

# Intro to ePCT

Intro to ePCT, why ePCT is important, getting a user ID and password, setting up 2FA

Thursday, March 2, 2023, 10AM Mountain Time

Carl Oppedahl  
<https://blog.oppedahl.com>

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## Disclaimer

Watching this webinar, or reading these slides, does not make you my firm's client and does not make me your attorney. This webinar is intended to be educational.

At times I will wear either of two hats. At times I will be presenting purely factual information, the same way that a WIPO person might present. At other times I will be sharing opinions and preferences. Please join me in appreciating these two distinct hats.

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Sequence listings and ePCT.

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Publication front page preview, generating reports of outstanding Forms ISA/202, generating reports of applications with outstanding priority documents.

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## Intro to ePCT

- There is nothing quite like the good feeling that one gets from having served a client well
- Making use of ePCT is part of serving clients well

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## Intro to ePCT

- Surely we all want to be trendy, modern, and up-to-date
- Making use of ePCT is part of being trendy, modern, and up-to-date

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# Intro to ePCT

- ePCT is an important part of PCT practice
- It validates your inputs when you are filing PCT applications and follow-on papers, and so it saves you from many kinds of malpractice
- It permits you to see contents and status of pending PCT applications even if they are not published (like PAIR and Patentcenter)
- It provides warnings of upcoming due dates (which PAIR and Patentcenter fail to provide)
- It facilitates collaborative workflow within your office and with external parties such as clients and foreign patent firms

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ePCT validates your inputs when you are filing PCT applications and follow-on papers, and so it saves you from many kinds of malpractice

- There are many ways to lose substantive rights of the client
- There are many ways to get embarrassed in front of the client
- ePCT validates your inputs and catches many user mistakes and blunders
- ePCT can validate your priority claims for correctness and accuracy
- ePCT can save you from being embarrassed in front of the client
- ePCT greatly reduces risk of malpractice while serving clients

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ePCT permits you to see contents and status of pending PCT applications even if they are not published (like PAIR and Patentcenter)

- You use PAIR and Patentcenter many times daily for such information
- You need similar capabilities for your PCT applications
- This can save time and trouble as well for clients and inventors and foreign patent firms

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ePCT notifies you of **all** new documents whether inbound or outbound (PAIR and Patentcenter only tell you of outgoing documents)



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## ePCT provides warnings of upcoming due dates

- Note that PAIR and Patentcenter fail to provide such warnings
- This can run in parallel with the protections that come from your docket systems
- Automatic warning of imminent end of the 30-month period
- Automatic warning of due date for filing Demand
- Automatic warning of due date for withdrawing to prevent publication
- Automatic warning of other due dates

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## ePCT provides warnings of upcoming due dates





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# ePCT provides warnings of upcoming due dates

From epct-noreply@wipo.int <epct-noreply@wipo.int> 

To @oppedahl.com 

2/12/2023, 6:31 PM

Subject **ePCT Notification: Time Limit for Article 19 Amendments - PCT/IB2022/**

ePCT

WIPO


## **ePCT Notification: Time Limit for Article 19 Amendments - PCT/IB2022/** **P012WO-3**



The time limit for submitting Article 19 amendments for PCT/IB2022 / will expire in 2 weeks.

Amendments received by the IB after the time limit are still accepted if they have been received before the technical preparations for international publication have been completed.

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# ePCT provides warnings of upcoming due dates

From epct-noreply@wipo.int <epct-noreply@wipo.int> 

To @oppedahl.com 


2/15/2023, 7:08 PM

Subject **ePCT Notification: Technical Preparations for Publication - PCT/IB2022/**

ePCT

WIPO

## **ePCT Notification: Technical Preparations for Publication - PCT/IB2022/** **P058WO2**

Technical preparations for international publication for PCT/IB2022 / are scheduled to close in 2 weeks.

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# ePCT provides notifications of events of interest

From: epct-noreply@wipo.int <epct-noreply@wipo.int>

To: carl@oppedahl.com

2/22/2023, 10:30 AM

Subject: ePCT Notification: Access rights changed by another person - PCT/EP2021/1470

ePCT

WIPO

## ePCT Notification: Access rights changed by another person - PCT/EP2021/1470

This is to notify you that Access Rights have been modified as follows for PCT/EP2021/1470 for which you are eOwner.

User Name	New Access Rights	Modified by	Date/Time
carl OPPEDAHL	eOwner	carl OPPEDAHL	22 February 2023 12:44:12 CET
carl OPPEDAHL	eOwner	carl OPPEDAHL	22 February 2023 12:55:17 CET

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# ePCT provides warnings of failures and problems

- Automatic email warning you if there is a priority document outstanding
  - This helps to save you from the dreaded 4-and-16 date

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ePCT facilitates collaborative workflow within your office and with external parties such as clients and foreign patent firms

- With a click of a mouse you can enable a foreign patent firm to move forward on a task (e.g. national-phase entry)
- Obtain e-signatures from inventors and applicants who are trendy, modern and up-to-date
- Obtain e-signatures from dinosaur participants

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## Why ePCT is important

ePCT “actions”

- Many recurring tasks can be carried out as “actions” which leads to auto-loading of data and efficient workflow within Offices

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# Validations

- Some Offices only do validations that benefit the Office
- ePCT does hundreds of validations that specifically benefit the filer
- One example – missing signature on e-filed form

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## Getting a user ID and password

You can create a WIPO account via the ePCT home page. To complete the creation of your account, you will receive a confirmation e-mail containing the link that is required to validate the account creation process.

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## Setting up 2FA

- Push Notification
- App for one-time password
- One-time password via telephone
- Digital certificates
- Do I still need a WIPO digital certificate?

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## Push Notification

- Uses “Forgerock” app on your smart phone
- It is often very easy to use it

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## App for one-time password

- Google Authenticator
- WinAuth
- Bitwarden
- You can store the “secret” in several places

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## One-time password via telephone

- You can set this up with a telephone number that can receive text messages (SMS)
- You can set this up with a telephone number that cannot receive text messages (typically a landline telephone number)

**TEXT MESSAGE (SMS) WITH ONE-TIME PASSWORD**

Register your mobile phone number to receive a one-time password. Alternatively a landline number may be registered.

Mobile phone number +412233891

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## One-time password via SMS

- The login system sends a text message (SMS)
- You receive the text message, and you read it, and you key the secret code number in at the login screen

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## One-time password via SMS

- This only works if you have cell coverage at the time
- Might not work when traveling internationally
- Might be expensive when traveling internationally
- Is not trendy, modern, or up-to-date

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## One-time password via telephone call

- When setting it up in the login system, you specify a telephone number that is not able to receive text messages (for example some landlines)
- A robot places a telephone call to you, and you answer the call, and the robot reads the secret code number to you
- You key in the secret code number at the login system

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- Digital certificates

- WIPO Customer digital certificates
- Digital certificates issued by EPO which are stored in smart cards

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## Digital certificates

- Digital certificates issued by EPO which are stored in smart cards
- You may want to have an EPO smart card so that you can pick up ISR/WOs and other documents from EPO's portal

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# WIPO Customer digital certificates

- This is my absolute favorite way of doing ePCT 2FA
- Logins are super quick, requiring only one extra mouse click
- No cell coverage needed for this to work
- No smart phone needed for this to work
- WIPO begs users to choose other 2FA approaches, such as push notifications
- Some calls to WIPO's PCT Help Desk are from people who need help with this
- This approach is best for power users

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# Setting up 2FA methods in addition to an existing one

- This is extremely important
- Any user who fails to do this will inevitably get locked out at some very inconvenient moment
- This forces the user to get in touch with the WIPO ePCT Help Desk
- They might be asleep in Switzerland when the user gets locked out
- If only the user had set up more than one 2FA method, the user would have been able to avoid getting locked out
- Please please please set up more than one 2FA method!
- Did I mention that this is extremely important?

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# Helpful videos



## WEBINARS, VIDEOS AND TRAINING

WIPO participation in international IP events [New]  
Free of charge ePCT training and webinars  
Past ePCT webinar recordings  
ePCT Video Tutorials for Applicants ←  
Videos  
Try ePCT in DEMO mode  
PCT Newsletter - ePCT related 'Practical Advice' and other articles on Rule 92bis changes, color drawings, document upload, fax service etc.  
Further PCT training and information  
PCT homepage - PCT Applicant's Guide, PCT Newsletter, Fees etc.  
Recorded webinar from Carl Oppedahl on "Learning to be paperless with PCT (Covid-19 issues)"

<https://www.wipo.int/pct/en/epct/tutorials.html>

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# Possible live demo

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# Please complete the evaluation questionnaire

- Yes please complete it
- Pay it forward

45

# Thank you

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