EPO Online Filing

Installation Guide

Version 5.00 (Release 5.00)

Last Update: 25/03/2010
Document Version: OLF5_InstallGuide_EN_100325.doc

Table of Contents

1   Introduction

This document describes the most important aspects of the installation of Online Filing (OLF) version 5.00.

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

- ◆ **Section 2** (see "Installation overview" p. 6) provides an installation overview and describes the hardware and software requirements.
- ◆ **Section 3** (see "Performing installation" p. 15) describes the installation procedure for the following scenarios:
  - **Initial installation** (p. 21)
  - **Making changes to an installation** (p. 34)
  - **Re-installation** (p. 42), including prior uninstallation
- ◆ **Section 4** (see "Upgrading from OLF version 4.00 to version 5.00" p. 56) provides information for users updating from OLF version 4.00 to version 5.00.
- ◆ **Section 5** (see "Uninstalling Online Filing" p. 58) describes how to completely uninstall the Online Filing software.
- ◆ **Section 6** (see "Using the PMS gateway interface" p. 60) outlines the steps needed to use and configure the PMS gateway interface.
- ◆ **Section 7** (see "Troubleshooting" p. 63) covers troubleshooting and provides solutions to problems.

1.1   Legal notices

Copyright

© European Patent Office (EPO), 2009. All rights reserved.

Accurate reproduction of EPO-created information contained in this documentation is authorised, provided the source is acknowledged and unless otherwise stated (e.g. that use is restricted or subject to prior permission).

Further use of third-party works requires permission from the copyright holder, unless this is waived under the law applicable.

Trademarks and logo

The EPO's official logo is likewise protected worldwide as an emblem of an international organisation under the Paris Convention for the Protection of Industrial Property.

Disclaimer

EPO Online-Services and the associated data from EPO databases are regularly maintained and updated. Great care has likewise been taken in writing the instructions for using the services provided, to ensure that the information supplied is correct. Furthermore, the EPO makes every effort to prevent technical malfunctions. Given the amount of data and information provided, however, it is not possible to rule out all errors and omissions.

The EPO therefore accepts no liability for the completeness and accuracy of the data and information made available in connection with these services, and it does not guarantee that the underlying files and the formats used are error-free and will not cause the user's systems to malfunction. Nor can the EPO guarantee that the information presented in this documentation about the functionality and use of these services is fully up to date, complete, and without any errors or mistakes.

Other access conditions

The EPO reserves the right to modify, extend or discontinue the available services, in full or in part, without prior notice.

1.2   EPO User Support

EPO User Support operates a helpdesk for Online Filing users.

Open:	Monday to Friday, 08.00 – 18.00 hrs CET
Tel.:	+31 (0)70 340-4500
Fax:	+31 (0)70 340-4600
e-mail:	**support@epo.org** (mailto:support@epo.org)
Internet:	**www.epoline.org** (http://www.epoline.org)

2 Installation overview

2.1 How Online Filing works

You can install Online Filing for two different modes of operation:

◆ on a stand-alone PC, in other words, local installation of the OLF application server and the OLF thin client together on a single PC

◆ in a network, in other words, distributed installation of the server and thin client(s) on multiple PCs

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 receiving server installed on the office side and uses Online Filing mechanisms for data validation and transmission, see **PMS gateway features** (p. 61).
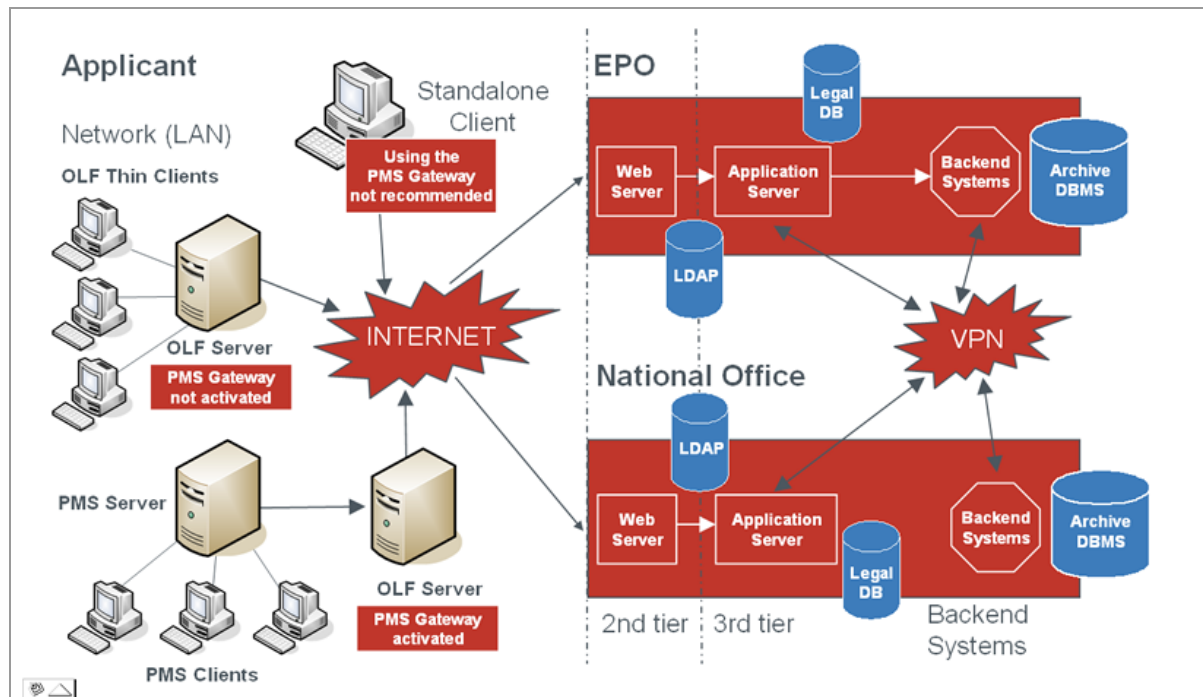
Figure 1: Modes of installation for Online Filing software

2.1.1   Server and thin client in a single network

Network (distributed) mode facilitates workflow synchronisation when there are multiple employees, departments or offices involved in the patent application process.

The OLF server is installed at one of the applicant's sites, with one or more thin clients installed on the employees' networked PCs. The OLF server will run against the applicant database, ensuring that all users can access the same data and only one user can modify a specific record at a time.

A smart card reader must be installed at all workstations so that forms can be signed using a personal smart card (digital signature) and applications can be submitted to a patent office.
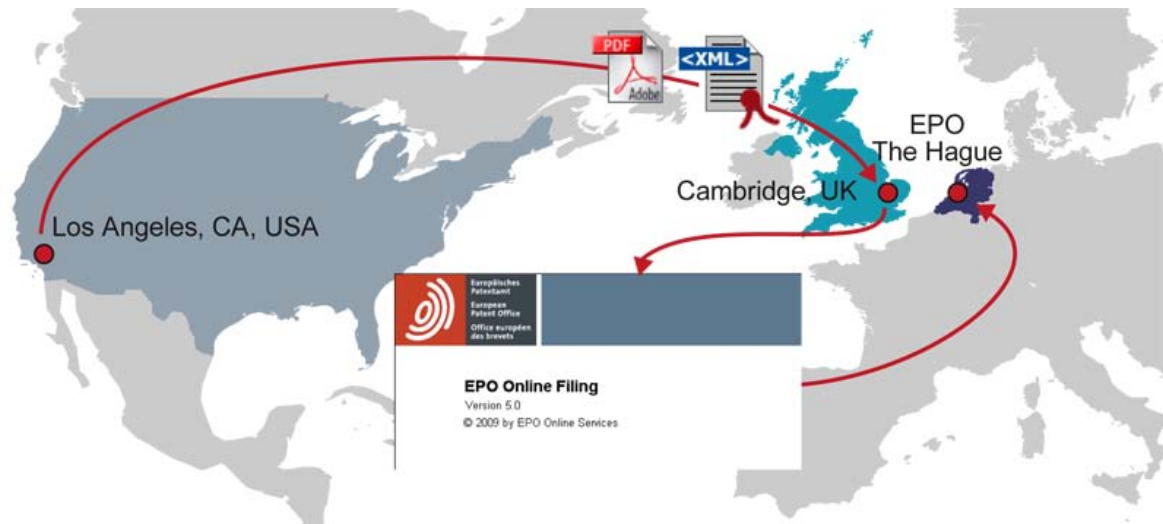
Figure 2: Networked environment

In a private network, the Online Filing system will allow a user in, say, Los Angeles to create and sign an application and for this application to be checked and submitted by an attorney in, for example, Cambridge, UK.

In another example, a paralegal can create a ready-to-sign application which can then be approved and signed by an attorney using their own smart card, and finally sent by an assistant using their own smart card. The assistant can also receive the receipt.
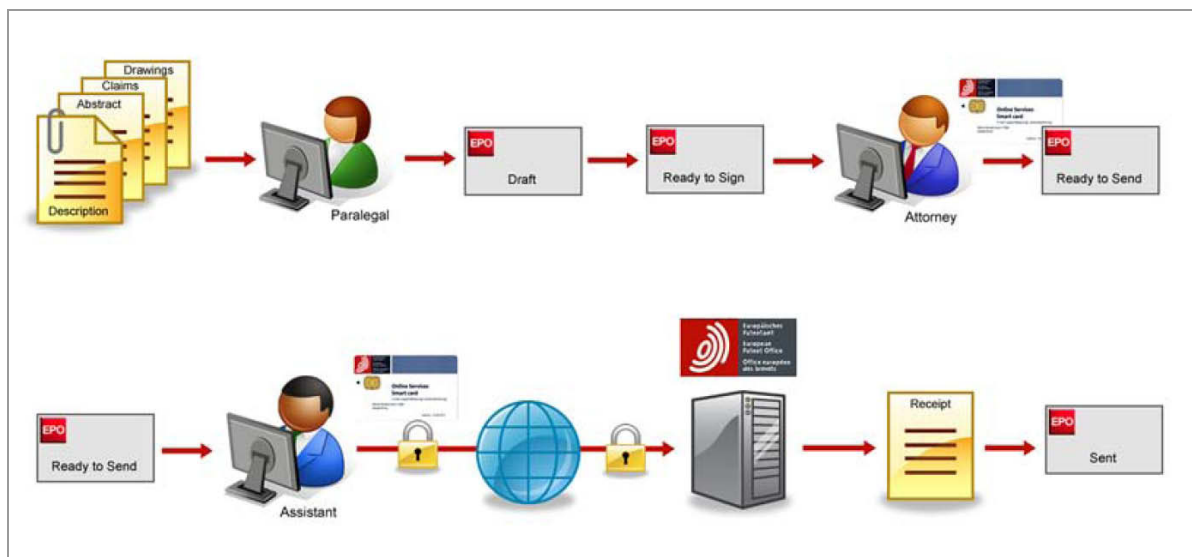
Figure 3: Individual steps in application submission workflow

The progress of the application can be monitored at all times by all persons involved.
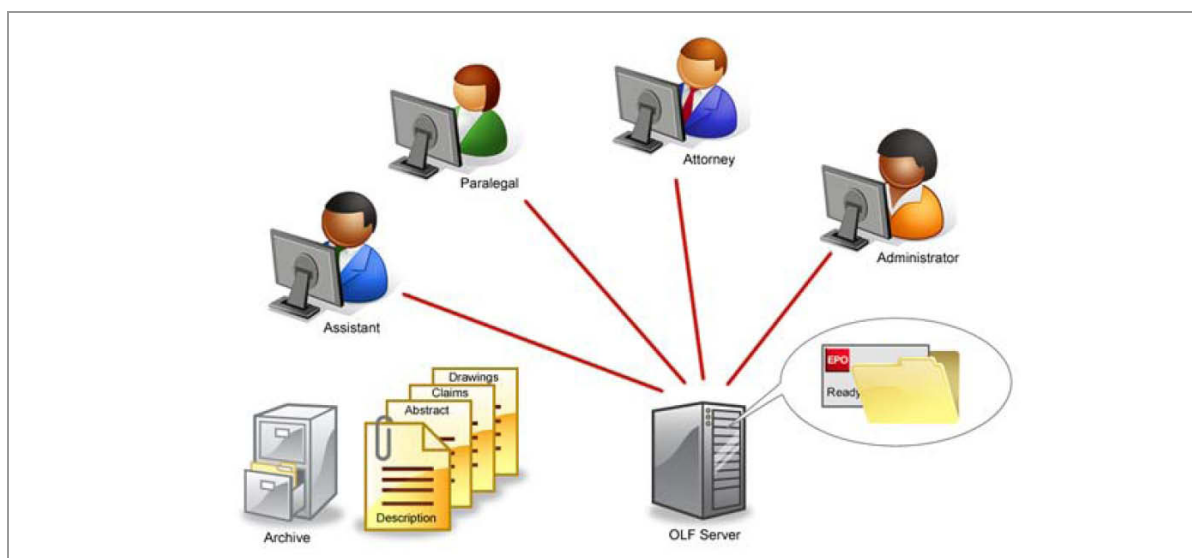
Figure 4: Employees' clients connected to database

2.1.2 Communication via CORBA or SOAP

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 form (EP1001E2K, EP1200E2K, EP1038E, EPOPPO, PCT/RO/101, etc.)

The ports are configured when installing Online Filing and can be changed afterwards in the File Manager configuration file, see **CORBA and SOAP ports configuration** (p. 13).

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 as a result of the slightly reduced playback speed, this protocol will pass firewalls as communication is done with wrapped HTTP requests.

Please note that SOAP is not compatible with the PCT procedure. CORBA is required for PCT.

2.2 Installation requirements

2.2.1 Settings in MS Windows

Windows user rights

You need administrator rights to install the OLF server modules and to start the Online Filing Server Manager. In other words:

◆ in Windows 7 and Windows Vista, you need an administrator password for certain tasks or you can log on with **Administrator** as the user account type.

◆ in Windows XP, log on as a member of the **Administrators** group or with **Computer Administrator** as the user account type.

You need enhanced user rights to install the thin client if you do not already have administrator rights:

◆ in Windows 7 and Windows Vista, you need an administrator password for certain tasks.

◆ in Windows XP, log on as a member of the **Power Users** group.

The thin clients can be used with normal user rights, in other words, with the **Limited** user account type (**Standard user** in Windows 7 and Windows Vista) or by a member of the **Users** group.

Service status in Windows

The services used by Online Filing are programmed during installation to start automatically with Windows, see **Checking and verifying the server PC** (p. 64). 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. 67).

2.2.2   Hardware requirements

To use the OLF Client version 5.00, your hardware should meet the following requirements:

Minimum hardware requirements	Recommended hardware requirements
◆ Processor: Intel Pentium II processor (or equivalent), 500 MHz	◆ Processor: Intel Pentium 4 processor (or equivalent), 2.4 GHz
◆ CD-ROM drive (for CD installation only)	◆ CD-ROM drive (for CD installation only)
◆ RAM: 512 MB	◆ RAM: 1 GB
◆ 1 GB of available hard disk space	◆ 4 GB of available hard disk space
◆ Monitor: VGA/SVGA/XGA/SXGA, resolution 800*600	◆ Monitor: VGA/SVGA/XGA/SXGA, resolution 1024*768 or higher
◆ Smart card reader connected to serial or USB port	◆ Smart card reader connected to serial or USB port

! *Note: PC memory (RAM) requirements depend on the size of the application to be filed and the processor speed. A PC with 1 GB RAM is recommended to avoid problems with larger file attachments (applications over 50 MB in total). If you are using Windows 7 or Windows Vista, even 2 GB RAM is recommended to meet the operating system's requirements in an optimal way.*

2.2.3   Software requirements

Operating systems supported

The OLF software was tested on the following operating systems:

◆ Microsoft Windows 2000 (SP4)

◆ Microsoft Windows XP (SP3), 32-bit operating system

◆ Microsoft Windows 2003 Server (SP3), 32-bit operating system

◆ Microsoft Windows Vista (SP2), 32-bit operating system

◆ Microsoft Windows 7, 32-bit operating system

◆ Microsoft Windows 2008 Server, 32-bit operating system

Fonts

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

The font is also available for license from **Ascender Corporation** (http://www.ascendercorp.com/msfonts/arial_unicode.html).

Additional Software for the thin client

The following software should be pre-installed on the computer that you want to operate for the OLF thin client or stand-alone version:

◆ Adobe Acrobat Reader, version 7.x, 8.x or 9.x (recommended)

◆ Gemplus driver for the smart card reader

◆ GemSAFE Libraries 4.2.0 SP4 or higher for computers running Windows XP or Windows Server 2003

◆ GemSAFE 5.2 Patch 1 for computers running Windows 7 or Windows Vista

The above software is not required if you only want to use your OLF server as a server, in other words, if you do not install any OLF clients on the same computer.

You can download the software packages for the installation from the **EPO's Online Services** (http://www.epoline.org) website or obtain a CD from the EPO containing the start package for Online Services. The CD comes with an installer tool that will guide you through installing all the software and drivers required for your machine.

2.2.4   Network settings

The installation currently assumes a fixed IP address of the OLF application server machine and that the computer network identification can be put in the `OLFfm.conf` file with the following attribute:

`IPAddress=<IP Address>`

> **!** *Note: The thin client also needs to point to this address.*

If you are using a dynamic IP address please contact EPO User Support for more information

Running a HTTP Web server at the same time

To ensure that the OLF client 5.0 works properly, there should be no HTTP server installed on the OLF server or local machine because otherwise the Help files might not be available. The reason for this is that the OLF client runs its own HTTP server on port 80 for displaying the online help. On the stand-alone it is on the same machine, while in a network installation you will find it on your OLF server. If another Web server (for example IIS, Apache, Xitami, IBM HTTP server, etc.) is already running on the machine where the OLF client 5.0 system is installed, the Online Filing installation program automatically chooses another port, i.e. 88.

Proxy configuration

If you are using a proxy server, your OLF server has to be configured to point to a proxy server (and to a specific port) to access the EPO's receiving server over the Internet. Please enter the settings corresponding to the ones in your Internet browser.

2.2.5 CORBA and SOAP ports configuration

Configuration of the CORBA and SOAP ports (for communication between the thin client and the applicant side server) is usually done at installation time; see **Setting CORBA and SOAP ports** (p. 25). Each form has to have a unique communication port for the thin client in order to connect to it. The ports in question must be free from use by other processes on the machine.

> **!** **Note:** *For local (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.*

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 respective configuration files.

You will find these **.conf** files in the corresponding folders in the installation directory, e.g. **Program Files\EPO_OLF5\fm\config** or **Program Files\EPO_OLF5\ep1001\config**.

* **OLFfm.conf** for the **EPO OLF FM** service, i.e. File Manager

* **ep_oppo.conf** for the **EPO OLF EPOPPO** service, i.e. Form EP(Oppo)

* **ep1001.conf** for the **EPO OLF EP2000** service, i.e. Form EP(1001E2K)

* **ep1200.conf** for the **EPO OLF EP122K** service, i.e. Form Euro-PCT(1200E2K)

* **ep1038.conf** for the **EPO OLF EP1038** service, i.e. Form EP(1038E)

* **pcti.ini** for the **EPO OLF IBR101** service, i.e. Form PCT/RO/101 (located under **Program Files\EPO_OLF5\pct**)

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

Examples

For File Manager in **OLFfm.conf** file:

```
# Corba protocol port number

CorbaPort=11000

# SOAP protocol port number

SOAPPort=21000
```

For **EPO OLF EP122K** in **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.*

2.3   Using Online Filing on various Windows versions

EPO Online Filing version 5.00 runs on all present versions of Windows, however, some specific issues for each version should be considered.

Windows XP SP3 and Windows Server 2003 SP3

There are no limitations for users of Windows XP and Windows Server 2003. In this manual, Windows 7 is used to demonstrate the setup and installation of Online Filing. Basically, the functionality on Windows XP and Windows Server 2003 is the same. Some of Windows' proprietary system functions can be found under other terms in the Control Panel, e.g. the Windows 7 *Programs and features* group is labelled *Add or Remove Programs* in Windows XP. We point out any differences where appropriate.

The OLF thin client can be installed both with the `OLF500client.msi` installer package or the `OLF500client.exe` installation file.

Windows Vista SP2

Online Filing version 5.00 runs on Windows Vista SP1 and SP2 (32-bit system). Please read the special notes provided below on installing the OLF thin client or the OLF server on a computer running Windows Vista. In general, Windows Vista without Service Pack 1 or Service Pack 2 is not supported.

The *Local Installation* option is not possible in Windows Vista; see **Installing a stand-alone version (local installation)** (p. 33). If you want to operate Online Filing as a stand-alone version, first install the OLF server and then the thin client on the same computer. Enter **localhost** or the IP address of the server under *Online Filing 5.0 Client Settings*.

Windows 7 and Windows Vista SP2

The thin client should only be installed with the `OLF500client.exe` installation file, not the msi file. Windows Vista and Windows 7 do not support installation with the msi package and terminate the operation with an appropriate error message, see **Thin Client installation** (p. 30).

Using the smart card and smart card reader requires the GemSAFE 5.2 software, see **Software requirements** (p. 11).

For security reasons, Windows 7 and Windows Vista only allow users with Windows administrator rights to perform certain installation steps. The *User Account Control* window appears in these instances. Click **Yes** (Windows 7) or **Continue** (Windows Vista) if you are logged on as an administrator. If not, you must enter a Windows administrator password here; see **Settings in MS Windows** (p. 10) and **Starting installation** (p. 18).

Windows Administrator rights are also needed to operate Server Manager, which can be started by right-clicking the shortcut icon; see **Testing the installation** (p. 55).

Windows Server 2008

Online Filing runs on Windows Server 2008 (32-bit) in the same way as on Windows 7 (32-bit).

However, it cannot be installed on systems running Windows Server 2008 R2 (64-bit).

3   Performing installation

The following section describes how to install OLF version 5.00 on Windows 7. Any deviations from this procedure for installation on other Windows versions are indicated at the appropriate place in the text.

Possible installation scenarios

◆ Read the section **Initial installation** (p. 21) if you have never installed any earlier versions of Online Filing on the target machine and you want to install version 5.00 for the first time.

   • If you want to operate Online Filing in a network, first install the **server** (see "Server installation" p. 21), followed by the **thin client(s)** (see "Thin Client installation" p. 30).

   • If you only want to operate Online Filing on a single PC, select **Local installation** (see "Installing a stand-alone version (local installation)" p. 33).

◆ If you want to make changes to your installation of Online Filing version 5.00, please read the chapter entitled **Making changes to an installation** (p. 34).

◆ If Online Filing version 4.00 is installed on your computer and you would like to upgrade to version 5.00, please start by reading the chapter entitled **Upgrading from OLF version 4.00 to version 5.00** (p. 56) and then follow the instructions under **Making changes to an installation** (p. 34).

◆ In the event of a fatal system error that causes Online Filing to work with limited functionality or not work at all and forces you to re-install the software, please read the section entitled **Re-installation** (p. 42).

◆ You should test whether Online Filing works following successful installation, see **Testing the installation** (p. 55).

3.1   Preparing for installation

The following list summarises the steps involved in the installation procedure. You can use it as a checklist.

1. Get the OLF version 5.00 distribution (for example from the Download centre on the **EPO Online Services website** (http://www.epoline.org)) or make use of the installation CD contained in the EPO Online Filing starter pack.

2. Decide on the mode of installation you want, see **Selecting the mode of installation** (p. 20).

3. If you have decided in favour of a network installation, make note of the server data such as IP address, CORBA and SOAP ports available, proxy settings etc. so that you have this data to hand during installation.

4. Make sure the Arial Unicode font is installed on the target machine. You need this font for both server and client installation. Use a Microsoft Office installation CD and select the Universal font and the Additional True Type fonts under Office Shared Features in the Custom installation mode. Deselect all other MS Office components that you do not want to install.

5. If using the downloaded installation file rather than the CD: install the Adobe Acrobat Reader 9.0 (if not already installed) and the Gemplus driver with corresponding libraries on the target client PCs.

6. If upgrading from a previous version (OLF version 4.00), please read carefully section **Upgrading from OLF version 4.00 to version 5.00** (p. 56) and take any necessary action.

7. Give all network installation users ample warning of the impending disruption of Online Filing if you need to shut down the OLF server ahead of an upgrade.

8. Start the installation and select the desired installation mode and type.

9. Perform the individual steps as described in this guideline. You may be prompted to restart your computer (including the server).

10. Verify the installation by filing an application to the OLF demo server of a filing office.

3.1.1 Using the installation CD

The Online Services starter kit not only provides you with the Online Filing software and documentation, but also with all the other required software like Adobe Acrobat Reader, Amyuni PDF converter and Gem Plus smart card driver and software. It does not contain the Arial Unicode font, however.

You can receive the starter kit after you enrolled for an Online Services user account on the EPO's **Online Services website** (http://www.epoline.org).

The super installer running from the CD checks your computer and installs the missing (or outdated) software automatically. You are not required to cancel the installation of Online Filing in order to install other features first, which makes the installation procedure very comfortable.

➜ Log on to the computer as a Windows administrator.

➜ Insert the CD into your CD/DVD drive.

➜ If AutoPlay is disabled on your machine, click the appropriate option in the AutoPlay window.

   The installer starts up automatically.

➜ Follow the instructions on the screen.

➜ Proceed to the next installation steps described in the section **Starting installation** (p. 18).

For more information on installation from the CD, please refer to the booklet that came with your Online Services starter kit.

3.1.2 Using the installation file

Choose one of the following installation files to install Online Filing, depending on the mode of installation you opted for:

`OLF500.exe`	for server (network), local (stand-alone) or thin client (network) installation
`OLF500client.exe`	for installation of the thin client only
`OLF500client.msi`	for installation of the thin client only on Windows XP, especially for remote installation or automated software distribution in a network. This installation file should only be used for re-installation, not for updates.

> **!** *Note: It is strongly recommended that you quit all Windows programs before starting the installation. If updating from an earlier version of OLF, please submit any pending applications first.*

➜ Log on to the computer as a Windows administrator.

➜ Double-click the installation file.

➜ Confirm the security warning:

   ● Windows 7: 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.

3.2   Starting installation
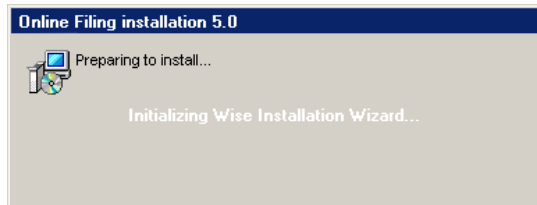
Windows Installer starts the installation wizard.

Figure 5: Wise Installation Wizard is initialised

Selecting the language

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

The default setting is *EN* for English.

ⓘ This language setting only applies for installation. The language of the Online Filing user interface is set directly in the software.
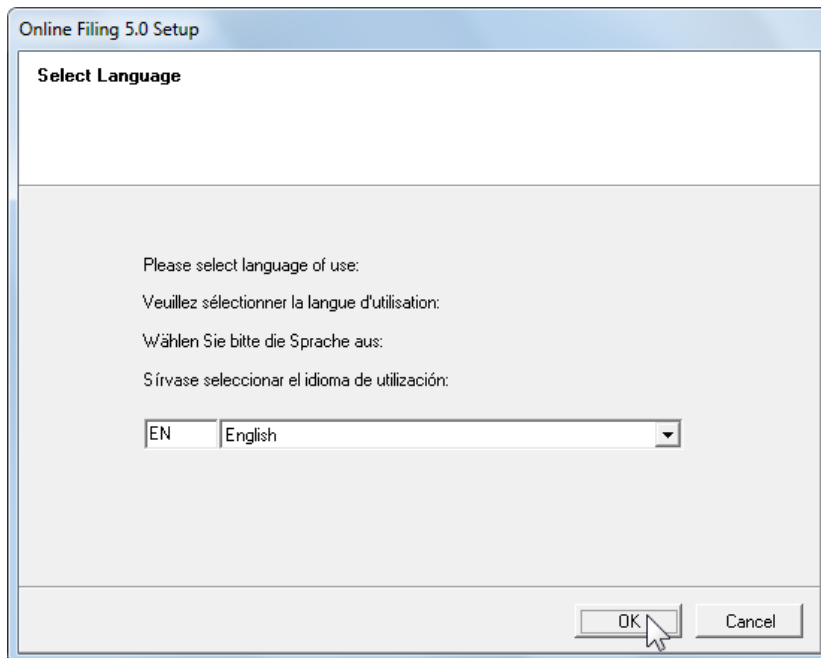
➔ Click **OK**.

Figure 6: Selecting the language for installation

➜ In the Welcome screen click **Next**.

Figure 7: Welcome to the Installation Wizard

3.3   Selecting the mode of installation

! *The **Local installation** option is not active in Windows Vista and cannot be selected.*

Local installation   Installs the stand-alone version (for users who only need the software on one PC)

Server installation   Installs the OLF server only (suitable for companies with multiple users in a networked environment)

Client installation   Installs the thin client only.

➜ Select the installation mode you require.

➜ Click **Next**.
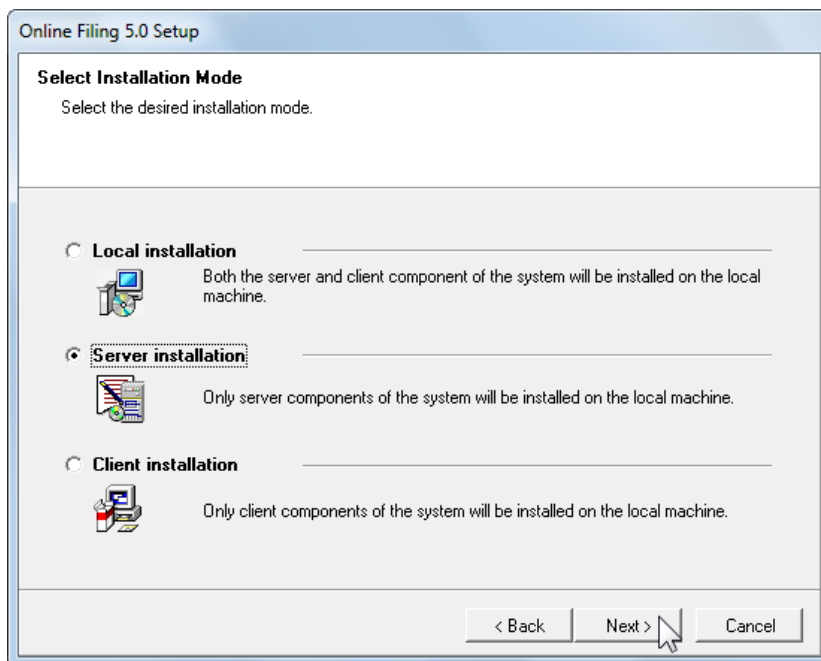
Figure 8: Selecting installation mode

3.4 Initial installation

Read this section if you have never installed any earlier versions of Online Filing on the target machine and you want to install version 5.00 for the first time.

- ◆ If you want to operate Online Filing in a network, first install the **server** (see "Server installation" p. 21), followed by the **thin client(s)** (see "Thin Client installation" p. 30).

- ◆ If you want to operate Online Filing on a single PC only, select **Local installation** (see "Installing a stand-alone version (local installation)" p. 33) .

3.4.1 Server installation

➜ Select *Server installation* as the mode of installation; see **Selecting the mode of installation** (p. 20).

➜ Click **Next**.

Specifying the destination folder

The default program folder for installation is `C:\Program Files\EPO_OLF5`.

➜ Click **Next** to use this destination folder.

-OR-

Click **Browse** 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.*
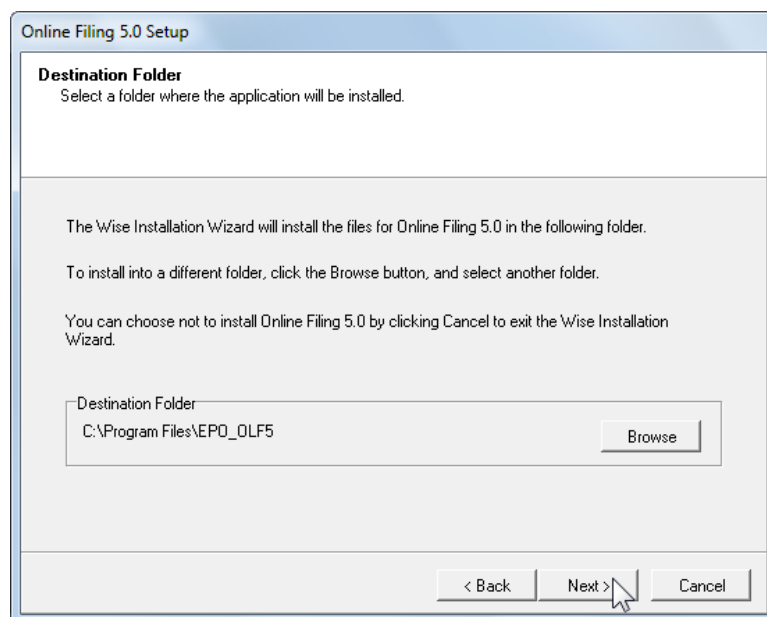

Figure 9: Selecting the destination folder for installation

A warning appears if there is not enough disk space on the selected hard drive. If this happens, delete data to free up space on the hard disk or install Online Filing on another drive.

➜ Click **Cancel** to terminate the installation process.

3.4.1.1 Selecting the installation type

The *Typical* option installs the complete set of services for File Manager, Server Manager, the EP procedures EP(1001E2K), Euro-PCT(1200E2K), EP(1038E) and EP(Oppo) as well as the PCT/RO/101 procedure.

The *Custom* option also enables you to select national procedures, such as UK-Form 1, UK-NP1 and UK-Other Forms and Documents for filing with the UK Intellectual Property Office. For information on installing national procedures, refer to the chapter entitled **Installing national plug-ins** (p. 36).

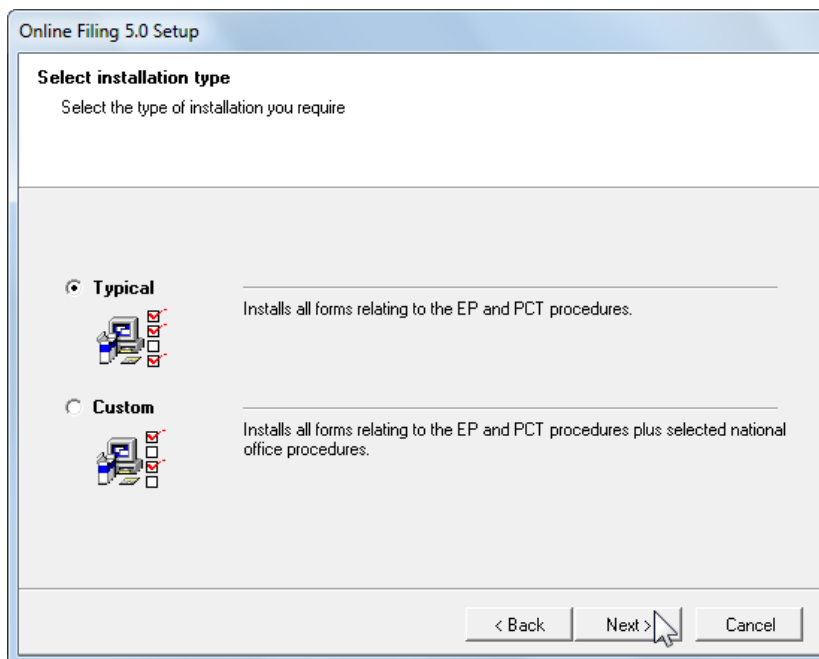➜ Select the appropriate option.

➜ Click **Next**.

Figure 10: Selecting installation type

Confirming the settings for installation

➜ Click **Next** in the *Ready to Install the Application* window.

➜ If you are not sure you want proceed, you can click **Back** to check your settings and change them as required.

-OR-

Click **Cancel** to terminate the installation process. There are no system files copied to your computer at this point.

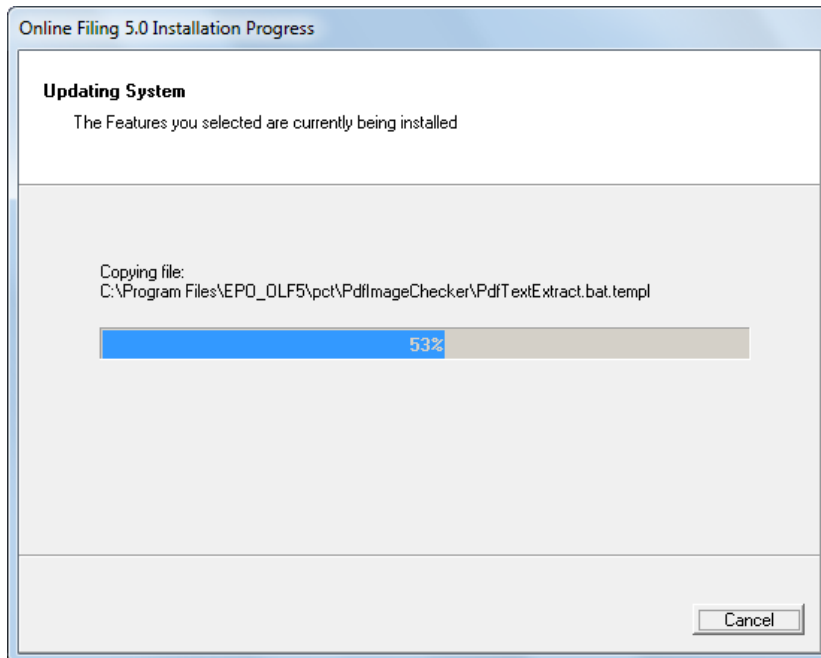The *Updating System* window appears and indicates the installation progress.

Figure 11: Installation progress

3.4.1.2 Setting access authorisation

Database access can be protected by assigning an *Administrator* and 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.

The option for password protection is selected by default.

➜ Enter the *Password* for the administrator and re-enter it for confirmation in the *Confirm password* field.

Figure 12: Setting password protection for database access

> ❗ *If you select the option* **is not protected by password**, *user management will not be enabled later in Online Filing, which means that users will be able to start the software without entering a username. User management must be enabled if you want to activate the PMS gateway.*

You can enable user management afterwards in File Manager's system preferences and enter the password for the administrator.

For detailed information on user management, refer to the user guide for Online Filing version 5.00.

3.4.1.3 Setting CORBA and SOAP ports

You can change the CORBA and SOAP ports for the individual OLF services when installing the software, see also **CORBA and SOAP ports configuration** (p. 13). For example, the default CORBA port for the File Manager is 11000, the default SOAP port is 21000.

ⓘ At present, SOAP is only available for Version 5 procedures. This is why there are no SOAP ports for the PCT procedure.

→ Modify the settings for CORBA and SOAP ports as required.

→ Click **Next**.
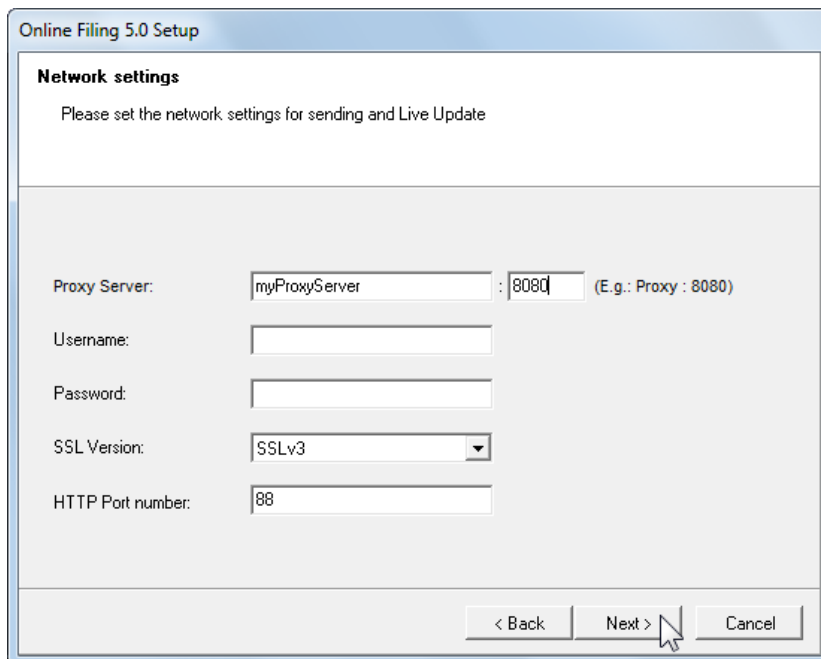

Figure 13: CORBA and SOAP communication ports

3.4.1.4 Settings for network and proxy server

If your network uses a proxy server to set up the Internet connection, you can enter the network settings here for application transfer and for the Live Update.

➜ Enter an IP address or the name of the proxy server in the **Proxy Server** field and 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.

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

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

This port is going to be used by Online Filing to run its own web server for the Online Help pages to be accessed by the Online Filing thin clients in the network. The default setting is port **80**. However, if the installation programme detects another web server already running on the same machine, it will assign a different port to Online Filing, i.e. **88**.

➜ Click **Next**.

Figure 14: Network (proxy) settings

3.4.1.5 Setting the options for Live Update

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.

➔ Select the countries that you are interested in.
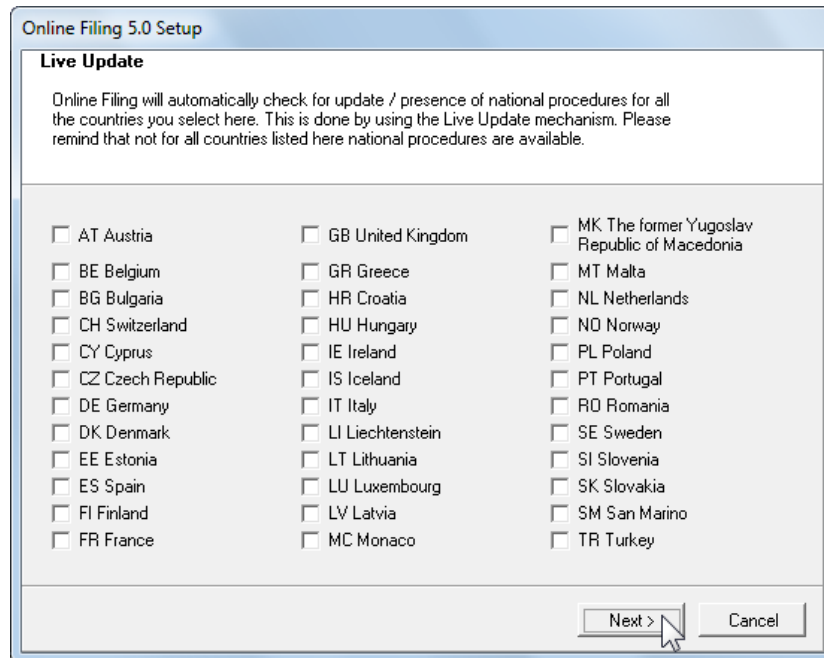
➔ Click **Next**.

Figure 15: Selecting countries for Live Update

3.4.1.6   Completing the server installation process

The system proceeds with the installation process. A message appears on the client installation once all data for the OLF server has been copied.

The installation file for the thin client (**OLF500client.msi** or **OLF500client.exe**) is located in the installation directory **C:\Program Files\EPO_OLF5\ThinClient_v500**.
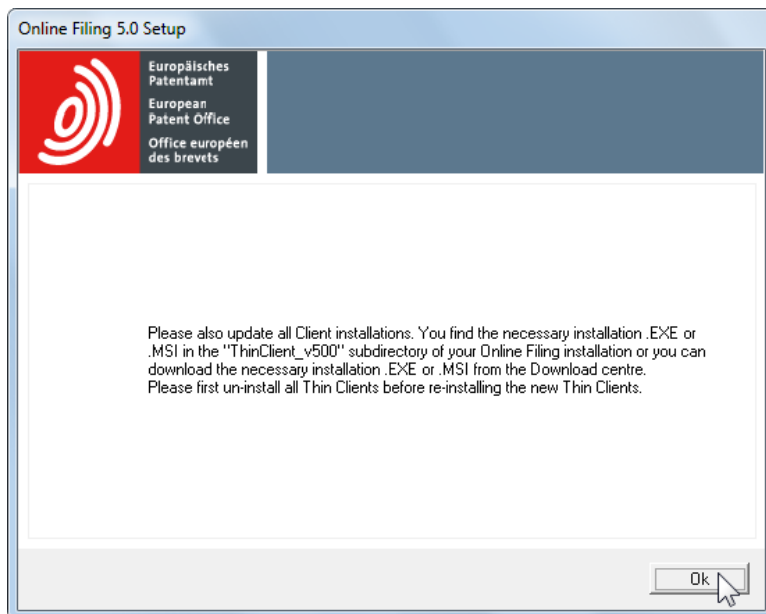
➜ Click **OK**.

Figure 16: Reminder for thin client update

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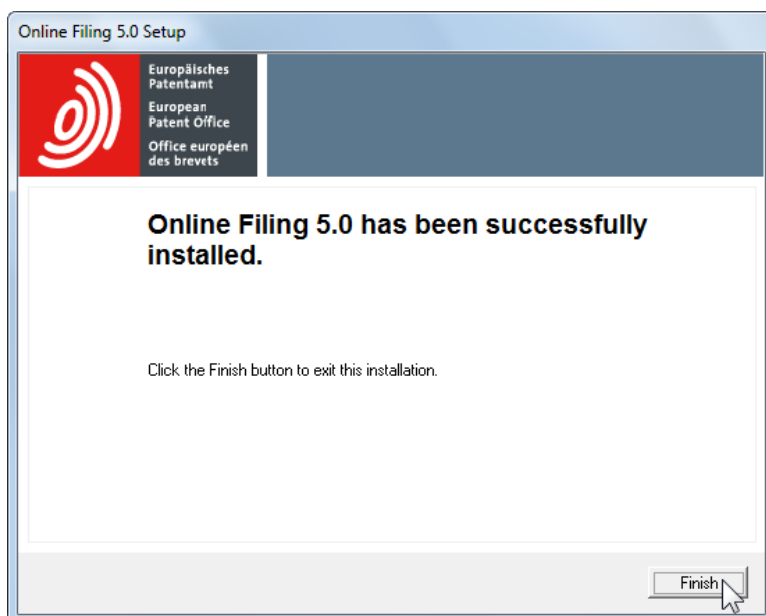
➜ Click **Finish**.

Figure 17: Online Filing has been successfully installed

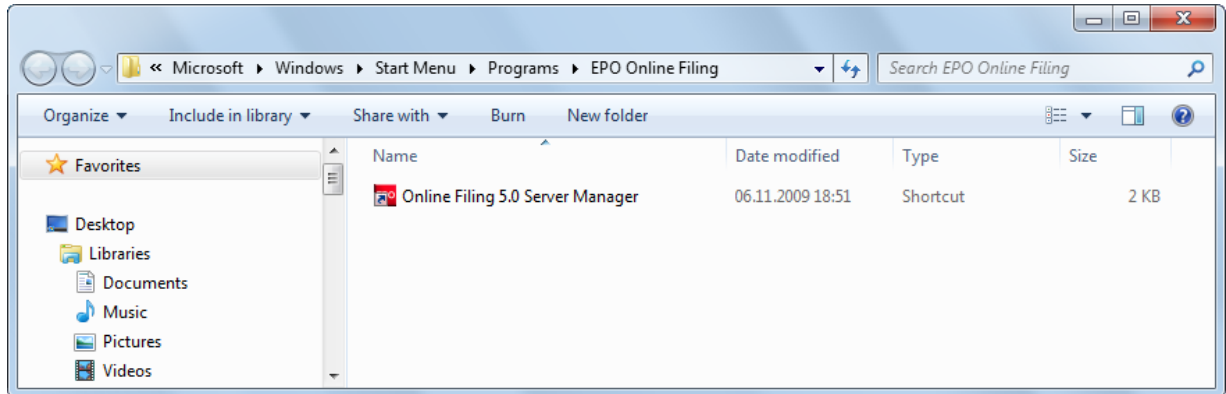The **EPO Online Filing** program group is created in the Windows Start menu when installation is complete.

Figure 18: Shortcut to the Server Manager in the EPO Online Filing program group

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.
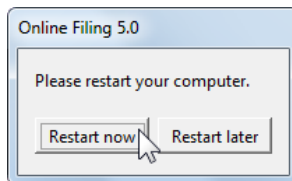
➜ Click **Restart now**.

Figure 19: Prompt to restart your computer to complete the installation process

3.4.2 Thin Client installation

In the thin client installation mode, only the Online Filing 5.0 Client component will be installed on the local machine. An OLF server should have been installed in your network before you install a thin client. For more information, see **Server installation** (p. 21).

To install the thin client, you can either revert to the installation file **OLF500.exe** or use one of the two thin-client installation files (**OLF500client.exe** or **OLF500client.msi**) that can also be found in the program folder **C:\Program Files\EPO_OLF5\ThinClient_v500** on the server PC following OLF server installation.
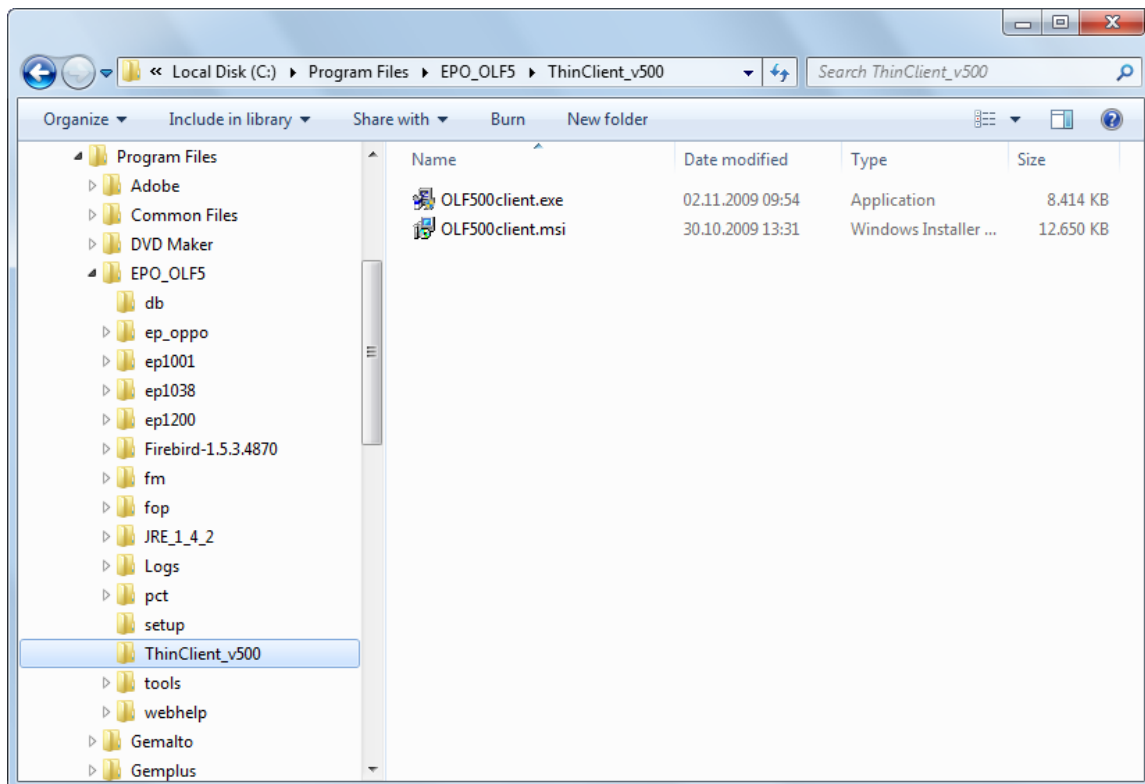

Figure 20: Folder with installation files for the thin client

Notice to system administrators

Windows 7 and Windows Vista do not support installation with the **.msi** package and terminate the installation process with an error message. Use the **.exe** file instead. Most established automated software distribution systems are able to distribute this file type without difficulty.

Add the following line when writing a batch file for the distribution of the **.msi** installer package:

OLF500client.msi -quiet SOAP=1 host=localhost port=2100

It is also advisable to use the **.exe** file instead of the **.msi** file for installation when updating existing OLF thin clients. When using the **.msi** package, you must first uninstall any older version of the thin client. Otherwise, the installation routine will output an appropriate message.

3.4.2.1 Starting thin client installation

The following section describes how to install the thin client with `OLFclient500.exe`.

→ Log on to the computer as a Windows administrator.

→ Double-click the installation file.

- Windows 7: 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.
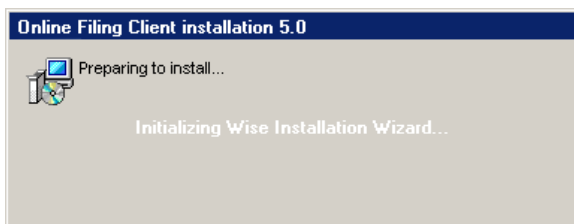
Windows Installer starts the installation wizard.

Figure 21: Wise Installation Wizard is initialised for the thin client

Selecting the language

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

The default setting is *EN* for English.

ⓘ This language setting only applies for installation. The language of the Online Filing user interface is set directly in the software.

→ 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

→ Click **Next** in the *Ready to Install the Application* window.

→ If you are not sure you want to proceed, you can click **Back** to check your settings and change them as required.

-OR-

Click **Cancel** to terminate the installation process. There are no system files copied to your computer at this point.

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

3.4.2.2 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.

> **!** *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. 25).

 The default setting is 11000 in CORBA and 21000 in SOAP.
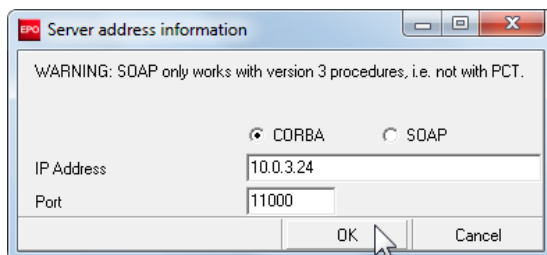
→ Click **OK**.

Figure 22: Data for the connection to the server

You can also enter or modify this data afterwards once installation is complete:

→ Open *EPO Online Filing* in the Windows Start menu and select *EPO Online Filing 5.0 Client settings*.

This information can also be found in the `OLFfm.conf` file, see **CORBA and SOAP ports configuration** (p. 13).

3.4.2.3 Completing the client installation process

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**.

The *EPO Online Filing* program group is created in the Windows Start menu when installation is complete.

You can start working with the OLF thin client immediately, without restarting your computer.
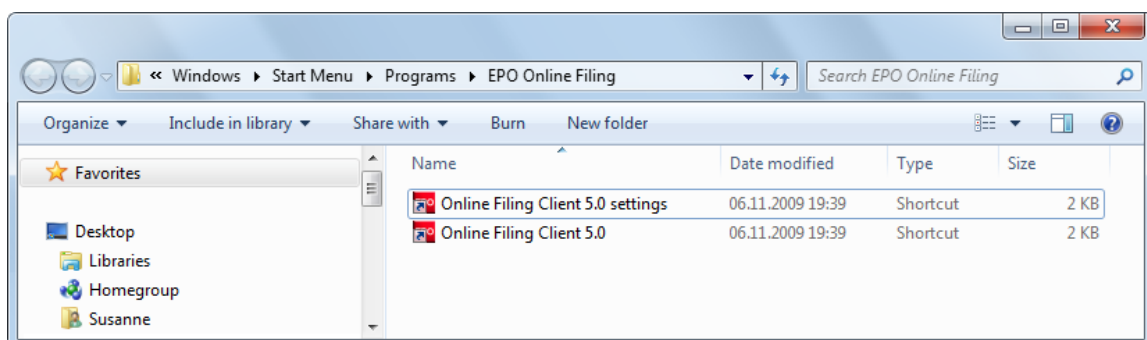
Figure 23: Shortcut to the client in the EPO Online Filing program group

3.4.3   Installing a stand-alone version (local 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.

> **!** **Note:** The **Local installation** option is not active in Windows Vista and cannot be selected. Install the OLF server and the thin client one after the other, see **Using Online Filing on various Windows versions** (p. 14).

Preparing for local installation

→ Log on to the computer as a Windows administrator.

→ Install the software required by Online Filing on the PC, see **Software requirements** (p. 11):

- smart card infrastructure components
- Arial Unicode MS font
- Adobe Reader version 9.x (7.x and 8.x are also supported)

- OR -

Insert the starter kit CD into your machine's CD/DVD drive and follow the instructions given by the installer.

The installation process

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

→ Start the installation with `OLF500.exe`, in case you did not make use of the installation CD.

→ Select the **Local installation** option as the mode of installation; see **Selecting the mode of installation** (p. 20).

→ Follow the instructions as described under **Server installation** (p. 21).

When installation is complete, shortcuts are created in the Windows Start menu and you are prompted to restart your computer.
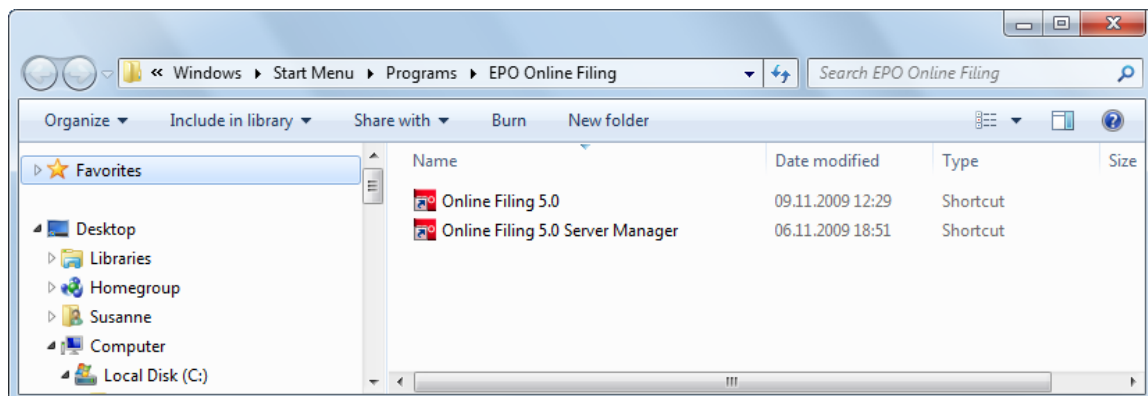

Figure 24: Shortcut to the client and server in the EPO Online Filing program group

3.5   Making changes to an installation

Read this section if you want to modify your installation of Online Filing version 5.00, for instance, to install or remove additional national procedures.

3.5.1   Updating the server

> **!** **Note:** *Before each server update, we recommend that you create a backup of the entire Online Filing database, see* **Database backup with Server Manager** *(p. 43).*

The following section describes by way of example how to install a national procedure at a subsequent time. The procedure for installing a patch is basically identical.

3.5.1.1   Starting a modification

➜ Start the installation program `OLF500.exe` on the PC with a local or server installation.

If you have enabled user management in Online Filing, the installation program recognises that a password-protected version of Online Filing is already installed.

➜ Enter the *password* for the *Administrator* username.

➜ Click **Next**.

Online Filing 5.0 Setup

Online Filing 5.0 Access

A previous installation of Online Filing was detected. It is protected. Please enter the password for the Online Filing Administrator for production mode.

Please enter your Administrator password for production mode

User name: Administrator
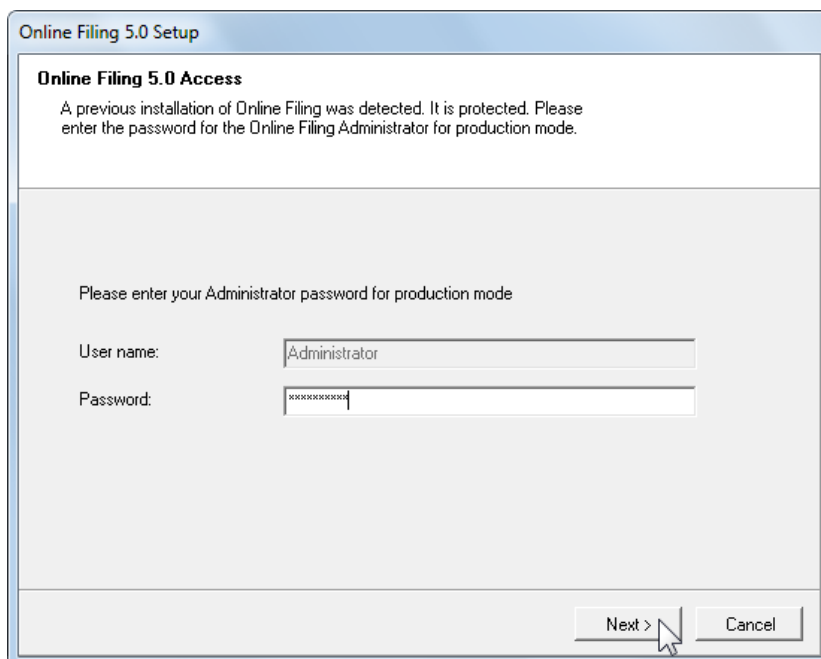
Password: ***********

Next >   Cancel

Figure 25: Entering the password for accessing an existing OLF installation

➜ 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.
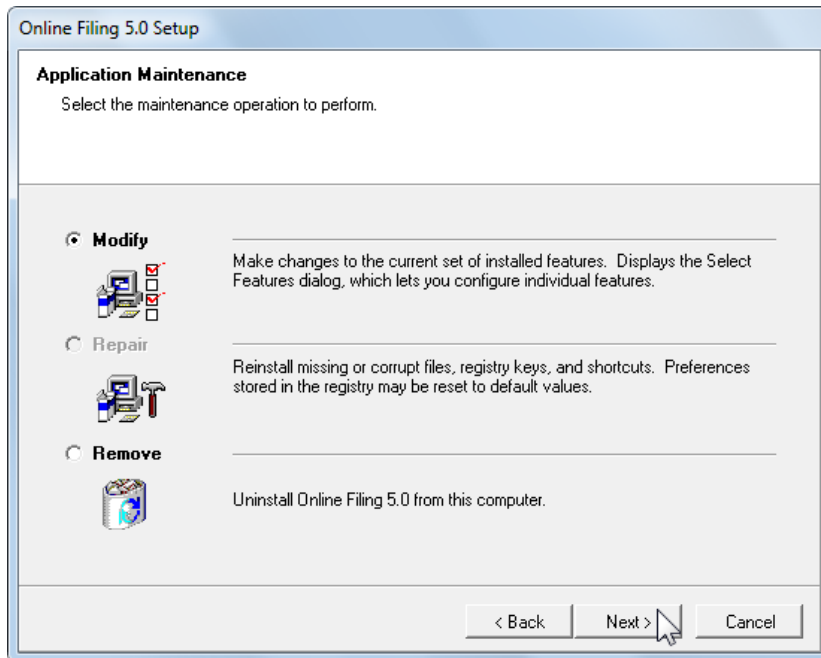
➜ Select **Modify**.

➜ Click **Next**.

Figure 26: Modifying the Online Filing installation

3.5.1.2 Installing national plug-ins

Online Filing features are grouped in a tree structure during setup. Detailed Feature Description is displayed in the right pane when you click the name of a specific feature.

For an overview of all national plug-ins, go to *National offices* on the **EPO's Online Services website** (http://www.epoline.org).

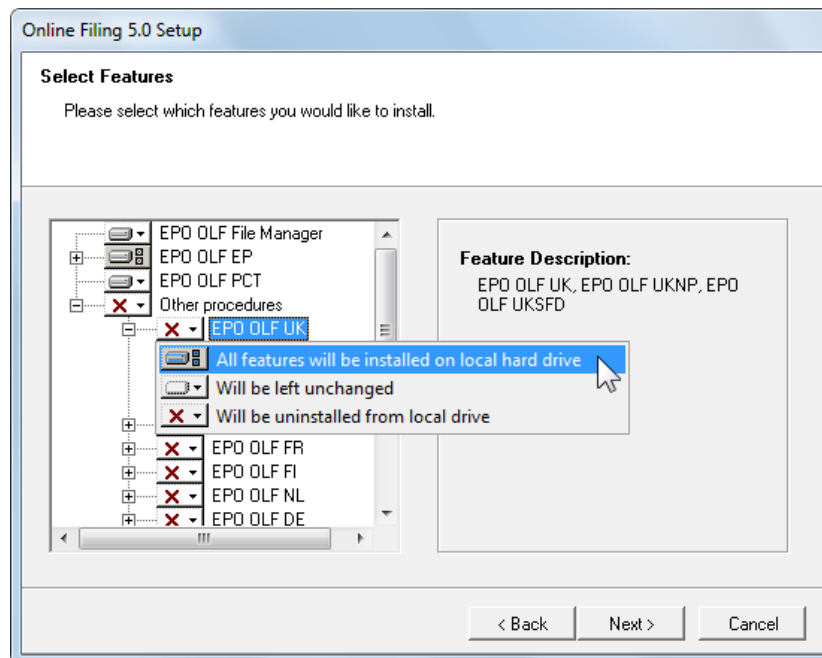In this example, the services *EPO OLF UK*, *EPO OLF UKNP* and *EPO OLF UKSFD* are to be installed.

Figure 27: Selecting national procedures

➜ Select and de-select items using the tree controls.

Control	Comment
⊞	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 not be installed/will be uninstalled.

➜ When you are done, click **Next** to continue.

ⓘ Skip these steps if you do not want to install any national plug-ins.

3.5.1.3 Shutting down the server and 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.

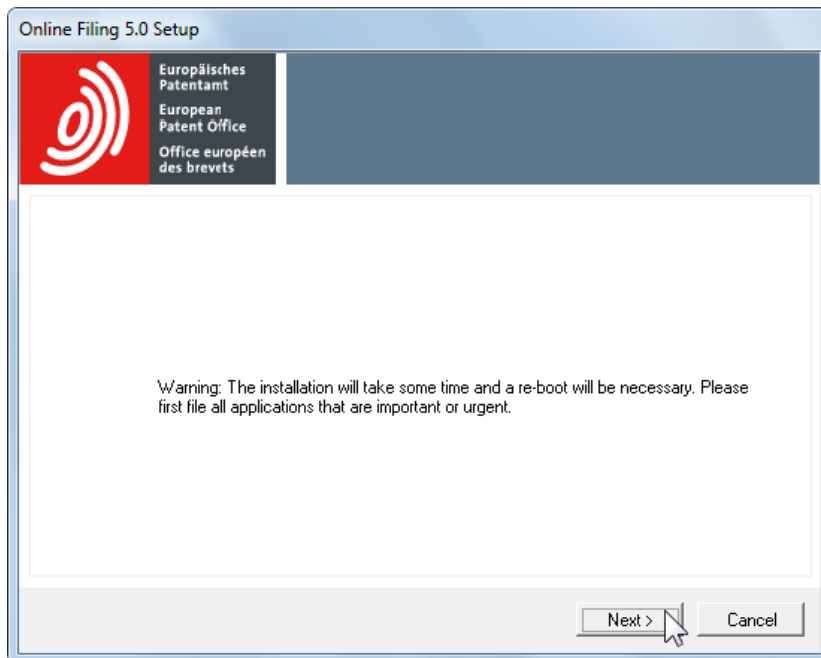➜ Click **Next** if there are no longer any applications still being processed.

Figure 28: Warning before Online Services terminates

➜ Click **Yes** in the ensuing message if there are no more users operating the OLF services.
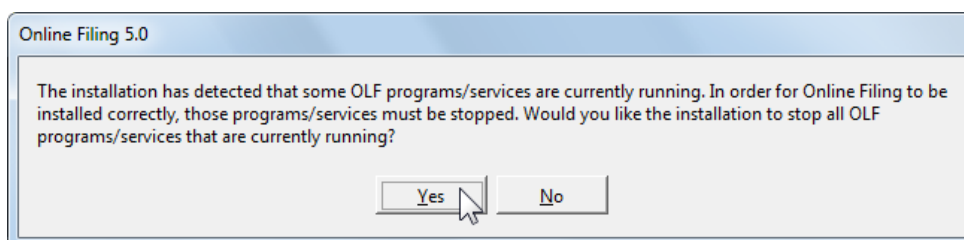

Figure 29: Previous installation detected

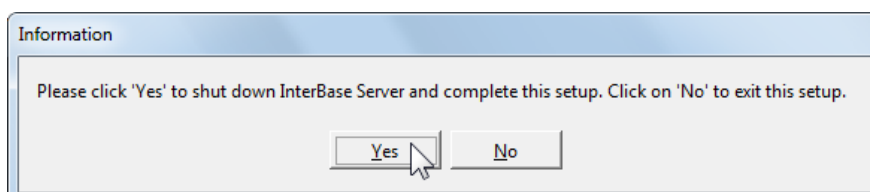➜ Confirm the InterBase server shutdown prompt with **Yes**.

Figure 30: Shutdown InterBase (Firebird) Server

3.5.1.4 Updating the 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.
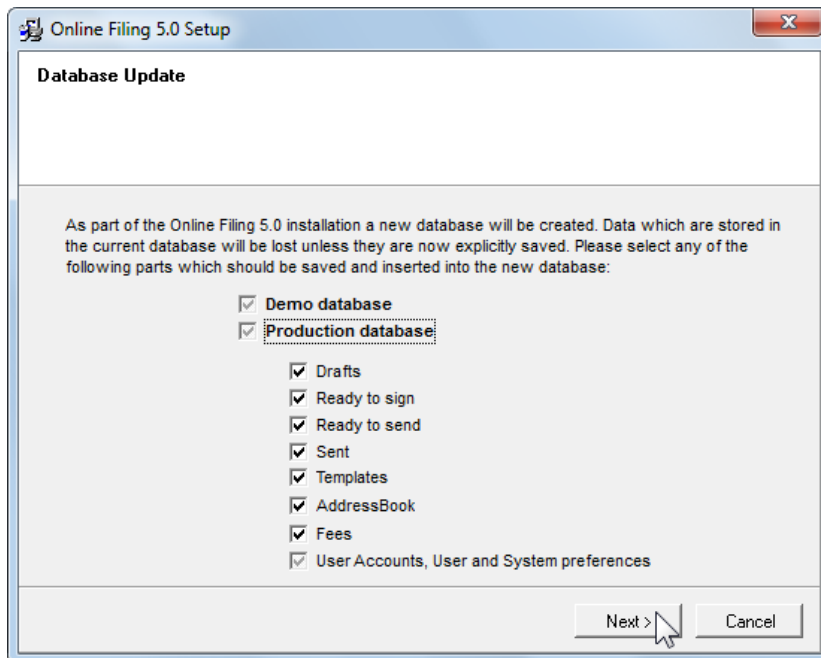
➜ Click **Next**.

Figure 31: Database update

All selected components are now copied to a safe place, where they remain until installation is complete and they are copied back to the OLF database for later use.

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. `20091109_130305`.

Please make sure that there is enough disk space available if your OLF database is already very large. You will need at least 600 MB of available hard disk space plus three times the size of the two databases (`eOLFi.gdb` and `eOLFdi.gdb`).

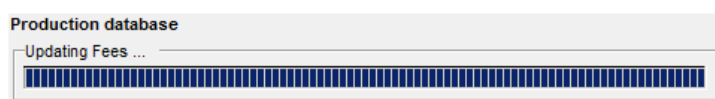The installation process first deletes all data in the database and then reloads it.

Figure 32: Update of database tables

3.5.1.5 Changing settings

The following process enables you to change the settings for Online Filing. The windows are identical to those that appear during initial installation. For an explanation of the individual steps see **Server installation** (p. 21).

Access authorisation

➜ Change the password for the administrator as required in the *Online Filing Access* window; see **Setting access authorisation** (p. 24).

➜ Click **Next**.

CORBA and SOAP ports

Installing a national plug-in creates new services, in this example, *EPO OLF UK177E*, *EPO OLF UKNPUK* and *EPO OLF UKSFD*; a separate CORBA and SOAP port is available for each of these services.

➜ Change the relevant port numbers as required.

➜ Click **Next**.

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 EPOPPO	11108	21108
EPO OLF PCT	11301	
EPO OLF UK177E	12901	22901
EPO OLF UKNPUK	12902	22902
EPO OLF UKSFDE	12903	22903

Figure 33: CORBA and SOAP ports

Network settings

➜ Change the data for access to the proxy server as required, see **Settings for network and proxy server** (p. 26).

➜ Click **Next**.

Settings for Live-Update

If new national procedures have been installed, you should now specify whether Live Update should automatically search for updates for these procedures too.

➜ Select all countries that qualify for your installation.
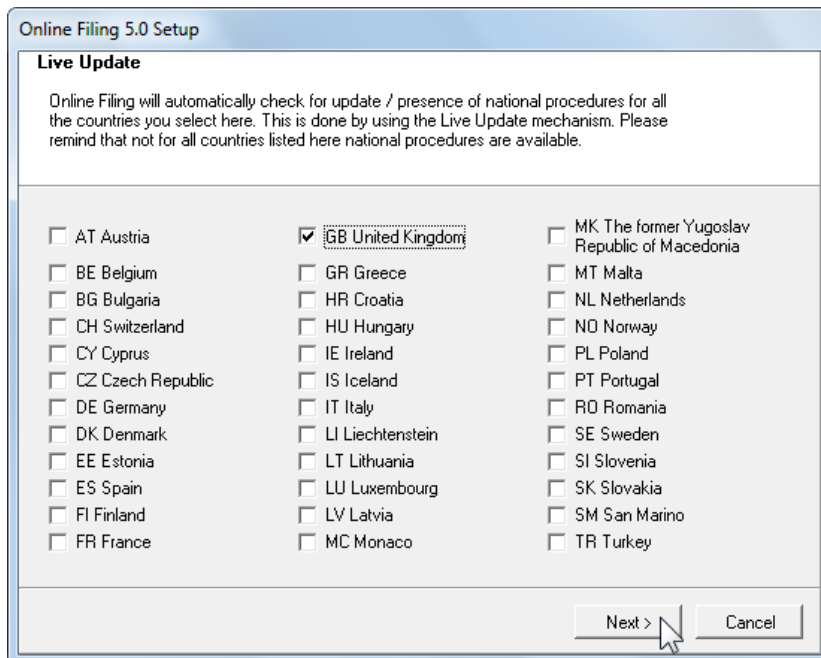
➜ Click **Next**.

Figure 34: Selecting additional countries for Live Update

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.

The *EPO Online Filing* program group in the Windows Start menu is updated when installation is complete.

The message about thin client installation is displayed as a reminder.

➜ Click **Finish** in the final screen.

You are then prompted to restart your computer now.

3.5.2   Updating the thin client

Your thin clients may also need to be updated after you modify the server installation during major changes to the Online Filing software.

Use the installation file `OLF500client.exe` or `OLF500client.msi` in the program folder `C:\Program Files\EPO_OLF5\ThinClient_v500` on the server PC for this. Alternatively, you can download the installation files from the Download centre on the **EPO's Online Services website** (http://www.epoline.org).

➜ Start the installation program as described under **Thin Client installation** (p. 30) and perform the initial steps.

➜ Select *Modify* as the installation activity you want.
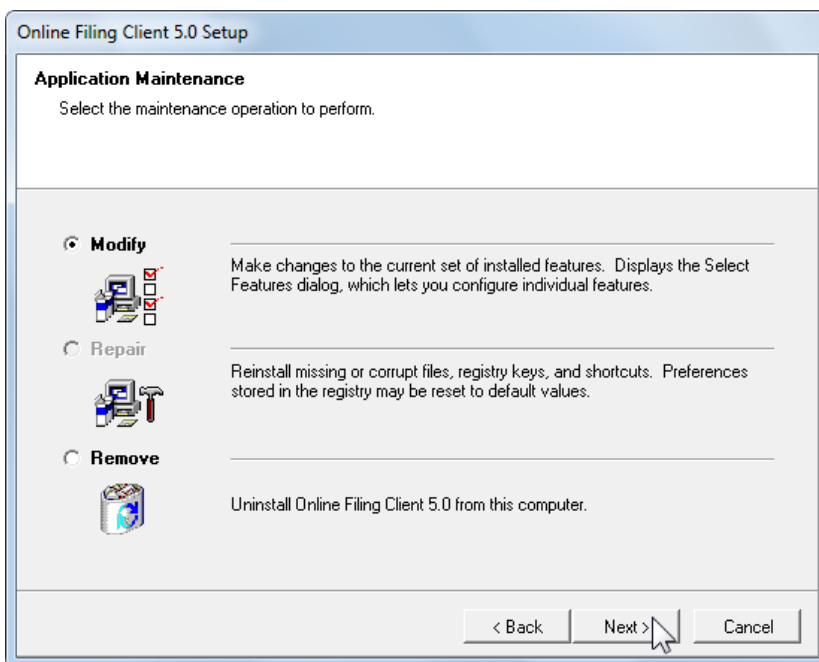
➜ Click **Next**.

Figure 35: Modifying thin client installation

➜ Change the OLF server connection data as required, see **Setting the connection to the server** (p. 32).
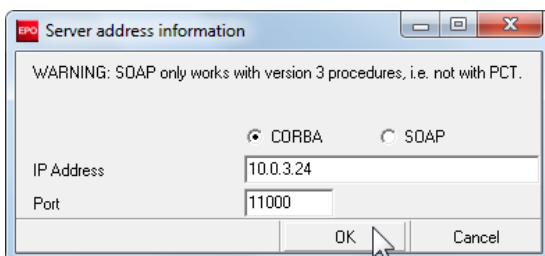
➜ Click **OK**.

Figure 36: Data for the connection to the server

➜ Click **Finish** in the final window.

The thin client update is now complete.

3.5.3 Updating the stand-alone version

The procedure for updating the server is largely identical for a server PC in a network and a stand-alone computer running a local installation.

→ Start the installation program as described under **Starting a modification** (p. 34).

→ Perform the individual steps.

→ Select *Local installation* as the mode of installation.

→ Perform the various steps as described in the relevant sections under **Updating the server** (p. 34).

→ Finally, restart your computer.

3.6 Re-installation

Please read this section in the event of a fatal system error that causes Online Filing to work with limited functionality or not work at all and forces you to re-install the software.

> **!** *Important: When re-installing, you must ensure that you re-install the same build of Online Filing (including all patches) that you were working with previously. Failure to do so may lead to inconsistencies in the data.*

We recommend the following procedure for re-installing Online Filing:

1. Save your data with Server Manager's Backup and/or Export function, see **Backing up data** (p. 43).

2. Uninstall the OLF server, see **Uninstalling the server** (p. 46).

3. Remove any remaining program folders, see **Removing OLF program files and folders** (p. 48).

4. Remove the entries from the Windows registry, see **Editing the Windows registry** (p. 49).

   > **!** *Attention: This should be carried out by knowledgeable personnel or with assistance of such, due to the nature of the registry.*

5. Download the latest software package for the installation from the EPO website, see **Re-installing the latest version of the software** (p. 52).

6. Re-install the OLF server, see **Server installation** (p. 21).

7. Restore your data with Restore and/or Import, see **Restoring data** (p. 53).

8. If necessary, update all thin clients, see **Updating the thin client** (p. 41).

3.6.1 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.

> **❗ Warning:** *It is not advisable to simply copy the databases* `eOLFi.gdb` *(production) and* `eOLFdi.gdb` *(demo) to another storage location and then copy them back to the* `EPO_OLF5` *program directory after re-installation. However, in an emergency you could use a copy of the database - for example one created by an automatic system backup - as long as no changes had been made to the Online Filing software since the backup was performed.*

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.

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

Use this method in the event of problems with the database and if the Server Manager's Backup function does not work.

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.

3.6.1.1 Database backup with Server Manager

➔ Start the Online Filing Server Manager.

   ⓘ In Windows 7 and Windows Vista, right-click the **Online Filing 5.0 Server Manager** shortcut in the Windows Start menu and select **Run as administrator** from the context menu.

➔ Login with your Online Filing user name and password.

   ⓘ You need to login with an Online Filing user account that is member of the **Administrators** group. Other users, even if their profile provides the identical user rights, cannot login to Server Manager. See also note on **Using remote-access software** (see "Settings in MS Windows" p. 10).

➔ Click the **Settings** tab in order to modify the settings for the location of your backup files.

The standard location for backup files is `C:\Program Files\EPO_OLF5\tools\smanager\data`. As the complete `EPO_OLF5` installation folder is going to be overwritten later during the installation process (or removed during uninstallation), you should change that path to an external folder, preferably on a hard drive different from your system drive.

➔ Click the folder button next to the path named ***Backup and restore directory***.

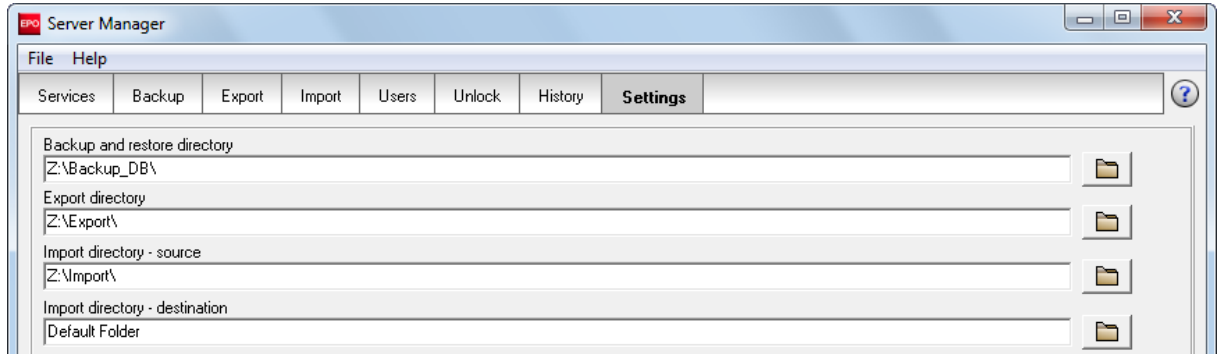➔ Select the location for your backup files and click **OK** when you are done.

Figure 37: Settings for the backup and restore directory in Server Manager

In this example, there is a backup folder named `Backup_DB` created on the network drive ***Z***. This folder will now be used by the Server Manager to store backups.

➔ Click the ***Backup*** tab.

➔ Select ***Action > Backup*** from the menu or click the ***Backup*** icon.
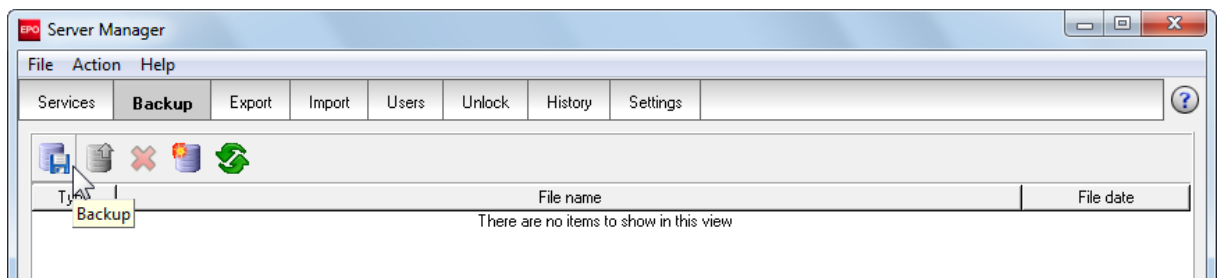
Figure 38: Starting backup of database in Server Manager

A dialogue box will appear prompting you to select either the production database or the demo database for backup.

➔ Please back up both production and demo databases.
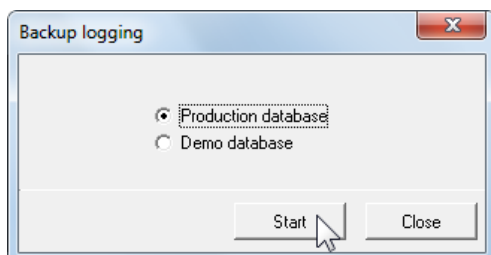
Figure 39: Selecting database for backup

A message will inform you when the action has been completed.

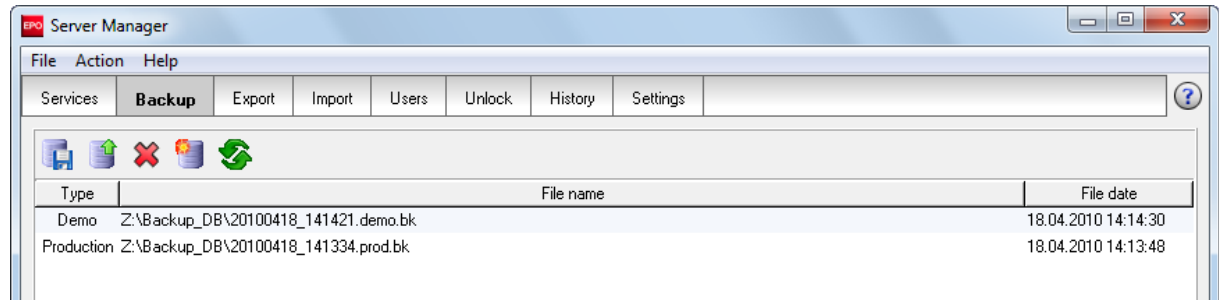This is how the *Backup* tab in Server Manager looks after successful backup:

Figure 40: Backup of production and demo database successful

3.6.1.2   Backing up selected data with Export

> **!** *Please note that you can only back up the user management settings in Online Filing, the individual folders in File Manager and folder management if you created a backup of the database.*

Exported applications, templates and address books can be individually imported at a subsequent point in time. For detailed information on the Export and Import functions, refer to the user guide for Online Filing version 5.00.

Exporting applications and templates with Server Manager

→ Start the Online Filing Server Manager.

→ Select a directory in your file system as the default export directory, see **Database backup with Server Manager** (p. 43).

→ Click the *Export* tab.

→ Select the *All Applications* folder on the left.

   This folder contains all applications as well as all templates.

→ Click the ✔ icon in the column headers on the right to select all applications and templates.

→ Click the **Export** button.

   A ZIP file is created in the default export directory for every application or template.

Exporting the Address Book with File Manager

→ Start the Online Filing client, in other words, File Manager.

→ Click the **Address Book** button.

→ Select *File > Export*.

→ Select the relevant storage location and click **Save**.

   The Address Book is saved as a CSV file.

3.6.2 Uninstalling the server

Windows 7 and Windows Vista

➜ Open the Windows *Control Panel*.

➜ Go to *Programs > Programs and Features > Uninstall or change a program*.

➜ Select *Online Filing 5.0* and click **Uninstall/Change**.

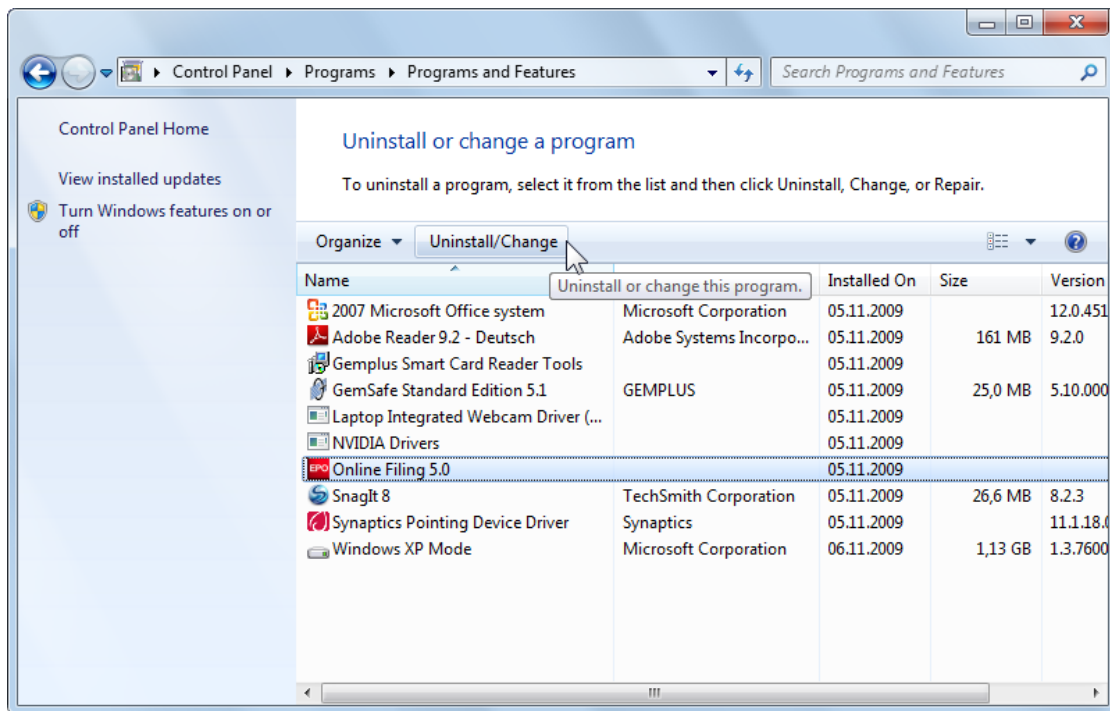*Figure 41: Uninstalling the Online Filing software in "Uninstall or change a program" in Windows 7 and Windows Vista*

Windows XP

➔ Open the Windows **Control Panel**.

➔ Go to **Add or Remove Programs > Change or Remove Programs**.

➔ Select **Online Filing 5.0** and click **Change/Remove**.
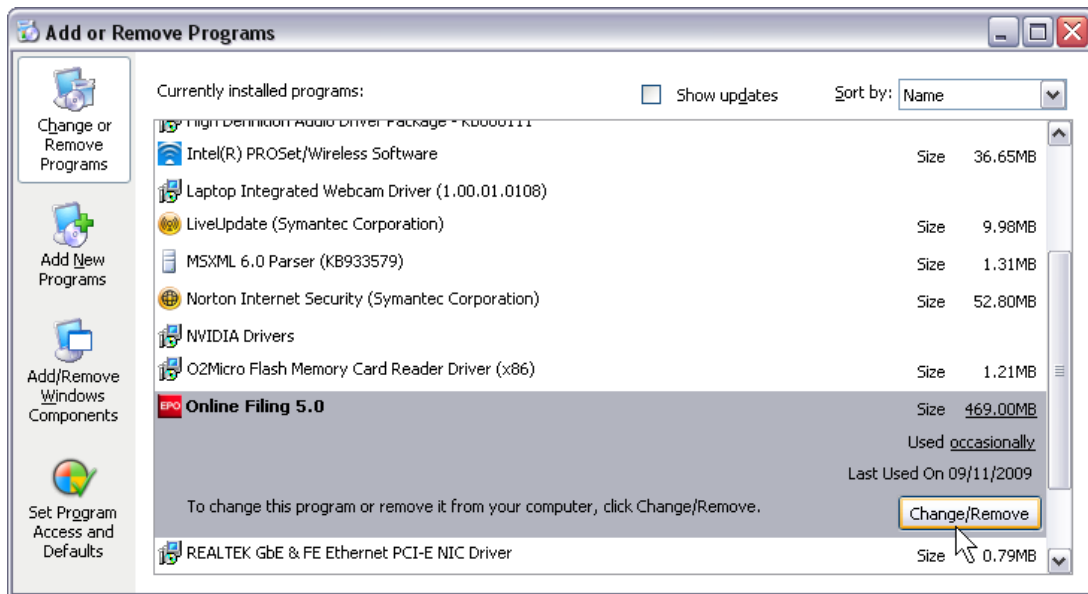
Figure 42: Uninstalling the Online Filing software in "Add or Remove Programs" in Windows XP

The uninstallation routine starts.

Figure 43: Wise Installation Wizard is initialised for the uninstallation routine

➔ Click **Next** in the **Online Filing Uninstall** window.

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

➔ Click **Finish** in the **Online Filing has been successfully uninstalled** window.

→ Confirm the prompt to delete the **EPO_OLF5** folder with **Yes**.
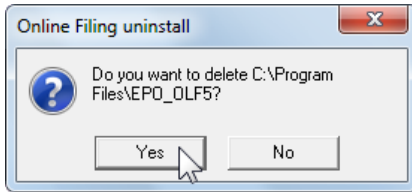
Figure 44: Prompt to delete the Online Filing program folder

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

→ Restart your computer after uninstalling has completed.

To uninstall the stand-alone version, proceed exactly as described for uninstalling the OLF server.

3.6.3 Removing OLF program files and folders

> **!** **Attention:** *Deleting system files may lead to an unstable operating system and is recommended for experienced users only, at their own risk.*

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. OLF version 5.00 uses the following installation path by default: **C:\Program Files\EPO_OLF5**.

→ Check Windows Explorer to see if you can still see the **EPO_OLF5** folder after you restart the computer.

→ Delete the entire remaining **EPO_OLF5** folder.

→ Delete the **EPO_OLF5-TC** folder, too, if you can still see it after uninstalling the thin client.

→ Delete the folders **epoline3** and **EPO_OLF**, if shown.

→ Delete the files **GDS32.dll** and **fbclient.dll**, if shown in the directory **WINDOWS\system32**.

With this version of OLF, no other files will be copied to the WINDOWS, WINDOWS\sys, WINDOWS\system or WINDOWS\system32 directories.

3.6.4 Editing the Windows registry

> **❗ Attention:** *Editing the registry may lead to an unstable operating system and is recommended for experienced users only, at their own risk.*

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

Please open the **Registry editor** to check your Windows registry.

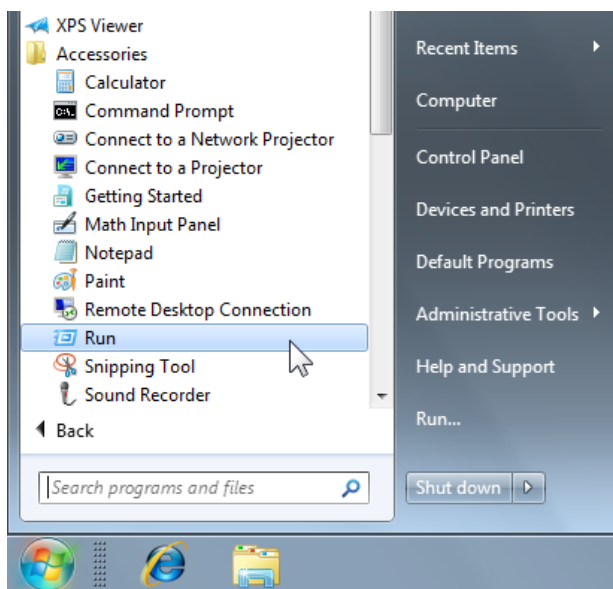➔ Open the Windows Start Menu and select **Accessories > Run**.

Figure 45: Windows Start menu - Run

➔ In the **Run** dialogue box, type the command `regedit`.
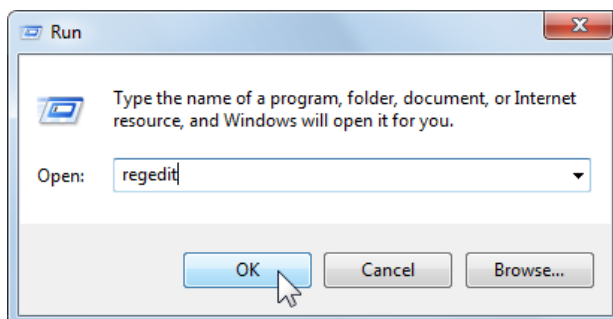
Figure 46: Entering "regedit" command

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.
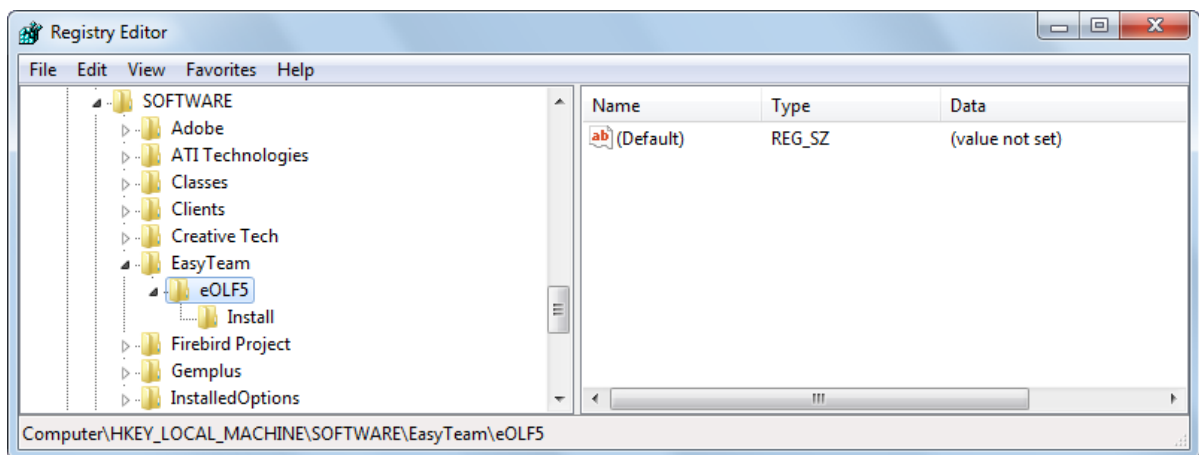
Figure 47: EasyTeam key in the registry

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}
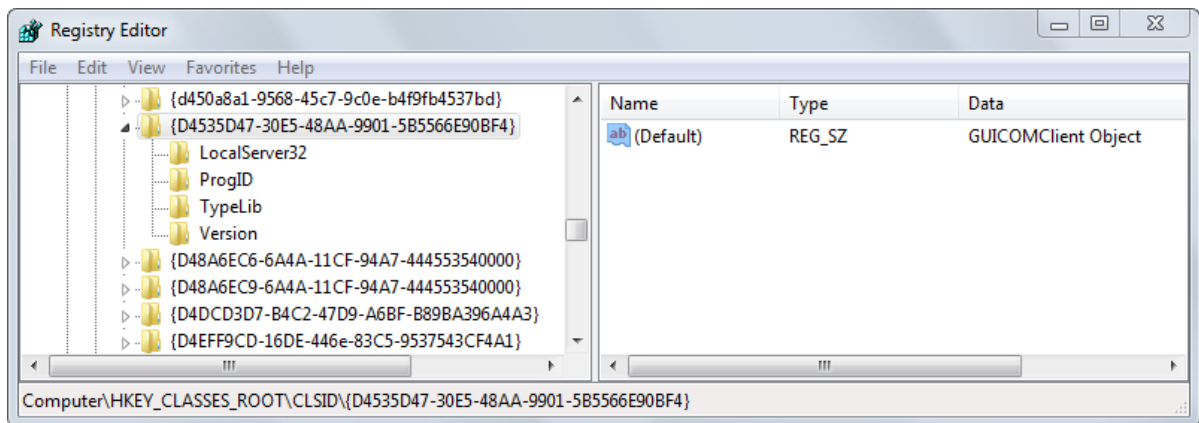
Figure 48: Deleting registry keys for MClient.exe

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_EPOPPO_Service (ep_oppo.exe)
- ◆ Form PCT/RO/101, EPO_OLF_IBR101_Service (pcti.exe)
- ◆ Other national plug-ins.

If you had installed Online Filing Version 5.0 as an upgrade of Version 4.0, the registry may also contain several keys relating to the previous Online Filing Version 4.0 services. These keys should also be deleted:

- ◆ Form EP(1001E), ep1001e.exe
- ◆ Form EP(1001E) EPC 2000, ep1001e_2000.exe
- ◆ Form Euro-PCT(1200E), ep1200e.exe
- ◆ Form Euro-PCT(1200E) EPC 2000, ep1200e_2000.exe
- ◆ Form EP(1038E) EPC 2000, ep1038e_2000.exe

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

3.6.5 Re-installing the latest version of the software

In order to make sure that you have the most recent version of the Online Filing software available, we recommend that you download it from the EPO website, rather than use a (possibly outdated) installation CD. Visit the OLF portal at the **EPO Online Services website** (http://www.epoline.org).

→ Select *Download centre* on the left-hand side, then *Software* and *Download the Online Filing related software*.

→ Download the package for the installation of Online Filing version 5.00.

Re-installing Online Filing

→ Perform the required installation procedure as described under **Performing installation** (p. 15).

- *Network version*: First install the server, then restart the computer and finally install thin clients.
- *Stand-alone version*: Perform local installation (not possible in Windows Vista), then restart the computer.

Installing patches

→ Visit the Download centre to check if new patches have been issued by the EPO in the meantime and download them as necessary.

ⓘ New patches are also announced on the website in the *Hot News* section.

→ Install the patches either manually or via *Live Update* in Server Manager.

ⓘ For information on how Live Update works, refer to the user guide for Online Filing version 5.00.

3.6.6 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.

3.6.6.1 Restoring the database with Server Manager

Use the *Restore* function to restore a backup of the OLF database with all user administration settings and File Manager folders.

➜ Start the Online Filing Server Manager.

➜ Go to the *Settings* tab.

➜ Modify the *backup and restore directory* in order to set it to the same directory that you had previously used to back up your database. In the example below, the directory `Backup_DB` on the network drive *Z* has been specified.
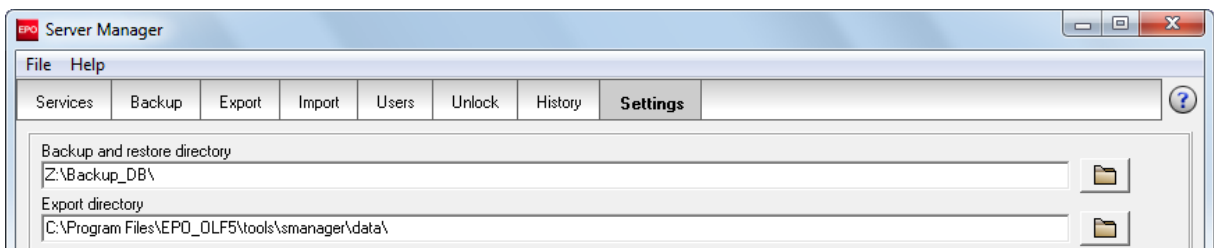
Figure 49: Modifying settings for the backup and restore directory in Server Manager

➜ Click the *Backup* tab.

➜ Select the backup you would like to restore (Demo or Production) and use either *Action > Restore* from the menu or click the *Restore* icon.
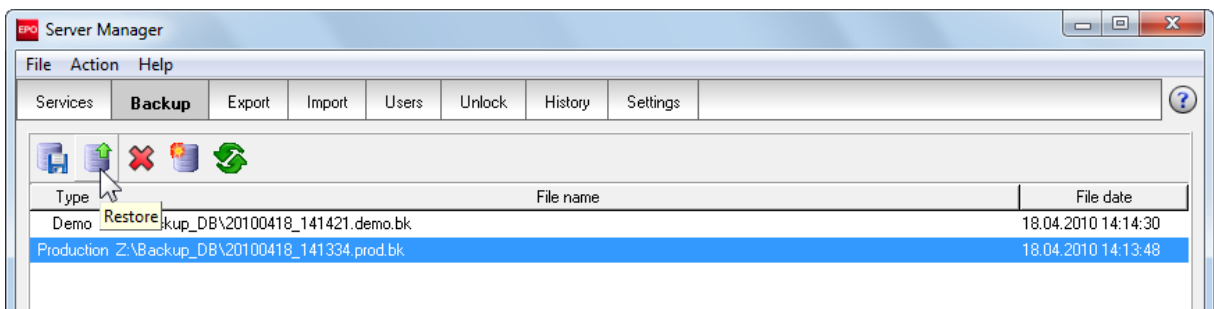
Figure 50: Selecting backup file for restoring the database

A message will inform you if the restore has been successful.

3.6.6.2 Importing selected data

ⓘ For detailed information on the Export and Import functions, refer to the user guide for Online Filing version 5.00.

Importing applications and templates with Server Manager

❗ *Note: After the import, all applications that have not yet been sent are switched to* **Draft** *status in File Manager. In other words, you have to sign them again as required so they are ready to send before you can file them.*

→ Start the Online Filing Server Manager.

→ Select a folder as the default import directory as described above for the restore directory, see **Restoring the database with Server Manager** (p. 53).

→ Click the *Import* tab.

Available applications and templates are displayed.

→ Select the *All Applications* folder on the left. This folder also contains all templates.

→ Click the ✔ icon in the column headers on the right to select all applications and templates.

→ Click the **Import** icon.

The ZIP files previously created are unzipped and imported.

ⓘ Applications in *Draft* status are automatically imported into the *Default folder* in File Manager. Templates are automatically imported into the *Templates* folder.

Importing the Address Book with File Manager

→ Start the Online Filing client, in other words, File Manager.

→ Click the **Address Book** icon.

The Address Book is empty.

→ Select *File > Import*.

→ Select the location where the previously exported CSV file is saved and click **Open**.

→ Follow the software instructions for the import.

3.7   Testing the installation

The **EPO Online Filing** program group is created in the Windows Start menu when installation is completed and, depending on the mode of installation, contains shortcuts for starting the Online Filing components:

♦ **Online Filing Client 5.0** and **Online Filing Client 5.0 settings** for the thin client

♦ **Online Filing 5.0 Server Manager** for the server

♦ **Online Filing 5.0** und **Online Filing 5.0 Server Manager** for the standalone installation.

Test whether your Online Filing installation is working properly by starting the application.

Starting Online Filing in a local installation

➔ Go to the Windows Start menu and select:

   Programs > EPO Online Filing > Online Filing 5.0

Starting a thin client in a server installation

➔ Go to the Windows Start menu and select:

   Programs > EPO Online Filing > Online Filing Client 5.0

Starting Server Manager in a local or server installation running Windows 2000/XP

➔ Go to the Windows Start menu and select:

   Programs > EPO Online Filing > Online Filing 5.0 Server Manager

Starting Server Manager on Windows 7 or Windows Vista

➔ Go to the Windows Start menu and select: **Programs > EPO Online Filing > Online Filing 5.0 Server Manager**.

➔ Right-click the **Online Filing 5.0 Server Manager** shortcut.

➔ Select **Run as administrator** in the shortcut menu.

   If you are not the Windows administrator, you must now enter his or her Windows username and password.

➔ Click **Yes** in the **User Account Control** window (**Allow** in Windows Vista).

   The Server Manager login window then appears.

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.

4 Upgrading from OLF version 4.00 to version 5.00

Please read the following information if you are using Online Filing version 4.00 and want to upgrade to version 5.00. If required, perform all preparatory steps described below before you install version 5.00.

> **!** **Note**: *You cannot revert to version 4.00 after installing version 5.00.*

Compatibility with older versions

Online Filing can be upgraded to version 5 from builds 4.228 or 4.229 of the version 4 File Manager. The build number can be found in the File Manager info pane, under the menu option ***Help > Info***.

→ If necessary, use the ***Live Update*** function in Server Manager to update version 4.00.

When you install version 5.00 all data from the previous version will be safely migrated.

Upgrading the thin clients to version 5.00

Users with a client-server network should proceed as follows:

→ Install the thin client version 5.00 in addition to the thin client version 4.00 on all relevant computers.

   At this stage, you will still be able to file using Online Filing version 4.00.

→ As soon as you have installed all the thin clients for version 5.00, upgrade the server computer to version 5.00.

   You can then no longer file via the thin clients of version 4.00.

→ Uninstall the thin clients for version 4.00.

Applications still being processed

You should complete all applications in version 4.00 and send them to either the EPO or the relevant designated office before you carry out the upgrade.

Templates

Update all version 4.00 templates with the most recent fee schedule, if not yet done.

Applications in the Trash folder

The Trash folder in File Manager must be empty before you install version 5.00, otherwise the installation process will terminate. Check if you still need any of the data in the Trash folder and, if not, empty it completely.

Version 4.00 applications with forms that are not compliant with EPC 2000

Applications based on the Forms EP(1001E) and Euro-PCT(1200E) can no longer be viewed in OLF version 5.00 while this was still possible in version 4.00. If you need data from those applications for your reference, export the forms from File Manager. Before upgrading to version 5.00, delete the "old" applications from your version 4.00 database after archiving them in an appropriate way.

Administrator password

If you have enabled user management in Online Filing, a password must be set for the administrator, otherwise a message appears during installation to indicate that the password is incorrect. Log on to File Manager as an administrator to check the password or, where necessary, reset it.

Program folder of an earlier version

The `EPO_OLF` program folder used in the past might not be completely deleted during updates. If this happens, you should delete the folder manually as soon as you restart the computer after installing version 5.00.

5 Uninstalling Online Filing

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

Uninstalling the server or the stand-alone version

1. Save your applications and templates as well as the Address Book with the Export functions in File Manager and Server Manager, see **Backing up data** (p. 43).

2. Uninstall the software, see **Uninstalling the server** (p. 46).

3. Remove any files you no longer need, see **Removing OLF program files and folders** (p. 48).

4. Delete the Online Filing keys in the Windows registry, see **Editing the Windows registry** (p. 49).

Uninstalling the thin client

Windows 7 and Windows Vista:

➜ Open the Windows *Control Panel*.

➜ Go to *Programs > Programs and Features > Uninstall or change a program*.

➜ Select *Online Filing Client 5.0* and click **Uninstall/Change**.
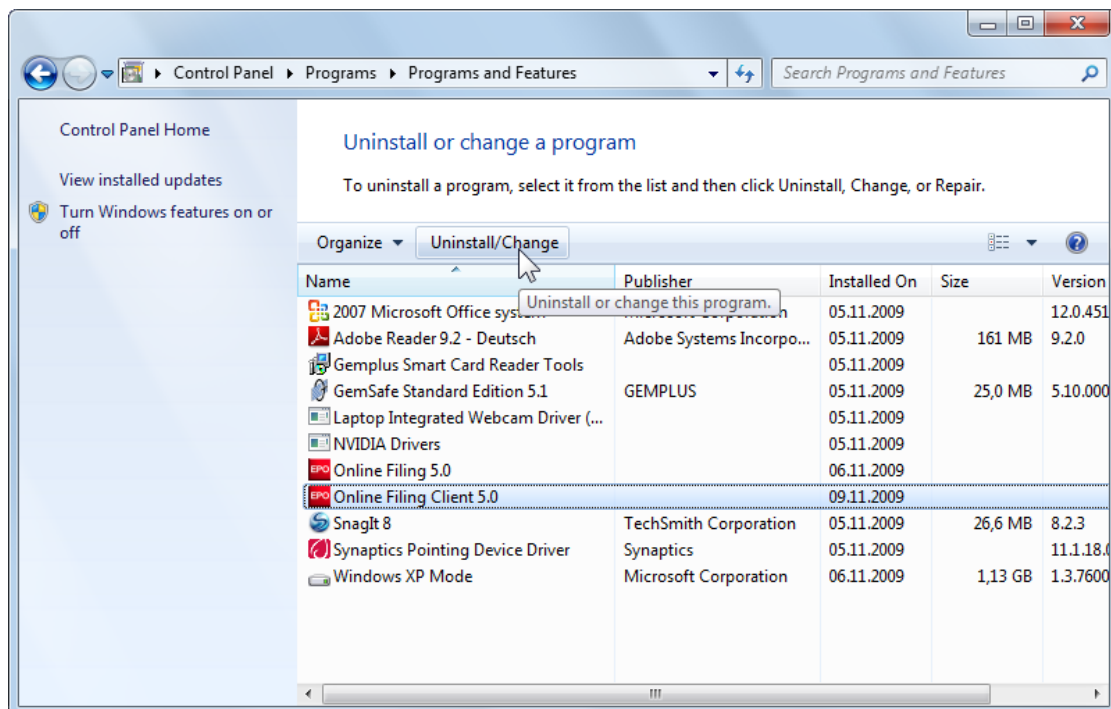
Figure 51: Uninstalling the OLF thin client in "Uninstall or change a program" in Windows 7 and Windows Vista

Uninstalling in Windows XP:

➔ Open the Windows **Control Panel**.

➔ Go to **Add or Remove Programs > Change or Remove Programs**.

➔ Select **Online Filing Client 5.0** and click **Change/Remove** or **Remove**.

- If the thin client was installed with MSI Installer, two individual buttons will be displayed here (**Change** and **Remove**).
- Only a single button is displayed if the thin client was installed with the EXE file (**Change/Remove**).
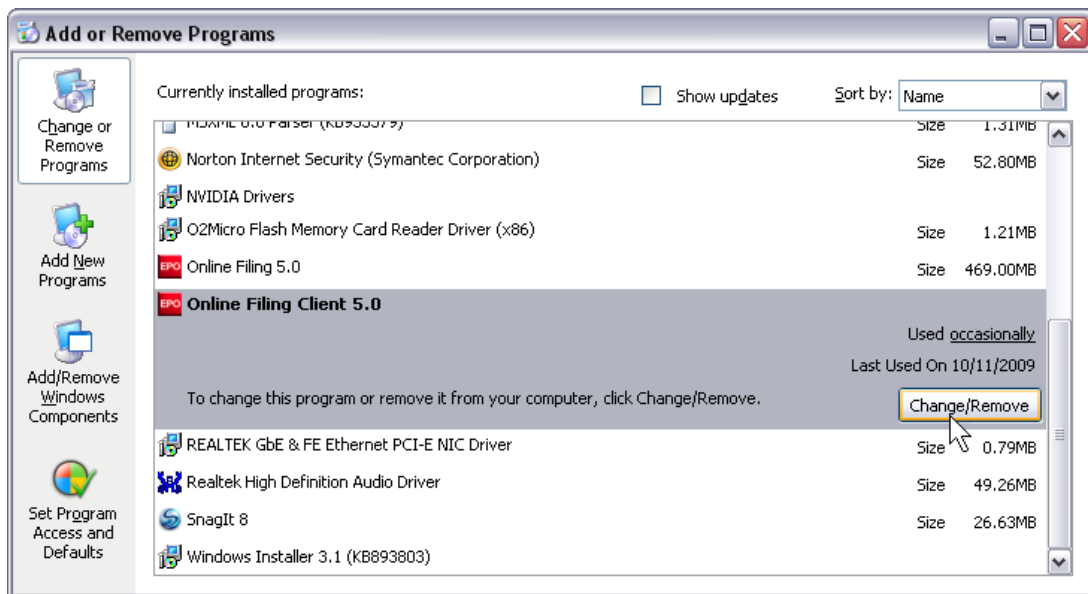
Figure 52: Uninstalling OLF thin client in "Add or Remove Programs" in Windows XP

The uninstallation routine starts.

➔ Click **Next** in the **Online Filing Client 5.0 Uninstall** window.

➔ Click **Finish** in the **Online Filing Client 5.0 has been successfully uninstalled** window.

You are prompted to delete the folder `EPO_OLF5-TC`.

➔ Click **Yes** to confirm.
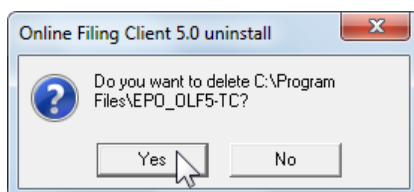
Figure 53: Prompt to delete the Online Filing thin client program folder

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 you can still see it, delete it manually.

6 Using the PMS gateway interface

An installation guide and description of how the PMS gateway works is provided in the ***Online Filing V5 development kit***. This kit is available under ***Download-centre > Software > Online Filing related software*** on the **EPO's Online Services website** (http://www.epoline.org). 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 OFL 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.

◆ In a local installation, PMS gateway access is only possible if the OLF File Manager is active.

◆ The OLF client's GUI blocks when the system is processing a PMS request. The EPO recommends installing two different OLF instances for PMS use and GUI use, if you want to simultaneously operate a PMS with the gateway and OLF via the GUI in your company.

◆ Certain validation messages (GUI-specific validations) are only outputted 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 3.20 (release 3.80) and higher" available under ***Download-centre > Documentation > Online Filing documentation*** on the **EPO's Online Services website** (http://www.epoline.org).

6.1   PMS gateway features

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

Web service 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. A soft certificate can alternatively be used for this.
send	Sends an application to the receiving office.
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.

PMS requests for OLF Web services are always processed sequentially by the PMS gateway, meaning they are routed to a queue and then processed one after the other.

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

6.2   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 support desk before patent offices are contacted.

Please refer to the latest information on the **EPO's Online Services website** (http://www.epoline.org), 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 EPA. 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 for further coordination. The support desk 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.

7   Troubleshooting

The OLF 5.00 installation also includes services for the server and the Firebird (InterBase) database. In server or stand-alone installation mode, the OLF system creates and starts

◆ a service for the File Manager

◆ one service for each procedure, irrespective of whether it is in production or demo mode.

The OLF related services can be monitored via:

◆ the OLF Server Manager

◆ the Windows Services Manager to be found in **Control Panel > System and Security > Administrative Tools > Services**.

7.1   Checking and verifying installation of the stand-alone version

For complete stand-alone installation of Online Filing the following devices and applications should be on your PC:

◆ GemPC Twin smart card reader (hardware)

◆ GemPC Twin driver (normally automatically installed if the GemSAFE Libraries were installed and the smart card reader was connected to the computer)

◆ GemSAFE Libraries Version 4.2.0 SP4 (5.2 Patch 1 for Windows 7 and Windows Vista)

◆ Adobe Acrobat Reader, Version 9.x (versions 7.x or 8.x are also supported)

◆ Arial Unicode MS Font, Version 0.86 or higher

◆ Amyuni PDF Converter 3.0.3, if required

◆ Online Filing client

➜ Check your Windows **Programs** menu for the **EPO Online Filing** program group.
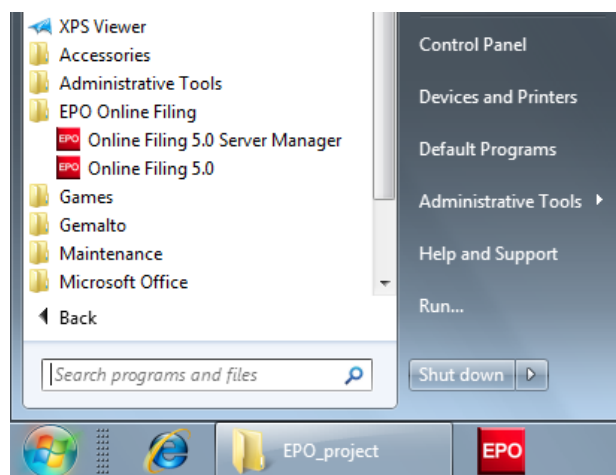
Figure 54: Program group "EPO Online Filing" exists (stand-alone version)

7.2 Checking and verifying installation of the network version

7.2.1 Checking and verifying the server PC

➜ Check your Windows program menu for the *EPO Online Filing* program group.
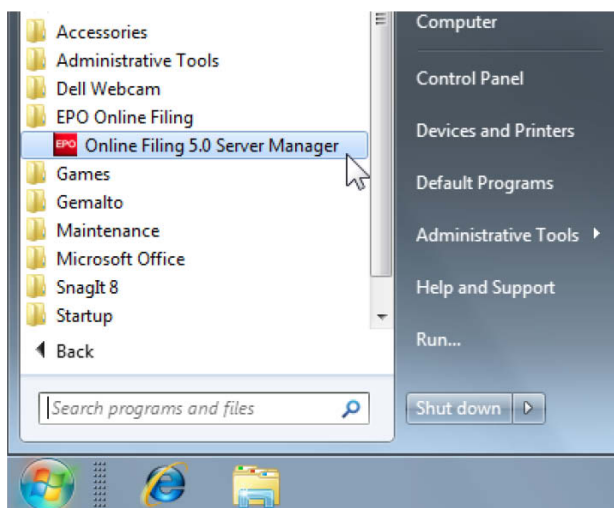
Figure 55: Program group "EPO Online Filing" exists (network version)

➜ Check that the services shown in the *Services* tab of the *Server Manager* are all running.
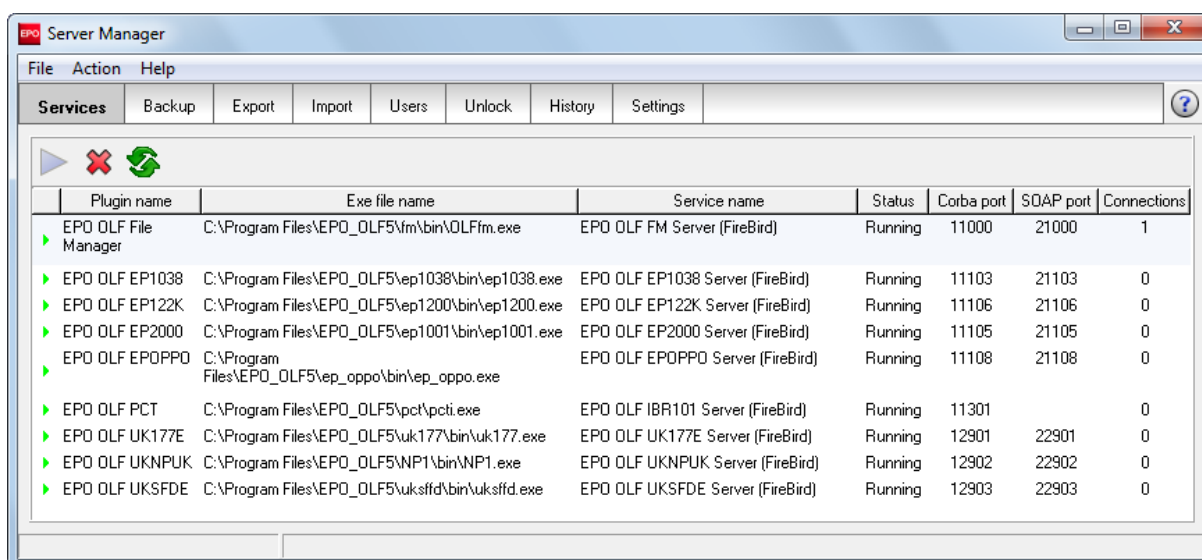
Figure 56: Server Manager - Services tab

Alternatively, you can check in the Windows Services Manager under **Control Panel > System and Security > Administrative Tools > Services**. The EPO OLF services should be running for all forms.
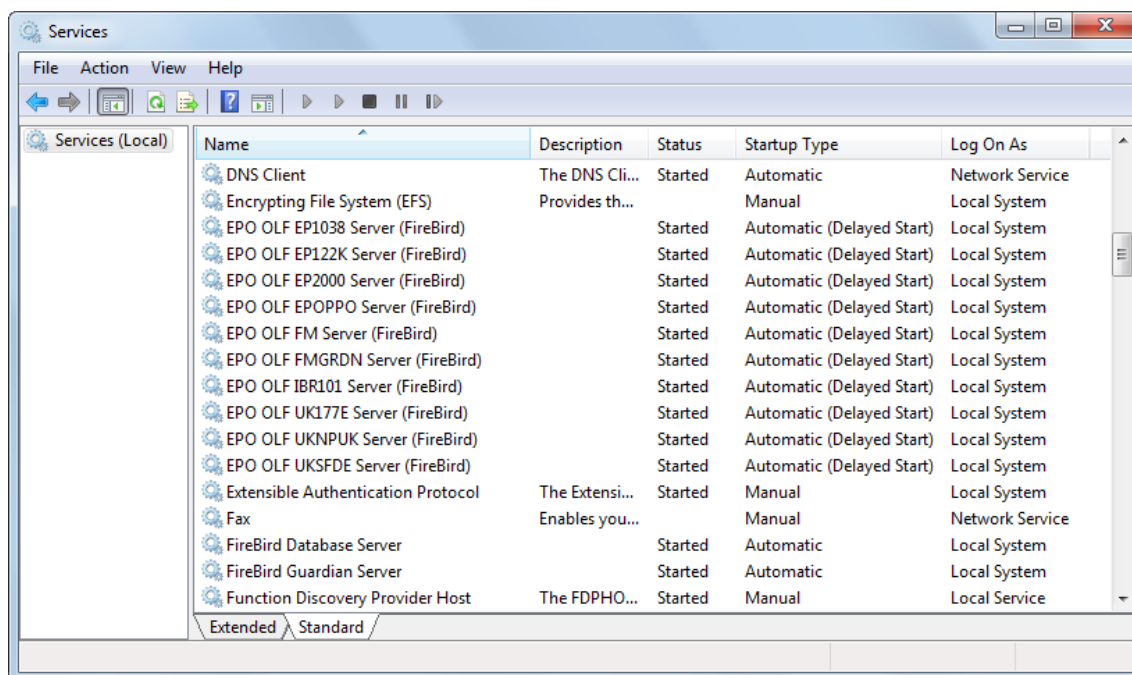
Figure 57: Checking eOLF services in Windows

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.
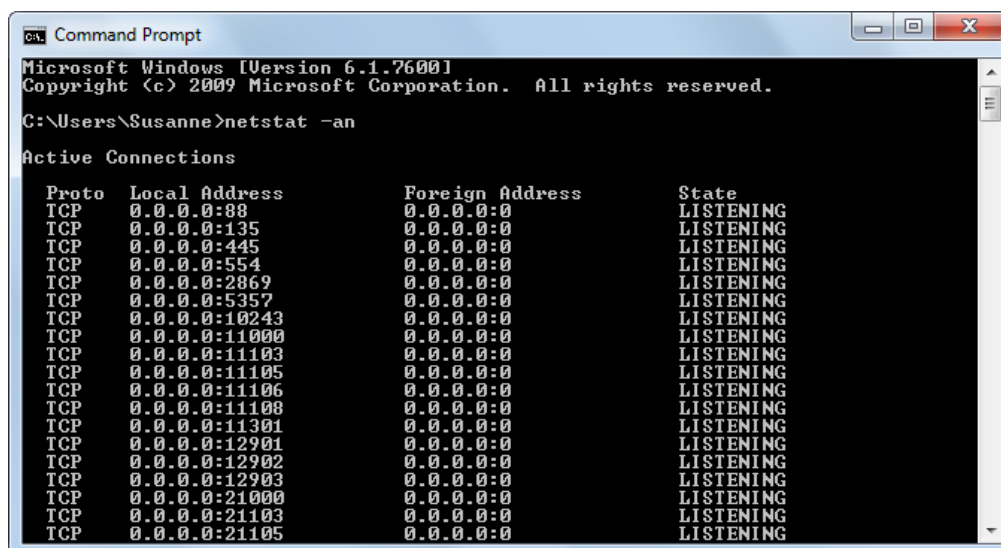
Figure 58: MS-DOS command "netstat -an"

7.2.2 Checking and verifying the client PC
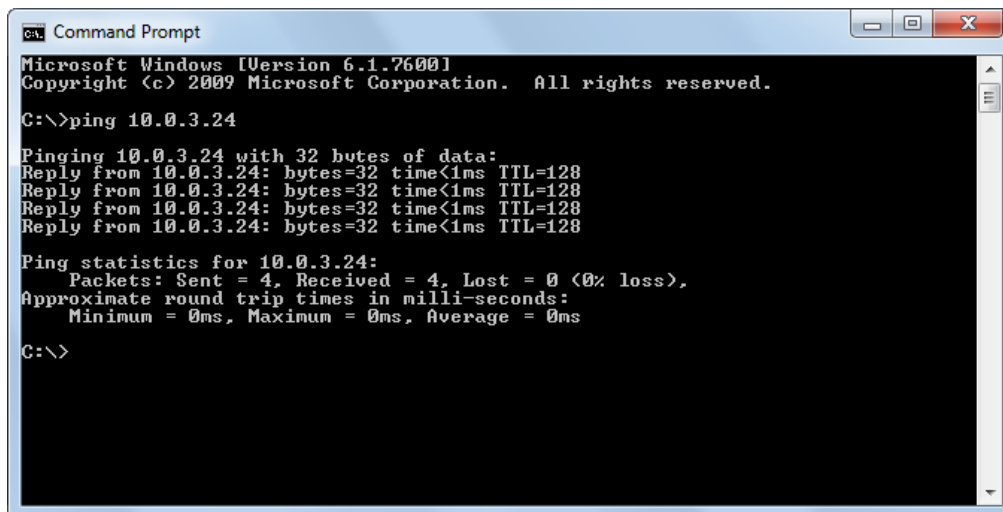
To check that the network connection to the server machine is possible, you can also do that at a DOS prompt with the MS-DOS command **ping**.

➜ Open the **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.

Figure 59: MS-DOS command "ping"

7.3   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:

Windows 7

➜ 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 *Display* option in the *Control Panel*.

➜ Click the *Appearance* tab.

➜ Set the option for *Size* to *Normal*.

➜ Click **OK**.

The modified settings take effect immediately.

7.4   Setting up your office firewall for OLF

> **!** **Note:** *To do this you must be the network administrator.*

Online Filing uses the HTTPS protocol over the standard port 443. In your firewall, that port needs to be opened for the IP addresses required by the various OLF services that your company uses.

To get the IP addresses for the configuration of your firewall, you need to know the host names of all receiving servers. Check with your colleagues which patent offices they will be using OLF to file to.

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**.
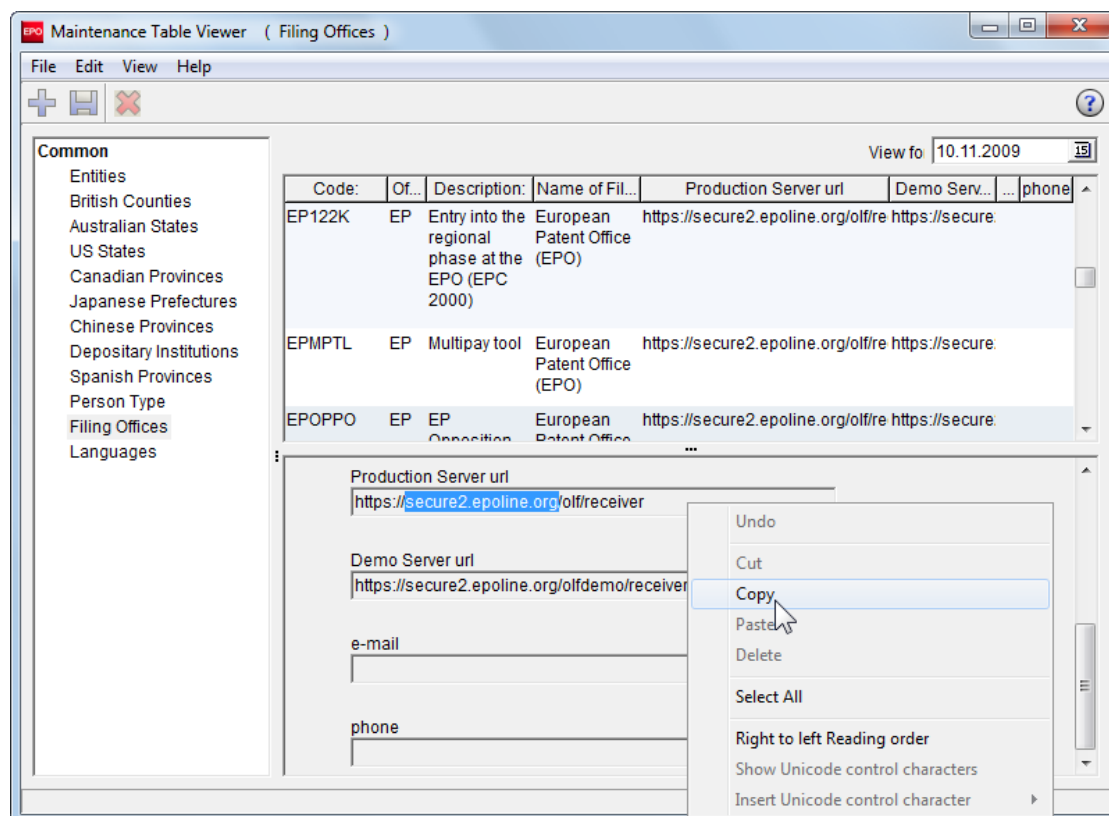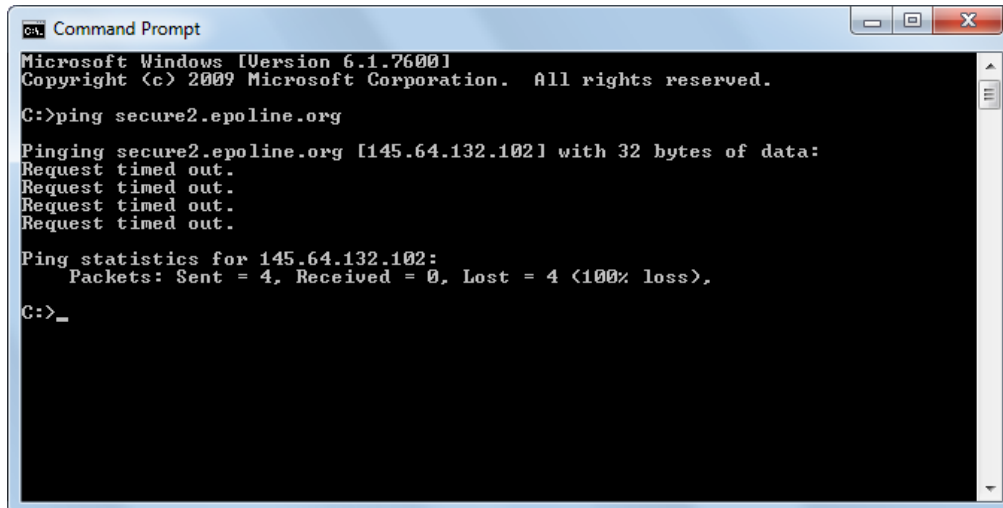
Figure 60: Maintenance Table Viewer listing the Filing Offices

➔ 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**, see **Checking and verifying the client PC** (p. 66). 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.

```
Command Prompt                                                    ─ □ ✕

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

C:>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:>_
```

Figure 61: Pinging the receiving server to retrieve its IP address

8 Glossary

CORBA

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

Default

An automatic selection made by the system when the user does not specify an alternative.

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.

Icon

A small image displayed on the screen that allows the user to control certain computer actions without having to remember commands or type them on the keyboard.

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.

PDF

Portable Document Format: A file format used in saving documents. It can be read using free PDF Reader software.

PIN

Personal Identification Number: PINs are used for transmitting information electronically over a secure internet link.

PMS

Patent Management System: Software for the administration and filing of patent applications, generally based on a database.

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 developed by Netscape Communications Corporation 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.

Workflow

The tracking and management of all activities from start to finish.

XML

eXtensible Markup Language: XML is a document-processing standard officially recommended by the World Wide Web Consortium and widely accepted throughout the internet community. It provides a way to define and manage information. It can be used to check the accuracy and quality of documents.

9   Index

W