

ePCT webinar series

Getting to know your ePCT workbench,
portfolios, office profiles, cloning, ePCT
actions

Webinar 6
Tuesday, April 4, 2023, 10AM Mountain Time

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<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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Upcoming webinars

Webinar 7. Thursday, April 13, 2023, 10AM Mountain Time.

Getting pending PCT applications into your workbench, going back to January 1, 2009, archiving old applications.

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Webinar 8. Thursday, April 20, 2023, 10AM Mountain Time. Filing a new US PCT application in RO/US using ePCT. [Click to register.](#)

Filing a new US PCT application in RO/IB using ePCT.

ePCT actions and communications with the IB.

External signatures and PCT declarations.

Sequence listings and ePCT.

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Upcoming webinars

Using ePCT to e-file in ISAs and IPEAs, filing Demands.

Doing *92bis* changes.

Docketing of PCT applications and making use of ePCT notifications.

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

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Upcoming webinars

How to register? Go to

https://blog.oppedahl.com/?page_id=8978.

How to learn of future webinars? Subscribe to my blog (<https://blog.oppedahl.com/>), or subscribe to the PCT listserv (https://oppedahl-lists.com/mailman/listinfo/pct_oppedahl-lists.com).

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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).
- Webinar 4. Thursday, March 23, 2023. Handshakes, eOwners, eEditors, eViewers, access rights groups, employee first day of work, employee last day of work. [Download the presentation materials.](#) [View the recording](#) (1:20).
- Webinar 5. Thursday, March 30, 2023. Shared address books, collaborative workflow, sharing with clients, sharing with outside counsel. [Download the presentation materials.](#) [View the recording](#) (1:10).

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Our topics

- Getting to know your ePCT workbench
- Portfolios
- Office profiles
- Cloning
- ePCT actions

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Getting to know your ePCT workbench

- What is the Workbench?
- Workbench filters
- Workbench + Portfolios
- Workbench – Search IA
- Workbench – My rights
- Workbench – Comment and Warning
- Workbench actions – manage access rights
- Workbench actions – archive
- Workbench actions – delete draft (New IA)
- Access suspended
- Viewing an international application (already filed)

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High-level filters

- 'Current IAs': all your active international applications;
- 'Last Accessed': IAs in the order in which you accessed them in the last month (most recent first);
- 'Drafts IAs': New IA drafts that have not yet been filed;
- 'Draft Actions': international applications that contain draft 'actions' that have not yet been submitted;
- 'Unpublished': all your active international applications that have not yet been published;
- 'Published': all your active international applications that have been published;
- 'Archived': international applications that you do not need to access on a regular basis and are 'hidden' from your default Workbench view;
- 'Advanced Search' provides advanced filter options.

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Columns

- 'Columns' allows you to customize which columns of the Workbench to show/hide and the Workbench contents may be downloaded as an Excel spreadsheet if required.

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Searching

- The search field can be used to quickly locate an international application that appears on your Workbench (i.e., you have access rights to the IA) by typing either the international application number or the file reference



The image shows a search interface. At the top, there is a search field with the placeholder text "Search" and a magnifying glass icon. Below the search field, there is a tooltip that reads "Search IA by application number or file reference".

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Searching

To search for an international application to which you do not have access rights, you must use the link 'Find IA outside of my Workbench' since it is necessary to indicate also the international filing date when searching for an international application that you do not have access rights to

The screenshot shows a search interface. At the top, there is a search bar with the placeholder text 'Search' and a magnifying glass icon. Below the search bar is a link labeled 'Find IA outside of my workbench'. Below this link is a form titled 'FIND IA OUTSIDE OF MY WORKBENCH'. The form contains two input fields: 'International Application Number *' and 'International Filing Date *'. To the right of the 'International Filing Date *' field is a calendar icon. At the bottom of the form are two buttons: 'Cancel' and 'Search IA'.

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Access rights

- Your access rights to each application on your Workbench is displayed as a link, which when clicked opens the IA in question and displays the full list of access rights for this IA.. Access rights to the IA may have been assigned by another eOwner to someone with whom you have not made an eHandshake and this is indicated when you expand the view of users with access rights as shown below

The screenshot shows the 'ACCESS RIGHTS' section. At the top, there are four buttons: 'Add eHandshake user', 'Add access rights group', 'Add Office eViewer rights', and 'History'. Below the buttons is a table with the following data:

Name	Email address	Rights eOwner	eHandshake user
Ann Bardini	ann.bardini@wipo.int	Yes	Yes
Riadh Test BEN GHACHEM	riadh.benghachem@wipo.int	No	No

The 'eHandshake user' column for the second user is highlighted in red.

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Comment


You can add a personal comment for an international application either directly from your Workbench or when viewing the contents of the international application. This comment will not be visible to other users.

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Comment

DATA DOCUMENTS ACTIONS ACCESS RIGHTS TIMELINE NATIONAL PHASE HISTORY SEND EPCT MESSAGE

1234567 PCT/IB2017/080020 ▾

My Comments For my eyes only. 

IA Status Not yet Published	Int. Filing Date 23 Jan 2017	ISA/EP Search copy not yet sent
Applicant(s) ABC COMPANY (+1) Inventor(s) SMITH, John		
Portfolio	Team at IB PCT RO/IB Team	Language of Filing EN

WORKBENCH ▾

Current IAs Drafts Unpublished Published Archived Search

Filter Applied | Columns | Download list

IA Number ▾	IA Status ▾	File Ref ▾	IFD ▾	Priority ▾	Applicant Name ▾	My Rights ▾	My Comments ▾	Warning ▾
EPCT/IB2017/080020	Not yet Published	1234567	23 Jan 2017	24 Jan 2016	ABC COMPANY	eOwner	Edit or my eyes only	EditThe applicant w...

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Warning

- You can add a warning message to an international application either directly from your Workbench or when viewing the contents of the international application. The warning message will be visible to all users who have access to the international application, both from their Workbench or when they are viewing the contents of the international application.
- You can choose to be notified each time a warning message is updated by another user for an international application to which you have access rights by selecting the corresponding Notifications preference.

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Warning

The screenshot displays a software interface for managing an international application. At the top, there is a navigation bar with tabs: DATA, DOCUMENTS, ACTIONS, ACCESS RIGHTS, TIMELINE, NATIONAL PHASE, and HISTORY. On the right side of this bar is a button labeled "SEND EPCT MESSAGE". Below the navigation bar, the application number "1234567 PCT/IB2017/080020" is displayed with a dropdown arrow. A red rectangular box highlights a warning message: "Warning The applicant wishes to withdraw before publication - powers of attorney missing!". To the right of the warning message is a small edit icon. Below the warning message, there is a table of application details:

IA Status Not yet Published	Int. Filing Date 23 Jan 2017	ISA/EP Search copy not yet sent
Applicant[s] ABC COMPANY [+1] Inventor[s] SMITH, John		
Portfolio	Team at IB PCT R0/IB Team	Language of Filing EN

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Warning

WORKBENCH ▾

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

Show Filter | Download list | Columns | Show rows (ALL) | Default sort order (IA Number)

<input type="checkbox"/>	IA Number ^o	IA Status ^o	File Ref ^o	Priority ^o	IFD ^o	Applicant Name ^o	My Rights ^o	My C...	Warning ^o	Last Accessed ^o
<input type="checkbox"/>	PCT/EP2018/080011	Not yet Published	TESL0000	28 Apr 2017	09 Apr 2018	DEPARDEIU, Gérard	sOwner	Add	Fees not paid	25 Jul 2019

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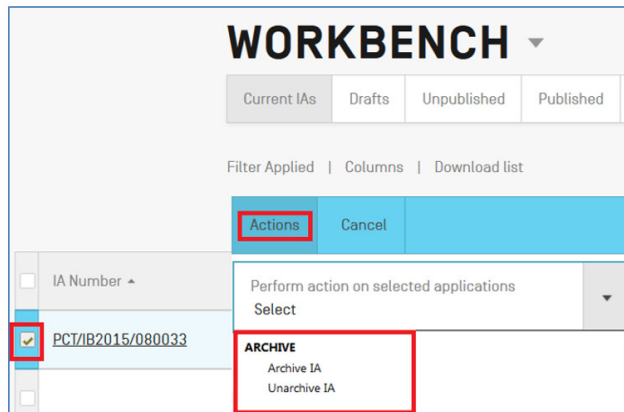
Manage access rights

- See previous webinar 4

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Archive

- It is possible to 'archive' international applications that you do not need to access on a regular basis so that they are hidden from your default Workbench view. Simply select the applications on your Workbench and then choose the relevant operation on the dropdown list of 'Actions'



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Archive

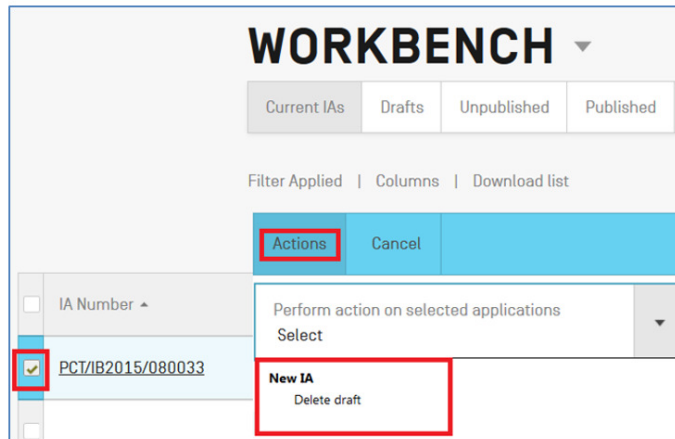
- In order to facilitate Workbench management, a shortcut allows you to 'archive' IAs for which the end of the international phase has passed (30 months from the priority date + 2 additional months for entry into the national phase in certain designated Offices) in one click



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Delete draft (new IA)

- If you have created draft New IAs that you do not intend to file and wish to discard, it is possible to delete them from your Workbench. Simply select the draft New IAs on your Workbench and then choose the relevant operation on the dropdown list of 'Actions'



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Access suspended

- If the 'IA Status' column of the Workbench shows 'access suspended' for an international application, this means that online access to the confidential data and documents of the application is suspended, even for users who have signed in with strong authentication. The only documents that are visible in the contents of the international application are those that were previously uploaded by you.
- Access to an international application is usually suspended due to the receipt by the IB of a request for change under PCT Rule 92bis which is pending processing. If the 92bis change concerns a change of applicant or agent, this may affect the access rights to the IA via ePCT and access may need to be suspended.

The screenshot shows the 'WORKBENCH' interface with tabs for 'Current IAs', 'Last Accessed', 'Draft IAs', 'Draft Actions', 'Unpublished', 'Published', and 'Archived'. Below the tabs, there are links for 'Filter applied', 'Save filter', 'Download list', 'Columns', 'Show rows [ALL]', and 'Default sort order [Last Accessed]'. A table lists international applications. One application, 'PCT/IB2017/080195', is highlighted in grey. The 'IA Status' column for this application is 'Access suspended', which is highlighted with a red box. Other columns include 'File Ref', 'Priority', 'IPO', 'Applicant Name', 'My Rights', 'My Comments', 'W...', and 'Last Accessed'.

While access to an IA is suspended, it is nevertheless possible to send an 'ePCT Message' or to upload documents using the Upload Documents action.

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History

HISTORY

Filter

Start Date End Date

Include detailed document history

User Name	Type Of Action	Audit Info	Event Date
Jane Doe	Save Draft Action	Rule 92bis	13 Mar 2017 11:34:02 CET
[EP] Hans Fritz	Form generated	Recipient IB - Written Opinion of the International Search Authority [16] International Search Report [18]	10 Mar 2017
Jane Doe	Update IA warning	IA Warning updated.	09 Mar 2017
[IB] Tamira Lombardi	Form generated	PCT/IB/345	21 Feb 2017
victoria cortiello	Upload document	Recipient IB - ePCT Cover Letter [8] Power of Attorney [9]	23 Jan 2017
victoria cortiello	File Draft IA	Draft IA 1234567 filed as IB2017080020	23 Jan 2017

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My history

ANN BARDINI

- MY ACCOUNT
- ENGLISH
- Address Book
- Access rights groups
- My History
- Generate eOwnership code
- PCT Resources
- Office Profiles
- LOGOUT

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My history

MY HISTORY

Filter | Download list

Start Date: 14/03/2017 | End Date: 21/03/2017

Reset | Apply Filter

IA Number	IFO	File Ref	Type of Action	Audit Info	Event Date
PCT/AT2016/080029	30 Nov 2016	AtransRC-2	Grant user access to IA	Granted eOwner rights to Ann Bardini.	21 Mar 2017
PCT/AT2016/080029	30 Nov 2016	AtransRC-2	Grant user access to IA	Granted eViewer rights to victoria cortello.	21 Mar 2017
PCT/AT2016/080029	30 Nov 2016	AtransRC-2	Grant user access to IA	Granted eViewer rights to Riadh BEN GHACHEM.	21 Mar 2017
PCT/AT2016/080029	30 Nov 2016	AtransRC-2	Grant user access to IA	Granted eEditor rights to PIEROU PASCAL.	21 Mar 2017
PCT/AT2016/080029	30 Nov 2016	AtransRC-2	Grant user access to IA	Granted eOwner rights to Murray Leach.	21 Mar 2017
PCT/AT2016/080029	30 Nov 2016	AtransRC-2	Grant user access to IA	Granted eEditor rights to Aymeric BLANC.	21 Mar 2017
PCT/02017/080114	20 Mar 2017	MyRef-10882	Withdraw Priority Claim(s)	Recipient IB - Power of Attorney (14) Withdrawal of priority claim (33)	21 Mar 2017

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Add bookmark

WIPO | ePCT | PCT/IB2017/080095 | GENEVA OCT 18, 2017 5:27 PM CEST | SUPPORT | ANN BARDINI | Close

DATA | DOCUMENTS | ACTIONS | ACCESS RIGHTS | TIMELINE | NATIONAL PHASE | HISTORY | SEND EPCT MESSAGE

000AB-0212D PCT/IB2017/080095

- Archive
- Add to Portfolio
- Warning Message
- My Comments
- Clone IA
- View draft IA as filed via ePCT
- IA Status Report (PDF)
- IA Status Report (XML)
- History
- Add bookmark**

Int. Filing Date 13 Mar 2017	ISA/EP Search copy not yet sent
Team at IB PCT RO/IB Team	Language of Filing EN

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ePCT message

SEND EPCT MESSAGE

Select recipient *
IB

Select subject *

- ePCT access rights
- DAS assistance
- Processing status of a document
- Fees & payments
- International publication
- ISR & Written opinion
- Chapter II Demand/IPEA
- Translation
- Other

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View application

- Contents
- Data: Bibliographic data, target publication date, preview front page and full draft international publication, translation of the title
- Documents
- View document information + PATENTSCOPE visibility
- Document source
- Document status
- View/edit access rights
- Timeline
- History
- ePCT message
- Accessing functions available for filed applications
- Archive
- Add/move to portfolio
- Warning message
- My Comments
- Clone IA
- View draft IA as filed via ePCT
- IASR (PDF), IASR (XML)
- History
- My History
- Add bookmark

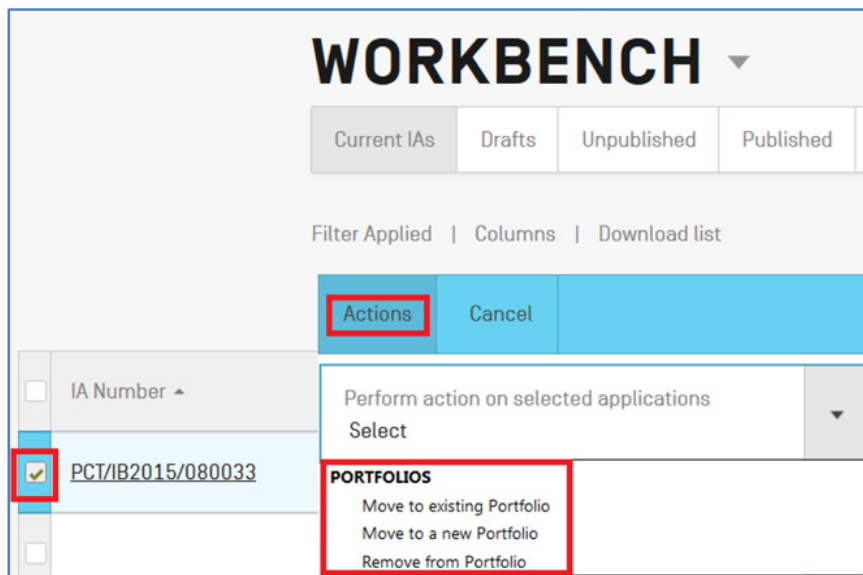
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Portfolios

- As an alternative to viewing your international applications as a single list on your Workbench, you can also opt to organize your international applications into personal folders or 'portfolios' and then toggle between the 'Workbench' or 'Portfolio' view via the dropdown menu icon on the Workbench
- You can create new portfolios and subsequently rename and delete them - even if a portfolio is deleted, the international applications that were contained in it are of course not deleted and remain visible on the Workbench.
- To add one or more international applications to a portfolio, simply select the applications on your Workbench and select the relevant operation on the dropdown list of 'Actions'
- Portfolios are personal to you – if you move international applications from one portfolio to another or rename or delete portfolios, this does not affect the view that any other users with shared access rights have to the same international applications.

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Portfolios



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Office profiles

WIPO
IP PORTAL MENU ePCT HELP PASCAL PRIOU WIPO

GENEVA - JUL 29, 2020 4:42 PM CEST

INFORMATION FILING FEES ESEARCH COPY SIGNATURE TYPES SETTINGS DISTRIBUTION CLOSED DATES OUTAGE DATES

OFFICE PROFILES

Office
IB - International Bureau of WIPO

MY ACCOUNT
MY HISTORY
PCT RESOURCES
OFFICE PROFILES
LOGOUT

- OFFICE INFORMATION
- FILING METHODS
- FEES AND PAYMENTS
- ESEARCH COPY
- ACCEPTED SIGNATURE TYPES
- PROCESSING SETTINGS

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Office profiles

PROCESSING SETTINGS

As Receiving Office (RO)

Applicants have the ability to upload documents using ePCT
Applicants have the ability to send ePCT messages
Applicants have the ability to give eViewer access rights to the receiving Office before filing if ePCT-Filing is used
Processing is performed in ePCT, documents under the RO tab have a status (Not yet processed/Processed).
ePCT Notifications (with emails) are expected to be used as primary trigger for exchanges.
IB official communication of forms is expected, see distribution settings below.
Communication is instant and online.
The RO can create paper new IAs using ePCT.
Applicants can file with ePCT Filing with all documents and data immediately available to applicant and to RO for processing. RO must use the transmit to IB action in ePCT to send application to IB.

As International Searching Authority (ISA) Applicants have the ability to upload do ...

As International Preliminary Examining Authority (IPEA) Applicants have the ability to submit Ch ...

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Office profiles

▼ FILING METHODS

Notifications concerning requirements and practices for electronic filing under Section 710(a)

Accepted PAPER, E-Filing (PDF), E-Filing XML, Scanned e-filing
ePCT-Filing Available (hosted by WIPO)

ePCT Filing server start date for RO 01 January 2013

OFFICE OUTAGE DATES

Outage dates per year

2020

Thursday, 26 November 2020

Friday, 27 November 2020

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Cloning

CREATE NEW IA (BASED ON 00000AB-2102)

Applicant/Agent's file reference *

Access rights groups *

Access rights in the new IA as cloned
Group1
Group2
Jane Doe

IMPORTANT: Cloning a New IA does not automatically include the following data and documents listed, unless you check the box.

International search

- Any sequence listings in text format that are also part of the international application as filed will not be copied.

Declarations

- Any declaration of inventorship under Rule 4.17(v) will not be copied.

Documents

- Data and documents making up the IA contents screen, including any translation, will not be copied.

Access rights

- You will be automatically assigned eOwner access rights to the New IA created as a result of this action. In addition, access rights will also be automatically assigned to the default access rights group selected above.

Check this box to include all data and documents in the New IA as cloned

Cancel

Confirm

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ePCT actions

- Actions
- Draft Actions
- Signing Actions, including external signature
- Filtering IAs with draft Actions saved
- Action – Upload documents
- Action – Amendments under Article 19 (text format only)
- Action – Create power of attorney
- Action – Update Applicant/Agent's file reference
- Action – Declarations under Rule 4.17
- Action – Make international application available to DAS
- Action – Observations on close prior art
- Action – Obtain priority document from DAS
- Action – Online Payment at RO/IB (post-filing)

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ePCT actions

- Action – Prepare and submit indications relating to biological material (RO/134)
- Action – Request for early publication
- Action – Rule 92*bis* change request
- Action – Submit Chapter II Demand
- Action – Licensing availability request
- Action – Withdraw Chapter II Demand
- Action – Withdraw designations
- Action – Withdraw election(s)
- Action – Withdraw International Application
- Action – Withdraw priority claim(s)
- Action - IA in RO phase

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Possible live demo

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Please complete the evaluation questionnaire

- Yes please complete it
- Pay it forward

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Thank you