



EPO Online Filing

Installation and troubleshooting

Version 5.06

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Using the Online Filing software (OLF)

The EPO grants users the right to use the Online Filing software free of charge for an unlimited period. The software is exclusively intended for online filing with the EPO, i.e. for European patent applications and other documents.

Please refer to the EPO website and go to **Applying for a patent > Online services > Online filing > Download documentation**

(<http://www.epo.org/applying/online-services/online-filing/documentation.html>) to download the most recent version of the **Conditions for the loan and use of the Online Filing software** (<http://docs.epoline.org/onlinefilingdocs/olf-license-en.pdf>).

2 Document contents

This document describes the most important aspects of the installation of Online Filing (OLF) version 5.06.

Online Filing enables users to file patent applications under the EP, PCT and national procedures of the EPO, WIPO, and the national offices electronically, using secure Internet connections and state-of-the-art electronic commerce technology for secure transactions.

Intended audience

This guide is intended for administrators who are responsible for installing and providing support for Online Filing software in networks or on stand-alone PCs.

Document structure

- The chapter **Online Filing - Overview** (p. 6) provides a basic explanation of how OLF works and includes links to various support material on installing and using the software.
- The chapter **Installation requirements** (p. 9) provides an overview of installing OLF on Microsoft Windows operating systems and describes the hardware and software requirements.
- The chapter **Initial installation** (p. 14) describes how to install OLF version 5.06 for the first time and select the appropriate installation mode.
- The chapter **Changing the configuration of OLF services** (p. 39) provides an overview of how to manually edit the OLF services' configuration files for the network, proxy and port settings.
- The chapter **Installation maintenance** (p. 44) describes how to perform a reinstallation to update the OLF software (including national plug-ins).
- The chapter **Uninstalling** (p. 56) describes how to completely uninstall the OLF software.
- The chapter **Reinstallation with data migration** (p. 64) explains how to restore OLF after a fatal error and how to migrate to another computer and import all existing data.
- The chapter **Using the PMS gateway interface** (p. 68) outlines the steps needed to use and configure the PMS gateway interface.
- The chapter **Troubleshooting** (p. 70) provides help on how to troubleshoot the software and offers solutions to specific problems.
- The **annex** (p. 81) contains various reference information and lists, including tips on how to solve specific installation problems.

3 Online Filing - overview

3.1 Online Filing help

The EPO operates a helpdesk for Online Filing users.

Send us your question using our contact form on the EPO website at www.epo.org/contact-form.

Our experts will get back to you as soon as possible.

You can also reach us by phone or e-mail:

Open:	Monday to Friday, 08:00 to 18:00 (CET)
Tel.:	+31 (0)70 340-4500
Fax:	+31 (0)70 340-4600
e-mail:	support@epo.org
Internet:	Online filing on the EPO website: www.epo.org/online-filing Contact us online on the EPO website: www.epo.org/contact

Important note for customers using Online Filing version 5 Service Pack 3 (Build 5.0.0.053) or earlier:

- As of 1 September 2012, the EPO has withdrawn customer support for Online Filing versions Service Pack 3 (and earlier).
- As of 1 March 2013, the EPO has ceased to accept applications filed with Online Filing versions Service Pack 3 (and earlier). However, PCT applications to the EPO as receiving office are still accepted by the office's receiving server.

Online Services forum

You will find a lot of advice and information on the **EPO's Online Services discussion forum** (<http://forums.epo.org/onlineservices/>). As a registered user, you can post questions and exchange experiences on the subject of Online Filing or other online services. The EPO's experts or other users will answer your questions and help where possible to solve your problem. The **Online Filing forum** (<http://forums.epo.org/onlineservices-your-say-online-filing/>) and others such as the smart card forum are only available in English.

Documentation

More information on how to use Online Filing can be found in the User Guide for version 5.06 and other documents. You can access this documentation on the EPO website under **Applying for a patent > Online services > Online filing > Download documentation** (<http://www.epo.org/applying/online-services/online-filing/documentation.html>).

Information on the system settings, user administration, and importing and exporting data can also be found in the File Manager online help. Server Manager functions, in particular backup/restore and Live Update, are described in both the User Guide and the online help.

FAQs

In addition, EPO User Support has compiled a list of frequently asked questions on how to use Online Filing. This and a lot more information besides can be found on the EPO website under **Applying for a patent > Online services > Online filing > FAQ** (<http://www.epo.org/applying/online-services/online-filing/faq.html>).

3.2 How Online Filing works

Online Filing is based on a typical client/server architecture with database. The application can be installed in either client/server or stand-alone mode.

- In the **network version** (client/server mode) the OLF server and the database are installed on a server computer linked to the network. The OLF thin client is the actual user interface and is separately installed on each workstation for the different users. The distributed OLF thin clients communicate with the OLF server via the network.
- In the **stand-alone version** the server and client both run on the same physical computer. In this case, only a single user can work with Online Filing.

OLF services, server and database

The Firebird database server - an open-source software application - serves as the platform for OLF services and has both read and write access to the Firebird database. The database operates as a central storage area, containing all data on patent applications, OLF user administration and the OLF address book. Running on the Firebird database server are the OLF services, including File Manager, the plug-ins for all EP procedures and the activated national procedures. These services are operated and the database is administered using the **Online Filing 5.0 Server Manager** tool installed on the server computer.

User connections via the thin client

Starting the thin client automatically launches File Manager which manages all applications and features various different resources for OLF administration, including tools for user settings and authorisation management. In File Manager, a new OLF session is started for every application opened. The OLF server does this by retrieving the relevant data from the database and blocking this record for other users. This ensures that an application can only ever be processed by one user at a time.

Data exchange between the server, client and filing office

The GUI engine generates the data for the electronic forms and sends it to the OLF thin client. As soon as the user enters data, the thin client saves it in a temporary XML file on the client computer. Only when the user actively saves the application on the client is the data sent to the server and written to the database. When the application is closed, the client deletes the temporary data from the hard disk and terminates the server connection. This unblocks the modified record in the database so that it can be edited once more by another user.

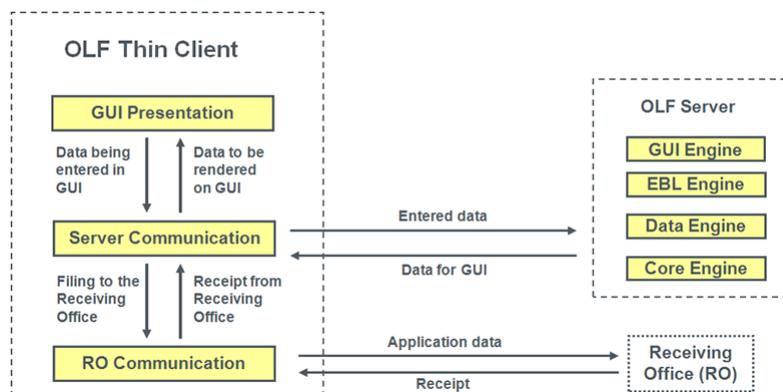


Figure 1: Communication between the OLF thin client, OLF server and the filing office

To send an application to the EPO - or another filing office - the client sets up a secure internet connection to the EPO's receiving server via HTTPS. User authentication is necessary before you can start filing and is done with your personal smart card and PIN. If filing is successful, the EPO's receiving server sends a receipt to the OLF client which, in turn, transmits this data to the local OLF service in PDF and XML format. Filing is now complete and the application's status in the database changes to **Sent**.

3.3 Communication via CORBA or SOAP

The thin client has two ways of communicating with the OLF server: via CORBA for the internal network (LAN) or via SOAP for the internet (WAN).

CORBA communication

For low-level communication between the Thin Client and the OLF Server within a LAN, the CORBA-IIOP protocol is preferable. At network level communication, the IIOP port (CORBA port) can be configured separately for the OLF File Manager and for every service (EP1001E2K, EP1200E2K, EP1038E, EPOPP0, PCT/RO/101, etc.)

! ***Note:** For stand-alone installation, all communication is done by CORBA. The OLF software is configured in such a way that it rejects any connection attempt using one of the SOAP ports on a stand-alone installation.*

SOAP communication

If you are using Online Filing in a company with subsidiaries connected through a WAN, you may want to use SOAP communication instead of CORBA. Although small performance losses might occur, SOAP can penetrate firewalls as communication is based on the HTTPS protocol.

! ***Attention:** Please note that SOAP is not compatible with the PCT procedure. The PCT plug-in can only communicate with the OLF server via CORBA.*

The CORBA and SOAP ports are usually configured during installation, see **Setting CORBA and SOAP ports** (p. 27). Each service has to have a separate port on the server for communication with the thin client. The ports in question must not be used by other processes on the server computer.

4 Installation requirements

! *Note: The Online Filing software can only be installed and only runs on computers with a suitable Windows operating system. Operating systems such as Linux or Mac OS are not supported.*

To install and run EPO Online Filing you will need:

- a smart card and a smart card reader
- the latest version of the Online Filing software
- a PC with Internet access

A starter kit containing a smart card and smart card reader and other information material can be obtained from the EPO free of charge.

- To order your starter kit, go to the EPO website at **Online services > Online filing** (<http://www.epo.org/online-filing>).
- Follow the prompts to register and submit your data.
Your smart card will be sent to you in around four weeks.
Once you have enrolled online for a smart card you will receive an e-mail containing your enrolment form.
- Please print this form out, check your data, sign the form and return it to the address shown on the form.

4.1 Latest version of the OLF software

The latest version of the OLF software, including all new updates and patches, is always available for download on the EPO website.

You will find the downloads under **Applying for a patent > Online services > Online filing > Download software for filing with the EPO** (<http://www.epo.org/applying/online-services/online-filing/download.html>).

Description of download	Name of download file	Remarks
5.0.6 Full package for installation of Online Filing (OLF) V5 (Build 5.0.6.111) (stand-alone and/or server and thin client) Where? Under Software , at the top of the Download page	OLF506.exe	Suitable for all types of installation
MSI and EXE file for alternative installation of Online Filing version 5 (thin client only) Where? Under More software - Other installations at the bottom of the Download page	The ZIP file contains OLF506client.exe and OLF506client.msi	The EXE file is for installing and updating the thin client on all Windows versions. The MSI file is especially for remote installation or automated software distribution in a network. This installation file should only be used for reinstallation, not for updates.

4.2 Hardware requirements

Client machine

To use the OLF Client version 5.0, your hardware should meet the following requirements:

Minimum hardware requirements	Recommended hardware requirements
<ul style="list-style-type: none"> ▪ Intel Pentium II processor (or equivalent), 500 MHz ▪ RAM: 512 MB ▪ 1 GB of available hard disk space ▪ Monitor: VGA/SVGA/XGA/SXGA, resolution 800*600 ▪ Smart card reader connected to USB port, e.g. GemPC Twin 	<ul style="list-style-type: none"> ▪ Intel Pentium 4 processor (or equivalent), 2.4 GHz ▪ RAM: 2 GB ▪ 4 GB of available hard disk space ▪ Monitor: VGA/SVGA/XGA/SXGA, resolution 1024*768 or higher ▪ Smart card reader connected to USB port, e.g. GemPC Twin

PC memory (RAM) requirements depend on the size of the application to be filed and the processor speed. A PC with 2 GB RAM is recommended if you are using Windows 7 or Windows Vista, in order to avoid problems with larger file attachments (applications over 50 MB in total).

Server machine

For use as an OLF server, a computer should be powerful enough to run the OLF services and all other current applications at the same time and with ease. In particular, it should have sufficient disk space to host the OLF database and create backup copies.

! ***Attention:** If your computer's hard disk is formatted with the FAT32 file system, the OLF database is limited in size to 2 GB. The NTFS file system, on the other hand, does not impose any restrictions.*

As a rule, it is advisable to keep the size of the OLF database under 4.5 GB so that a backup copy fits on a DVD. The larger the database, the longer it takes to complete operations such as updates, backups and restores. You can work much faster with a more moderately sized database.

You will need free disk space equivalent to three times the size of the OLF database for future updates. For example, if the database is 4.5 GB in size, you will need at least 13.5 GB free disk space for the software update.

For more information on updating the database and cleaning disk space, see **Updating the server** (p. 45) and **Compressing the database** (p. 53).

4.3 Software requirements

EPO Online Filing version 5.06 runs on all current versions of Windows.

Operating systems supported

The OLF software was tested on the following operating systems:

- Microsoft Windows XP (SP3), 32-bit and 64-bit
- Microsoft Windows Server 2003 (SP3), 32-bit and 64-bit
- Microsoft Windows Vista (SP2), 32-bit and 64-bit
- Microsoft Windows 7 (SP1), 32-bit and 64-bit
- Microsoft Windows 8, 32-bit and 64-bit
- Microsoft Windows Server 2008, 32-bit
- Microsoft Windows Server 2008 R2, 64-bit
- Microsoft Windows Server 2012, 64-bit

! *Note: Microsoft will stop supporting Windows XP on 8 April 2014. If you are planning to install OLF from scratch, it is recommended that you install it on a computer running Windows 7 or a suitable version of Windows Server. Bear in mind that using an outdated operating system without regular support and security updates puts your data security at risk.*

Arial Unicode font

Online Filing requires the **Arial Unicode MS (TTF)** font for both the server installation and the client installation. This font is automatically installed with the MS Office package.

The font is also available for license from **Ascender Corporation** (<http://www.ascenderfonts.com>).

To install Arial Unicode on a server - without installing the actual Office programs at the same time - proceed as follows:

- Use a Microsoft Office installation CD-ROM/DVD or installation file.
- Select the **Custom installation** mode.
- Under **Office Shared Features**, select the **Universal font** and the **Additional True Type fonts** options.
- Deselect all other MS Office components that you do not want to install.
- Start the installation.

The file ARIALUNI.TTF should be in the folder `/Windows/Fonts`. If it is elsewhere, you will be asked during installation to specify the exact path.

Additional software for the thin client

The following additional software must be installed on the computer for the OLF thin client or stand-alone version:

- Adobe Acrobat Reader version 10.1x or higher (10.0x is not supported)
- Gemalto Classic Client 6.2 Patch 1
 - ① Please note the different installation files for 32-bit and 64-bit systems.
- Gemplus driver for the smart card reader
 - ① The drivers are normally automatically installed if the Gemalto Classic Client was installed and the smart card reader was connected to the computer.

The EPO provides registered users with a free Online Services starter kit. The starter kit contains a smart card, a smart card reader and information material with direct links for downloading the additional software such as the latest version of the Gemalto Classic Client.

4.4 Windows user rights

To set the rights for a Windows user, you can either assign an account type to the user's account (**Control Panel > User Accounts**) or add the user to a local group (**Administrative Tools > Computer Management > Local Users and Groups**).

The minimum Windows user rights required for OLF correspond to the default account types or groups as follows:

	Windows XP / Windows Server 2003	Windows Vista / 7 / 8 Windows Server 2008 / 2008 R2 / 2012
Action	Account type/group	Account type/group
Install the OLF Server and the stand-alone version	Computer Administrator/ Administrators	Administrator/Administrators
Install the OLF thin client	Computer Administrator/ Administrators or Power Users	Administrator/Administrators
Start Server Manager (network version/stand-alone version)	Computer Administrator/ Administrators	Administrator/Administrators
Start the thin client (stand-alone version)	Limited/Users	Administrator/Administrators (*)
Start the thin client (network version)	Limited/Users	Standard user/Users

(*) Administrator rights are required in Windows Vista / 7 / Server 2008 to use the PCT plug-in. Standard users can operate the File Manager and the EP plug-ins.

Adapting rights

If your company has a special rights management system, compare the rights in your groups with those in the standard Windows groups. Where necessary, change the rights for your groups to give Online Filing users unrestricted access.

Run as Administrator

In Windows (Vista and above) a user who is logged on can start programs with administrator rights without having to first log off. Windows prompts you to enter an administrator user name and password when starting certain programs or changing system settings. Once authentication is complete, you can proceed as an administrator.

Even if you are already logged on as an administrator, you must start OLF Server Manager explicitly as an administrator; see **Testing the server** (p. 32).

4.5 Further information

Service status in Windows

The services used by Online Filing are configured during installation to start automatically with Windows; see **Checking the status of the OLF server and OLF services** (p. 70). Make sure that your system allows you to configure services that start automatically before you install them.

Using remote-access software

Remote-access software can generally be used without any problems. Select the `/console` option if working with Microsoft Remote Desktop. This option may appear as `/admin`, depending on the operating system used.

Display settings in Windows

The font size for the screen should be set to **Normal** or the **default** option; see **Optimising the display settings** (p. 75).

5 Initial installation

The following section describes how to install EPO Online Filing on Windows 7. Any deviations from this procedure for installation on other Windows versions are indicated at the appropriate place in the text.

- Read **Initial installation checklist: client/server** (p. 14) or **Initial installation checklist: stand-alone** (p. 15) if you have never installed any earlier versions of Online Filing on the target machine and you want to install Online Filing for the first time.
- If you want to operate Online Filing in a network, first install the **server** ("**Server installation**" p. 19), then the **thin client(s)** ("**Thin client installation**" p. 35).
- If you only want to operate Online Filing on a single PC, select **Stand-alone installation** (p. 38) as the installation mode.
- If you have already installed Online Filing and now want to update it, refer to the chapter **Installation maintenance** (p. 44).

5.1 Initial installation checklist: client/server

The following checklist details the most important steps for installing the software for the first time in a client/server network.

- Make sure you have the latest installation files to hand; see **Latest version of the OLF software** (p. 9)
- Choose how you want to use the application, i.e. in a network with server and client(s) or in stand-alone mode; see **How Online Filing works** (p. 7)
- Ask future users where (i.e. with which national office) they want to file applications online so that the relevant plug-ins are activated when OLF is installed
- Install any additional software necessary; see **Software requirements** (p. 11)
 - Arial Unicode font (for server and client)
 - Adobe Acrobat Reader (for client)
 - Gemalto Classic Client and Gemplus smart card driver (for client)
- Make note of the data for configuring the OLF server in your network:
 - IP address and hostname of the server computer
 - Free HTTP port number on the server (for online help)
 - CORBA and SOAP ports on the server that are available (or disabled or already in use)
 - IP address, hostname and port of the proxy server (if a proxy server is used to set up the internet connection to the EPO)
 - If necessary, user name and password for the proxy server
- Give all users in your network ample warning of the impending server disruption as it will have to be restarted after the OLF server has been installed
- Install the OLF server; see **Server installation** (p. 19)
- Start Server Manager and check the status of all OLF services; see **Testing the server** (p. 32)
- Use **Live Update** to check if there are any updates or patches available for Online Filing; see **Performing a live update** (p. 34)
 - Download all updates
 - Install all updates
 - Restart all OLF services in Server Manager
 - If necessary, restart the OLF server too
- **Install a thin client** ("**Thin client installation**" p. 35) for the Online Filing administrator first. Then, in demo mode, send a test application to a filing office's OLF demo server; see **Testing the thin client** (p. 37)
- Configure all users and groups for your company staff under User Administration in OLF
- Install the thin clients for all users and any additional software necessary
- Test the client/server connection; see **Testing the thin client** (p. 37)

5.2 Initial installation checklist: stand-alone

The following checklist details the most important steps for stand-alone installation.

- Make sure you have the latest installation files to hand, see **Latest version of the OLF software** (p. 9)
- Choose how you want to use the application, i.e. in a network with server and client(s) or in stand-alone mode, see **How Online Filing works** (p. 7)
- Ask future users where (i.e. with which national office) they want to file applications online so that the relevant plug-ins are activated when OLF is installed
- Install any additional software necessary, see **Software requirements** (p. 11)
 - Arial Unicode font
 - Adobe Acrobat Reader
 - Gemalto Classic Client and Gemplus smart card driver
- Make note of the data for the configuration in your network:
 - IP address, hostname and port of the proxy server (if a proxy server is used to set up the internet connection to the EPO)
 - If necessary, user name and password for the proxy server
- Install the OLF software, see **Stand-alone installation** (p. 38)
- Start Server Manager and check the status of all OLF services, see **Testing the server** (p. 32)
- Use **Live Update** to check if there are any updates or patches available for Online Filing, see **Performing a live update** (p. 34)
 - Download all updates
 - Install all updates
 - Restart all OLF services in Server Manager
 - If necessary, reboot the stand-alone machine too

5.3 Starting installation

- Quit all Windows programs.
- Log on to the computer as a Windows administrator; see **Windows user rights** (p. 12).

Running the downloaded installation file

You will find the downloads on the EPO website under **Applying for a patent > Online services > Online filing > Download software for filing with the EPO** (<http://www.epo.org/applying/online-services/online-filing/download.html>).

- To run the installer, double-click the installation file.
- To confirm the security warning, click **Yes** in the **User Account Control** window.
 - Windows Vista: Click **Allow** in the **User Account Control** window.
 - Windows XP: Click **Run** in the **Security Warning** window.

Windows Installer starts the installation wizard.

Selecting the language

- Select the language for the installation process in the next dialogue box.
The default setting is **EN** for English.

i This initial language setting applies for the installation process only. You can set the language of the Online Filing user interface later in the actual software (change to Dutch, for instance).

- Click **OK**.

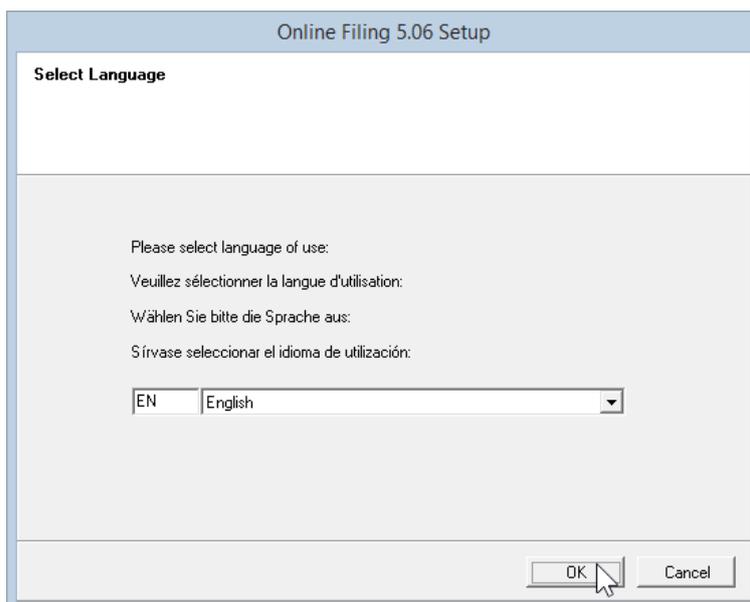


Figure 2: Selecting the language for installation

The window **Welcome to the Online Filing 5.06 Installation Wizard** appears.

① Please read the legal notices and the Online Filing software's terms of use.

! **Attention:** *Quit all Windows programs now before proceeding with the installation.*

→ If you do not want to start the installation yet, click **Cancel**.

→ To start the installation, click **Next**.



Figure 3: Welcome to the Installation Wizard

5.4 Installation mode

Select the installation mode in the following dialogue. The default setting is **Stand alone installation**.

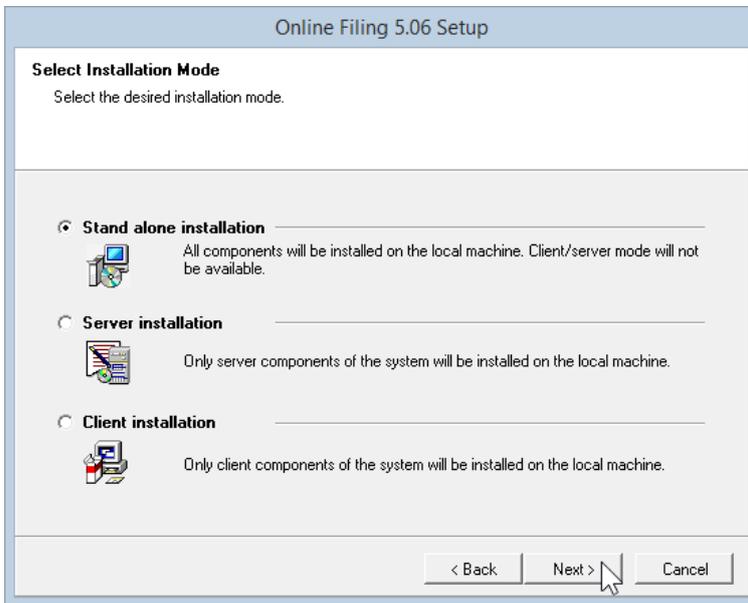


Figure 4: Selecting installation mode

This table summarises the various uses of the Online Filing software.

Planned use of OLF software	Installation mode	Action
You want to use Online Filing on a single computer only	Stand alone installation	Installs the stand-alone version on the local computer
Many users in a corporate network are to use OLF and access a central database	Server installation	Installs the OLF server on the local computer only
A single user is to use OLF on his workstation which is networked to the OLF server	Client installation	Installs the OLF thin client on the local computer only

5.5 Server installation

Before installing the server, make sure that the destination drive also has sufficient free disk space for future use. Remember that the OLF database will grow over time and can store several GB of data.

- Select **Server installation** as the mode of installation; see **Installation mode** (p. 18).
- Click **Next**.

Specifying the destination folder

The default program folder for installation is C:\Program Files\EPO_OLF5 on a 32-bit operating system and C:\Program Files (x86)\EPO_OLF5 on a 64-bit system.

The default database location is C:\Program Files\EPO_OLF5\db and C:\Program Files (x86)\EPO_OLF5\db, respectively.

- Click the first **Browse** button to select a different folder for installation, for instance, on another drive.

! **Warning:** Make sure the folder you select will only be used by Online Filing as it will be completely deleted in the event of uninstallation. If necessary, create a new folder on the destination drive. Never install the software directly in the root directory of a partition.

- Click the second **Browse** button to modify the database location.
- Click **Next** to use the selected folders or the default destination folders.
- Click **Cancel** to terminate the installation process.

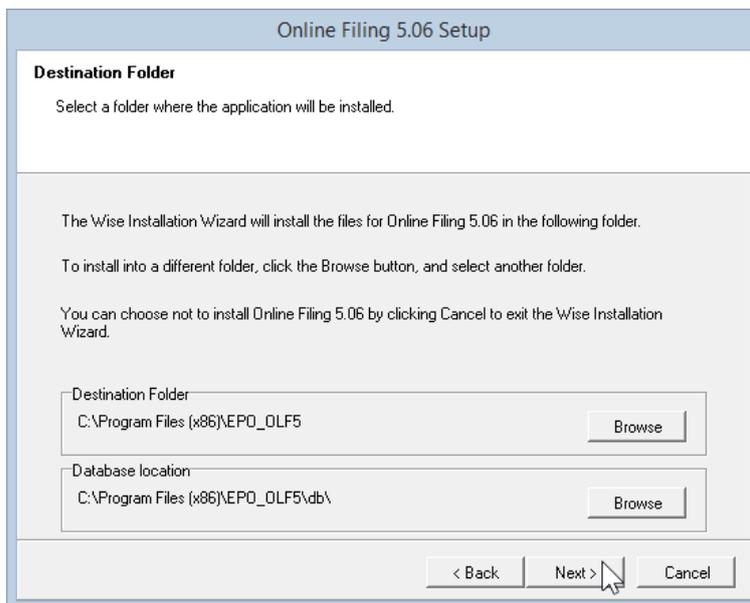


Figure 5: Selecting the destination folder for installation

5.5.1 Installation type

All national procedures compatible with Online Filing are integrated by default in the software as standalone plugins and are systematically installed. To be able to work with the plug-ins, however, you must activate them one by one.

The **Select installation type** dialogue contains two options:

- **Typical**
 - Installs the default services: File Manager, Server Manager, EP(1001E), Euro-PCT(1200E), EP(1038E),EP(OPPO) and PCT/RO/101.
 - Installs all national plug-ins without activating them.
- **Custom**
 - Installs the default services and all national plug-ins.
 - Also activates selected national plug-ins, see **Activating national plug-ins** (p. 21).

→ Select the appropriate option.

→ Click **Next**.

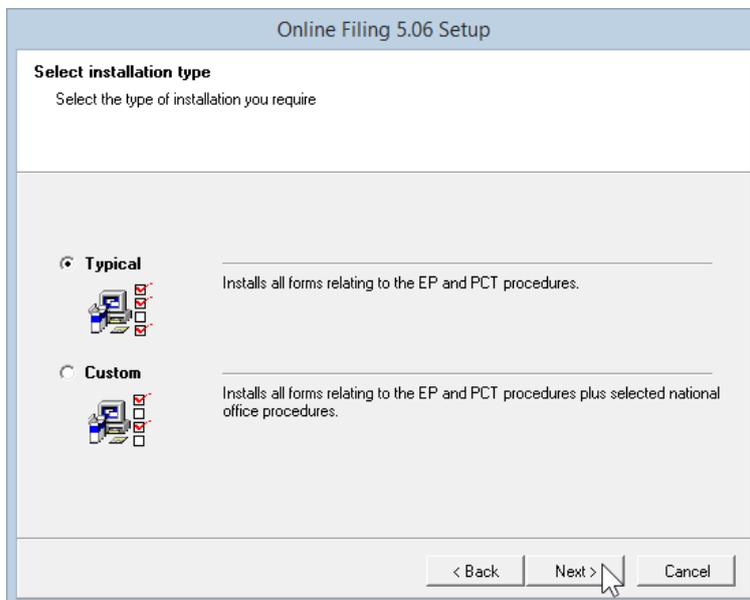


Figure 6: Selecting installation type

You can activate national plug-ins either when installing the software or later in Server Manager.

- The advantage of activating the services during installation is that they are immediately available.
- In Server Manager you can activate or deactivate the plug-ins as required.

For more information on Server Manager features, refer to the online help for Server Manager or the user guide for Online Filing version 5.06.

5.5.2 Activating national plug-ins

The following dialogue only appears if you selected **Custom** as the installation type. You can skip this chapter, therefore, if you selected **Typical** in the previous step.

The Online Filing functions or services available are displayed in a tree structure on the left. A feature description, including version number, is displayed on the right.

File Manager (EPO OLF File Manager), all EPO OLF plug-ins and the PCT plug-in are selected by default for installation. You cannot deactivate these standard services.

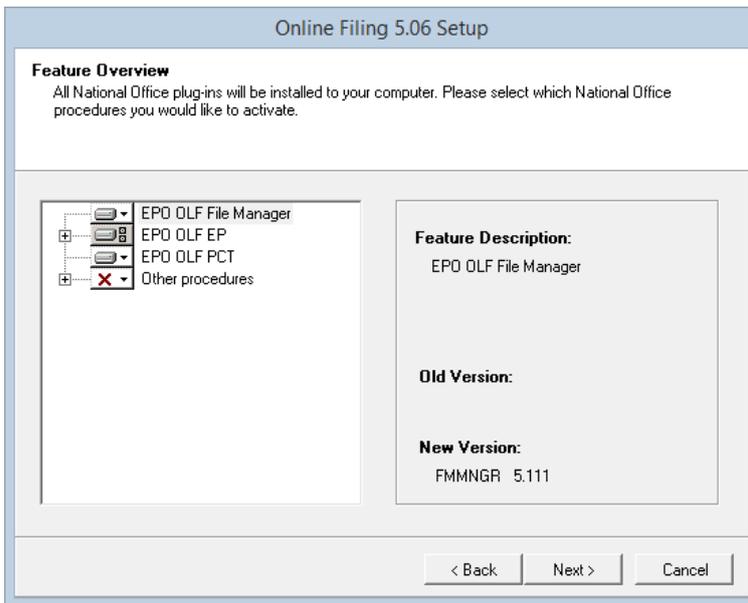


Figure 7: Overview of the EPO OLF plug-ins

The icons in the installation tree have the following meaning:

Control	Function
	Show child objects in tree.
	Hide child objects.
	Feature will be installed on local hard drive.
	Feature will be installed with some of its child features.
	Feature will be installed with all child features.
	Feature will be left unchanged
	Feature will not be installed/will be uninstalled.

→ Expand the tree under **Other procedures** to open the list of national plug-ins.

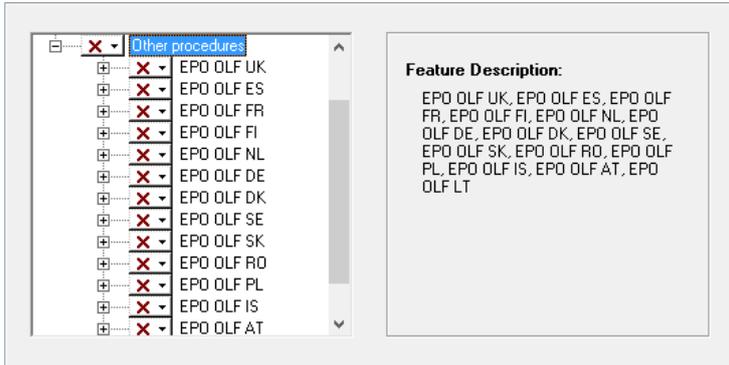


Figure 8: All national plug-ins installed with Online Filing

→ Select the plug-in you want to activate, either in groups or individually.

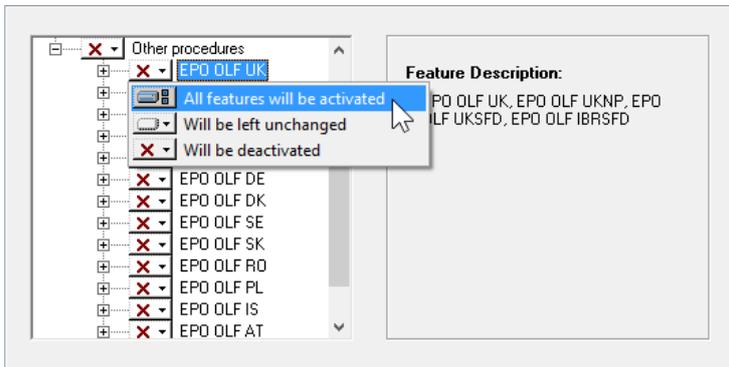


Figure 9: Activating national plug-ins

→ If you are ready, click **Next** to continue.

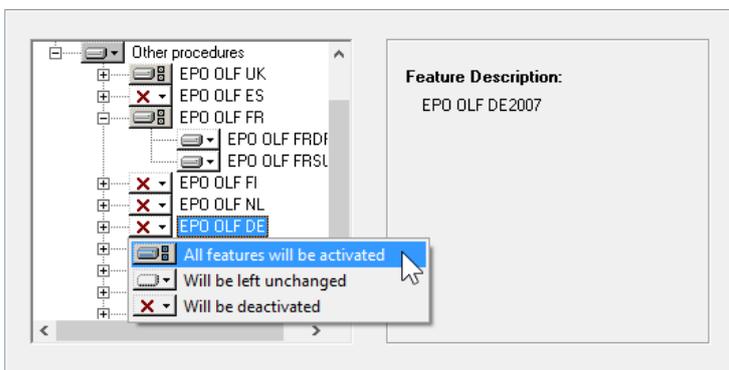


Figure 10: Multiple national plug-ins selected for activation

The following dialogue warns you that reinstalling Online Filing can overwrite earlier updates.

- If you are installing the software for the first time, click **Next**, because the warning does not apply in this case.
- If you are unsure and would like to save your data before proceeding with the installation, click **Cancel**.

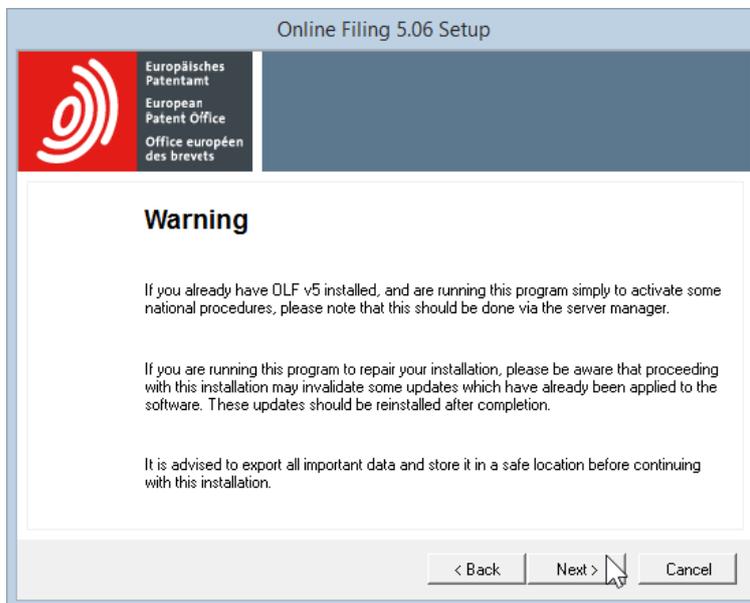


Figure 11: Warning in the case of user-defined installation

5.5.3 Confirming installation settings

You are given a last chance to change your settings or cancel installation before the installation proper begins.

The **Ready to Install the Application** dialogue contains three options:

- **Back** - check - and where necessary change - settings
 - **Next** - start installation
 - **Cancel** - cancel installation without copying files to your computer
- Click **Next** to continue.

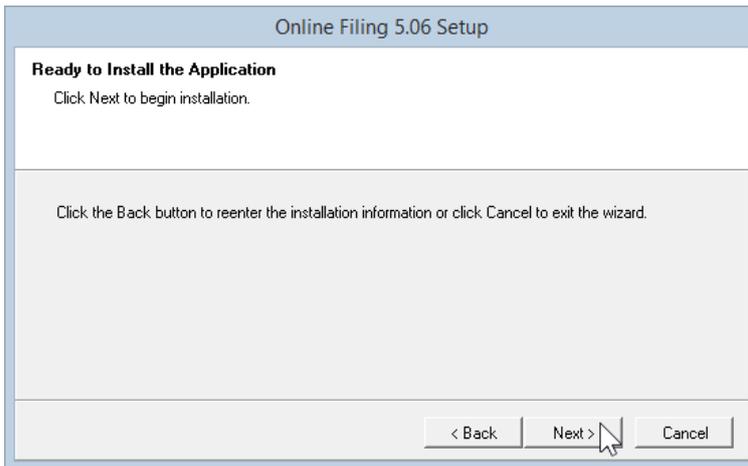


Figure 12: Options still available to begin installation, cancel it or go back

The **Updating System** window appears and indicates the installation progress.

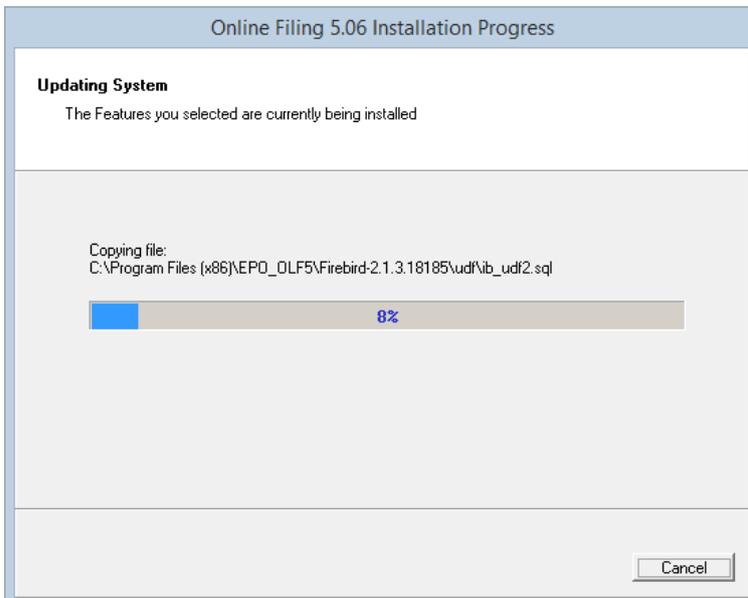


Figure 13: Installation progress

5.5.4 Enabling user management

The access to Online Filing can be protected by assigning an administrator password. For the purposes of data security, this is highly recommended, as otherwise, any random user could modify important data and settings in Online Filing.

User management not enabled

The option ***is not protected by password*** is selected by default. This means that user management is not enabled for Online Filing.

If you do not enable user management when installing the software you can do so afterwards in File Manager's system preferences. For more information on user management, refer to the user guide for Online Filing version 5.06.

Enabling user management and entering the Administrator's password

When you install Online Filing, an initial user named ***Administrator*** is automatically created. This user can then create additional users and groups and assign them specific privileges under User Administration in OLF File Manager. The ***Administrator*** user can be neither modified nor deleted.

Only the ***Administrator*** user or another user from the ***Administrators*** group in production mode is authorised to run Server Manager and administer the OLF services and OLF database.

! **Attention:** When installation is complete, make sure you create a second user with full administrator rights ***in production mode***. This user will be able to unblock the initial administrator if his or her access to Online Filing is blocked after entering the wrong password three times in succession.

- Select the option ***is protected by the following password***.
The ***Administrator*** user name cannot be changed.
- Enter the ***Password*** for the administrator.
- Re-enter the password in the ***Confirm password*** field.
- Click ***Next***.

Online Filing 5.06 Setup

Online Filing 5.06 Access
Select the mode of Online Filing 5.06 access. If you want protect the access enter the User Name and Password

is not protected by password
 is protected by the following password:

User name:

Password:

Confirm password:

Figure 14: Setting password protection for Online Filing access

5.5.5 Enabling password policy

If user management was selected in the previous step, password policy is automatically also enabled. The **Enable Password Management** option is selected and the check box is locked.

→ Click **Next**.

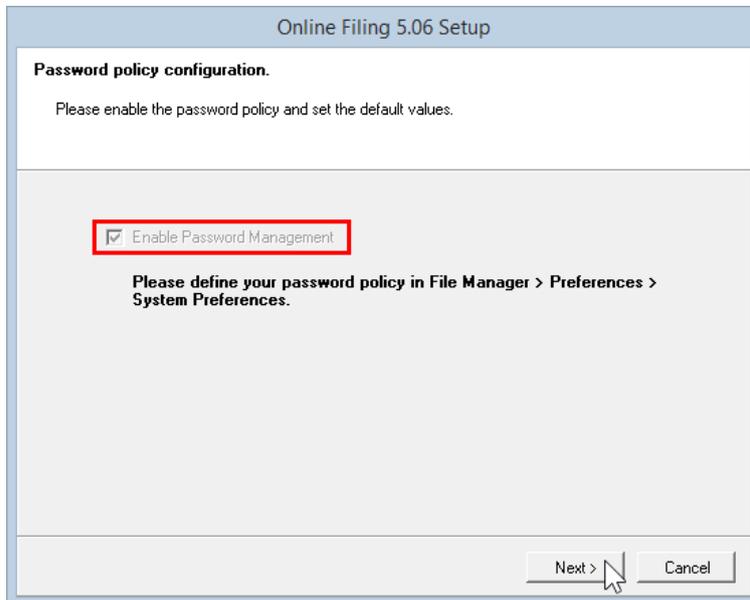


Figure 15: Password policy is automatically enabled

If the **Administrator** user's password does not comply with the default password policy, he or she is prompted to provide a new password in File Manager when logging on to Online Filing the first time.

The default password policy requires a password complying with these rules:

- (1) Password length: minimum 6 characters (i.e. letters, special characters or digits), maximum 20 characters
- (2) Minimum number of lowercase characters: 1
- (3) Minimum number of uppercase characters: 1
- (4) Minimum number of special characters: 0
These special characters are allowed: ! # \$ % * + , - . / : ; = ? @ [\] ^ _ { } ~
- (5) Minimum number of digits: 1

① For more information on the password policy please refer to section 4.10.2 in the most recent Online Filing User Guide.

5.5.6 Setting CORBA and SOAP ports

In this dialogue, you can change the CORBA and SOAP ports for the individual OLF services. For example, the default CORBA port for the File Manager is 11000, the default SOAP port is 21000.

❗ The EPO OLF PCT service (PCT/RO/101 procedure) can only be used with CORBA. A SOAP port is thus not provided for it.

Application	Port (Corba)	Port (SOAP)
EPO OLF File Manager	11000	21000
EPO OLF EP1038	11103	21103
EPO OLF EP122K	11106	21106
EPO OLF EP2000	11105	21105
EPO OLF EPOPP0	11108	21108
EPO OLF PCT	11301	
EPO OLF UK177E	12901	22901
EPO OLF UKNPUK	12902	22902
EPO OLF UKSFDE	12903	22903
EPO OLF ES3101	12701	22701

Figure 16: CORBA and SOAP communication ports

- Scroll down the list to check the ports for the plug-ins you activated.
- Modify the settings for CORBA and SOAP ports as required.
- Click **Next**.

If you need to re-configure one or more of the CORBA or SOAP ports after installation is complete, you can do this in the corresponding configuration files, see **Changing CORBA and SOAP ports** (p. 40).

You will find a list of all plug-ins and the default ports used by Online Filing in the annex under **OLF services and ports** (p. 86).

! **Note:** Few antivirus software products can detect the use of these high ports, suggesting malign software or a Trojan horse has infected your system. Please configure your antivirus software or firewall accordingly so as to allow the plug-ins to use these ports.

5.5.7 Network settings

The OLF software's online help is shown as HTML pages in the Web browser. This is why the OLF server has its own inbuilt Web server where the OLF clients can go to retrieve help pages. This HTTP server has the same IP address in the network as the OLF server.

TCP/IP uses port **80** by default for HTTP connections. As a result, the OLF installation program always assigns the OLF server HTTP port number **88** to avoid conflicts with other Web servers on the same computer.

→ Enter your server's **HTTP IP Address**.

! **Attention:** The installation program recognises and automatically enters the computer's current IP address. If your server uses a dynamic IP address, enter the server name instead of the IP address to guarantee that the clients can access the OLF server via its name in the network, even if its IP address changes regularly.

→ Modify the **HTTP Port number** if required.

→ Select the encryption version used by your network in the **SSL Version** field. The default setting is **SSLv3**.

Figure 17: HTTP settings for the OLF server

i You can change these settings later in the File Manager configuration file, see **Changing network settings** (p. 40).

5.5.8 Proxy settings

Corporate networks mostly use a proxy server to set up internet connections. When operating in such environments, Online Filing also has to use a proxy server to set up a connection to the EPO to transmit data to the filing office or download updates from the EPO website, see also **Performing a live update** (p. 34).

- Enter an IP address or the name of the proxy server in the **Proxy Server** field
- Enter the number of the relevant proxy server port in the field after the colon.
- If necessary, enter the **username** and **password** for logging on to the proxy server.

! **Warning:** The username and password for the proxy user are saved in unencrypted form in the file `OLFFm.conf`. As a result, these credentials should NOT be identical to your Windows access.

The screenshot shows the 'Online Filing 5.06 Setup' dialog box. The 'Network settings' section is titled 'Please set the network settings for sending and Live Update'. It contains three input fields: 'HTTP IP Address' with the value '192.168.178.39', 'HTTP Port number' with the value '88', and 'SSL Version' with a dropdown menu set to 'SSLv3'. Below this is the 'Proxy settings' section, which is highlighted with a red rectangular box. It contains three input fields: 'Proxy Server' with the value 'CompanyProxy : 8080 (E.g.: Proxy : 8080)', 'Username' with the value 'ProxyUser', and 'Password' with the value 'XXXXXXXXXX'. At the bottom of the dialog box are three buttons: '< Back', 'Next >', and 'Cancel'.

Figure 18: Settings for internet access via a proxy server

i You can change these settings later in Server Manager or in the File Manager configuration file, see **Changing proxy settings** (p. 42).

TIP: Applying the browser's connection settings

If you are not familiar with the proxy settings in your network, try using your browser settings. You can find them at the following locations:

- In the Windows Control Panel under: **Network and Internet > Internet Options > Connections > LAN settings**
- **Internet Explorer:** Select **Tools > Internet Options > Connections > LAN settings**
If your system uses a proxy server, you will find the address and the port here, see also **Error: "Connection aborted on request"** (p. 77).
- **Mozilla Firefox:** Select **Tools > Options > Advanced > Network > Settings**.
Additional information is displayed here depending on the configuration.
If **Use system proxy settings** is selected, Firefox applies the settings under Internet Options in the Windows Control Panel, see above.

If in doubt, consult your network administrator.

5.5.9 Configuring Live Update for national procedures

In the next window, select the countries for which Online Filing should search for and install updates using the automatic Live Update mechanism. You will receive new or updated plug-ins for the national procedures of the selected countries as soon as they are released by the EPO.

If you selected national plug-ins for activation in the course of Custom installation, the relevant countries are selected here by default.

- Select additional countries so that the corresponding plug-ins are also updated regularly.
 - ① You can also select countries here for which an OLF plug-in does not yet exist.
- Click **Next**.

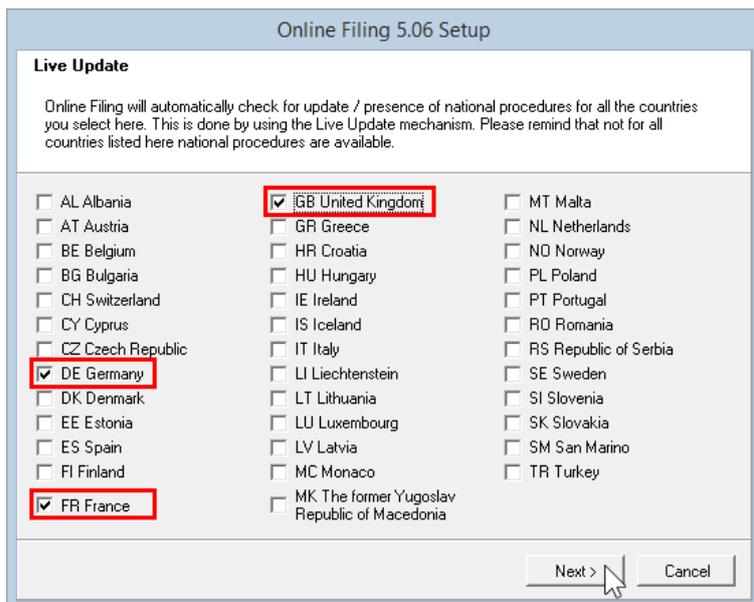


Figure 19: Selecting countries for Live Update

If you perform a live update after completing installation, the patches and updates available for all plug-ins associated with the countries you selected are displayed.

- ① You can change the countries selected for Live Update later in Server Manager.

5.5.10 Completing the server installation

The installation program copies all data for the OLF server and the OLF plug-ins to the selected program folder.

If your computer is equipped with a desktop firewall, it may now display a number of warnings indicating that an unknown program is trying to access your computer. Check carefully that these are the program files used by OLF, see **OLF services and ports** (p. 86), before you allow them through the firewall.

Reminder for thin client update/installation

The next window informs you that you should also update any thin clients installed.

The installation file for the thin client (`OLF506client.msi` or `OLF506client.exe`) is located in the installation directory `C:\Program Files\EPO_OLF5\ThinClient_v500`. Alternatively, you can download the installation file, see **Latest version of the OLF software** (p. 9).

→ Click **OK** in the message box.

The following screen will be displayed to inform you that installation has been successfully completed.

→ Click **Finish**.



Figure 20: Online Filing has been successfully installed

You are prompted to restart the computer.

❗ If you cannot see this window, it might be because it is hidden behind other windows on your screen. Use ALT+TAB to toggle between the windows.

→ Click **Restart now**.

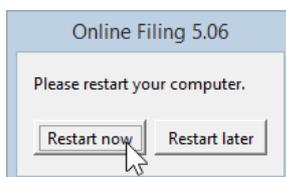


Figure 21: Prompt to restart your computer to complete the installation process

5.5.11 Testing the server

The installation program creates the **EPO Online Filing** program group in the Windows Start menu. This is where you'll find the shortcut for starting OLF Server Manager.

In Windows 8, you will find a new app group in the start screen.

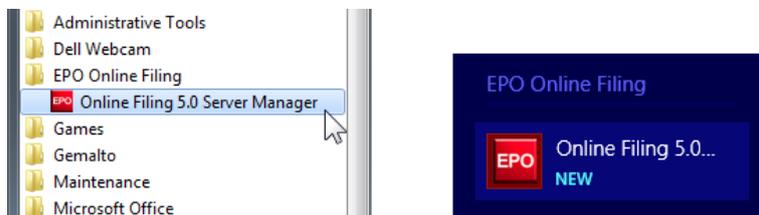


Figure 22: Shortcuts in the Windows 7 Start menu and Apps in the Windows 8 Start screen

Starting Server Manager

- Right-click the **Online Filing 5.0 Server Manager** shortcut in the Windows Start menu or on the desktop.
- Select **Run as administrator** in the shortcut menu.
- Click **Yes** in the **User Account Control** window (**Allow** in Windows Vista).
 - ① If you are not the Windows administrator, you must now enter his or her Windows username and password.

! **Note:** You can save the option **Run as administrator** in the shortcut so that you don't have to remember to right-click every time.

- Right-click the shortcut **Online-Filing 5.0 Server Manager** and select **Properties** in the shortcut menu.
- Click the **Shortcut** tab.
- Click the **Advanced** button.
- Select the option **Run as administrator**.
- Click **OK**.
- Return to the **Properties** window and click **OK** once more.

The next time you double-click the shortcut to start Server Manager, you only have to click **Yes** in the **User Account Control** window.

Starting Server Manager on Windows XP

- Log on to the computer as a Windows administrator.
- Go to the Windows Start menu and select **Programs > EPO Online Filing > Online Filing 5.0 Server Manager**.

Checking the status of services in Server Manager

- Log on as **Administrator** in the login window using the administrator password set during installation. Server Manager opens at the **Services** tab.
- Check if all EPO OLF services are running, i.e. **Running** should appear in the **Status** column.
- If you activated national plug-ins during custom installation, their status should also be **Running**.
- If you want to activate additional national plug-ins now, use the **Activate Service** button.

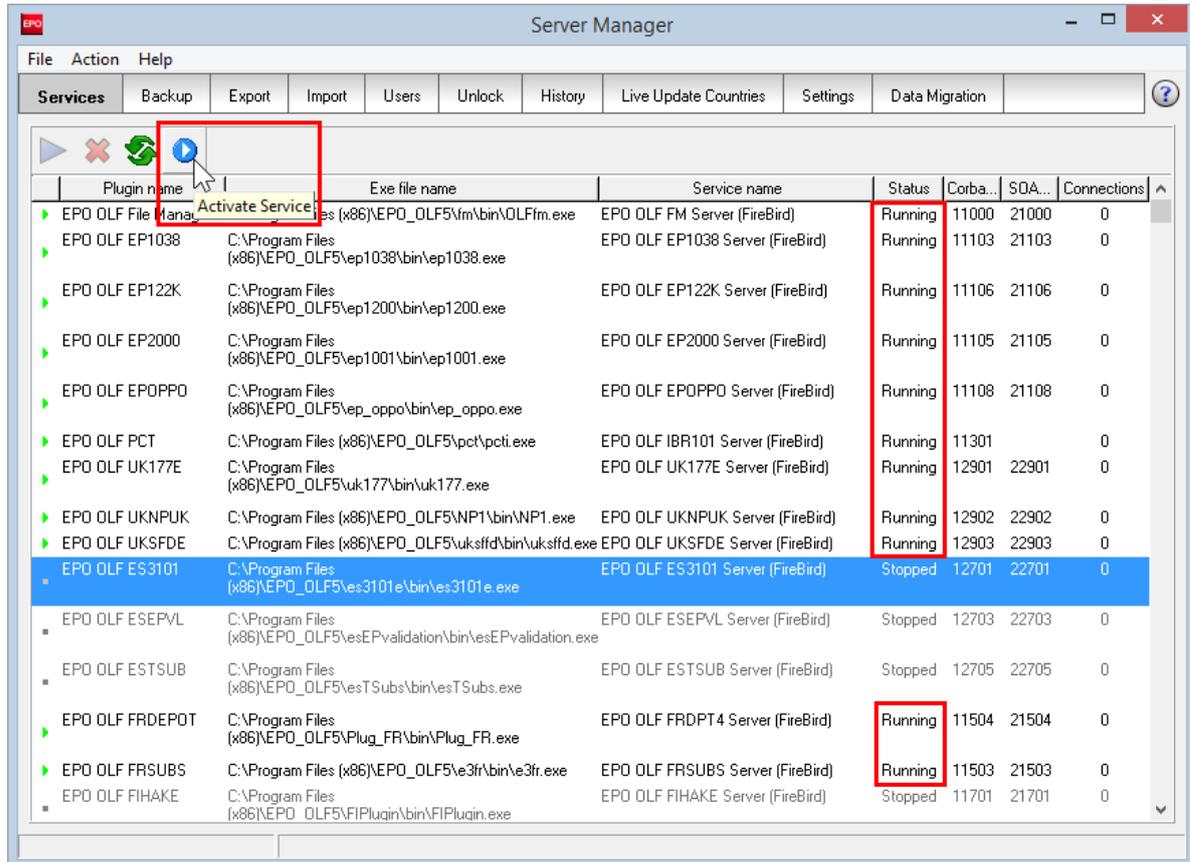


Figure 23: Checking services running in Server Manager and activating services

- Then start the services you just activated with the **Start as service** button.

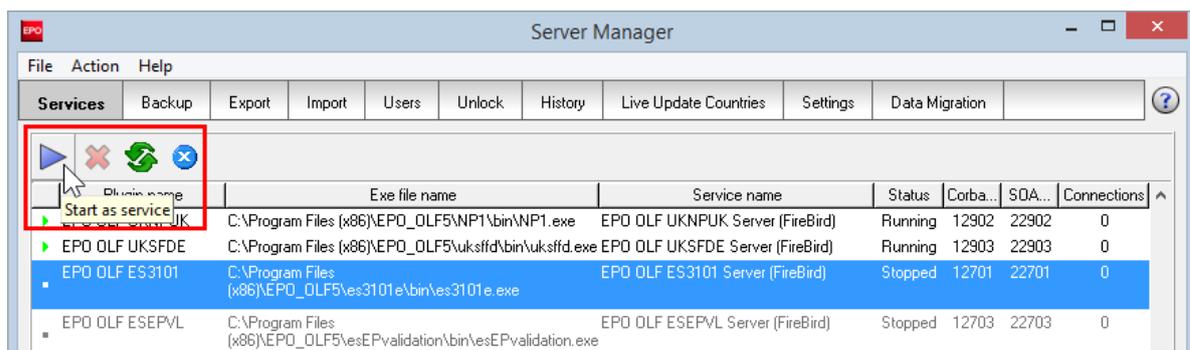


Figure 24: Starting an activated service in Server Manager

5.5.12 Performing a live update

Before starting to install the thin clients for your users, you should first check your server installation for updates. Use the Live Update function in Server Manager for this.

- Start Server Manager as the **Administrator** user.
- Click the **Settings** tab.
- Click **Check Now** in the lower part of the application window.

Live Update searches the EPO server for updates and patches for your installation as well as for the national plug-in you installed. If it finds updates, it outputs an appropriate message.

- Click **Yes** at the prompt.

The **Live Update** window displays the new updates available for your installation.

- Download the updates or patches one after the other (**Download**), and then install them (**Install**).

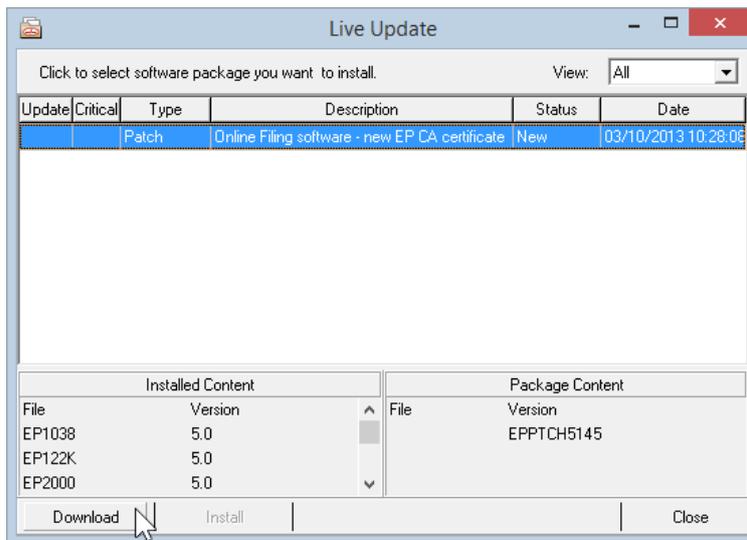


Figure 25: Downloading patches via Live Update

Alternatively, you can download the updates and patches from the EPO website and install them manually.

For more information on how to use Live Update, refer to the online help for Server Manager or the user guide for Online Filing version 5.06.

5.6 Thin client installation

An OLF server should have been installed in your network before you install a thin client. For more information, see **Server installation** (p. 19).

To install the thin client, you can either revert to the installation file `OLF506.exe` or the thin client installation files. You can find the thin client installation files `OLF506client.exe` or `OLF506client.msi` in the program folder `C:\Program Files\EPO_OLF5\ThinClient_v500` on the server PC following OLF server installation.

You can also download the latest version of the thin client installation files from the EPO website, see **Latest version of the OLF software** (p. 9).

Installation with the .msi package

The `.msi` file can be used to install the client for the first time, particularly in remote mode.

❗ Should installation with the `.msi` package fail, use the `.exe` file instead.

If you want to update the thin client with a new `.msi` file, you must first uninstall the older version completely. Otherwise, the installation routine will output an appropriate message.

TIP: As system administrator, you can save a lot of time by installing the client on all workstations from a batch file in silent mode. For more information, see **Installing the thin client in silent mode** (p. 89) in the annex.

Installation with the .exe file

The `.exe` file can be used to install and update the thin client on all Windows operating systems. You can update the thin client directly with the `.exe` file without having to uninstall it first. Most established automated software distribution systems are able to distribute this file type without difficulty.

5.6.1 Starting thin client installation

The following section describes how to install the thin client with `OLF506client.exe`.

- Log on to the computer as a Windows administrator.
- Double-click the installation file.
- To confirm the security warning, click **Yes** in the **User Account Control** window.
 - Windows Vista: Click **Allow** in the **User Account Control** window.
 - Windows XP: Click **Run** in the **Security Warning** window.

Windows Installer starts the installation wizard.

Selecting the language

Select the language for the installation process in the next dialogue.

The thin client will open in this language the first time you start it up after installation. You can change the language later under User Preference in File Manager. In addition to English, French, German and Spanish, you can also choose Dutch, Romanian, Slovak, Polish and Swedish.

- Select the language you want from the list. The default setting is **EN** for English.
- Click **OK**.

The **Welcome to the Online Filing Client 5.0 Installation Wizard** appears.

- Click **Next**.

Specifying the destination folder

The default program folder for installing the thin client is `C:\Program Files\EPO_OLF5-TC`.

- Click **Next** to use this destination folder.
- OR-

Click **Browse** to select or create a different folder for installation, for instance, on another drive.

Confirming the settings for installation

You are given a last chance to change your settings or cancel installation before the installation proper begins.

The **Ready to Install the Application** dialogue contains three options:

- **Back** - check - and where necessary change - settings
 - **Next** - start installation
 - **Cancel** - cancel installation without copying files to your computer
- Click **Next** to continue

The **Updating System** window appears and indicates the installation progress.

5.6.2 Setting the connection to the server

The **Server address information** window prompts you to enter the IP address of the OLF server component to which the thin client should set up a connection.

You can select CORBA or SOAP as the method of connection for communication with the server, see also **Communication via CORBA or SOAP** (p. 8).

! *Note: CORBA is recommended, since SOAP, due to its HTTP wrapping, will not be as fast as CORBA communication.*

- Enter the IP address or the computer name of your OLF server under **IP Address**.
- Under **Port**, enter the port that you set for File Manager (EPO OLF File Manager) when installing the OLF server, see **Setting CORBA and SOAP ports** (p. 27).
The default setting is 11000 in CORBA and 21000 in SOAP.
- Click **Connect** to start the client immediately and thereby test the File Manager connection to the OLF Server.
- Click **Cancel** to defer configuring the setting.
- Click **Save** to proceed with installation.

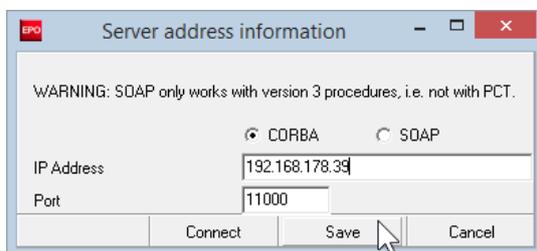


Figure 26: Data for the connection to the server

A screen will appear at the end of the process to inform you that the Online Filing client 5.0 has been successfully installed.

- Click **Finish**.

You can start working with the OLF thin client immediately, without restarting your computer.

5.6.3 Testing the thin client

The installation program creates the **EPO Online Filing** program group in the Windows Start menu. This is where you'll find the shortcuts for starting the thin client.

In Windows 8, you will find a new app group in the start screen.

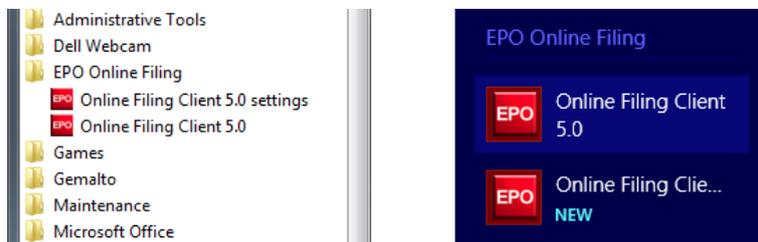


Figure 27: Shortcuts in the Windows 7 Start menu and Apps in the Windows 8 Start screen

Starting the thin client

- Go to the Windows Start menu and select **Programs > EPO Online Filing > Online Filing Client 5.0**. The Online Filing File Manager starts.
- Log on with your user name and password.
- Select either **production mode** or **demo mode**.
 - ⓘ Production mode and demo mode each have a separate user management system. As a result, a user name and password has to be set for every user in both modes.

Changing connection settings for the thin client

If the client is unable to set up a connection to the server, check the OLF server data, i.e. IP address or server name and port number (CORBA or SOAP) for File Manager.

- Go to the Windows Start menu and select **Programs > EPO Online Filing > EPO Online Filing Client 5.0 settings**. The **Server address information** window appears, see **Setting the connection to the server** (p. 36).
- Change the connection data as required.

Sending an application to the demo server

- Start File Manager in demo mode from a client PC.
- Create a new application, for instance, with the Form EP(1038E).
- Attach a document.
- Sign the application digitally by inserting your smart card into the reader connected to the workstation.
- Send the application to the EPO's demo server.

If no errors occur during the transfer operation and you receive your demo acknowledgment of receipt, everything is in order.

5.7 Stand-alone installation

In stand-alone installation, the Online Filing server and the Online Filing thin client are both installed on the same stand-alone computer. Following this type of installation, the OLF server cannot be accessed by other workstations, even if the computers are networked with each other. During installation, the client is automatically configured to point to the `localhost` address.

Preparation

- Log on to the computer as a Windows administrator, see **Windows user rights** (p. 12).
- Install the additional software, see **Software requirements** (p. 11).

The installation process

Stand-alone installation is basically identical to server installation, but it also installs the thin client.

- Start the installation with `OLF506.exe`.
- Select the **standalone installation** option as the mode of installation; see **Installation mode** (p. 18).
- Follow the instructions as described under **Server installation** (p. 19).

The **HTTP IP address** of the OLF server is automatically set to `localhost` and cannot be changed.

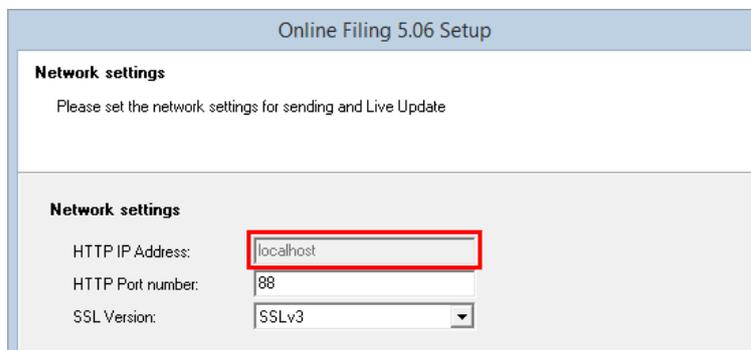


Figure 28: Server address set to localhost in the stand-alone version

When installation is complete, you are prompted to restart your computer.

Testing the stand-alone version

The installation program creates the **EPO Online Filing** program group in the Windows Start menu. This is where you'll find the shortcuts for starting the stand-alone version.

In Windows 8, you will find a new app group in the start screen.



Figure 29: Shortcuts in the Windows 7 Start menu and Apps in the Windows 8 Start screen

Starting Server Manager and running Live Update

See **Testing the server** (p. 32) and **Performing a live update** (p. 34) for installing the server.

Starting Online Filing (client)

! *Note: You need administrator rights in Windows 7 to work with the stand-alone version.*

- Go to the Windows Start menu and select **Programs > EPO Online Filing > Online Filing 5.0**.
- Log on to File Manager with your user name and password.
- Send a demo application to the EPO, see **Testing the thin client** (p. 37).

6 Changing the configuration of OLF services

Most of the settings you are prompted to make in the various dialogues during installation can be changed quickly and easily afterwards in the configuration files. As a separate configuration file exists for each OLF file, every plug-in can be configured separately.

! *WARNING: Changes to system files should be undertaken only by experienced users.*

Online Filing folder structure

The program folder `C:\Program Files\EPO_OLF5\` contains a subfolder for each plug-in, with a subfolder `config` for the configuration file.

Examples:

OLF File Manager: `C:\Program Files\EPO_OLF5\fm\config\OLFfm.conf`

EP122K plug-in (Euro-PCT(1200E2K) procedure): `C:\Program Files\EPO_OLF5\ep1200\config\ep1200.conf`

i For a full list of all plug-ins, see **OLF services and ports** (p. 86) in the annex.

Editing the configuration files

You will need administrator rights in Windows to edit files in the **Programs** folder.

- Use the **Run as administrator** option to open the Windows editor with **Programs > Accessories > Notepad**.
 - i** In Windows XP, log on to Windows as an administrator and open the editor.
- Open the `.conf` file or the `.ini` file.
 - i** It is advisable to create a backup of the file in case you want to revert to the old settings.
- Make your changes and save the configuration file.
- Terminate the relevant OLF service in Server Manager and restart it for the configuration changes to take effect.

6.1 Changing CORBA and SOAP ports

In the configuration file, the key "CorbaPort=" or "SOAPPort=" respectively are assigned to the chosen port number.

- Open the relevant configuration file, see **Changing the configuration of OLF services** (p. 39).
- Change the ports, if necessary.
- Save the modified configuration file.
- Restart the relevant OLF service in Server Manager.

Examples of standard port assignments

For File Manager in the `OLFFm.conf` file:

```
# Corba protocol port number
CorbaPort=11000
# SOAP protocol port number
SOAPPort=21000
```

For EPO OLF EP122K in the `ep1200.conf` file:

```
# Corba protocol port number
CorbaPort=11106
# SOAP protocol port number
SOAPPort=21106
```

! *Note: Few antivirus software products can detect the use of these high ports, suggesting malign software or a Trojan horse has infected your system. Please configure your antivirus software or firewall accordingly so as to allow the plug-ins to use these ports.*

6.2 Changing network settings

The `IPAddress` parameter in the `OLFFm.conf` configuration file is for connecting all thin clients to the OLF server, i.e. for starting File Manager on the server computer. The same IP address and the `webPort` parameter are used to open the online help for File Manager.

```
[General]
...
# Server IP address
IPAddress=192.168.178.27 (example: client/server installation)
# web-help port number
WebPort=88
```

If you are using a dynamic IP address, enter the server name instead of the IP address in all configuration files, e.g.

```
# Server IP address
IPAddress=myOLFServer (example: client/server installation)
```

- Edit the `OLFFm.conf` configuration file for the File Manager.

→ Terminate and restart the EPO OLF File Manager service in Server Manager.

This action terminates and starts all other plug-ins at the same time.

The parameters `IPAddress` and `WebPort` also appear in the configuration files of all EP plug-ins, e.g. in `ep1200.conf`. However, these parameters are not used for connecting to the OLF server. Only the `IPAddress` parameter in the `OLFFm.conf` file is used by all OLF services when connecting to the server.

❶ For a full list of all plug-ins, see **OLF services and ports** (p. 86) in the annex.

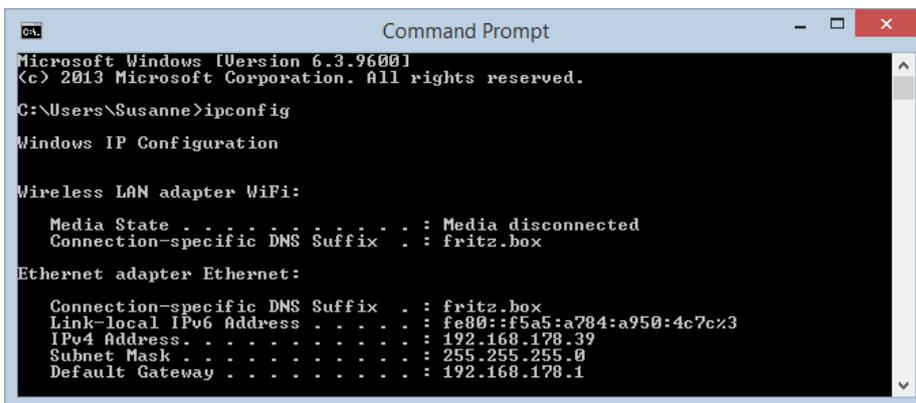
TIP: Finding out the server's IP address

Use the command `ipconfig` if you do not know the server's IP address.

→ Go to the Windows Start menu and select **Programs > Accessories > Command Prompt**.

→ Enter the command `ipconfig`.

This command displays the computer's IP configuration for all of its network adapters - both LAN (Ethernet) and WLAN (wireless).



```
Microsoft Windows [Version 6.3.9600]
(c) 2013 Microsoft Corporation. All rights reserved.

C:\Users\Susanne>ipconfig

Windows IP Configuration

Wireless LAN adapter WiFi:

    Media State . . . . . : Media disconnected
    Connection-specific DNS Suffix  . : fritz.box

Ethernet adapter Ethernet:

    Connection-specific DNS Suffix  . : fritz.box
    Link-local IPv6 Address . . . . . : fe80::f5a5:a784:a950:4c7c%3
    IPv4 Address. . . . . : 192.168.178.39
    Subnet Mask . . . . . : 255.255.255.0
    Default Gateway . . . . . : 192.168.178.1
```

Figure 30: Querying the computer's IP address

6.3 Changing proxy settings

The proxy server access data is written to the File Manager configuration file during installation, see **Proxy settings** (p. 29).

The proxy parameters in the configuration file `OLFFm.conf` are used to set up the HTTPS connection to the filing office's receiving server when sending applications.

- You can change the settings in Server Manager in the `Settings` tab or directly in the configuration file.
- Then restart the EPO OLF File Manager service in Server Manager.

Example for a proxy server:

```
...
# sending, proxy server name
ProxyServer=myProxy
# sending, proxy port number
ProxyPort=8080
# sending, proxy user name
ProxyUser=ourProxyUser
# sending, proxy user password (hashed)
ProxyPassword=PasswordProxy
# sending SSL version
SSL Version=SSLv3
```

If your network does not use a proxy server, leave all keys, apart from the SSL version, blank:

```
# sending, proxy server name
ProxyServer=
# sending, proxy port number
ProxyPort=
# sending, proxy user name
ProxyUser=
# sending, proxy user password (hashed)
ProxyPassword=
# sending SSL version
SSL Version=SSLv3
```

6.4 Changing the thin client settings

You can change the connection parameters between the thin client and the OLF server in the **Server address information** dialogue, see **Setting the connection to the server** (p. 36).

- Go to the Windows Start menu and select **Programs > EPO Online Filing > Online Filing Client 5.0 settings**.
- Change the settings, e.g. enter the server name instead of the IP address.
- Click **Save**.

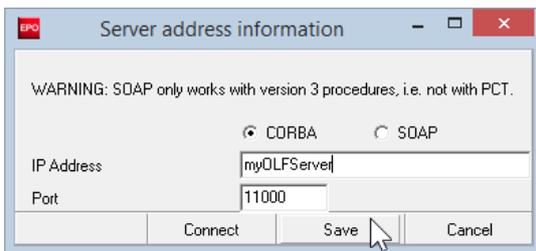


Figure 31: Changing the server address in the thin client settings

Making changes in the configuration file

You can also edit connection parameters directly in the `OLFClient.ini` file. You will find this file in the thin client's program directory under `C:\Program Files\EPO_OLF5-TC`.

! **Attention:** This method does not work in Windows 8 / 7 / Vista if the thin client is installed in the system folder `C:\Program Files`. If this is the case, you can only change the connection parameters for the client via **Online Filing Client 5.0 settings**.

- Enter your OLF server's IP address or server name.
- Set the parameters for CORBA:
 - CORBA=1 - if using CORBA
 - CORBA=0 - if using SOAP

Sample server name when using CORBA:

```
[Common]
...
CORBA=1
...
[CORBA]
ORBBINDADDR=inet:myOLFServer:11000
```

Sample IP address when using SOAP:

```
...
CORBA=0
...
[SOAP]
ORBBINDADDR=inet:192.168.178.27:21000
```

7 Installation maintenance

This section describes how to update the Online Filing software. Software maintenance or updating using the installation program is mainly required in three situations:

A) Upgrading to a new version

The EPO releases a new version of Online Filing. All users must update their software if they want to continue to file applications with the EPO.

- For more information, refer to the chapters **Updating the server** (p. 45), **Updating the thin client** (p. 51) and **Updating the stand-alone version** (p. 52).

B) Repairing the installation in the event of a malfunction

The latest version of Online Filing is already installed but the software or one of the national plug-ins is no longer working properly. You therefore want to repair the OLF software in the current version and continue using the same database as before.

- For more information, refer to the chapter **Repairing national plug-ins** (p. 48).

C) Switching from stand-alone to network-based mode

You want to convert a stand-alone installation into a server installation and migrate all data in this process.

- For more information, refer to the chapter **Converting from stand-alone to server mode** (p. 52).

Most other changes are easier to perform directly in the configuration files, see **Changing the configuration of OLF services** (p. 39).

7.1 Maintenance checklist

The following checklist details the most important steps in the maintenance of an Online Filing installation using the installation file.

- Finalise the applications that are still being processed and send them all to the relevant filing office
- Create a database backup in Server Manager (production and demo modes)
- Give all users ample warning of the impending disruption
- Start the installation program and proceed as described for **updating the server** (p. 45) and **updating the stand-alone version** (p. 52)
- Install all updates, either via Live Update or from the downloaded patch files, see **Performing a live update** (p. 34)
- Update the thin client for the administrator, start File Manager and check if all the same data is available as before
- If using customised templates, these have to be updated, see **Updating templates** (p. 53)
- Reinstall all thin clients too after updating the OLF server, see **Updating the thin client** (p. 51)

7.2 Updating the server

! **Attention:** If updating from an earlier version of OLF, first finalise all applications still being processed and submit them to the EPO. Then use Server Manager to create a backup of the OLF-database, see **Backing up data** (p. 65).

- Quit all Windows programs.
- Start the installation program OLF506.exe on the server computer.

Entering access data

If user management is enabled in production mode and the users in the **Administrators** group have been assigned passwords, the installation program recognises that the version of Online Filing installed is password-protected.

! **Attention:** Do **NOT** enter a password here if you have already used your **Administrator** user name without a password in production mode, otherwise your Administrator ID will be blocked.

- Enter the **User name** and **Password** for one of the users in the **Administrators** group.
- Click **Next**.

Figure 32: Entering the password for accessing an existing OLF installation

Selecting the installation mode

- In the Welcome screen click **Next**.
- Select **Server installation** as the mode of installation.
- Proceed through the ensuing steps until the **Application Maintenance** window appears.
- Select **Modify**.

→ Click **Next**.

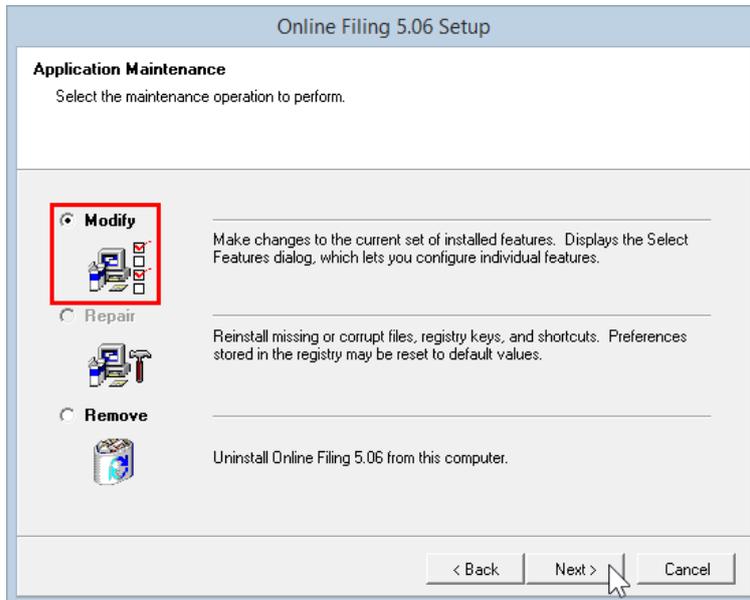


Figure 33: Modifying the Online Filing installation

Shutting down OLF services

The installation program warns you that it will take some time to upgrade Online Filing. It is advisable to file all applications that are important or urgent before you start the upgrade.

- Give all logged-on users ample warning (at the latest now) of the impending service disruption.
- Click **Next** if there are no longer any applications still being processed.
- Click **Yes** in the ensuing message.

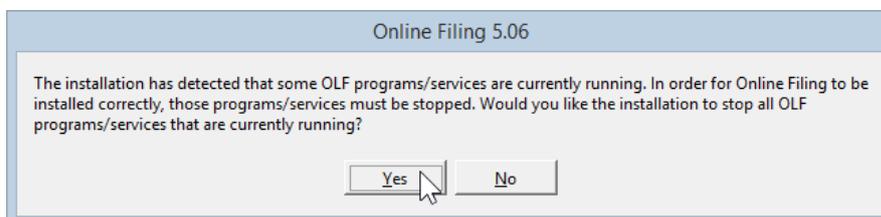


Figure 34: Previous installation detected

- Confirm the InterBase server shutdown prompt with **Yes**.

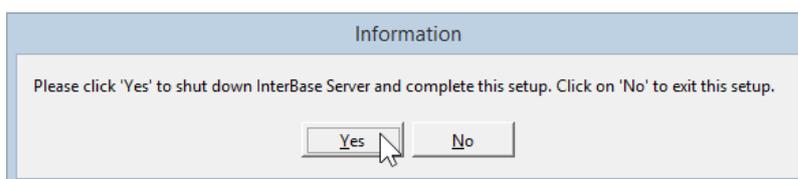


Figure 35: Shutdown InterBase (Firebird) Server

Updating the database

The installation program creates a new database in the course of the update. The data from the existing database is therefore first copied and then imported into the new database.

The **Database Update** dialogue enables you to select which parts of the previous installation you want to have carried over. All options are selected by default.

- Clear the check boxes beside the elements you do not want to have carried over to the updated database.
- Click **Next**.

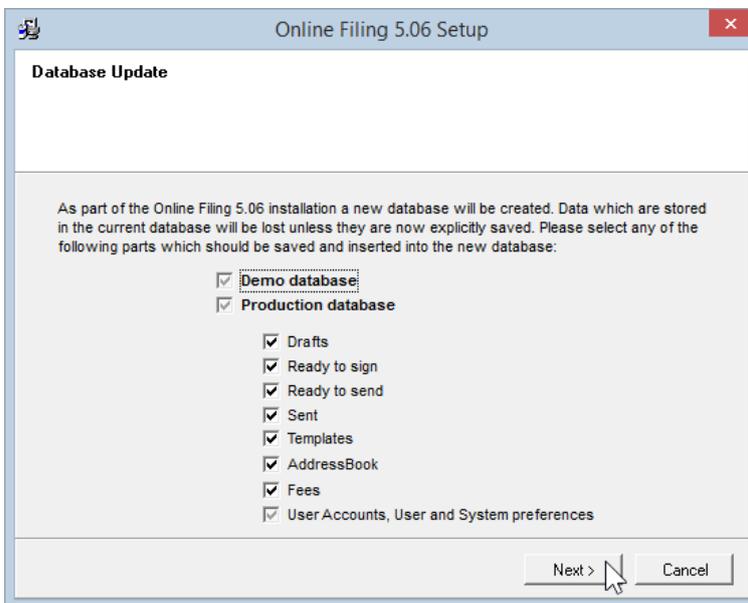


Figure 36: Database update

The copies of the production database (eOLFi.gdb) and the demo database (eOLFdi.gdb) will be stored in a new sub-folder in the Unload folder of the installation directory (default: C:\Program Files\EPO_OLF5\Unload). This new sub-folder is labelled with the creation date and time during installation, e.g. 20120710_130305.

ⓘ Please make sure that there is enough disk space available if your OLF database is already very large. You will need at least 2 GB of available hard disk space plus three times the size of the two databases (eOLFi.gdb and eOLFdi.gdb).

Changing settings

In the next steps you can change the settings for Online Filing as required. The dialogues are identical to those that appear during initial installation:

- Administrator password, see **Enabling user management** (p. 25).
- Password management, see **Enabling password policy** (p. 26).

! **Note:** OLF version 5.06 introduces the new password policy functionality. If you are upgrading from OLF version 5.05 and user management is enabled in your OLF installation, you can enable the password policy at this point of the update process. For more information on the password policy please refer to section 4.10.2 in the most recent Online Filing User Guide.

- CORBA and SOAP port numbers, see **Setting CORBA and SOAP ports**. ("Setting CORBA and SOAP ports" p. 27)
- Network connection, see **Network settings** (p. 28).
- Connection via the proxy server, see **Proxy settings** (p. 29).
- Countries for Live Update, see **Configuring Live Update for national procedures** (p. 30).

After this, the system is updated and the database is repopulated with the previously exported data. The progress indicator lets you monitor the installation progress.

- Click **Finish** in the final screen.
- Restart your computer.

7.3 Repairing national plug-ins

In Online Filing, all national plug-ins are automatically installed during initial installation. All you have to do is select whether or not the plug-in should be activated, see **Activating national plug-ins** (p. 21).

If at a later stage you want to use a national plug-in that is not available in the **Forms** folder in File Manager, you can simply activate it in Server Manager. This makes it available to all Online Filing users. If you would like Live Update to perform regular checks for updates of this plug-in, select the appropriate country in the **Live Update Countries** tab in Server Manager.

You should therefore only use the installation program if a plug-in is no longer working properly and has to be repaired.

! **Attention:** Reinstallation overwrites all your current plug-ins with the plug-in versions available in the installation file. If you have installed updates or patches for your plug-ins since performing initial installation, you will lose all of these changes. You will therefore have to reinstall all updates once maintenance is complete.

- Read section **Maintenance checklist** (p. 44) in preparation for this step.
- Make note of the current build number of all plug-ins and the current updates installed. You will find these under **Help > Info** in the **About File Manager** window.

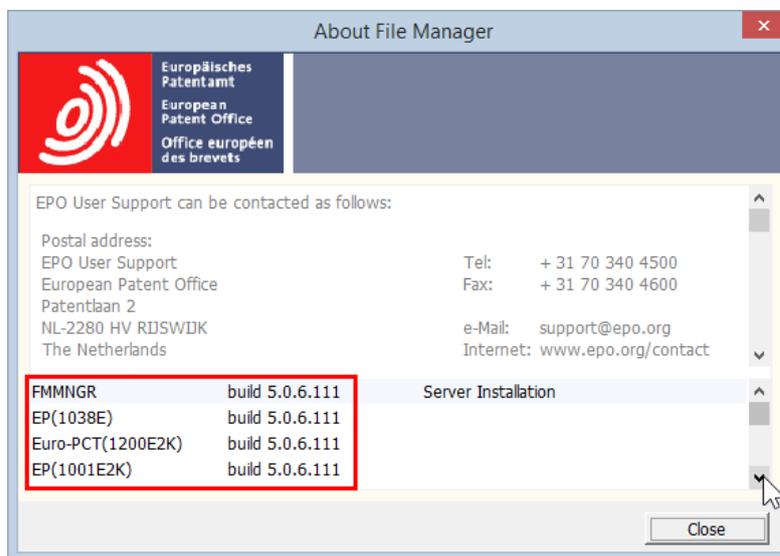


Figure 37: Versions of Online Filing and all plug-ins currently installed

- Scroll to the end of the lower list to see the updates or patches.
 - ① These are the precise updates you will have to reinstall later to bring your OLF installation up to date.
- Make note of the exact sequence of all updates as displayed in this window.

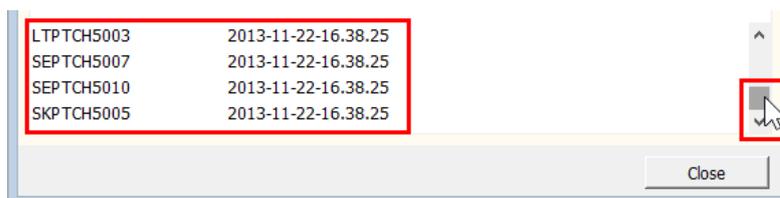


Figure 38: List of patches already installed

- Make sure that you use the same installation file as for initial installation, otherwise the OLF database will not integrate properly.
- Now proceed as described under **Updating the server** (p. 45) to repair plug-ins.

In the Feature Overview dialogue you will again see which version is currently installed (**Old Version**) and which version will replace it (**New Version**).

In this example, the old version of File Manager (i.e. version currently installed) is more up to date than the new version (i.e. in the installation file), meaning that no change will be made.

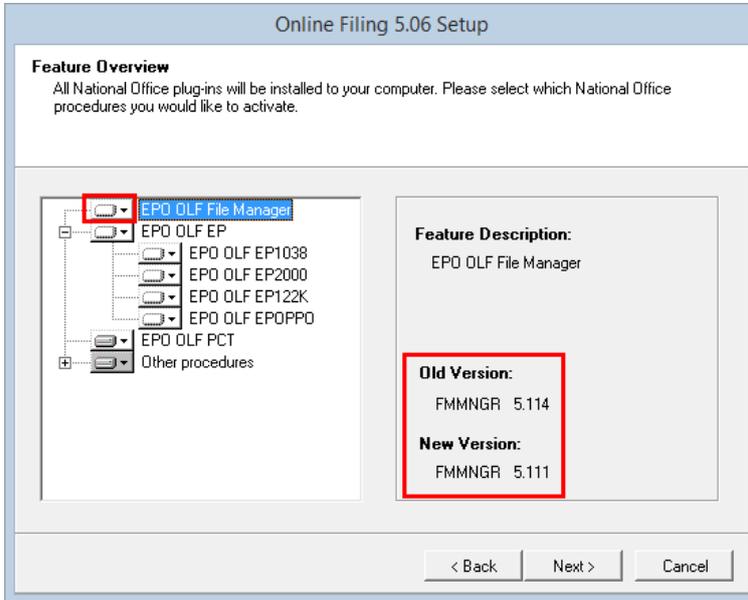


Figure 39: Comparison of the old and new version of EPO OLF File Manager

The plug-ins activated in your installation are automatically selected by default.

➔ Check the settings for the plug-ins you want to repair.

In this example, the old and the new version are identical so the plug-ins can be reinstalled.

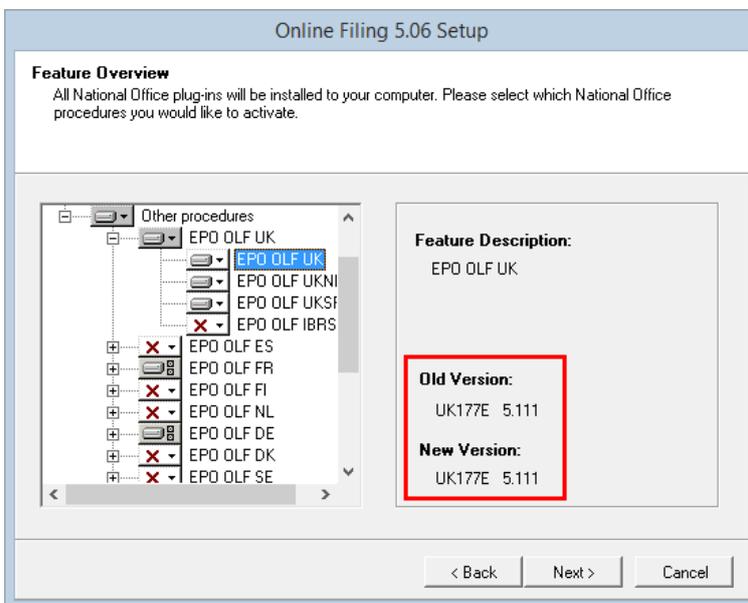


Figure 40: Comparison of the old and new version of the activated plug-ins

- Make sure that you read the warning. Following installation, you will have to reinstall all patches and updates you previously downloaded.

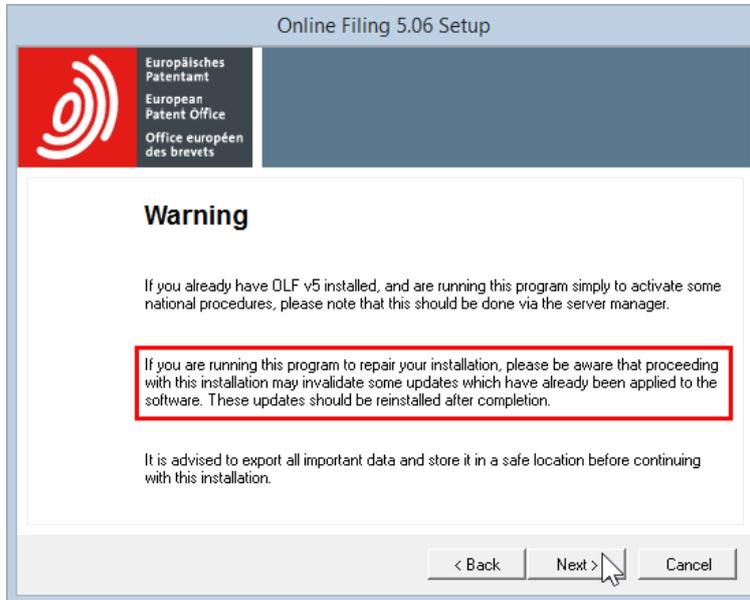


Figure 41: Warning about the reinstallation of plug-ins

- Proceed as described under **Updating the server** (p. 45).
- Download all the updates and patches that previously were installed from the EPO website.
- Install the updates one by one in the correct sequence, see the figure "List of patches already installed" above.

7.4 Updating the thin client

After you update the server installation, you should also update all thin clients so that all workstations are operating with the latest version.

Use the installation file `OLF506client.exe` or `OLF506client.msi`, see **Thin client installation** (p. 35).

! **Attention:** If you want to use the `OLF506client.msi` file in Windows XP, it is recommended that you **uninstall all thin clients first**. For more information, see **Installing the thin client in silent mode** (p. 89).

- Start the installation programme.
The **Modify** option is already selected.
- Click **Next**.

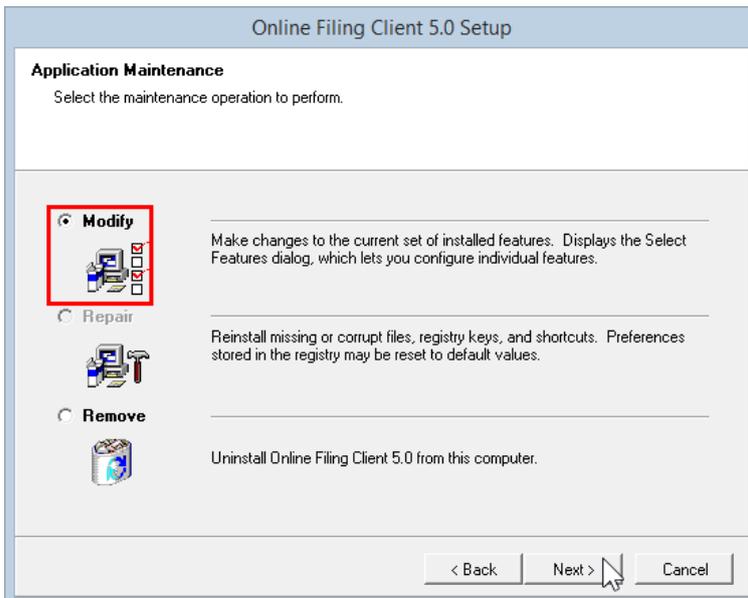


Figure 42: Modifying thin client installation

- Change the OLF server connection data as required, see **Setting the connection to the server** (p. 36).
- Click **Save**.

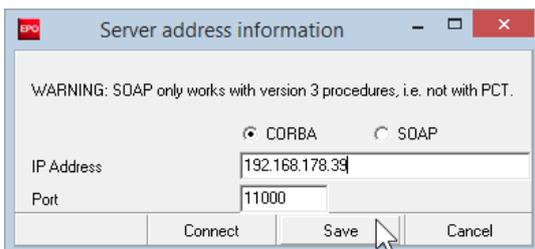


Figure 43: Data for the connection to the server

- Click **Finish** in the final window.
The thin client update is now complete.

7.5 Updating the stand-alone version

The procedure for updating a stand-alone version is for the most part identical to that for updating the server.

- Finalise the applications that are still being processed and send them all to the relevant filing office.
- Create a database backup in Server Manager (production and demo modes).
- Start the installation programme.
- Select **Standalone installation** as the mode of installation.
- Proceed as described in **Updating the server** (p. 45).
- In the **Network settings** dialogue, **localhost** is set as the server's IP address and cannot be changed.
- Install all updates, either via Live Update or from the downloaded patch files, see **Performing a live update** (p. 34).

7.6 Converting from stand-alone to server mode

If you installed Online Filing in stand-alone mode and are already operating the software successfully, you may want to make it available to additional staff in your company. For this to work, you must leave the OLF-database on the same computer but make the computer accessible via the network.

You do not have to reinstall the OLF server in this case. If the OLF database is installed on a sufficiently powerful computer, you can simply convert your stand-alone version into a server installation. Then install the latest OLF thin client on the computers of the relevant staff.

! *Attention: Make sure the version of Online Filing you install is exactly the same as the one used in the existing stand-alone version. Make note of all version numbers before you start the installation, see **Repairing national plug-ins** (p. 48).*

Phase 1: Preparation and data backup

- In preparation for this step, re-read the section **Initial installation checklist: client/server** (p. 14) so that you have all necessary data to hand.
- Finalise the applications that are still being processed and send them all to the relevant filing office.
- Create a database backup in Server Manager (production and demo modes).
- Stop the **Firebird Server - OLF** service in the Windows Services Manager. This will also terminate all other EPO OLF services, see **Checking the status of the OLF server and OLF services** (p. 70).
- For added safety, copy the databases `eOLFi.gdb` and `eOLFdi.gdb` to a secure location. You will find the databases in the program folder `C:\Program Files\EPO_OLF5\db\`. If anything goes wrong when converting your stand-alone version, you can use these database copies to restore your data.

Phase 2: Converting the stand-alone version into a server installation

- Start the installation program.
- Select **Server installation** as the installation mode.
- Proceed through the ensuing steps until the **Application Maintenance** window appears.
- Select **Modify**.
- Proceed as described in section **Updating the server** (p. 45), making sure you observe the following:

- Enter the computer's IP address or server name in the **Network settings** dialogue. The **localhost** setting from the stand-alone installation is still entered as the **HTTP IP Address**.
 - In the **CORBA/SOAP ports** dialogue, check if all these ports are accessible on the computer and, where necessary, change the firewall settings.
- Install all updates, either via Live Update or with the downloaded patch files, see **Performing a live update** (p. 34).

Phase 3: Configuring user administration and installing thin clients

- First install a thin client for the Online Filing administrator, see **Thin client installation** (p. 35).
- In demo mode, send a test application to a filing office's OLF demo server.
- Configure all users and groups for your company staff under User Administration in OLF.
- Install the thin clients for all users and any additional software necessary.
- Test the client/server connection, see **Testing the thin client** (p. 37).

7.7 Updating templates

! ***Attention:** Updating Online Filing often results in changes to the data structure in the individual plug-ins, i.e. in the forms. Remember, therefore, to also update your templates after a major update, for instance, from version 5.05 to 5.06.*

- Open File Manager and go to the **Templates** folder.
- Right-click a template and select **Edit template** in the shortcut menu.
- If a warning about changing fee information appears, click **OK**.
- Save and close the template.
- Repeat this step for all templates that are still in use.

This makes sure that new applications based on these templates comply with the latest data structure of the relevant plug-in. Otherwise, the data may not be compatible with the database on the receiving site and could be refused or incorrectly processed by the filing office.

7.8 Compressing the database

Your OLF database will grow over time and can reach several GB in size, especially if you have been using the software for some time already, file a large number of applications and attach large documents.

The OLF database is not designed as a storage system for data from all applications ever created. Every time changes are made to procedures, the data structure of the forms also changes in Online Filing, but not the data structure in the applications and templates you created. This means that in version 5.06 you may not be able to open and correctly display older applications, i.e. those created in prior OLF software versions.

It is therefore advisable to archive filed applications and the templates you no longer need at regular intervals and remove them from the database. Afterwards, you can compress the database, considerably reducing its size. Performing this kind of maintenance frees up disk space on the server computer and speeds up Online Filing for all users.

i For detailed information on performing backups, exports and imports refer to the online help for both Server Manager and File Manager or the user guide for Online Filing version 5.06.

Exporting and archiving data with Server Manager

You can use the export filter in Server Manager to selectively export applications at set intervals. For instance, you can export all applications sent in 2011 and then import them again afterwards, or you can export the applications sent prior to 2011 and then remove them permanently from the database.

- Start Server Manager and click the **Export** tab.
 - The All Applications view shows all applications.
- To see only the applications already filed, click **Sent** in the left pane.
- Select the check box **Delete items from database after archiving**.
- Select the check box **Enable Filter**.
- Using the two calendar icons  select the first day (the date corresponds to the applications' last save date) and the last day of the interval you want to set.
- Click **Apply Filter**.
 - The list is updated accordingly.
- To select all applications, click  in the column heading.
- Click the **Export** button.

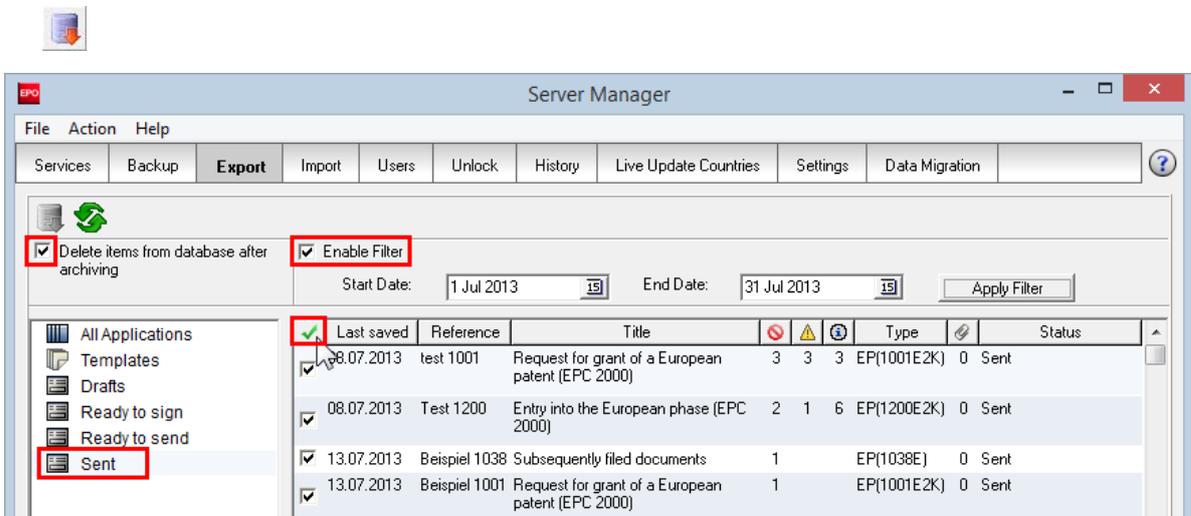


Figure 44: All applications sent in 2011 are marked for export followed by deletion

The selected applications are exported to the default export directory `C:\Program Files\EPO_OLF5\tools\smanager\data\` and simultaneously deleted from the database.

- Repeat this procedure as required for additional intervals.

Creating a new database in Server Manager

- Click the **Backup** tab.
- Select the production database (**Production** appears in the **Type** column).
- Click the **Empty Database** button.



- In the next dialogue, select which data should be copied from the old database to the new one.

! *Attention: The **Empty Database** function permanently removes all applications.*

→ Click **OK**.

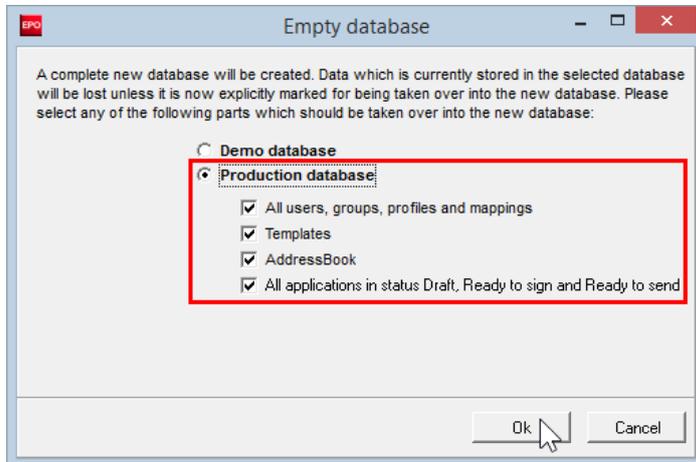


Figure 45: Selecting the data to be copied to the new database following compression

The database will now be compressed; this may take a few minutes.

Importing data with Server Manager

If you want to be able to re-access sent applications in Online Filing, you can re-import them via Server Manager. We recommend that you start by creating a new directory for archived applications in File Manager. Set this directory then as the destination import directory:

→ Start Server Manager and click the **Settings** tab.

The default setting for the destination import directory (**Import directory - destination**) is **Default Folder**.

→ Click the directory icon beside the field to select the new directory in File Manager.



→ Then click the **Import** tab.

All applications in the source import directory (**Import directory - source**) are displayed. The default is C:\Program Files\EPO_OLF5\tools\smanager\data\, which is the same as the default export folder.

→ To select all applications, click the  icon in the column header.

→ Click the **Import** button.



Deleting old database versions

When updating Online Filing, e.g. from version 5.05 to 5.06, the entire database is copied to the OLF program folder and restored once installation is complete. During the update, you can choose which parts should be copied to the new database, see also **Updating the server** (p. 45). In this way, you can remove unwanted data and reduce the size of the database.

The database copies created for the earlier version by the installation program are kept however and can take up a considerable amount of disk space on the server. You should therefore remove these too from time to time.

- Open the program folder `C:\Program Files\EPO_OLF5\Unload` in Windows Explorer.
This folder contains one or more subfolders created during previous updates. The subfolders are named after the creation date, e.g. `20120704_145257` relates to an update performed on 04.07.2012 at 14.52.57 hrs. Both the production database `eOLFi.gdb` and the demo database `eOLFdi.gdb` are stored in these subfolders.
- Delete all but the newest subfolders.

8 Uninstalling

If you decide you no longer want to run Online Filing on a specific computer, you can uninstall the software completely.

It is advisable to use the installation program for the OLF server or the OLF thin client also for uninstalling the software. The first steps are the same as for installation. Then select **Remove** in the **Application Maintenance** dialogue. The uninstallation routine completely removes all OLF system files and the relevant entries in the Windows registry.

If the installation file you used to install Online Filing is no longer available, you can also uninstall the software via the Windows Control Panel. Both methods work for both the OLF server and the thin client and for the stand-alone version.

Saving data for reuse

Before removing the software (and therefore also the OLF database) from the computer, you should export any data that you still need from Online Filing including, above all, the address book, the User Administration, the templates and the filed applications. For detailed information on the various export methods, refer to the user guide for Online Filing, version 5.06 or the online help for File Manager and Server Manager.

8.1 Uninstallation checklist

The following checklist details the most important steps for uninstalling Online Filing using the installation file.

- Make sure you have to hand the installation file you used to install or last update the Online Filing software:
 - `OLF506.exe` for uninstalling the OLF server
 - `OLF506client.exe` for uninstalling the OLF thin client
- Check if specific data is still needed for archiving or the import into other programs.
- Create a database backup or the relevant export files, see **Backing up data** (p. 65).
- In a network version, start by uninstalling the thin clients, see **Uninstalling the thin client** (p. 57), and then uninstall the server, see **Uninstalling the server** (p. 58).
 - ① The procedure for uninstalling the stand-alone version is similar to that for the server.
- Delete any files which are no longer required, see **Removing OLF files and folders** ("Removing OLF program files and folders" p. 61).
- Check if there are still keys for Online Filing in the Windows registry and if so, delete them, see **Editing the Windows registry** (p. 61).

8.2 Uninstalling the thin client

The user rights needed to uninstall the OLF software in Windows are the same as those needed to install it, see **Windows user rights** (p. 12).

Uninstalling with the installation file

- Start the installation program with the file `OLF506client.exe`.
 - ① You will find the file in the program folder `C:\Program Files\EPO_OLF5\ThinClient_v500` on the server computer.
- For the first steps, proceed as described for installation, see **Starting thin client installation** (p. 35).
- Select **Remove** when the **Application Maintenance** window appears.
- Click **Next**.

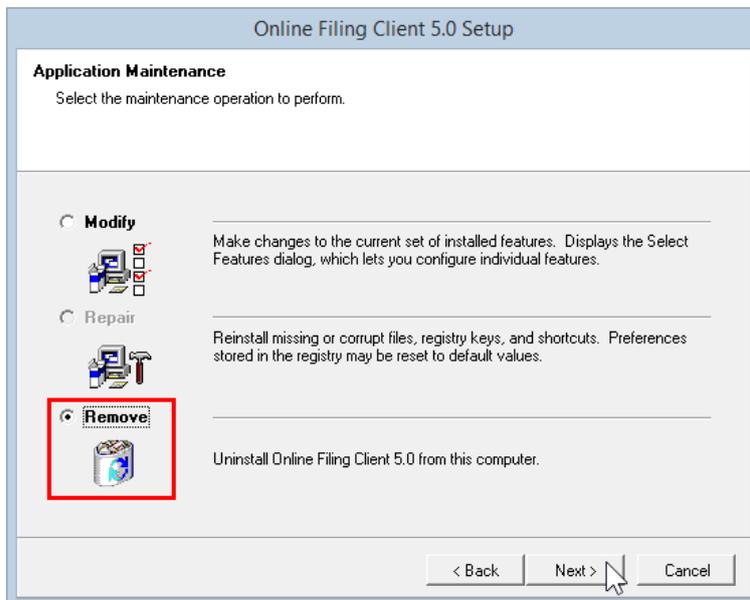


Figure 46: Option for removing Online Filing Client 5.0

The uninstallation routine starts.

- In the **Online Filing Client 5.0 Uninstall** window, click **Next**.
 - In the **Online Filing Client 5.0 has been successfully uninstalled** window, click **Finish**.
- You are prompted to delete the folder `EPO_OLF5 - TC`.
- Click **Yes** to confirm.

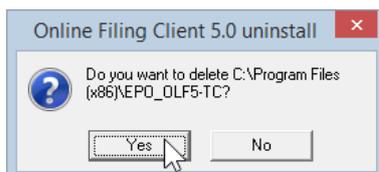


Figure 47: Prompt to delete the Online Filing Client program folder

If you cannot see the prompt, it might be because it is hidden behind other application windows on your screen.

- If this dialogue does not appear, check if the folder `Program Files\EPO_OLF5 - TC` was removed.
- If the folder still exists, delete it manually.

Uninstalling via the Windows Control Panel

- Open the Windows **Control Panel**.
- Go to **Programs > Programs and Features > Uninstall a program**.
 - ① In Windows XP / Server 2003, go to **Add or Remove Programs > Change or Remove Programs**.
- Select **Online Filing Client 5.0**.
- Click **Uninstall/Change**.
 - ① In Windows XP / Server 2003, click **Change/Remove** or **Remove**.
- Proceed as described above when the uninstallation program starts.

8.3 Uninstalling the server

The user rights needed to uninstall the OLF software in Windows are the same as those needed to install it, see **Windows user rights** (p. 12).

Uninstalling with the installation file

- Start the installation program with the installation file `OLF506.exe`.
- Confirm the security warning for user account control.
The Wise Installation Wizard is initialised.
- Select the required language and click **Next**.
- Enter the Administrator password if login with user name and password is activated in your OLF installation, and click **Next**.
- Click **Next** in the **Welcome** dialogue.

The option **Server installation** is already selected in the **Installation Mode** window.

- Click **Next**.
- Select **Remove** in the **Application Maintenance** window.
- Click **Next**.

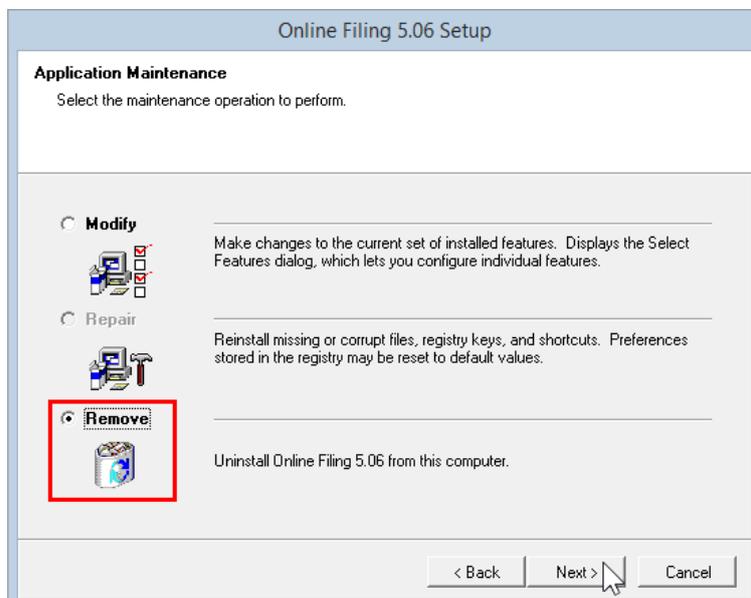


Figure 48: Option for removing Online Filing

- If you are sure you want to uninstall Online Filing, click **Next** in the **Online Filing 5.06 Uninstall** window.
- If you want to modify your settings, click **Back**.
- To exit the uninstall process, click **Cancel**.

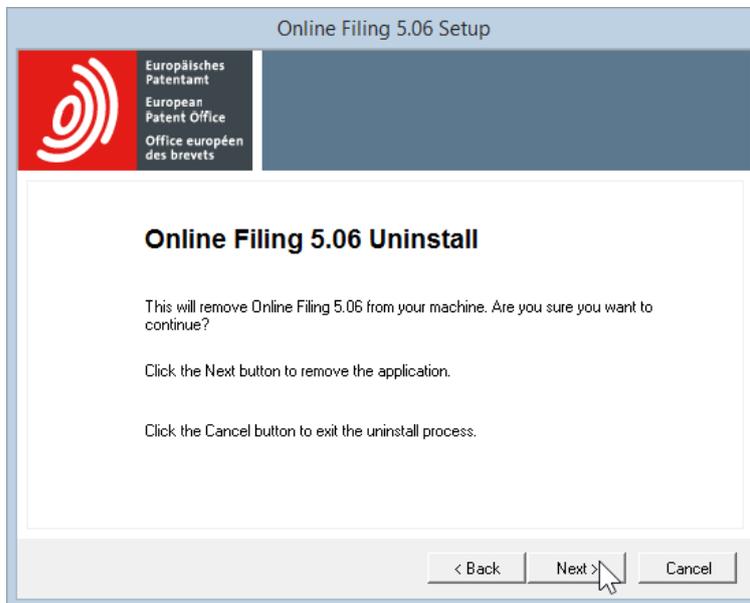


Figure 49: Starting the uninstall process

The uninstall routine starts and the **Online Filing 5.0 Uninstall** window opens a second time.

- To re-confirm your wish to uninstall Online Filing, click **Next**. This starts the process which cannot be stopped.
- If you decide you do not want to uninstall the software, you can still click **Cancel** here.

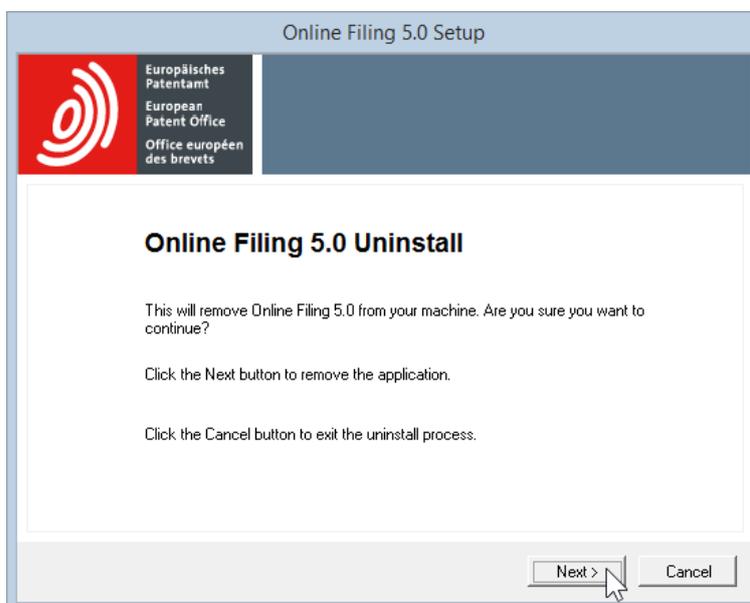


Figure 50: Second confirmation for uninstallation

The uninstallation program starts.



Figure 51: Wise Installation Wizard is initialised for the uninstallation routine

The uninstallation progress is indicated in the **Perform Uninstall** window.

→ In the **Online Filing has been successfully uninstalled** window, click **Finish**.

You are prompted to delete the folder EPO_OLF5.

→ Click **Yes** to confirm.

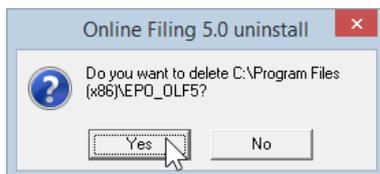


Figure 52: Prompt to delete the Online Filing program folder

If you cannot see the prompt, it might be because it is hidden behind other application windows on your screen.

① It is advisable to restart your computer when uninstallation is complete.

Uninstalling via the Windows Control Panel

→ Open the Windows **Control Panel**.

→ Go to **Programs > Programs and Features > Uninstall a program**.

① In Windows XP / Server 2003, go to **Add or Remove Programs > Change or Remove Programs**.

→ Select **Online Filing 5.06**.

→ Click **Uninstall/Change**.

① In Windows XP / Server 2003, click **Change/Remove** or **Remove**.

→ After starting the uninstallation program, proceed as described above.

8.4 Uninstalling the stand-alone version

- To uninstall the stand-alone version, proceed exactly as described for uninstalling the OLF server, see **Uninstalling the server** (p. 58).

8.5 Removing OLF program files and folders

! *Attention: Do not delete system files unless you know exactly what you are doing.*

The OLF installation folder may remain on your computer after uninstalling the OLF software. You may also find other individual folders from earlier installations, such as `epoline3` or `EPO_OLF` folders from older OLF versions.

By default, OLF version 5.06 uses the installation path `C:\Program Files\EPO_OLF5` for the server or the stand-alone version and the path `C:\Program Files\EPO_OLF5-TC` for the thin client.

- Check Windows Explorer to see if the `EPO_OLF5` folder is still present after restarting the computer.
- Delete the entire remaining `EPO_OLF5` folder.
- Delete the `EPO_OLF5-TC` folder, too, if it is still present after uninstalling the thin client.
- Delete the folders `epoline3` and `EPO_OLF`, if present.
- Delete the files `GDS32.dll` and `fbclient.dll`, if present in the directory `WINDOWS\system32`.

8.6 Editing the Windows registry

! *Warning: Editing the registry is at your own risk and should only be attempted by experienced users or with their assistance.*

Even after uninstalling the software within Windows, there may still be entries in the Windows Registry that need to be removed.

- To start the Windows Registry Editor, enter the command `regedit` in the search box in the Windows Start menu.
 - ① In Windows XP/Server 2003, go to **Start > Run** and enter the command `regedit` in the **Run** window.



Figure 53: Opening the Registry Editor with the "regedit" command

Remove the EasyTeam keys

- In the Windows Registry Editor, use either **Edit > Find** or press `CTRL+F`.
- Enter **EasyTeam** as the search term and click **Find Next**.
- Press `F3` to search again for the same term.

The registry contains at most the following two keys with an `eOLF5` subfolder, and possibly also an `eOLF4` subfolder from an older OLF installation:

```
HKEY_LOCAL_MACHINE\SOFTWARE\EasyTeam
HKEY_CURRENT_USER\Software\EasyTeam
```

- Delete both keys by right-clicking the folder `EasyTeam` on the left and then selecting **Delete** from the shortcut menu or hitting the `DEL` key.

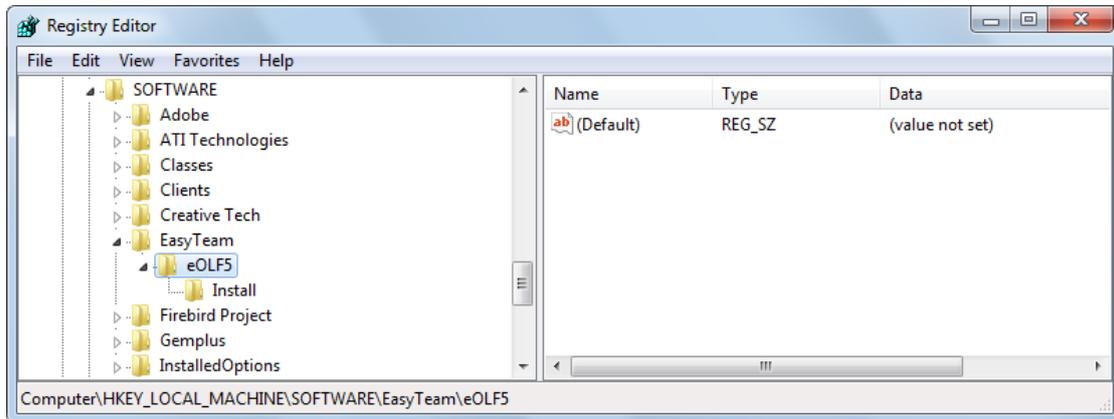


Figure 54: EasyTeam key in the registry

If you have installed PCT-Safe from WIPO, there will also be an entry for WIPO inside the `EasyTeam` folder.

- If that is the case, you should only delete the `eOLF5` sub-folder.

Remove the keys to start the MClient.exe

- Search the Windows registry for **MClient**.
- Delete the following keys one after the other by right-clicking the parent folder on the left and then selecting **Delete** from the shortcut menu:
 - HKEY_CLASSES_ROOT\CLSID\{D4535D47-30E5-48AA-9901-5B5566E90BF4}
 - HKEY_CLASSES_ROOT\Interface\{1EF9E2A1-A05F-4237-9499-34E0802338EE}
 - HKEY_CLASSES_ROOT\MCorbaClient.GUICOMClient
 - HKEY_CLASSES_ROOT\TypeLib\{0DDBDCE7-8EDD-4C1A-ACEA-69D1D83AA7CA}
 - HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID\{D4535D47-30E5-48AA-9901-5B5566E90BF4}
 - HKEY_LOCAL_MACHINE\SOFTWARE\Classes\TypeLib\{0DDBDCE7-8EDD-4C1A-ACEA-69D1D83AA7CA}

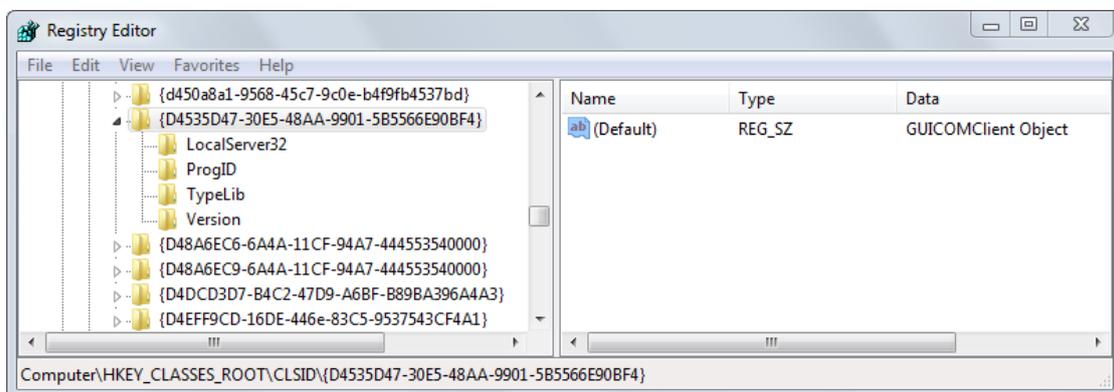


Figure 55: Deleting registry keys for MClient.exe

Delete keys for ClientAdvise (cl_cm.mtdORBClientAdvise)

HKEY_CLASSES_ROOT\CLSID\{4ECCBBFD-E55D-43F9-9135-59C8943E6F61}
HKEY_CLASSES_ROOT\Interface\{129B335F-837C-477D-B946-240C28BA316C}

Deleting additional keys

Depending on the prerequisites of your network or your stand-alone system, the registry may contain additional keys that have to be deleted:

- File Manager, EPO_OLF_FMMNGR_Service (OLFfm.exe)
- Server Manager, EPO_OLF_FMGRDN_Service (OLFGuardian.exe)
- Form EP(1001E2K), EPO_OLF_EP2000_Service (ep1001.exe)
- Form Euro-PCT(1200E2K), EPO_OLF_EP122K_Service (ep1200.exe)
- Form EP(1038E), EPO_OLF_EP1038_Service (ep1038.exe)
- Form EP(Oppo), EPO_OLF_EPOPPPO_Service (ep_oppo.exe)
- Form PCT/RO/101, EPO_OLF_IBR101_Service (pcti.exe)
- Other national plugins.

! **Note:** After cleaning the Windows registry, you need to reboot your computer for the changes to take effect.

9 Reinstallation with data migration

This section describes how to reinstall the Online Filing software and migrate the database from a previous installation. Reinstallation with data migration is intended for the following scenarios:

A) Restoring the system after a software crash

Your Online Filing installation crashes or stops working properly after a fatal error. You have to reinstall the software and want to restore the old OLF database at the same time.

→ Refer to section **Restore checklist** (p. 64).

B) Migrating data to new servers

You have been using Online Filing for some time already and now have to replace the server computer because it is no longer powerful enough. You want to transfer the OLF database from the functioning, up-to-date OLF installation to the new computer.

→ Refer to section **Migration checklist** (p. 65).

C) Migrating data to a new operating system on the same computer

You want to install a new operating system on the computer used for Online Filing, e.g. upgrade from Windows Server 2003 (32-bit version) to Microsoft Windows 2008 R2 Server (64-bit version). This entails reinstalling Online Filing on the new operating system and then importing the data from the old database.

→ Refer also to section **Migration checklist** (p. 65).

! ***Important:** When reinstalling Online Filing, ensure that you reinstall the exact same build (including all patches) as the one you were previously working with. Failure to do so may lead to inconsistencies in the data.*

9.1 Restore checklist

Proceed as following to reinstall Online Filing following a system error:

- Create a backup of the OLF database and additional copies of the database files, see **Backing up data** (p. 65)
 - ① If Server Manager is no longer working, refer to the information on how to copy the database manually
- Make note of the version numbers of the current installation, including all plug-ins, see **Maintenance checklist** (p. 44)
- Uninstall the OLF server, see **Uninstalling the server** (p. 58)
 - ① If uninstallation is no longer working, proceed with the following two steps
- Remove any remaining program folders and files, see **Removing OLF program files and folders** (p. 61)
- Delete any remaining entries in the Windows registry, see **Editing the Windows registry** (p. 61)
- Prepare the software installation files, see **Latest version of the OLF software** (p. 9)
- Reinstall the OLF server, see **Server installation** (p. 19)
- Reinstall the exact same version of the OLF server and all plug-ins as you already had
- Restore your database, see **Restoring data** (p. 67)
- If necessary, reinstall all thin clients, see **Updating the thin client** (p. 51)

9.2 Migration checklist

This checklist describes the steps needed to install OLF on a new computer or new operating system and then migrate the data.

- Create a backup of the OLF database on the old computer or operating system and copy the backup files and database to a secure location, see **Backing up data** (p. 65)
- Make note of the version numbers of the OLF installation on the old computer, including all plug-ins, see **Maintenance checklist** (p. 44)
- Prepare the new computer or the computer with the new operating system, see **Installation requirements** (p. 9)
- Install the OLF server on the new computer, see **Initial installation checklist: client/server** (p. 14)
- Reinstall the exact same version of the OLF server and all plug-ins as you had on the old computer.
- Restore your database on the new computer, see **Restoring data** (p. 67).
- Check that the Online Filing functions are working, see **Testing the server** (p. 32) and **Testing the thin client** (p. 37).
- If necessary, reinstall all thin clients, see **Updating the thin client** (p. 51).
- If you do not reinstall the thin clients, change the connection data to the new server for the thin clients, see **Changing the thin client settings** (p. 43).
- As soon as the new OLF server is working correctly, uninstall the OLF server from the old computer, see **Uninstalling the server** (p. 58).

9.3 Backing up data

We recommend that you create a backup of the database and save your data manually before you uninstall the Online Filing software.

Backing up the entire database with Server Manager's Backup function

The database backup function carries out a full backup of all the Online Filing data. All applications and templates, including all items in the Trash folder, are backed up. This option also backs up the Address Book, the user management settings, the File Manager folders and the folder management settings.

- Start Online Filing Server Manager as a user in the **Administrators** group.
- Click the **Settings** tab.
- Check the settings for the **Backup and restore directory**.
The default path is C:\Program Files\EPO_OLF5\tools\smanager\data.

! ***Attention:** The subsequent reinstallation will delete the entire EPO_OLF5 program folder. It is therefore advisable to either copy all backup files from this folder to another location or change the backup path before performing reinstallation.*

- To select a different path, click the folder icon.



- Click the **Backup** tab.
A list of all Server Manager database backups available in the selected backup folder is displayed.
- To create a new backup, click the **Backup** button.



- Back up the production database and the demo database one after the other.

The new backup files are labelled with the time and date, e.g. 20120708_113210.prod.bak for the production database backup. You will find the associated physical files as 20120708_113210.prod.bk and 20120708_113210.prod.sha1 in the backup folder set under **Settings**.

- Copy the *.bk and *.sha1 files for each database backup and save the file in a secure location such as on an external data carrier.

! ***Attention:** To restore a database at a later date, always use a backup created with the same build number or the same OLF version. If not, you run the risk data inconsistencies because the database structure changes from one version to another. For example, it would be impossible to restore the database from a backup created with version 5.05 in an installation of OLF version 5.06.*

Backing up applications and templates manually with Server Manager's Export function

Try this method if the database backup with Server Manager does not work.

ⓘ Note that a future import operation will place all applications - including those already sent - in **Draft** status in the new database. It is therefore advisable to group your applications in separate folders before you export or import them in order to maintain a clear overview.

Backing up the Address Book manually with File Manager's Export function

The Address Book can be exported as a CSV file and then re-imported later as required.

Manual database copy for emergencies

If none of the above-mentioned backup and export functions are working, you may be able to restore the database using a backup copy of the OLF database from an automatic backup. If possible, do not use the current database because this may already be corrupt as a result of the program crash.

Before performing an OLF migration make sure you create an extra copy of the current database in case an error occurs when restoring the database.

- Before copying the database, terminate the service **Firebird Server - OLF** under Windows **Control Panel > Administrative Tools > Services**, see also **Checking the status of the OLF server and OLF services** (p. 70).
- Copy the databases eOLFi.gdb (production) and eOLFdi.gdb (demo) from the default folder C:\Program Files\EPO_OLF5\db\ to a secure location.

! ***Important:** You can only restore a database with the database copy if the Online Filing version reinstalled is the one last used by the database.*

ⓘ For detailed information on Backup/Restore and Export/Import, refer to the online help for Server Manager and File Manager and the user guide for Online Filing version 5.06.

9.4 Restoring data

Once you have completed the installation, your database will be empty. Server Manager enables you to restore your complete database or import individual applications or templates.

Restoring the entire database with Server Manager's Restore function

To use the Restore function, you must have already created a backup of the database with Backup, see **Backing up data** (p. 65).

- Copy the four backup files to the new computer (i.e. the *.bk and *.shal files for both the production database and the demo database) and place them in the folder C:\Program Files\EPO_OLF5\tools\smanager\data (default path) or in the folder set in Server Manager as the **Backup and restore directory**.
- Start Online Filing Server Manager as a user in the **Administrators** group, see **Enabling user management** (p. 25).
- Click the **Backup** tab.
Two available backup copies are displayed: the production database and the demo database.
- Select the database you want to restore: **Demo** or **Production**.
- Click the **Restore** button.



- Restore both databases.

Importing applications and templates with Server Manager

Try this method if the database restore with Server Manager does not work and the data has already been exported.

i Note that a future import operation will reset all applications to **Draft** status. You will have to sign them again so they are ready to send before you can submit them to the filing office.

Importing the Address Book with File Manager

- Copy the CSV file already exported to the new computer.
- Start File Manager and open the Address Book.
- Import the CSV file.

Importing a manually generated database copy

If you were unable to create a backup before reinstallation or if the Restore function did not work, you can copy the old database to the new program folder.

! **Attention:** If the old database was already corrupt at the time it was copied, errors can occur in your data. You should only use a database copy therefore if you are sure that Online Filing was working properly when it was created.

- Before copying the database, terminate the service **Firebird Server - OLF** under Windows **Control Panel > Administrative Tools > Services**, see also **Checking the status of the OLF server and OLF services** (p. 70).
- Copy the databases eOLFi.gdb (production) and eOLFdi.gdb (demo) to the default folder C:\Program Files\EPO_OLF5\db\, i.e. overwrite the newer databases created during installation.

10 Using the PMS gateway interface

! *Attention: It is advisable to coordinate your technical details with EPO User Support before using the PMS gateway interface for filing. The smooth operation of the PMS gateway is guaranteed only with PMS software tested and approved by the EPO as Online Filing-compatible.*

Users operating a separate patent management system (PMS) can install Online Filing's PMS gateway interface on both a stand-alone workstation and a server in the corporate network. This gateway sets up a connection from the PMS to the OLF receiving server installed on the office side and uses Online Filing mechanisms for data validation and transmission.

An installation guide and description of how the PMS gateway works is provided in the "Online Filing V5 PMS development kit (for applicants and PMS providers)". This kit is available under **Applying for a patent > Online services > Online filing > Download software for filing with the EPO** (<http://www.epo.org/applying/online-services/online-filing/download.html>). In addition to documentation, the kit also contains the necessary program files, Java classes, and DTDs.

Important information on using the PMS gateway

- The PMS gateway interface is activated under System Preferences in the OLF File Manager. Activation is only possible if user management is also enabled in OLF.
- A smart card that has been approved and registered by the EPO must be inserted in the OLF server computer's reader to send applications to the EPO.
- The PMS gateway can be used both in production mode and demo mode. To enable PMS for both production and demo mode, you need to log on in production mode.
- Certain validation messages (GUI-specific validations) are only output in English.

Importing PMS data in OLF

For a detailed description of the import data requirements, refer to the document "Importing Data into Online Filing version 5 and higher". It is available from the EPO website under **Online filing > Download documentation** (<http://www.epo.org/applying/online-services/online-filing/documentation.html>).

10.1 Technical coordination with the EPO

Enabling the Patent Management Systems (PMS) gateway interface requires prior approval of the PMS software by the patent office(s) where an application is to be filed. Using the PMS gateway interface without prior approval of the software may result in malfunctions or technical/procedural errors.

In the case of standard PMS software, the supplier may already have obtained the necessary approval. For custom-made PMS software, or where no approval has yet been obtained for the standard version, approval must be obtained from the support desk(s) of the patent office(s) concerned. With regard to the EP F1001 and PCT/RO/101 procedures, approval must also be requested from the EPO User Support before patent offices are contacted.

Please refer to the latest information on the **EPO website** (<http://www.epo.org/online-services>), before activating the PMS gateway and filing applications.

Testing the PMS gateway

Start by performing a test in demo mode. This sends data to the demo database on the EPO's OLF server.

- Log on as an administrator and start the OLF File Manager in demo mode.
 - User management is enabled if you log on here with your username and password.
 - If not, go to **Tools > Preferences > System Preferences** and select the check box **Enable User Management**.
- Activate the PMS gateway interface with the **Smart card** option under **System Preferences**.

- Use your PMS to submit a couple of demo applications to the EPO. You can use the EPO's sample applications for this as they contain all the relevant data.
- Monitor the response from your PMS.

If everything works as expected, contact **EPO User Support** (see "**Online Filing help**" p. 6) for further coordination. The EPO User Support checks the demo applications received and reports any technical malfunctions that may have occurred. You are then granted a release for your PMS software.

For the verification of procedures other than those filed or accepted by the EPO, please contact the relevant patent offices immediately and inquire directly about the CP approval procedures.

Activating the PMS gateway for filing in production mode

- Start the OLF File Manager in **Production mode**.
- If necessary, enable user management under **System Preferences**.
- Then go to the PMS gateway interface under **System Preferences** and activate the **Smart card** option.
- Select the check box **I confirm that the PMS software has been approved by the patent office(s) concerned**.
- Select the check box **Enable filing to production**.

This now lets you send your applications from the PMS to the EPO and the other patent offices over the PMS gateway interface.

10.2 PMS gateway features

The PMS gateway uses OLF Web service commands that match the basic functions of the OLF client:

Command	Explanation
validate	Checks and validates data in an application using the OLF software verification rules
import	Imports an application from the PMS into the OLF database.
sign	Signs an application. The digital signature for non-repudiation is applied prior to transmission via a smart card inserted into a reader connected to the OLF server.
send	Sends an application to the receiving office. Only with authentication via a smart card.
export	Exports an application with all associated data from the OLF database to the PMS.
remove	Removes an object from the OLF database.
information	Exports data, including log files, to the OLF database for all or specific applications.

For more information, refer to the document "Introduction to the PMS Gateway Interface" supplied with the above-mentioned development kit.

11 Troubleshooting

The following section proposes solutions for a number of typical problems in Online Filing.

If your problem is not listed here, please contact the EPO User Support or search the Online Filing discussion forum, see **Online Filing help** (p. 6).

11.1 Checking the status of the OLF server and OLF services

If you are unable to start File Manager from a client computer or activate plug-ins, it may be because those services do not run on the server computer.

The following services are configured when you install Online Filing version 5.06:

- Firebird server (Firebird Guardian OLF)
- Firebird database server (Firebird server OLF)
- File Manager (EPO OLF FM server)
- a service for each procedure (plug-in)

The same services are used in both production and demo mode. The Firebird server connects to either the production database or the demo database, depending on the mode selected.

You can monitor and control the OLF services in OLF Server Manager or in the Windows Services Manager.

Checking the status of OLF services in Server Manager

- Start Server Manager with the option Run as administrator via the **Online Filing 5.0 Server Manager** shortcut.
- Check the **Services** tab in Server Manager to see if the EPO OLF standard services and the services related to the national plug-ins you activated are running (status is **Running**), see paragraph "Checking the status of services in Server Manager" under **Testing the server** (p. 32).

Checking the status of OLF services in the Windows Services Manager

All services automatically start as Windows processes when the computer is booted.

Depending on your configuration, it may take some time for OLF services to start up after booting. Once start-up is complete, the services will be continuously available.

- Open the Windows Control Panel and select **Administrative Tools > Services**.
- Check if all EPO OLF standard services (EP1038, EP122K, EP2000, EPOPP0, FM Server and IBR101) and those related to the national plug-ins started are running, i.e. **Started** appears in the **Status** column. The national plug-ins not activated are not running.

ⓘ Note that the startup type for the national plug-ins activated is **Automatic**, while it is **Manual** for the plug-ins not activated.

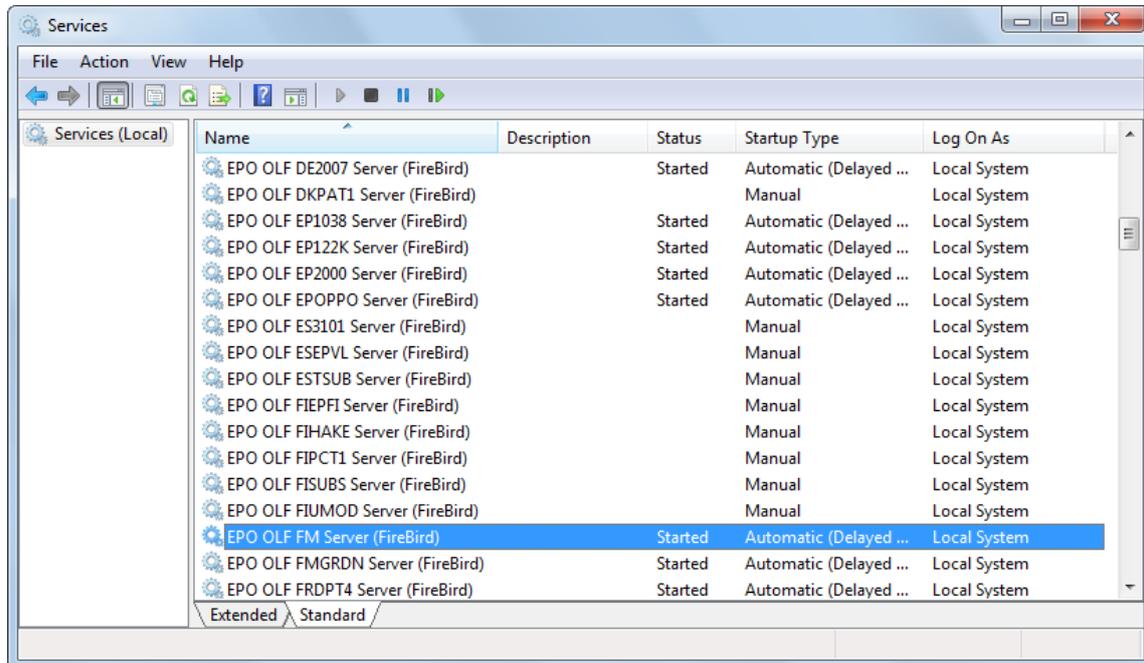


Figure 56: Checking EPO OLF services in Windows

The services Firebird Server Guardian (Firebird Guardian - OLF) and Firebird Database Server (Firebird Server - OLF) should also be running.

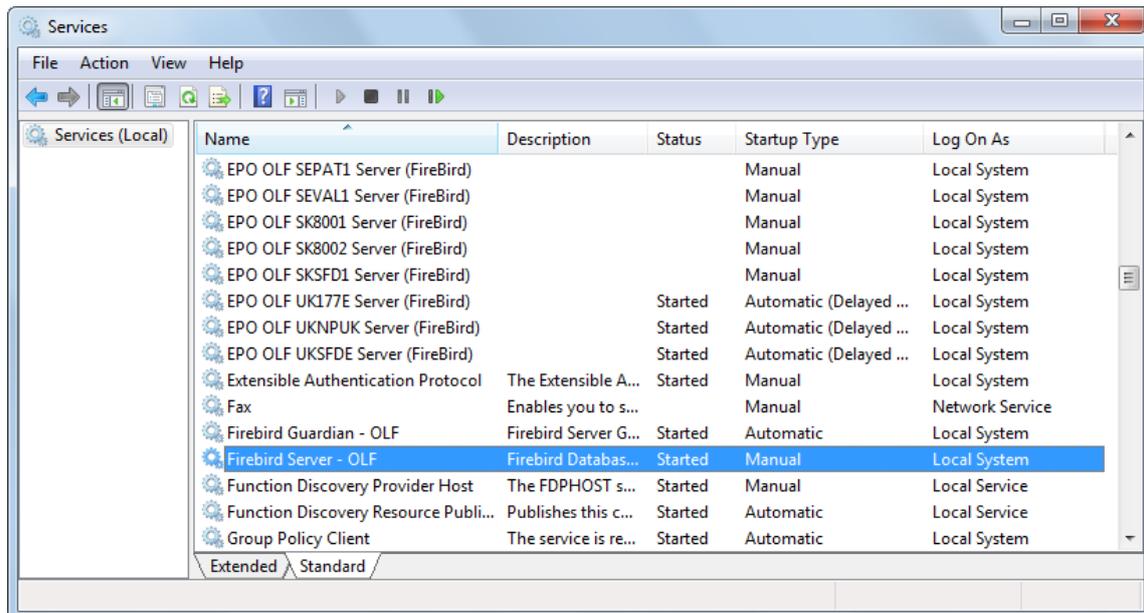


Figure 57: Status of Firebird Server - OLF in Windows

- If you terminate Firebird Server - OLF, all dependent OLF services will also terminate, i.e. the OLF service will shut down completely.

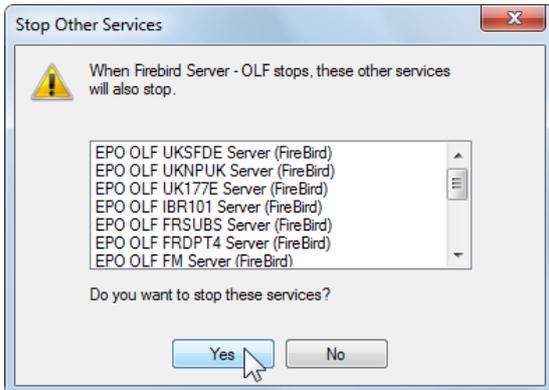


Figure 58: Prompt before terminating all OLF services with the Firebird server

Checking ports used by OLF

To verify that the ports are available, you can check in a DOS box.

- From the Windows Start menu, select **Accessories > Command Prompt**.
- Type the command `netstat -an`.

You can see here which ports are currently open on your server. The ports used by the OLF server, such as 11000, should all have LISTENING status.

```

C:\Windows\system32\cmd.exe
Microsoft Windows [Version 6.1.7600]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Users\Susanne>netstat -an

Active Connections

 Proto Local Address           Foreign Address         State
----
TCP   0.0.0.0:88                0.0.0.0:0               LISTENING
TCP   0.0.0.0:135               0.0.0.0:0               LISTENING
TCP   0.0.0.0:445               0.0.0.0:0               LISTENING
TCP   0.0.0.0:554               0.0.0.0:0               LISTENING
TCP   0.0.0.0:2869              0.0.0.0:0               LISTENING
TCP   0.0.0.0:3050              0.0.0.0:0               LISTENING
TCP   0.0.0.0:5357              0.0.0.0:0               LISTENING
TCP   0.0.0.0:10243             0.0.0.0:0               LISTENING
TCP   0.0.0.0:11000             0.0.0.0:0               LISTENING
TCP   0.0.0.0:11103             0.0.0.0:0               LISTENING
TCP   0.0.0.0:11105             0.0.0.0:0               LISTENING
TCP   0.0.0.0:11106             0.0.0.0:0               LISTENING
TCP   0.0.0.0:11108             0.0.0.0:0               LISTENING
TCP   0.0.0.0:11301             0.0.0.0:0               LISTENING
TCP   0.0.0.0:11503             0.0.0.0:0               LISTENING
TCP   0.0.0.0:11504             0.0.0.0:0               LISTENING

```

Figure 59: MS-DOS command "netstat -an"

11.2 Testing the connection between the client computer and the OLF server

If you are unable to connect to the OLF server with the OLF thin client, you will not be able to start File Manager. In this case, the network connection may be lost.

You can use `ping` to test the general connection to the server computer and `telnet` to test the connection to the individual plug-ins via the specific ports.

Ping

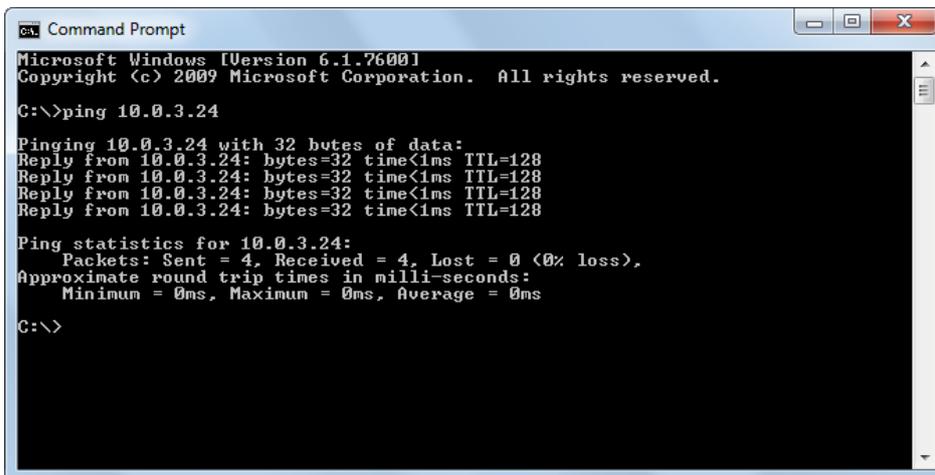
To check that the network connection to the server machine is possible, you can also do that at a DOS prompt with the MS-DOS command `ping`.

→ From the Windows Start menu, select **Programs > Accessories > Command Prompt**.

→ Type the command `ping` [IP address of your Online Filing server].

Example: `ping 10.0.3.24`

The result should be a response from the server machine without any error messages.



```
ca. Command Prompt
Microsoft Windows [Version 6.1.7600]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\>ping 10.0.3.24

Pinging 10.0.3.24 with 32 bytes of data:
Reply from 10.0.3.24: bytes=32 time<1ms TTL=128

Ping statistics for 10.0.3.24:
    Packets: Sent = 4, Received = 4, Lost = 0 (0% loss),
    Approximate round trip times in milli-seconds:
        Minimum = 0ms, Maximum = 0ms, Average = 0ms

C:\>
```

Figure 60: MS-DOS command "ping"

Telnet

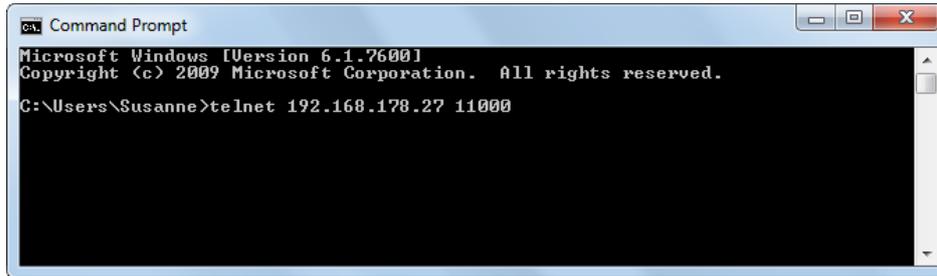
You can also use the `telnet` command to test the connection to the OLF server over the CORBA and SOAP ports you set during installation.

! **Note:** If the `telnet` command is not recognised in the DOS command prompt, activate the telnet client and the telnet server under **Control panel > Programs and Features > Turn Windows features on or off**.

→ From the Windows Start menu, select **Programs > Accessories > Command Prompt**.

→ Enter the command `telnet` [IP Address of your OLF server] [CORBA or SOAP port number].

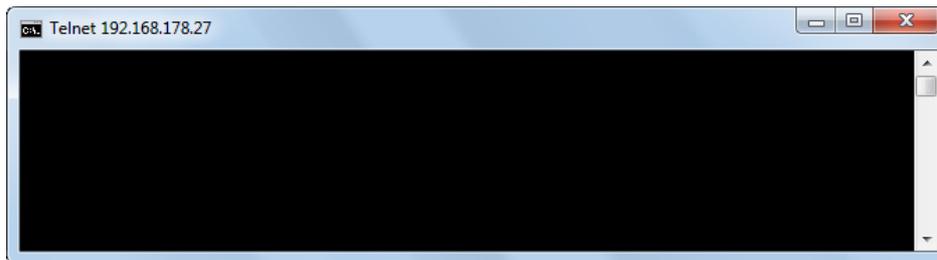
Example: `telnet 192.168.178.27 11000` to query the CORBA port for File Manager.



```
ca. Command Prompt
Microsoft Windows [Version 6.1.7600]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.
C:\Users\Susanne>telnet 192.168.178.27 11000
```

Figure 61: Enter the telnet command at the MS-DOS command prompt

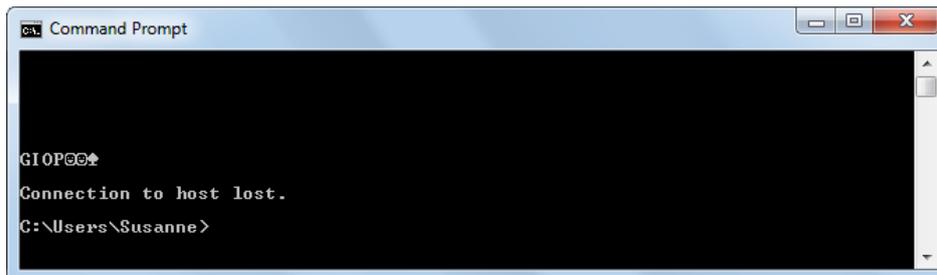
The result should be an empty window showing the IP address of the queried server in the title bar.



```
ca. Telnet 192.168.178.27
```

Figure 62: Connection to the OLF server set up via telnet

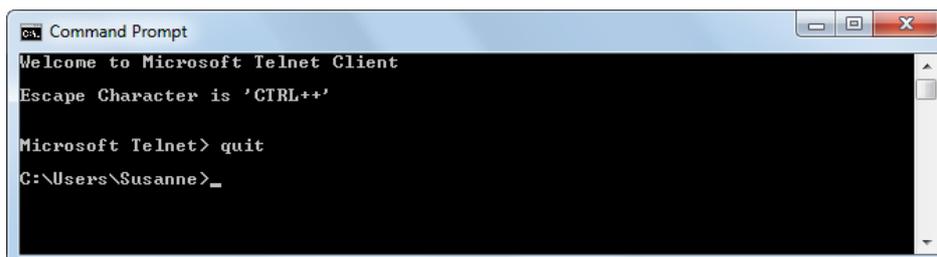
→ Terminate the telnet connection to the CORBA port by pressing ENTER six times.



```
ca. Command Prompt
GIOP@
Connection to host lost.
C:\Users\Susanne>
```

Figure 63: CORBA connection to the server terminated

→ Terminate the telnet connection to a SOAP port with the escape character `CTRL + +`, followed by the command `quit`.



```
ca. Command Prompt
Welcome to Microsoft Telnet Client
Escape Character is 'CTRL++'
Microsoft Telnet> quit
C:\Users\Susanne>_
```

Figure 64: SOAP connection to the server terminated

11.3 Optimising the display settings

Please note that Online Filing was optimised for display with the normal font size. Notebook computer users often choose a larger system font to make on-screen text easier to read on smaller, high-resolution displays. If you notice when working with Online Filing that some of the text in screen masks is missing or truncated, please change your settings as follows:

- Open the **Control Panel**.
- Go to **Appearance and Personalization > Display**.
- Select the **Smaller - 100% (default)** option.
- Click **Apply**.

You must log off your computer to activate the new settings.

Windows Vista

- Open the **Control Panel**.
- Go to **Appearance and Personalization > Personalization**.
- Click **Adjust font size (DPI)** in the Tasks area.
- Click **Continue** in the **User Account Control** window.

You are prompted to enter an administrator password here if you are not logged on as a Windows administrator.

- Select the **Default scale (96 DPI)** option.
- Click **OK**.

You must restart your computer to activate the new settings.

Windows XP

- Open the **Control Panel**.
- Double-click the **Display** icon.
- Click the **Settings** tab.
- Click the **Advanced** button.
The range of tabs you see depends on which graphics card is installed.
- Click the **General** tab.
- Select **Normal size (96 DPI)** in the **DPI setting** drop-down list.
- Click **OK**.

Depending on your compatibility settings, you will be prompted to apply the new settings or restart your computer.

11.4 Configuring PDF display in Adobe Reader

The following error message may appear when you are trying to preview a form or open a form you want to sign (but no PDF is displayed):

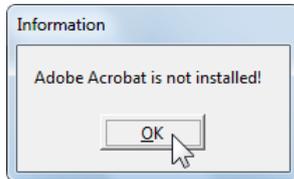


Figure 65: OLF cannot open Adobe Acrobat Reader

If, however, Adobe Reader is installed on your computer and you have no problem opening other PDF files, please check the settings in Adobe Reader.

① If Adobe Acrobat Pro or Adobe Acrobat Standard is installed in addition to or instead of Adobe Reader, please check and configure those applications too.

- Close all Online Filing windows apart from File Manager.
- Start Adobe Reader from the Windows Start menu.
- Select **Edit > Preferences**.
- Click the category **Internet** on the left.
The option **Display PDF in browser** must be selected.
- Select the check box as applicable.
- Click **OK**.
- Close Adobe Reader.

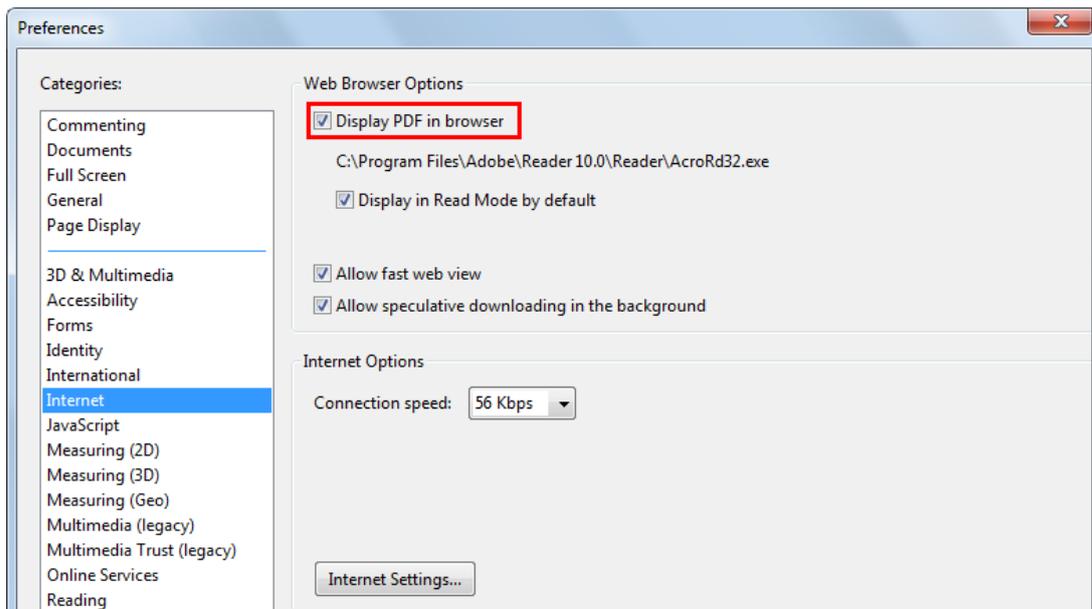


Figure 66: Option for displaying PDFs in Adobe Reader

11.5 Error: "Connection aborted on request"

The following error message may appear when an application you are trying to send fails to transfer and the sending process is aborted at 0% after a certain length of time:

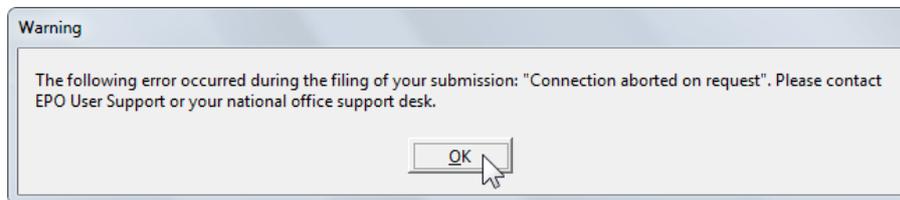


Figure 67: Error message: "Connection aborted on request"

Changing the network settings in Server Manager

If you are using a proxy server in your network, the error could occur because the settings for the proxy server connection are not correct in Online Filing.

- Open Server Manager and select the **Settings** tab.
You will find the proxy server settings under **Default Network Settings**.
- If you are familiar with your proxy settings, enter them correctly here.



Figure 68: Settings for connecting to the internet over a proxy server in Server Manager

- If you are not familiar with this data, try using your browser settings. You can find them at the following locations:
 - In the Windows Control Panel under: **Network and Internet > Internet Options > Connections > LAN settings**
 - **Internet Explorer:** Select **Tools > Internet Options > Connections > LAN settings**

If your system uses a proxy server, you will find the address and the port here.

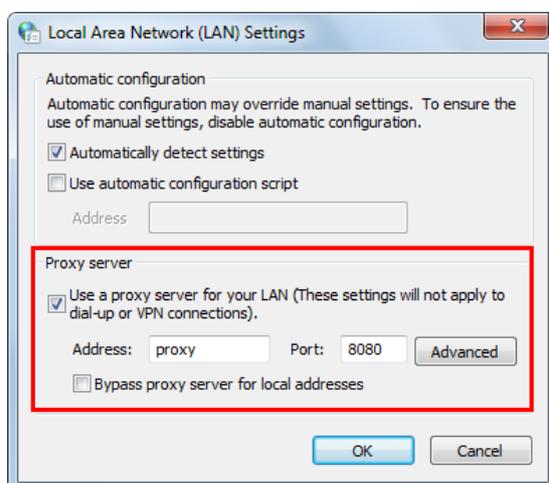


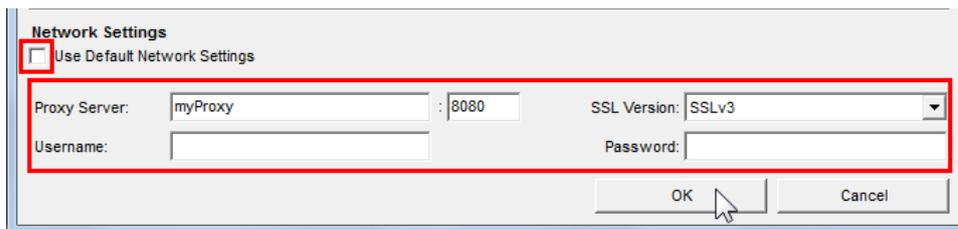
Figure 69: Proxy server settings under Windows Internet Options

- Change the proxy settings in Server Manager as appropriate.
- Close Server Manager.
- ⓘ This setting affects all Online Filing users connected to this OLF server.

Changing network settings in File Manager

If you cannot access Server Manager, you can change the settings for your own workstation as follows:

- Open File Manager (**Online Filing 5.0 Client**).
- Select **Tools > Preferences > User Preferences**.
- Check if **Use Default Network Settings** is selected under **Network Settings**.
If it is selected, the Server Manager settings are used.
- Clear this check box.
This enables the fields for the proxy settings for editing.
- Enter the proxy data (if you do not have this data, see above).
- Click **OK**.
You will be prompted to restart File Manager.



The screenshot shows a dialog box titled "Network Settings". At the top left, there is a checkbox labeled "Use Default Network Settings" which is currently unchecked. A red rectangular box highlights this checkbox and the area below it. Below the checkbox, there are four input fields: "Proxy Server:" with the text "myProxy", a port field with "8080", "SSL Version:" with a dropdown menu showing "SSLv3", "Username:" with an empty field, and "Password:" with an empty field. At the bottom right of the dialog, there are two buttons: "OK" and "Cancel". A mouse cursor is pointing at the "OK" button.

Figure 70: Individual setting for the proxy server in File Manager

11.6 Error: "Connection to server lost"

This or a similar error message appears if data retrieval suddenly fails while you are working in File Manager or in a form in Online Filing:

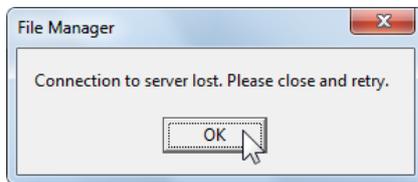


Figure 71: The client lost the connection to the server

This means that the OLF client or the OLF plug-in you are using is unable to set up a network connection to the OLF server in your network.

Loss of a connection can occur for a number of reasons:

- The OLF server is no longer running.
- The desired service on the OLF server is not running.
- The client is unable to set up a connection to the server because the network configuration is not correct.

Proceed as follows to solve the problem:

! **Attention:** You must have Windows administrator rights to change configuration files in the program folder `EPO_OLF5`. If you are unable to access the OLF server, try steps 2 and 5 to perform troubleshooting for the thin client.

1. Is the relevant service running?

- See **Checking the status of the OLF server and OLF services**. ("Checking the status of the OLF server and OLF services" p. 70)
- If the services are stopped, restart all of them on the server.

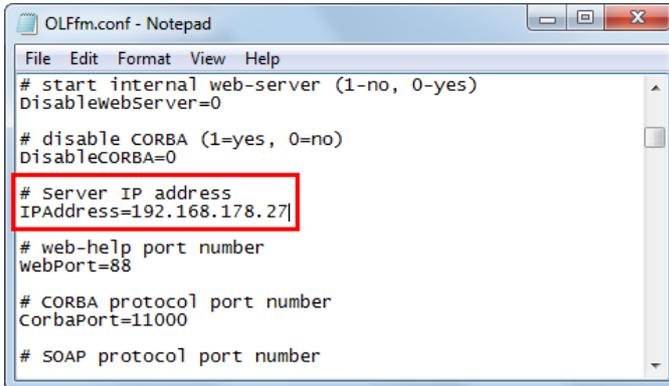
2. Is the client connected to the server and are the ports available?

- See **Testing the connection between the client computer and the OLF server** (p. 73).
- If you do not receive an answer with the IP address known to you, try using `ping` or `telnet` to query the server name of the OLF server.

3. Is the correct IP address entered for the OLF server in the configuration file?

- Find out your server's current IP address with `ipconfig`, see **Changing network settings** (p. 40).
- Open the configuration file `OLFfm.conf` for File Manager or the configuration file for the relevant plug-in (form) in Windows Notepad.

- Search for the string `# Server IP address`.



```

OLFfm.conf - Notepad
File Edit Format View Help
# start internal web-server (1=no, 0=yes)
DisablewebServer=0

# disable CORBA (1=yes, 0=no)
DisableCORBA=0

# Server IP address
IPAddress=192.168.178.27

# web-help port number
webPort=88

# CORBA protocol port number
CorbaPort=11000

# SOAP protocol port number

```

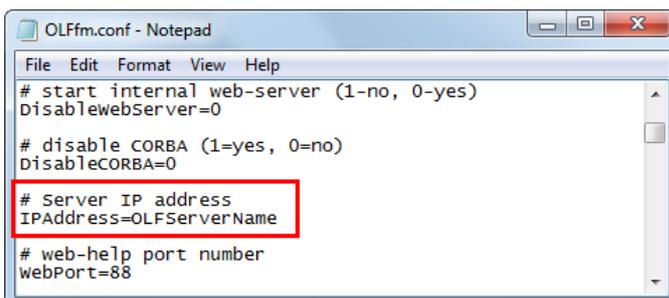
Figure 72: Example of an IP address in OLFfm.conf

If the IP address under `# Server IP address` does not match the one found with `ipconfig`, the IP address must have changed since Online Filing was installed.

- Correct the IP address in OLFfm.conf.
- Saved the changed file.

4. Is a dynamic IP address used for the OLF server in your network?

- Test the connection between the client computer and the server computer with `ping server name`.
- Enter the name of the OLF server instead of the IP address in OLFfm.conf.
- Save the changed file.



```

OLFfm.conf - Notepad
File Edit Format View Help
# start internal web-server (1=no, 0=yes)
DisablewebServer=0

# disable CORBA (1=yes, 0=no)
DisableCORBA=0

# Server IP address
IPAddress=OLFServerName

# web-help port number
webPort=88

```

Figure 73: Example of a server name in OLFfm.conf

5. Is the server address in the Online Filing 5.0 client settings correct?

- Correct the IP address here also or enter the server name, see **Changing the thin client settings** (p. 43).
- Start File Manager.
- Check if you can open all forms.

12 Annex

12.1 Installation scenarios

The following is a list of all installation scenarios described in this manual.

- Initial installation of Online Filing
see **Initial installation** (p. 14)
- Updating an installation
see **Installation maintenance** (p. 44)
- Converting a stand-alone installation into a network installation
see **Converting from stand-alone to server mode** (p. 52)
- Migrating data to a new computer or a new operating system
see **Reinstallation with data migration** (p. 64) and **Migration checklist** (p. 65)
- Restoring Online Filing including the database after a system crash
see **Reinstallation with data migration** (p. 64) and **Restore checklist** (p. 64)
- Replicating the OLF server at a second site (mirror)
see **Replicating the OLF server** (p. 81)
- Migrating the configuration of user rights from an existing OLF server to a new OLF installation
see **Migrating user data** (p. 82)
- Migrating the OLF database of an existing OLF network installation to a different hard disk location
see **Migrating databases** (p. 84)

12.1.1 Replicating the OLF server

You would like to replicate (mirror) the OLF server at a second site and program the thin clients to work with either server A or server B depending on the time and date.

A) Automatic script-based client configuration

The script must run in such a way that it is able to change the settings in the configuration file `OLFCClient.ini` on all client computers at the same time.

The parameters that must be changed are:

- CORBA yes/no
- Server IP address and CORBA port/SOAP port for File Manager

Example: Server A works with CORBA, server B with SOAP

The script must change the `CORBA` parameter in the following manner:

- `CORBA=1` - if the client should connect to server A via CORBA
- `CORBA=0` - if the client should connect to server B via SOAP

In `OLFCClient.ini` :

```
[Common]
...
CORBA=1
[CORBA]
ORBBINDADDR=inet:IPAddressServerA:11000
...
```

[SOAP]

```
ORBBINDADDR=inet:IPAddressServerB:21000
```

B) Manual server selection over the second thin client

You can configure a second client on each computer and program it to connect to either server A or server B. In this case, it is up to the user to start the correct client.

- Install the first thin client in the usual way.
- Program the client for the connection to server A.
- Copy the entire folder EPO_OLF5-TC to a different location on the client computer.
- Edit the `OLFClient.ini` file in this folder such that the connection to server B uses either CORBA or SOAP, see above.
- Create a shortcut for both clients on the Windows desktop.

Note for Windows 7 / Vista

If your client computer is running on Windows 7 or Windows Vista, you should not install the thin client(s) in or copy it(them) to the system folder `C:\Program Files`. Instead, you should choose a folder with write access for normal Windows users. Otherwise manual editing is impossible in `OLFClient.ini`.

What is more, changes made via the **Online Filing Client 5.0 settings** dialogue are not written to `OLFClient.ini` if the thin client was installed in the folder `C:\Program Files\EPO_OLF5-TC`.

12.1.2 Migrating user data

After successfully installing Online Filing on a new machine with an empty database, you may want to transfer your familiar user rights configuration from an existing OLF installation to the new server.

The Online Filing Server Manager provides a specific export/import function for this purpose.

- Start Server Manager as a user in the **Administrators** group.
- Click the **Data Migration** tab.
- There are three options available under **User Data Migration**:
 - Copy the complete user administration from the production server to the demo server.
 - Export the user administration from the production server to a file.
 - Import the user administration from a file to the production server.
- To migrate the data from the old machine to the new machine, first export the user administration from the old machine and then import it into the new machine.

! *Note: Migrating the user administration from one physical server to another only works for the production server.*

Exporting the user administration from the old machine

- Start Server Manager on the old machine and go to the **Data Migration** tab.
- Select the option **Export the user administration from the production server to a file**.

→ Click **Execute**.

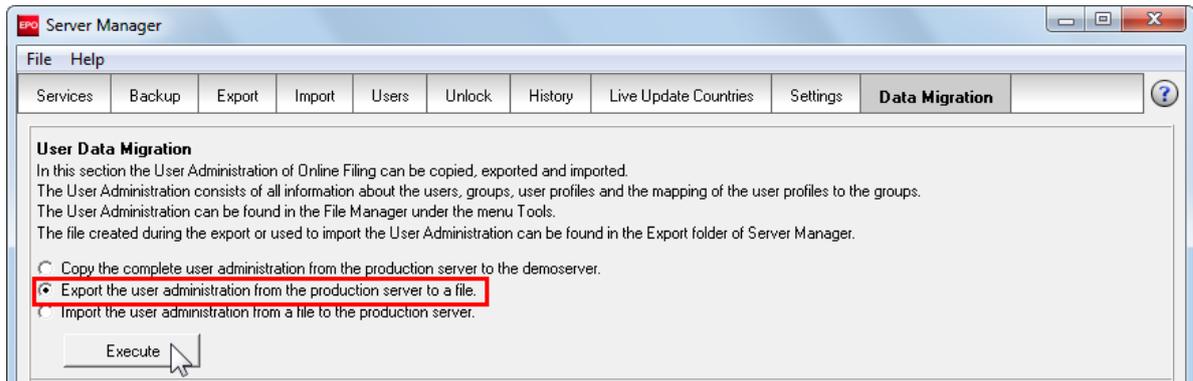


Figure 74: Exporting the user administration from the existing OLF installation

The export operation creates a ZIP file in the Server Manager's default export directory. The ZIP file is named `useradministration[date]_[time].zip`, e.g. `useradministration20120628_153639.zip` and contains three files, `um.tmp`, `uma.tmp` and `umr.tmp`.

→ Copy this ZIP file to the target machine.

Importing the user administration into the new machine

→ Start Server Manager on the new machine and go to the **Data Migration** tab.

→ Select the option **Import the user administration from a file to the production server**.

→ Click **Execute**.

→ Select the appropriate ZIP file from the file system.

The Data Migration function opens Server Manager's import directory by default.

→ Click **Open**.

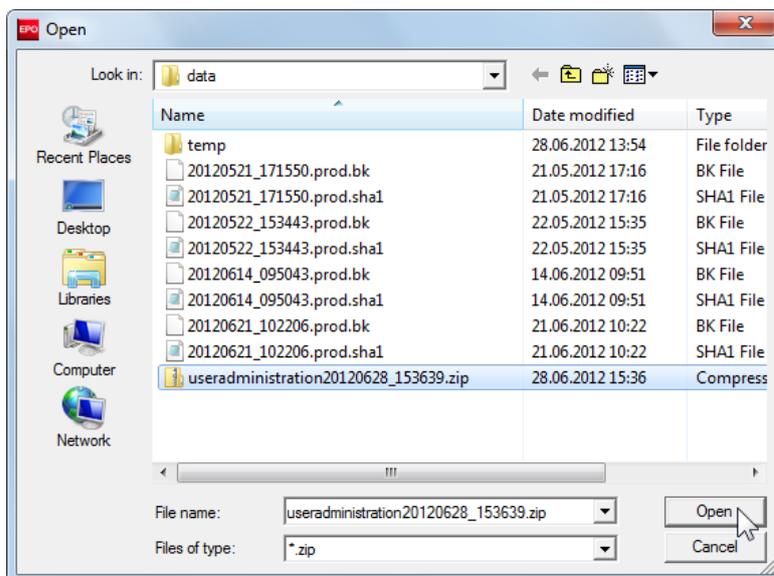


Figure 75: Selecting the user administration file to be imported

A prompt informs you when the import operation is complete.

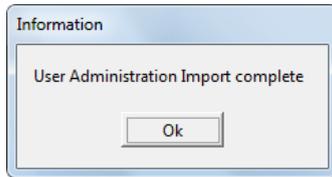


Figure 76: User administration was successfully imported

12.1.3 Migrating databases

You can move the Online Filing databases to a different hard disk drive if your server computer's hard disk runs out of space or if you have to replace the hardware.

By migrating the database to another location, the Online Filing server will be reconfigured to connect to the new database path.

- Start Server Manager as a user in the **Administrators** group.
- Click the **Data Migration** tab.
- Under **Database Migration**, select the appropriate option:
 - Leave the copy of the database in the former location after successful migration (default)
 - Delete the copy of the database in the former location after successful migration

❗ It is recommended to leave the copy of the database in the former location until you are sure that everything works correctly in the new location.

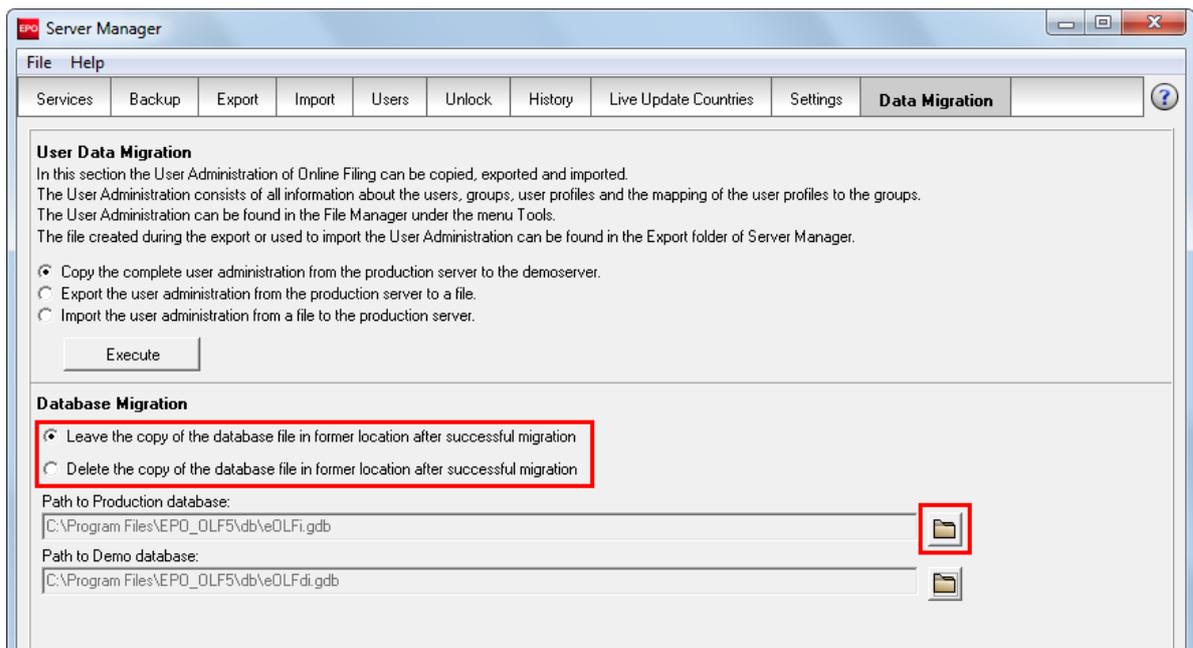


Figure 77: Options for migrating the OLF database

Both the production database and demo database can be migrated independently.

- Click the folder icon next to the database path you wish to modify.



- Select an existing folder in your file system or create a new one.

→ Click **OK**.

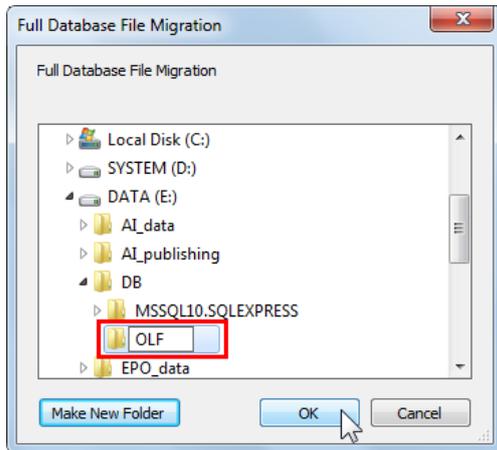


Figure 78: Selecting a new location for the OLF database

→ Wait until the **Information** prompt appears.

① If the database is very large, the process of copying and verifying the database could take some time. The new path is displayed in the message.

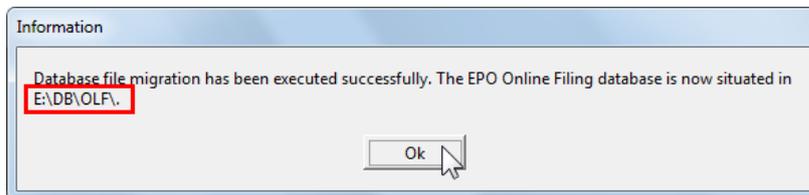


Figure 79: Confirmation of successful database migration

12.2 OLF services and ports

The table below lists the CORBA and SOAP port numbers for all EPO OLF services with the associated program and configuration files.

- There is a separate folder for every plug-in in the program folder `C:\Program Files\EPO_OLF5`.
- The program file for every plug-in is always located in the plug-in folder's `bin` subfolder.
- The configuration file for every plug-in is always located in the plug-in folder's `config` subfolder.

Example for the EP122K plug-in, Euro-PCT procedure (EP1200E2K)

Program file: `C:\Program Files\EPO_OLF5\ep1200\bin\ep1200.exe`

Configuration file: `C:\Program Files\EPO_OLF5\ep1200\config\ep1200.conf`

Exception: PCT plug-in

The PCT plug-in's plug-in folder does not have separate `bin` and `config` folders. Rather, the program file `pcti.exe` and the configuration file `pcti.ini` are stored directly under `C:\Program Files\EPO_OLF5\pct\`.

Plugin	Program file	CORBA port	SOAP port	Configuration file
FMMNGR	OLFfm.exe	11000	21000	OLFfm.conf
EP1038	ep1038.exe	11103	21103	ep1038.conf
EP122K	ep1200.exe	11106	21106	ep1200.conf
EP2000	ep1001.exe	11105	21105	ep1001.conf
EOPPO	ep_oppo.exe	11108	21108	ep_oppo.conf
IBR101	pcti.exe	11301	n.a.	pcti.ini
DE2007	de2007.exe	13102	23102	de2007.conf
UK177E	uk177.exe	12901	22901	uk177.conf
UKNPUK	NP1.exe	12902	22902	NP1.conf
UKSFDE	uksffd.exe	12903	22903	uksffd.conf
ES3101	es3101e.exe	12701	22701	es3101e.conf
ESEPVL	esEPvalidation.exe	12703	22703	esEPvalidation.conf
ESTSUB	esTSubs.exe	12705	22705	esTSubs.conf
FRDPT4	Plug_FR.exe	11504	21504	Plug_FR.conf
FRSUBS	e3fr.exe	11503	21503	e3fr.conf
FIHAKE	FIPlugin.exe	11701	21701	FIPlugin.conf
FIEPFI	FIEPPlugin.exe	11702	21702	FIEPPlugin.conf
FIPCT1	FIPCTPlugin.exe	11703	21703	FIPCTPlugin.conf
FISUBS	FISFDPlugin.exe	11704	21704	FISFDPlugin.conf
FIUMOD	FIUMPlugin.exe	11705	21705	FIUMPlugin.conf
NLAANV	nl_aanvraag.exe	15001	25001	nl_aanvraag.conf
NLPOST	nl_post.exe	15002	25002	nl_post.conf
NLEPNL	nlepnl_post.exe	15003	25003	nlepnl_post.conf

Plugin	Program file	CORBA port	SOAP port	Configuration file
DKPAT1	DK_plugin.exe	13901	23901	DK_plugin.conf
SEPAT1	SEClient141.exe	15401	25401	SEClient141.conf
SEVAL1	SEValidering.exe	15402	25402	SEValidering.conf
SK8001	sk8001.exe	15601	25601	sk8001.conf
SK8002	sk8002.exe	15602	25602	sk8002.conf
SKSFD1	skSFD.exe	15603	25603	skSFD.conf
ROB01A	ROb01a.exe	15301	25301	ROb01a.conf
ROPCT1	ROpct.exe	15303	25303	ROpct.conf
ROEPRO	roepro.exe	15304	25304	roepro.conf
PLPAT1	Patenty.exe	15101	25101	Patenty.conf
PLWZU1	WzoUzyt.exe	15102	25102	WzoUzyt.conf
ISPAT1	IS_plugin.exe	14401	24401	IS_plugin.conf
ISEPVL	IS-EPval.exe	14402	24402	IS-EPval.conf
PCT-DEMAND	PCT_Demand.exe	14121	24121	PCT_Demand.conf
PCT-SFD	PCTSFD.exe	14122	24122	PCTSFD.conf
ATPAT1	AT_Pat.exe	13401	23401	AT_Pat.conf
ATUMOD	AT_UM.exe	13402	23402	AT_UM.conf

12.3 Executable files to be allowed

The following files are used by Online Filing. Your firewall or Anti-Virus software should be configured to allow execution of these files.

1. Installation time

deploy.exe
i5Backup.exe
i5Restore.exe
i5Setup.exe

2. Run time, EP and PCT plug-ins (default set)

OLFClient.exe
OLFm.exe
LUClient.exe
fbguard.exe
OLFSManager.exe
mclient.exe
ep1001.exe
ep1038.exe
ep1200.exe

ep_oppo.exe
pcti.exe
cl_cm.exe
OLFSCard.exe

3. Run time, NO plug-ins

de2007.exe (DE)
DK_plugin.exe (DK)
e3fr.exe (FR)
Plug_FR.exe (FR)
es3101e.exe (ES)
esEPvalidation.exe (ES)
FIEPPlugin.exe (FI)
FIPCTPlugin.exe (FI)
FIPlugin.exe (FI)
FISFDPlugin.exe (FI)
nl_aanvraag.exe (NL)
nl_post.exe (NL)
nlepnl_post.exe (NL)
Patenty.exe (PL)
WzoUzyt.exe (PL)
ROb01a.exe (RO)
roepro.exe (RO)
ROpct.exe (RO)
SEClient141.exe (SE)
SEValidering.exe (SE)
sk8001.exe (SK)
sk8002.exe (SK)
skSFD.exe (SK)
uk177.exe (UK)
uksffd.exe (UK)
NP1.exe (UK)

12.4 Installing the thin client in silent mode

In silent mode, installation takes place in the background without any inputs by or interaction with the user. You can add the command line shown here to a batch file or invoke it directly in a DOS box.

Syntax:

```
msiexec /faumsv OLF506client.msi /quiet soap=[soap parameter] port=[port number]  
host=[host name]
```

Meaning:

`/faumsv`

force the update

including all files

include user specific Reg files

include machine specific Reg files

all shortcuts

`v`: run from source and re-cache local package

`/quiet`

perform installation in silent mode

`soap=0`

use Corba

`soap=1`

use SOAP

`port`

port number for File Manager, i.e. either CORBA or SOAP port

`host`

server name or IP address of the OLF server in the network

Example:

```
msiexec /faumsv OLF506client.msi /quiet soap=0 port=11000 host=192.168.178.27
```

The thin client is installed and the connection to the OLF server is set to CORBA port 11000.

12.5 Filing office host names and IP addresses

Online Filing uses the HTTPS protocol over the standard port 443. This port must be opened for all external IP addresses in your firewall so that you can send data to the filing offices.

You can find information about the filing offices in the Maintenance Tables of the File Manager.

- Start the File Manager by clicking the **Online Filing Client 5.0** shortcut.
- In the menu bar, select **Tools > Maintenance Table Viewer > Common Maintenance**.
- In the Maintenance Table Viewer go to **Filing Offices**.

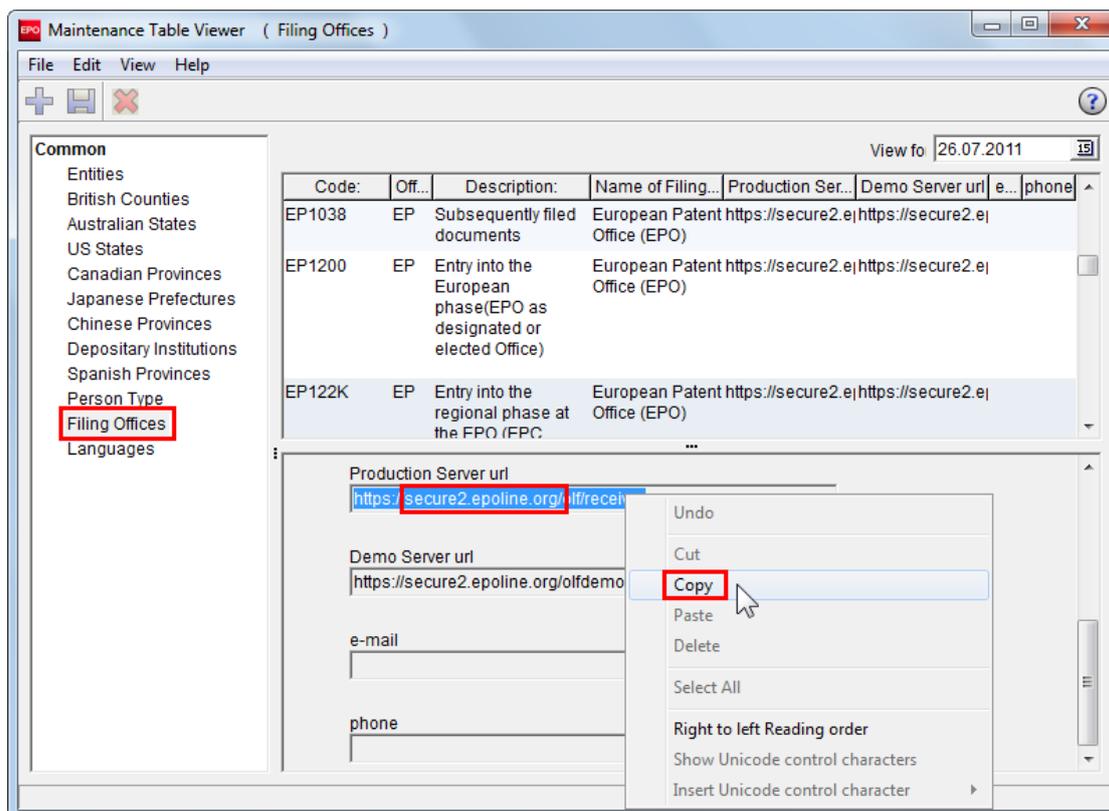
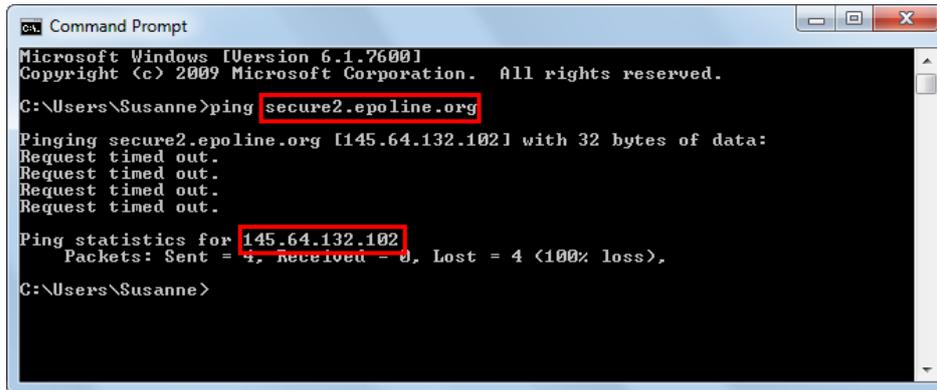


Figure 80: Maintenance Table Viewer listing the Filing Offices

- Select the office that you require from the list on the right of the screen
 - In the lower part on the right the details for the selected procedure are listed: code, office, description, name of filing office, production server url and demo server url.
- You can copy the hostname from the field **Production Server url**.
- Highlight the name with your mouse, then right-click and select **Copy** from the shortcut menu.
- Paste that name into a text file if you wish to save it for further use.
- Look for the IP address if your firewall needs an IP address rather than a host name.
 - You can search one of the IP lookup services on the Internet or use the command `ping`. The filing office's server will probably block the `ping` request but will return the IP address.
- Open port 443 for that IP address.

→ Repeat the above steps for all filing offices concerned.



```
ca. Command Prompt
Microsoft Windows [Version 6.1.7600]
Copyright (c) 2009 Microsoft Corporation. All rights reserved.

C:\Users\Susanne>ping secure2.epoline.org

Pinging secure2.epoline.org [145.64.132.102] with 32 bytes of data:
Request timed out.
Request timed out.
Request timed out.
Request timed out.

Ping statistics for 145.64.132.102:
    Packets: Sent = 4, Received = 0, Lost = 4 (100% loss),

C:\Users\Susanne>
```

Figure 81: Pinging the receiving server to retrieve its IP address

13 Glossary

CORBA

Common Object Request Broker Architecture: defines cross-platform protocols and services, eases development of distributed applications in heterogeneous environments.

Firebird SQL database server

Firebird is a simplified Open Source spin-off of the InterBase relational database management system produced by Borland.

GUI

Graphical User Interface: software component allowing user interaction with graphical elements in the program via a mouse and keyboard.

HTTP

HyperText Transfer Protocol: method of transferring information on the WWW, usually in HTML.

HTTPS

HyperText Transfer Protocol Secure: indicates that HTTP is used with a different port (443) and an additional encryption/authentication layer between HTTP and TCP.

IIOP

Internet Inter ORB Protocol: defined in CORBA, used to execute remote procedure calls.

LAN

Local Area Network: typically within one building of a company.

ORB

Object Request Broker: agent enabling communication between objects within a distributed system, for example the Internet.

Patch

A new feature or function added to a program, commonly used as an interim measure before release of a full version of the software.

PMS

Patent Management System.

Port

A port is part of a network address for a server application running on a computer within the network. Typical ports are 80 for HTTP Web servers and 110 for POP3 mail servers.

Proxy server

A firewall component that manages Internet traffic to and from a network.

SOAP

Simple Object Access Protocol: using XML for data display and mainly HTTP for transmission.

SSL

Secure Socket Layer. A protocol for ensuring security and privacy in internet communications. Supports authentication of client, server, or both, as well as encryption during a communication session.

TCP

Transmission Control Protocol.

Used to manage data exchange between computers via network connections.

URL

Uniform Resource Locator.

An address for a resource on the internet. Used by Web browsers to locate internet resources.

WAN

Wide Area Network: normally across several offices/subsidiaries of a large company or organisation, including Internet connection parts in between.

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