

# ePCT webinar series

Shared address books, collaborative workflow, sharing with clients, sharing with outside counsel

Webinar 5  
Thursday, March 30, 2023, 10AM Mountain Time

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<https://blog.oppedahl.com>

1

## 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.

2

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3

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4

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5

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6

# Recordings

- Webinar 1. Thursday, March 2, 2023. Intro to ePCT, why ePCT is important, getting a user ID and password, setting up 2FA. [Download the presentation materials.](#) [View the recording \(1:13\).](#)
- Webinar 2. Thursday, March 9, 2023. Why attorneys need to learn about ePCT, why you cannot simply delegate stuff to support staff. [Download the presentation materials.](#) [View the recording \(1:05\).](#)
- Webinar 3. Thursday, March 16, 2023. Making sure your US priority documents are available to DAS, best practices for filing US priority documents, Certificates of Availability, setting up alerts. [Download the presentation materials.](#) [View the recording \(1:21\).](#)

7

# Our topics

- Shared address books
- Collaborative workflow
- Sharing with clients
- Sharing with outside counsel

8

# Bibliographic data

- Any patent office will ask you for bib data
  - Inventor names
  - Applicant name
  - Title
  - Priority claims
  - Suggested figure for publication
  - Where to send correspondence

9

# Bibliographic data

- USPTO also asks for:
  - Application type (utility, design, plant)
  - Provisional, non-provisional
  - Inventor mailing address
  - Inventor residence (city, state or country)
  - Indication of small entity
  - Domestic benefit information
  - Assignee information

10

# Bibliographic data

- PCT system also asks for:
  - Email address for correspondence
  - Inventor mailing address
  - Applicant domicile and citizenship
  - Selection of International Searching AuthorityAnd you are picking a Receiving Office

11

How does bib data get into patent office systems?

- In the old days, it got typed by fingers of patent office people
- Even now it sometimes gets typed by fingers of patent office people
- Clearly you win if you can arrange for it to be auto-loaded
- Everybody wins if it gets auto-loaded

12

## How does bib data get into USPTO systems?

- Maybe from your Form AIA14 (Application Data Sheet)
- But only if it is a computer-readable Form AIA14 (not an image-scanned document)
- And only if it is in your first submission (the submission where you do not yet know your application number)

13

## How does bib data get into WIPO systems via RO/US?

- Maybe from your Form PCT/RO/101 (Request)
- But only if it is in a ZIP file
- It is malpractice not to use the ZIP file
- By which we mean, malpractice not to use ePCT to create the Request and the ZIP file

14

## How does bib data get into WIPO systems via RO/IB?

- You use ePCT to create the Request (Form PCT/RO/101)

15

## How does bib data get into your Form AIA14 (Application Data Sheet)?

- Probably you key it in with your fingers
- Or copy and paste
- Some power users use Notepad and the XML export and import
- Some docket systems can create XML files to import

16

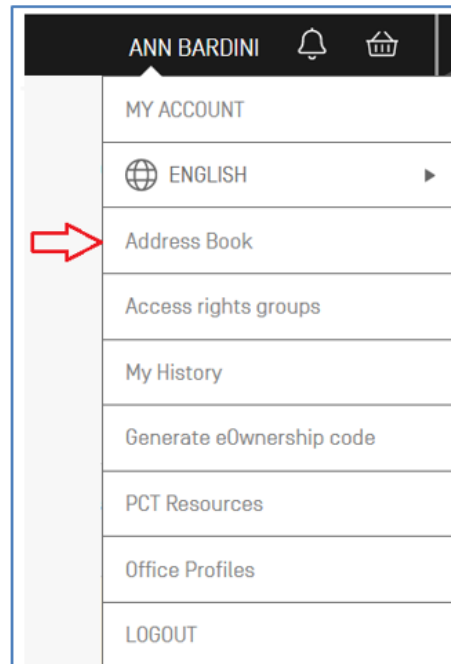


## How does bib data get into your Request?

- Maybe you key it in with your fingers?
- Maybe you copy and paste?
- Power users use the ePCT Address Books
  - Maybe somebody shares their ePCT Address Book with you
  - Maybe you make and use your own ePCT Address Book

You drag and drop persons from an ePCT Address Book into your Request

17



18

## Why we like dragging and dropping from an ePCT Address Book

- Do we like it because it is easier than hand-keying?
- Do we like it because it is easier than copying and pasting?
- The real reason we like it is that if it was correct in the ePCT Address Book, then it preserves its correctness when we drag and drop it into the PCT Request
- Note that we can also drag and drop from an ePCT Address Book into a Demand for Preliminary Exam
- Note that we can also drag and drop from an ePCT Address Book into a 92*bis* Request

19

## Why we like dragging and dropping from an ePCT Address Book

- With hand-keying, we might make mistakes
- With copying and pasting, we might leave a field blank or paste into an incorrect field
- If we drag and drop from an ePCT Address Book into the PCT Request, or into a Demand for Preliminary Exam or into a 92*bis* Request, it won't get information into an incorrect field or leave a field blank

20

# Export from PCT-SAFE

- You can export your Address Book from PCT-SAFE and import it into your ePCT Address Book

21

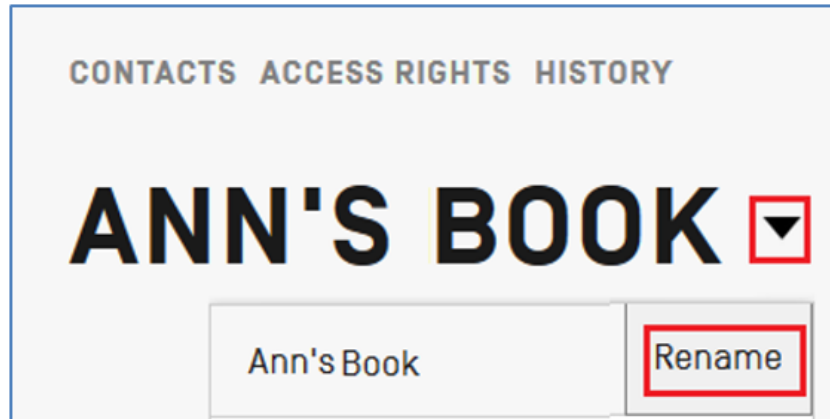
# Export from EPO-online filing software

- You can export your Address Book from EPO-online filing software and import it into your ePCT Address Book

22

Your ePCT Address Book has a name

- You can rename your ePCT Address Book



23

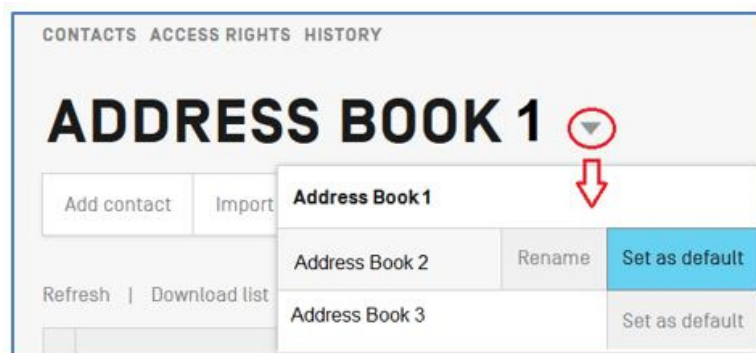
Your ePCT Address Book has a history feature

- This permits you to audit any changes or updates that have been made to your ePCT Address Book

24

Suppose you have access to more than one ePCT Address Book

- You get to pick which one is your default ePCT Address Book



25

It is multilingual!

MULTILINGUAL BOOK

Add contact Import contacts Search contact

Adding a new contact

Add new Contact [English transliteration is required for names and addresses in Arabic, Chinese, Japanese, Korean and Russian]

English Transliteration Required

Language \*

AR - Arabic  
JA - Japanese  
KO - Korean  
RU - Russian  
ZH - Chinese

Name \* [EN] Name \*

Street address [EN] Street address

No street address applicable [EN] City

City

26

# It is multilingual!

**MULTILINGUAL BOOK** Close

Add contact Import contacts Search contact

Editing an existing contact

Edit Contact

[EN] ABC COMPANY  
 Add additional language version for this Contact

Type \*

Legal entity  
 Natural person

Language \*

AR - Arabic  
JA - Japanese  
KO - Korean  
RU - Russian  
ZH - Chinese

Name \* [EN] Name \*  
ABC COMPANY

Street address \* [EN] Street address \*  
123 Palace Road

No street address applicable [EN] City \*  
London

City \*

Telephone

Country or territory \* GB - United Kingdom Please enter the full international number, prefixed with '+' (e.g. +16031234567 for the United States).

27

## Shared address books

- You and the other person have already done an eHandshake
- Now you click to share your address book with them
- Or they click to share their address book with you
- You get to pick eOwner or eEditor or eViewer when you are sharing your address book with somebody
- They get to pick eOwner or eEditor or eViewer when they are sharing their address book with you
- Of course there is a history for the sharing activity
- You can see how and when somebody gained access to a particular address book

28

# Access rights groups





## 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](#).

### ACME

Add eHandshake user History

Name Alleen Law	Rights eOwner	
Name charles roth	Rights eOwner	
Name Charles Smith	Rights eOwner	
Name Bret FIELD	Rights eViewer	

Close group

29

# Collaborative workflow

- In PAIR or EFS-Web or Patentcenter there are only very limited ways that people can work together on tasks
  - Most kinds of access are across all files, nor nothing
- In ePCT you can set up finely tuned access for particular tasks
  - A first person has access to collaborate on a first task
  - A second person has access to collaborate on a second task
  - You can set it up so that a particular person has only eViewer access to a particular task on a first file, but has eEditor access to a particular task on a second file

30

# Collaborative workflow

- A first person might start a task, completing some fields
- A second person might continue the task, completing additional fields
- A third person might review and click “submit”
- These people can be paralegals or assistants or attorneys or agents
- Some of the people might be client people
- One of the helpers might be an outside contract paralegal or service provider

31

# Sharing with clients

- Inventors can see the draft filing package taking shape
- They can check inventor lists
- They can check the sequence of the named inventors
- They can see priority claims
- They can see the specification, claims, abstract and drawings
- When it gets filed, they can see the application number
- They can receive notifications of events and later documents

32

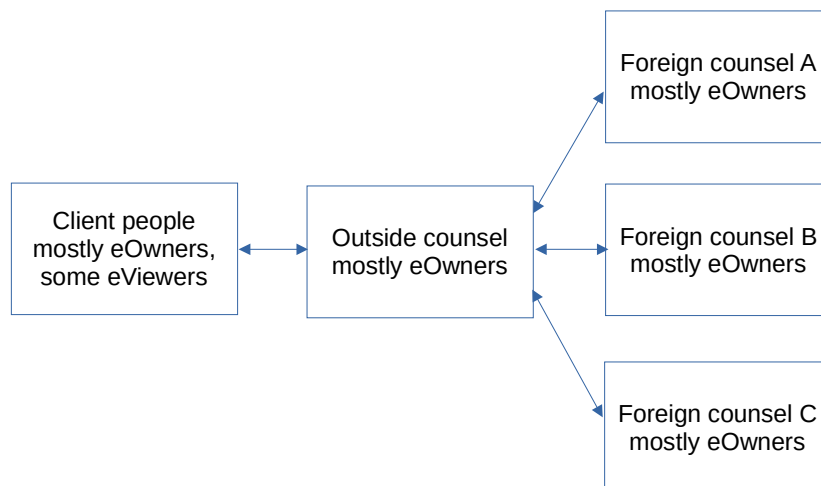


## Sharing with outside counsel

- A corporate patent department can share with outside counsel
- This might be multiple outside counsels
- This might be foreign agents

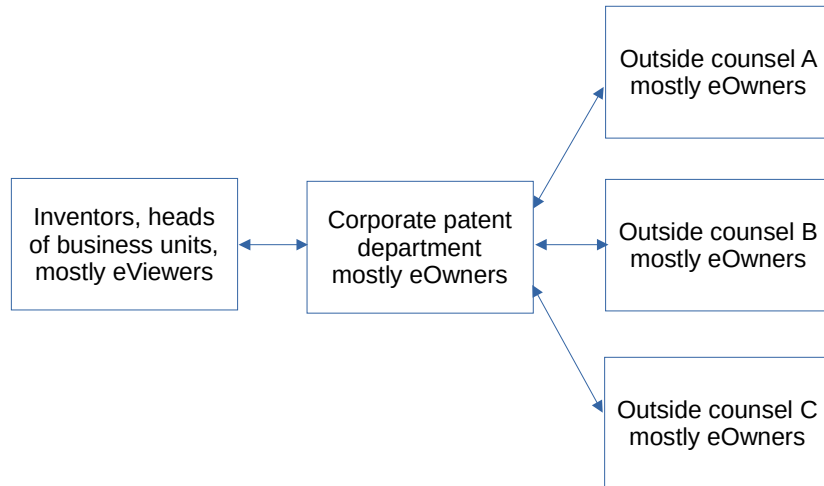
33

## Outside counsel approach



34

# Corporate control approach



35

# Possible live demo

36

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37

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38

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40

# Please complete the evaluation questionnaire

- Yes please complete it
- Pay it forward

41

# Thank you

42