandshake request.

Customer ID \*  
user\_CH\_PIRIOU\_PASCAL\_0044

Request eHandshake

- If you do not have the associate's customer ID, send yours by e-mail so that the associate can initiate the process

**INITIATE eHANDSHAKE**

Your Customer ID is **user\_CH\_PIRIOU\_PASCAL\_0044**. Send Customer ID by e-mail to an associate to initiate an eHandshake request

# eHandshakes (4)

- Shortcut link to eHandshake screen available when editing access rights

**ACCESS RIGHTS**

Name K. Ann BARDINI Rights eOwner



To assign rights to another person you must first have established an [eHandshake](#)

Name \* Rights \*

Cancel Add

# eHandshakes (5)

- It is possible, in a single operation, to remove all access rights for a given eHandshake user, including:
  - IAs, drafts
  - Address Books
  - Access Rights Groups
- Useful when a person leaves a company or a law firm
- If ePCT access rights have to be removed, remove access rights before deleting an eHandshake user

| MY eHANDSHAKES  |                                  |   |
|---|----------------------------------|---|
| <input type="button" value="Refresh"/>  |                                  |   |
|  Ahmed DRABI       | [user_CH_DRABI_AHMED_6170]       | <input type="button" value="Remove all ePCT rights"/> |
|  Andrzej ZOLTANSKI | [user_CH_ZOLTANSKI_ANDRZEJ_6437] | <input type="button" value="Remove all ePCT rights"/> |

# eHandshakes (6)

- On 'My eHandshakes' list, find the eHandshake contact concerned, then hover your mouse next to 'Remove all ePCT rights', click on the 'delete' icon appeared to delete the eHandshake
- An e-mail notification informs that person that an eHandshake has been deleted

The screenshot shows a web interface titled "MY eHANDSHAKES". At the top left is a "Refresh" button. Below it is a table with two rows of eHandshake contacts. The first row is for "Ahmed DRABI" with the user ID "[user\_CH\_DRABI\_AHMED\_6170]". To the right of this row is a blue trash can icon and the text "Remove all ePCT rights". The second row is for "Andrzej ZOLTANSKI" with the user ID "[user\_CH\_ZOLTANSKI\_ANDRZEJ\_6437]". A red-bordered tooltip box is positioned over the trash can icon, containing the text: "You currently share an eHandshake with this user. Click here to delete this eHandshake."

| MY eHANDSHAKES                                     |   |
|--|---|
| <a href="#">Refresh</a>                            |   |
| Ahmed DRABI [user_CH_DRABI_AHMED_6170]             | Remove all ePCT rights  |
| Andrzej ZOLTANSKI [user_CH_ZOLTANSKI_ANDRZEJ_6437] | <div style="border: 1px solid red; padding: 2px;">You currently share an eHandshake with this user. Click here to delete this eHandshake.</div> |



# Types of Access Rights

## ■ eOwner

- Complete control over the application in ePCT
- Can be the applicant, agent or another individual (e.g., paralegal, assistant, secretary) who actually filed the PCT application, or an individual to whom access rights were granted by an existing eOwner

## ■ eEditor

- Can take all actions except manage access rights

## ■ eViewer

- 'View' and 'Download'

<https://www.wipo.int/pct/en/epct/learnmore.html?N=694>

# Access Rights Groups (1)

- Set up access rights groups to share access rights  
<https://www.wipo.int/pct/en/epct/learnmore.html?N=542>
  - ❑ at the time of creating a New IA
  - ❑ when cloning an existing application
  - ❑ when requesting an eOwnership code for filing using PCT-SAFE, EPO online filing software or JPO PAS
  - ❑ when editing access rights

# Access Rights Groups (2)

WIPO IP PORTAL MENU ePCT [DEMO] HELP PASCAL PIRIOU

GENEVA AUG 12, 2021 12:08 PM CEST

CREATE NEW IA FIND IA OUT

MY WIPO ACCOUNT  
ADDRESS BOOK  
ACCESS RIGHTS GROUPS

## WORKBENCH ▾

# ACCESS RIGHTS GROUPS

Close

Create a group of eHandshake users to whom you would like access rights to be assigned when you create a New IA (or become eOwner by using a confirmation code).  
If you create more than one group, you will be prompted to select the group to which you would like to assign access rights.  
IMPORTANT - To remove all existing ePCT access rights for an eHandshake user, use the function 'Remove all ePCT rights' via your eHandshakes list, [here](#)

Add access rights group History

|                         |  |    |           |
|-------------------------|--|----|-----------|
| ▶ Name of group Geneva  |  |    |           |
| ▶ Name of group Webinar |  | 🗑️ | Rename 🖋️ |
| ▶ Name of group WIPO    |  |    | 🖋️        |

Access Rights Group

# Managing Access Rights (1)

- An eOwner can assign/modify/remove access rights via the Workbench (e.g. for multiple applications) or within individual applications via the 'Access Rights' section

Perform action on selected applications \*

- ACCESS RIGHTS
- Manage access rights
- Remove my rights

|                                     |                   |                   |                              |             |            |        |                     |
|-------------------------------------|-------------------|-------------------|------------------------------|-------------|------------|--------|---------------------|
| <input checked="" type="checkbox"/> | PCT/IB2019/040166 | Not yet Published | <a href="#">000ABKR-1003</a> | 25 Apr 2019 | BMW GMBH   | eOwner | <a href="#">Add</a> |
| <input checked="" type="checkbox"/> | PCT/IB2016/030353 | Not yet Published | <a href="#">00ABePay0512</a> | 05 Dec 2016 | BLACK, Joe | eOwner | <a href="#">Add</a> |
| <input type="checkbox"/>            |                   | New IA - Draft    | <a href="#">D-ABA-1806</a>   |             |            | eOwner | <a href="#">Add</a> |

DATA DOCUMENTS FEES ACTIONS **ACCESS RIGHTS** TIMELINE NATIONAL PHASE HISTORY

## D-PDOC PCT/IB2021/040253

# Managing Access Rights (2)

- Best practice - always have **at least 2 eOwners** to facilitate access rights management
- Access rights should be removed for ePCT users no longer requiring access (e.g., change of applicant, change of agent, departure of employee, etc.)
- Full history of all access rights modifications available

▼ **ACCESS RIGHTS**

Add eHandshake user   Add access rights group   **History**

**CURRENT ACCESS RIGHTS**

|                      |                |  |
|----------------------|----------------|--|
| ▶ Name John SMITH    | Rights eOwner  |  |
| ▶ Name Pascal PIRIOU | Rights eOwner  |  |
| ▶ Name Yinghua CHEN  | Rights eViewer |  |

# Practical Advice

## Access rights group in a large law firm (1)

- Each user in a group should create an access group in their account including the same eHandshake users

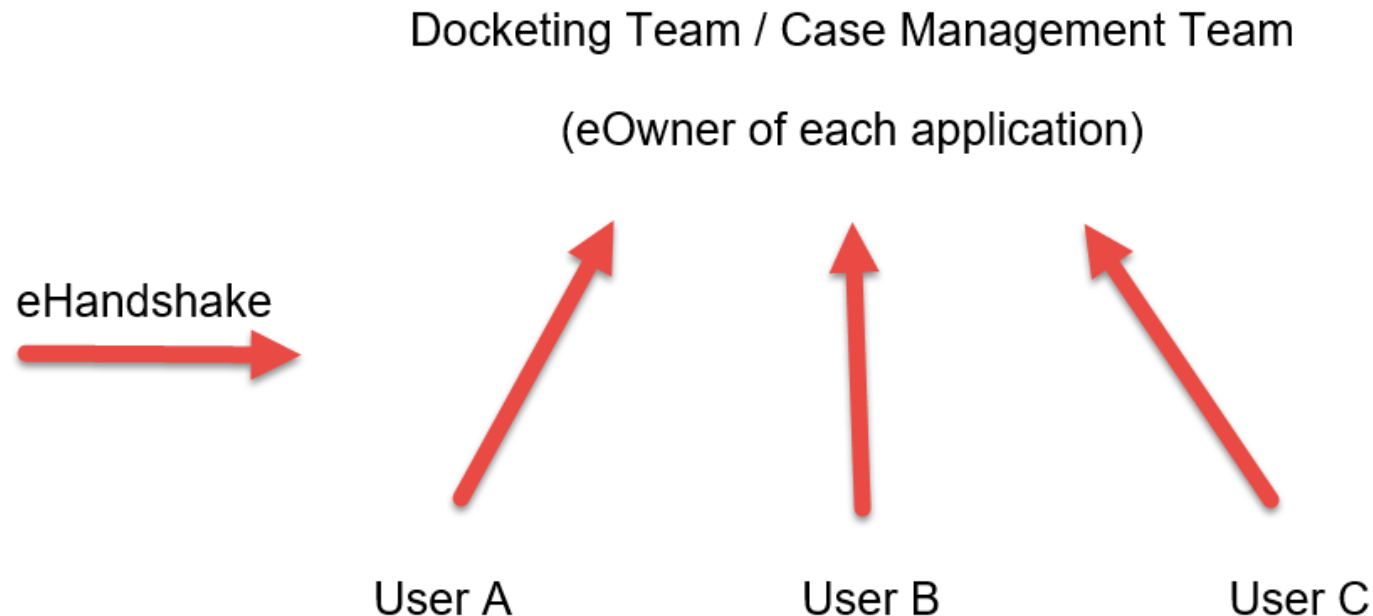
Group of User A  
with B and C

Group of User B  
with A and C

Group of User C  
with A and B

# Access rights group in a large law firm (2)

- Each user should have an eHandshake with the docketing team/ case management team



# ePCT notifications preferences setting (1)

- Docketing team/ case management team is eOwner of each application and receive all ePCT notification

The screenshot shows the 'ePCT [DEMO]' interface. At the top right, it says 'HELP PASCAL PIRIOU' and has a notification bell icon. Below the header, it says 'GENEVA SEP 3, 2021 8:50 PM CEST'. The main title is 'NOTIFICATIONS' with a 'Close' button. A message states: 'By default the 500 most recent results are displayed. Select and clear notifications to display the next 500 results. IMPORTANT - Notifications are automatically archived one year after the date of receipt and can be retrieved upon request to the ePCT [Help Desk](#).' Below this, there are tabs for 'Add filter', 'Columns', and 'Preferences' (which is highlighted with a red box). The 'Preferences' dialog box is open, showing 'Access Rights' with checkboxes for 'eEditor', 'eOwner', and 'eViewer'. Under 'Method of Notification \*', 'Email + Notifications list in ePCT' is selected. A red box highlights a list of events to be notified about, including 'I am eOwner and access rights are changed by another person', 'Priority document(s) still outstanding and international publication is scheduled to take place in 2 weeks', 'Priority document(s) still outstanding and the time limit under Rule 17.1(a) has expired', 'Time limit for submitting Article 19 amendments expires in 2 weeks', 'Technical preparations for publication scheduled to close in 2 weeks', 'Time limit for submitting Rectification of Obvious Mistakes to ISA Office [Rule 91.1] expires in 2 weeks', 'Republication event has been scheduled by the IB', 'Time limit to request supplementary international search expires in 2 weeks', 'Time limit to file Chapter II Demand expires in 2 weeks', '30 month time limit (end of the international phase) expires in 1 month', 'IA Warning added/modified', 'New document processed and/or new form issued', and 'ePCT-Filing confirmation - documents and bibliographic data available in ePCT'. At the bottom right of the dialog are 'Cancel' and 'OK' buttons.



# ePCT notifications preferences setting (2)

- Paralegals/secretaries who only file but do not monitor applications, untick the unnecessary notification options from 'Preferences'

ePCT [DEMO] HELP PASCAL.PIRIOU

GENEVA, SEP 3, 2021 8:50 PM CEST

## NOTIFICATIONS

By default the 500 most recent results are displayed. Select and clear notifications to display the next 500 results.  
IMPORTANT - Notifications are automatically archived one year after the date of receipt and can be retrieved upon request to the ePCT [Help Desk](#).

Add filter | Columns | **Preferences**

**Access Rights**

Notify me about events in IAs where my access rights are

- eEditor
- eOwner
- eViewer

Method of Notification \*

- Email + Notifications list in ePCT
- Email
- Notifications list in ePCT

Notify me about the following events for all IAs in my workbench

- I am eOwner and access rights are changed by another person
- Priority document(s) still outstanding and international publication is scheduled to take place in 2 weeks
- Priority document(s) still outstanding and the time limit under Rule 171(a) has expired
- Time limit for submitting Article 19 amendments expires in 2 weeks
- Technical preparations for publication scheduled to close in 2 weeks
- Time limit for submitting Rectification of Obvious Mistakes to ISA Office (Rule 91.1) expires in 2 weeks
- Republication event has been scheduled by the IB
- Time limit to request supplementary international search expires in 2 weeks
- Time limit to file Chapter II Demand expires in 2 weeks
- 30 month time limit (end of the international phase) expires in 1 month
- IA Warning added/modified
- New document processed and/or new form issued
- ePCT-Filing confirmation - documents and bibliographic data available in ePCT

Cancel OK

# What should I do if I leave the company (1)

- Scenario A: I move to another law firm
  - ❑ Assign access rights to my eHandshake colleague(s) if I'm the sole eOwner
  - ❑ Remove my access rights of all my PCT applications
  - ❑ Delete my eHandshake(s)
  - ❑ Update my WIPO account with my new contact details, including email address, name of the new company, etc
  - ❑ No need to create a new WIPO account

# What should I do if I leave the company (2)

## ■ Scenario B: I retire 😊

- Assign access rights to my eHandshake colleague(s) if I'm the sole eOwner
- Remove my access rights of all my PCT applications
- Delete my eHandshake(s)
- Contact PCT Operations Customer Support Section [pct.eservices@wipo.int](mailto:pct.eservices@wipo.int) to deactivate my WIPO account

# Taking eOwnership of Applications

- **Process is automatic when using ePCT-Filing**
- Access rights can be assigned to eHandshake contacts, including prior to filing
- Default access rights can be set up and automatically applied
- If ePCT-Filing is not used, additional steps are required to take eOwnership so to gain access rights  
<https://www.wipo.int/pct/en/epct/learnmore.html?N=693>

# Taking eOwnership - Request Access Rights

- Search for application outside of your Workbench and select reason 'Request Access Rights'

CREATE NEW IA **FIND IA OUTSIDE OF MY WORKBENCH**

**WORKBENCH** ▾

Current IAs | Draft IAs | Draft Actions | Unpublished | Published | Archived | Search

Filter Applied | Save filter | Download list | Columns | Show rows [ALL]

**FIND IA OUTSIDE OF MY WORKBENCH**

International Application Number \* | International Filing Date \* | 📅

Reason \*  
Request Access Rights

Cancel | Search IA

- E-mail notification is sent once the request for access rights has been processed by the IB
- If Form PCT/IB/345 with the eOwnership code is issued, the code can only be used by the account holder who submitted the request

# Confirming eOwnership

before publication: e-filing using an ePCT supported digital certificate

- Unpublished e-filed applications using a digital certificate supported by ePCT (WIPO digital certificates, EPO smart cards and certificates issued by JPO SECOM)

<https://www.wipo.int/pct/en/epct/learnmore.html?N=933>

- Digital certificate used to file must match the digital certificate uploaded to the user's WIPO account
- Enter the confirmation code in the bottom right-hand corner of Form PCT/IB/301
- eOwnership automatically assigned

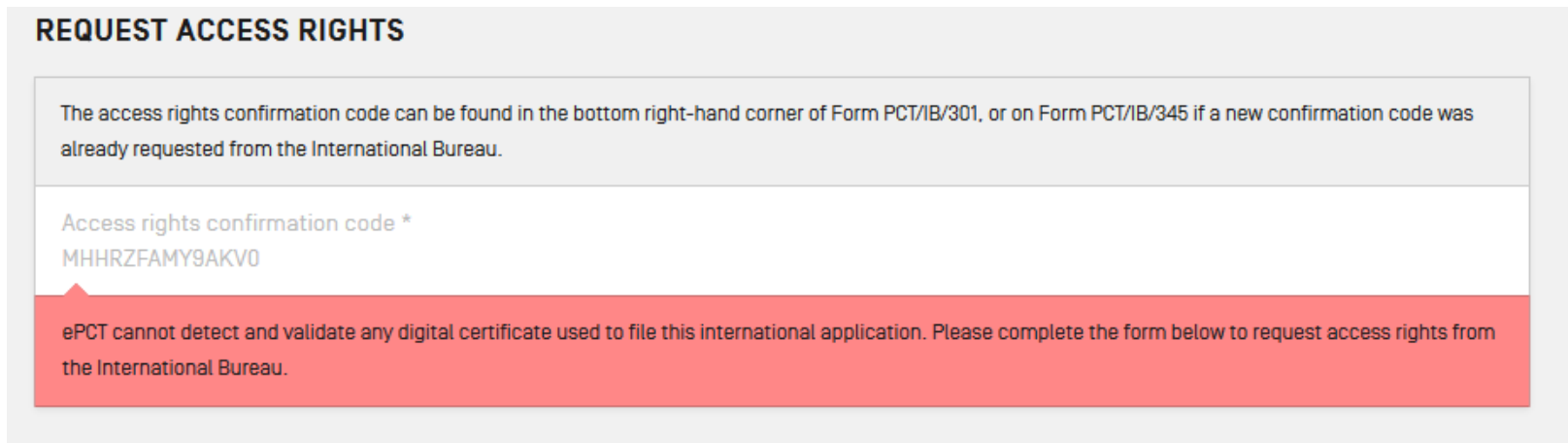
|  |  |
|--|--|
| The International Bureau of WIPO<br>34, chemin des Colombettes<br>1211 Geneva 20, Switzerland<br><br>Facsimile No. +41 22 338 82 70<br>Form PCT/IB/301 (July 2010) | Authorized officer<br><br>Bardini Ann<br>e-mail ro.ib@wipo.int<br>Telephone No. +4122 338 9117<br><br>1/FPG2ZMFEUFCQ70 |
|--|--|

WIPO | PCT  
The International  
Patent System

# Requesting eOwnership (1)

before publication: paper filing or e-filing with a digital certificate not supported by ePCT

- Enter confirmation code indicated on Form PCT/IB/301



**REQUEST ACCESS RIGHTS**

The access rights confirmation code can be found in the bottom right-hand corner of Form PCT/IB/301, or on Form PCT/IB/345 if a new confirmation code was already requested from the International Bureau.

Access rights confirmation code \*

MHHRZFAMY9AKV0

ePCT cannot detect and validate any digital certificate used to file this international application. Please complete the form below to request access rights from the International Bureau.

- Fill in an online form to submit a request to the IB
- eOwnership granted automatically if approved, or Form PCT/IB/345 sending the eOwnership code to the address for service if refused

# Requesting eOwnership (2)

before publication: with a Rule 92bis change request filed in the application

- Enter confirmation code indicated on Form PCT/IB/301
- Fill in an online form to 'Request confirmation code' from the IB

**REQUEST ACCESS RIGHTS**

The access rights confirmation code can be found in the bottom right-hand corner of Form PCT/IB/301, or on Form PCT/IB/345 if a new confirmation code was already requested from the International Bureau.

Access rights confirmation code \*  
CENFAJYZ4Q3DJ0

The Confirmation Code is no longer valid for the following reason: 92bis change since filing. Please complete the form below to request a new confirmation code from the International Bureau.

- Form PCT/IB/345 with the eOwnership code will be sent to the address for service



# Requesting eOwnership (3)

before publication: no PCT/IB/301

- No Form PCT/IB/301 (e.g. new agent): send ePCT message to the IB to request a copy of the form

<https://www.wipo.int/pct/en/epct/learnmore.html?N=938>

- Click 'Search IA outside my Workbench', enter PCT application number + International filing date, then select the reason 'View contents' to go to the application page
- Click 'send ePCT message'

# Requesting eOwnership for Published Applications

- Confirmation code on Form PCT/IB/301 is no longer valid after the publication
- Fill in an online form to 'Request confirmation code' from the IB
- Form PCT/IB/345 with the eOwnership code will be sent to the address for service

<https://www.wipo.int/pct/en/epct/learnmore.html?N=936>

# Requesting eOwnership as Part of the Filing Process

- Filing using compatible e-filing software, including PCT-SAFE, EPO online filing software and JPO PAS
- Generate a one-time eOwnership code in ePCT and paste it into the relevant signature field along with your Customer ID
- When the Record Copy is received at the IB, access rights will be automatically assigned to the account holder corresponding to the eOwnership code and Customer ID

<https://www.wipo.int/pct/en/epct/learnmore.html?N=518>

# Generating eOwnership Code

The screenshot shows the WIPO ePCT interface. The top navigation bar includes the WIPO logo, 'ePCT REQUEST ACCESS RIGHTS', the user name 'PASCAL PIRIOU', and a 'Close' button. A dropdown menu is open, listing various user options, with 'Generate eOwnership code' highlighted. Below the menu, a section titled 'GENERATE eOWNERSHIP CODE FOR USE WHEN PCT-SAFE, EPO ONLINE FILING & JPO PAS' provides instructions. A text box contains the following information:

Generate an eOwnership code to set up ePCT access rights as part of the filing process when using PCT-SAFE, EPO online filing or JPO PAS.  
**This eOwnership Code can only be used at the time of filing, for one application and is not applicable for multiple applications.**

Copy/paste your Customer ID and eOwnership code below into the corresponding fields in the signature box in PCT-SAFE, EPO online filing or JPO PAS.  
When the record copy is received at the International Bureau, eOwnership will be automatically assigned to the holder of the Customer ID.

Customer ID user\_CH\_PIRIOU\_PASCAL\_1755  
eOwnership Code SVYYHX2QMQRPY0

# Example - PCT-SAFE Filing

**WIPO | ePCT** REQUEST ACCESS RIGHTS GENEVA JUL 17, 2017 9:48 AM CEST SUPPORT **PASCAL PIRIOU** Close

## GENERATE eOWNERSHIP CODE FOR USE WHEN PCT-SAFE, EPO ONLINE FILING & JPO PAS

Generate an eOwnership code to set up ePCT access rights as part of the filing process when using PCT-SAFE, EPO ONLINE FILING & JPO PAS.  
**This eOwnership Code can only be used at the time of filing, for one application and is not applicable for multiple applications.**

Copy/paste your Customer ID and eOwnership code below into the corresponding fields in the signature box in PCT-SAFE, EPO online filing or JPO PAS.  
When the record copy is received at the International Bureau, eOwnership will be automatically assigned to the holder of the Customer ID.

Customer ID **user\_CH\_PIRIOU\_PASCAL\_1755**  
eOwnership Code **SVYYHX2QMQRPY0**

[Generate another code](#)

- Notifications
- Address Book
- Default access rights
- My History
- My Account
- Generate eOwnership code**
- PCT Resources
- WIPO Online Services
- Office Profiles

**Signature**

Legal Signature

Alphanumeric / Pascal Piriou/

Facsimile

Advanced Digital (No more signatures can be applied - this signature should be finalizing the signing process.)

**Assign eOwnership in ePCT (optional)**

ePCT Customer ID: user\_CH\_PIRIOU\_PASCAL\_1755

ePCT eOwnership code: SVYYHX2QMQRPY0

Apply Signature Cancel

# ePCT HELP (1)

- Use the 'HELP' link in the navigation bar  
<https://www.wipo.int/pct/en/epct/support.html>
- FAQs and user documentation
  - ❑ Database of help information (use 'Search' feature to pinpoint a topic)
  - ❑ Useful 'How to' videos
  - ❑ Live Chat (during business hours) available via FAQ answers
  - ❑ ePCT Webinars

# ePCT HELP (2)

## ■ PCT Customer Support Section

□ Tel: +41-22-338-9523

□ E-mail: [pct.eservices@wipo.int](mailto:pct.eservices@wipo.int)

□ Monday to Friday, 9am-6pm Geneva time

□ Chat feature available



# Thank you!



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ORGANIZATION

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