



European Communities Trade Mark Association

OHIM E-BUSINESS USER GROUP MEETING OF 10 AND 11 MAY 2010 IN ALICANTE

Twice a year, the OHIM organises at the OHIM headquarters an e-business Users' Group meeting, which brings together e-business users in Alicante. At these meetings, OHIM informs the users of the latest developments in electronic tools and collects feedback and suggestions regarding existing e-business services and future ones. For the first meeting of 2010, two days were arranged. On 10 May 2010, ECTA was represented by Jordi Güell, ECTA Member, Curell Suñol, Spain and on 11 May by Carlos Alvarez, Durán-Corretjer, Spain.

MEETING OF 10 MAY 2010

Reported by Jordi Güell, ECTA Member, Curell Suñol, Spain

The meeting of 10 May 2010 was a Focus Group meeting to present and discuss users' requirements for a new online project called "the Portal", which is intended to replace MyPage.

The new Portal is intended to be a much more useful and interactive platform between the Office and users. The Portal is planned to contain a new tool with banking services, a reminder section of deadlines with the Office, a "news" section, blogs and also links with national trade mark offices, the latter being the most controversial topic that needs further discussion with users (see further details in the report of 11 May 2010 below).

Participants were invited to test the OHIM database for comparison of goods and services. This new tool compares classes, goods and services and allows a filter on identity, high similarity, similarity, average degree of similarity, low degree of similarity and dissimilarity. The results show the decision number (if any) that declared the goods/services similar or dissimilar and provides a list of codes to know the reason why the goods/services were regarded as similar, i.e. nature, purpose of use, complementary, etc. This tool is supposed to provide more consistency and predictability to first instance decisions and, fortunately, is not binding for the Boards of Appeal. The final version shall be opened to users soon.

MEETING OF 11 MAY 2010

Reported by Carlos Alvarez, Durán-Corretjer, Spain

Etienne Sanz de Acedo (OHIM) opened the meeting of 11 May and welcomed the participants.

As an introduction, Arkadiusz Górný (OHIM) presented an 'Update on Online Services' as follows:



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- Information:
- Bibliographical Data on CTMs
 - Electronic certificate
 - Basic advanced Search
 - Receive Alerts when status changes (CTM Watch) only for My Page Users
 - Getting information on TM in EU, including IR.
- Filing:
- CTM Filing: New features Search for classification, validate your own classification
 - RCD E-Filing Web Form in 1 page, option to save your form
- On Line Platform, My Page:
- E-Communication
 - E-Renewal Manager for CTM/RCD
 - On line access to whole content of the file
 - On line modification of personal data
 - CTM Watch
 - Current account holder can order online copy of documents
 - Save draft e-filing forms and search

The following items were discussed at the meeting:

1. Feedback from users on the current systems

Rita Khaitan (GlaxoSmithKline/AIM) explained some problems regarding My Page related to:

- How to identify the office user's inside My Page?
- Why is necessary to use E-Comm in the OHIM sense instead of standard e-mails communications between OHIM and users?
- Found problems in My Page with many users.
- Due to these problems they don't use My Page.

Elia Sugrañes (SUGRAÑES / FICPI) said that it was necessary to respect the users' reference and to manage different users' inside My Page.

Peter Dost (Novagraaf) informed about the problems with the performance of My Page and asked what tests OHIM conducted with this application. Miguel Ortega (OHIM) recognized this problem and informed that there was currently a limit of users connected to My Page which would be solved in the New Portal. A set of robots will be executed to test the new release.

José María Penalva (Lovells) asked whether it was possible to use either e-mail, post or fax with the E-comm concept. Etienne Sanz de Acedo (OHIM) answered that E-comm was the only way.

Andreas Renck (Lovells / GRUR) commented that it was better to communicate by e-mail between OHIM and users.

Begoña Uriarte (PricewaterhouseCoopers) explained that the Spanish Office used e-mail communications to advise of some decisions.



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Elia Sugrañes (SUGRAÑES / FICPI) proposed to separate users into two groups: a group of users who are interested in using E-comm and a group of the rest of users.

Carlos Alvarez (Durán-Corretjer / ECTA) explained that OEPM publishes an electronic Bulletin and that the E-comm concept as explained by OHIM, was only E-comm for the OHIM but it was not E-comm for the users because the users must go to My Page to recover and manually transfer the communication to their own electronic systems.

José María Penalva (Lovells) explained that in My Page, E-communications could be received twice, and that there were problems with attached files. Etienne Sanz de Acedo advised that these problems would be solved.

George Munelly (FRKELLY) explained that they had problems with different applicant addresses.

Peter Rodinger (OHIM) informed that in summer (June-September 2010) they would test the RCD in My Page. Nathan Wajsman (OHIM) also informed that they wanted to have 100% security against possible attacks by hackers.

Andreas Renck (Lovells / GRUR) asked if it was possible to have the seniority information in TM-View. Andrea Di Carlo (OHIM) informed that TM View had a limitation, and it was not possible to include all relevant data however they would try to propose the addition of the seniority information to the rest of Offices.

Rita Khaitan (GlaxoSmithKline/AIM) asked if it was possible to claim seniority online. Nicolas Vigneron (OHIM) informed that it was possible in the E-Register through My Page.

Catherine Montheil (Procter & Gamble France) informed that they had problems when several users accessed the same profile in My Page. Nicolas Vigneron (OHIM) informed that they would look into this.

Etienne Sanz de Acedo (OHIM) closed this item, and proposed to use ONLINE workshops in order to improve the use of the Applications.

2. Future e-business services: E-Register Service

Diego Eguidazu (OHIM) presented the state of the Electronic Register Project for CTM & RCD:

- The E-Register is only for My Page users;
- Owners and Representative have a slightly different interface;
- There are two areas, one dedicated to 'My Details' (representatives may see also 'My Owners'), and the second dedicated to 'My Portfolio';
- Change Client's reference: entered in the e-filing process and used in the correspondence. It is easy to change and the change is updated immediately;
- Change of name and address. CTM/RCD owners can change their details, Representatives can change their own details as well as owner's details:
 - The change is updated immediately, it is possible to download a PDF file with the data related in the change;
 - A communication is sent by E-comm or fax.

- Change of professional representation: an owner can add, replace or delete the name of the representative. Representatives can delete or add files from their portfolios. There is a limitation to adding an owner's files and they must be added one by one.
- Transfer of applications: an owner may transfer CTM/RCD's to another entity, the representative of the owner may request the transfer to the assignee, or the representative of the assignee may request the transfer from the current owner. In all cases the assignee may be a new person. The transfer will be communicated to the old representative. In general, the change of owners are not changed immediately, the transfer must be checked by an examiner. Peter Rodinger (OHIM) informed that there could be some cases in which it was not necessary to be examined.
- The status of the project is that the second test took place in March 2010 with corrections being made from March-June 2010 . The third round of tests will take place in July 2010.

Rita Khaitan (GlaxoSmithKline/AIM) asked if it was possible to upload a list of CTMs plus clients reference. Diego Eguidazu (OHIM) answered that it was not possible.

Rita Khaitan (GlaxoSmithKline/AIM) asked how long OHIM archived the files for. The answer was that at the moment OHIM archived files forever.

3. Future e-business services: Opposition ONLINE Project

Caroline Hetterschijt (OHIM) presented the state of the Opposition ONLINE Project:

The Opposition ONLINE Project is only for My Page users and have next steps:

Phase 1

- Represent an improved version of E-Opposition, harmonized with CTM/RCD E-Filing, with immediate opposition number and receipt;
- Contains the list of oppositions and opposed applications;
- First action: e-filing an opposition notice;
- The estimated GO LIVE is during Summer 2010.

Phase 2

- Represent a platform to manage opposition procedures containing Alerts, Time Line and Action Manager:

- Alerts:
 - There are two screens, one related to the owner as applicant, and the second to the owner as opponent;
 - The list in the screen will contain an alert when the other party has a direct request. This alert will be also available via email;
 - OHIM asked if the next pending task in the list was useful or not, and if yes, whether only the date or also the task name. In general people answered 'yes' with both variables.
- Time line:
 - This will be the first part of the main action manager screen;
 - Objective is to have a global view of the process;
 - Time Line will be actualized each time user enters the file;
 - Relevant dates begin on the opposition filing date and end on the date of closure of the file;

- There will be variable information such as date and information about the next pending task. OHIM asked whether any other variable should appear. It is proposed to add a reminder date (entered manually);
 - There was a discussion about the date on the screens and OHIM informed that the date on the screens responded to the date in the BackOffice, the date used by the examiners was the same;
 - Reyes Campello (CEALAW / INTA) asked if it was possible to have a search tool to check opposition alerts for the next 2 months. OHIM took note of this request.
 - Rita Khaitan (GlaxoSmithKline/AIM) asked if it was possible to export the information to files, for example, deadline, next due date and comment field.
 - Rita Khaitan (GlaxoSmithKline/AIM) asked what happened if two users were working with the same opposition.
- Action Manager:
 - Actions will be context specific;
 - Action Manager will cover the whole opposition procedure;
 - Unilateral requests are always available;
 - Joint requests: in the case of actions that require two signatures, they can be automatically accepted by the Office. Action manager will allow the management of the communication flow between the parties and send a joint request to the Office. The BackOffice will receive the request as a new mail task and the examiner will then send the official communications.
- OHIM Workflow 1 Proposal (P1 is Party 1, P2 is Party 2):
 - P1 sends a request to P2 → P2 receives an alert, and;
 - P2 accepts the request which is submitted automatically to the Office. BackOffice updates new dates and sends official notifications to both parties;
 - If P2 rejects or does not accept the request, P1 receives a rejection. P1 can initiate unilateral request.
 - OHIM Workflow 2 Proposal (P1 is Party 1, P2 is Party 2):
 - P1 sends a request to P2 → P2 receives an alert, and;
 - P2 accepts the request and a confirmation of P2 is sent back to P1, and P1 proceeds to submit the request to the Office. BackOffice updates new dates and sends official notifications to both parties;
 - If P2 rejects or does not accept the request, P1 receives a rejection. P1 can initiate unilateral request.

Elia Sugrañes (SUGRAÑES / FICPI) proposed the possibility to use either of the two workflows.

José María Penalva (Lovells) proposed a combination of the two workflows.

OHIM asked for the time out in case the P2 does not answer the request.

Reyes Campello (CEALAW / INTA) proposed that P1 could cancel the request if P2 does not answer the request.

José María Penalva (Lovells) proposed that the system changed status automatically after a period of time.

OHIM took notes of all these proposals and will study them.

The project will start in June 2010. The estimated GO LIVE is first half 2011.

4. Future E-Business services: Future Portal

Sonia Perez (OHIM) presented the state of the Future Portal:

Objectives

Need for a Portal to:

- Bring OHIM online services to the State of the Art;
- Phase out MyPage.

Five main capabilities

- Aggregation
- Federation
- Personalization
- Single Sign ON
- Permissioning

Other targets

Available 24 hours x 7 days

- High performance
- Scalability
- Security Standards
- Powerful search engine
- Compatibility with most user browsers
- Compliant with OHIM AT Architecture

Approach to the work

Integration with all the existing OHIM Applications

Project Plan

- 3 Stages

- Requirement Pilot level
- Obtaining requirements
- Development of a pilot, delivering a better version, technical documentation and functional requirements.

- Portal Development

- Objectives: implementation of standard portal features, integration of some E-Business applications and Integration of My Page;
- Delivering a Portal in Production with objectives implemented.

- Portal Completion

- Objectives: Decommission of My Page;
- Delivering a Portal in Production integrated with all E-Business Applications.

- Duration

- Pilot: 6 months from Kick off (May) plus 2 months for Restricted GO Live, available first quarter 2011;
- Portal Development: 9 to 12 months from the End of Pilot;
- Portal Completion: 6 months from first delivery of Portal in Production.

5. Future E-Business services: Portal Concepts

Jorge Márquez, member of the ETIQ's Usability Team, explained the results of the Focus Group presented on 10 May 2010.

The main goal of this focus group was to explore new ways of communications between the Office and the applicants through the different information tools.

The most relevant aspects of this focus group were related to the users' needs, that could be resumed as follows grouped by functionality:

Access

- Users suggested to have a single login to interact with OHIM's Apps (Account online vs My Page);
- It is a common practice to have different roles to manage relations with OHIM;
- Users proposed to replicate this work model granting separate access by trade marks, design and accountability;
- They are willing to manage access profiles.

Design and information architecture

- Users would like to include iconography in order to differentiate sections, contents and profiles;
- Users recommended to use colours to create more visual impact;
- The group highlighted the importance of being able to use their own references from notifications to easily handle the information received;
- One of the main concerns was the information order (notification arrangement, owners, internal documents, etc.);
- Unify application access will simplify access, users said "The more options the more complex the portal gets";
- Some users don't know whether to go to OHIM's website or to My Page to access some applications;
- Users said that it would be great to mix their internal data with OHIM's file in order to speed up the filing process. Some fields could be completed with standard data.

Alerts and communication systems

- All agreed that email notification is the best way to communicate, although they would like to export or synchronize those communications with their own systems, to centralize information;
- Users would like to be able to choose the type and the right person to receive communications (customization) to speed up answering process;
- Users want a payment gateway linked with the OHIM account to keep updated and to be sure that always have funds to pay.

Elia Sagrañes (SUGRAÑES / FICPI) said that now 'My Page' was a mixture, and it should be a tool to operate with OHIM.

6. Future E-Business services: Future search services

OHIM presented the state of the Future search Services:

Current State

The information related to CTM and RCD is disseminated:

- Search Tools;
- CTM and RCD Bulletin;
- Online Access to CTM files;
- CTM Watch.

New project called COPLA has been launched

The objectives is to convert the dissemination of all CTM/RCD information in a quality-focused, productive, agile, user-friendly, accessible, efficient and cost-effective way:

- Provide 100% reliable and timely updated information in all ONLINE services;
- Increase user friendliness by providing an improved search service;
- Compliance with the Office's legal obligation of publication.

What is the relevant information?

- Option to search by any data; combine search criteria; normal and expert search;
- Get last updated data on CTM/RCD; historical, main events;
- Search for documents;
- Search when CTM/RCD has been published and for what purpose.

A solution proposed

- Single access via search screen;
- All information in a single place for RCD and CTM? Included documents and historical data;
- What about setting your own alerts for being informed of any change? For your files and third party changes;
- If you want to print it out or download it you can do it;
- If some services would only be available to MyPage users;
- How you want to receive and send communication to OHIM.