EPO Online Filing

Installation and troubleshooting

Software version 5.15 / 2023-11

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Please refer to the EPO's website to view the most recent version of the Terms and conditions for EPO online services electronic infrastructure (www.epo.org/en/terms-of-use).

2   Document contents

This document describes the most important aspects of the installation of Online Filing (OLF) version 5.15.
Online Filing enables users to file patent applications under the EP, PCT and national procedures of the EPO, WIPO, and the national offices electronically, using secure Internet connections and state-of-the-art electronic commerce technology for secure transactions.

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

Document structure
- The chapter Online Filing – overview (Navigate to section) provides a basic explanation of how OLF works and includes links to various support material on installing and using the software.
- The chapter Installation requirements (**Navigate to section**) provides an overview of installing OLF on Microsoft Windows operating systems and describes the hardware and software requirements.
- The chapter Initial installation (Navigate to section) describes how to install OLF version 5.15 for the first time and select the appropriate installation mode.
- The chapter Installation maintenance (Navigate to section) describes how to perform a reinstallation to update the OLF software (including national plug-ins).
- The chapter Uninstalling (Navigate to section) describes how to completely uninstall the OLF software.
- The chapter Reinstallation with data migration (Navigate to section) explains how to restore OLF after a fatal error and how to migrate to another computer and import all existing data.
- The chapter Using the PMS gateway interface (Navigate to section) outlines the steps needed to use and configure the PMS gateway interface.
- The chapter Troubleshooting (Navigate to section) provides help on how to troubleshoot the software and offers solutions to specific problems.
- The annex (Navigate to section) contains various reference information and lists, including tips on how to solve specific installation problems.

3 Online Filing – overview

3.1 Online Filing help

The EPO operates a helpdesk for Online Filing users.
Send us your question using our contact form on the EPO website at
epo.org/contact-form.
Our experts will get back to you as soon as possible.
You can also reach us by phone or email:

Open:	Monday to Friday, 08:00 to 18:00 (CET)
Phone:	00800 8020-2020 (free call from most countries worldwide)
Email:	support@epo.org
Internet:	Online filing on the EPO website: epo.org/online-filing Contact us online on the EPO website: epo.org/contact Visit the Online filing discussion forum (English only): http://forums.epo.org/onlineservices-your-say-online-filing/

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

Documentation
More information on how to use Online Filing can be found in the user guide for version 5.15 and other documents. You can access this documentation on the EPO website under *Applying for a patent > Online services > Online filing > Download documentation* (www.epo.org/en/applying/myepo-services/file-with-us/online-filing/documentation). Information on the system settings, user administration, and importing and exporting data can also be found in the File Manager online help. Server Manager functions, in particular backup/restore, network settings and Live Update, are described in both the user guide and the online help.

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

3.2   How Online Filing works

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

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

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

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

Data exchange between the server, client and filing office
The GUI engine generates the data for the electronic forms and sends it to the OLF thin client. As soon as the user enters data, the thin client saves it in a temporary XML file on the client computer. Only when the user actively saves the application on the client is the data sent to the server and written to the database. When the application is closed, the client deletes the temporary data from the hard disk and terminates the server connection. This unblocks the modified record in the database so that it can be edited once more by another user.
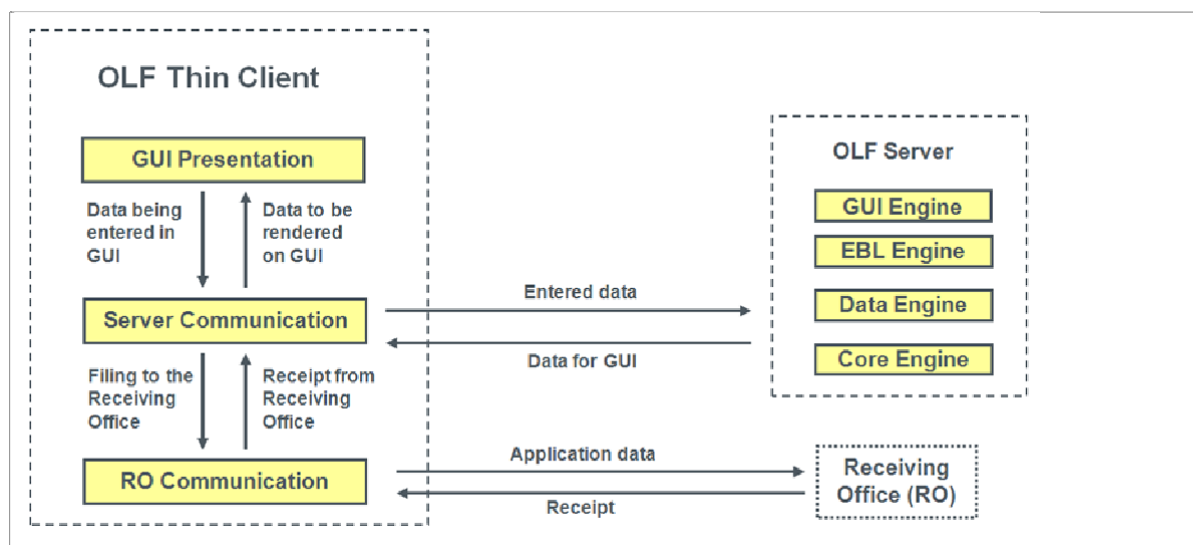
Figure 1: Communication between the OLF thin client, OLF server and the filing office

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

3.3   Communication via CORBA or SOAP

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

CORBA communication

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

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

SOAP communication

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

> ⓘ Please note that SOAP is not compatible with the PCT/RO/101 service. The PCT/RO/101 plug-in can only communicate with the OLF server via CORBA.

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

4 Installation requirements

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

To install and run EPO Online Filing you will need:
- the latest version of the Online Filing software
- a PC with Internet access
- an **EPO Account** (www.epo.org/en/applying/myepo-services/get-access) or smart card.

> ⓘ New EPO smart cards will no longer be issued from January 2024 and the Office intends to decommission smart cards as from 1 January 2025, please refer to Article 50, "Notice from the European Patent Office dated 3 May 2023 concerning new milestones for EPO online services", published in the Official Journal EPO 5/2023 (www.epo.org/en/legal/official-journal/2023/05/a50.html)
> For more information on the decommissioning of smart cards, see the dedicated FAQ (www.epo.org/en/service-support/faq/myepo-services/phasing-out-use-smart-cards-2024)

> ⓘ When using OLF to file outside of the EPO (e.g. EP(1001E2K) to a Filing Office which is not EPO) or using form PCT/RO/101, only the signature options available to that receiving or filing Office or form will be shown.

Optionally, if you want to use a smart card for secure signing, you will need both a smart card and a smart card reader. A starter kit containing those and other information material can be obtained from the EPO free of charge.
➡ To order your starter kit, go to the EPO website at ***Online services > Online filing*** (epo.org/online-filing).
➡ Follow the instructions to register and submit your data. Your smart card will be sent to you in around four weeks.
Once you have enrolled online for a smart card you will receive an email containing your enrolment form.

➜ Please print this form out, check your data, sign the form and return it to the address shown on the form.

4.1   Latest version of the OLF software

The latest version of the OLF software, including all new updates and patches, is always available for download on the EPO website. You will find the downloads under *MyEPO services > File with us > Online filing > Download* (www.epo.org/en/applying/myepo-services/file-with-us/online-filing/download).

Updates are cumulative per area – only the latest EP, IB or national update should be installed; previous updates are included in the latest package and will only be applied if necessary.

Description of download	Name of download file	Remarks
5.0.15 Full package for installation of Online Filing (OLF) V5 (Build 5.0.15 (stand-alone and/or server and thin client) Where? Under **Software**, at the top of the Download page	**OLF515.exe**	Suitable for all types of installation
EXE and MSI file for installation of Online Filing version 5 (thin client) Where? Under **More software -** *Other installations* at the bottom of the Download page	The ZIP file contains **OLF515client.exe** and **OLF515client.msi**	The EXE file is for installing and updating the thin client on all Windows versions. The MSI file is especially for remote installation or automated software distribution in a network. This installation file should not be used for updates.

4.2 Hardware requirements

To use the OLF software, your hardware should meet the following minimal requirements:
- Intel Pentium 4 processor (or equivalent), 2.4 GHz (or more, depending on operating system)
- RAM: 2 GB (4 GB, depending on operating system)
- 4 GB of available hard disk space, at least 20 GB recommended for server installation with database
- Monitor: resolution 1024*768 or higher
- *(Optional)* Smart card reader, e.g. IDBridge CT30, connected to USB port

Server machine

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

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

As a rule, it is advisable to keep the size of the OLF database under 4.5 GB so that a backup copy fits on a DVD. The larger the database, the longer it takes to complete operations such as updates, backups and restores. You can work much faster with a more moderately sized database.
You will need free disk space equivalent to three times the size of the OLF database for future updates. For example, if the database is 4.5 GB in size, you will need at least 13.5 GB free disk space for the software update.

For more information on updating the database and cleaning disk space, see <u>Updating the</u> <u>server</u> (Navigate to section) and <u>Compressing the database</u> (Navigate to section).

4.3   Software requirements

The following operating systems are supported for running EPO Online Filing version 5.15:
- Microsoft Windows Vista (SP2), 32-bit and 64-bit
- Microsoft Windows 7 (SP1), 32-bit and 64-bit
- Microsoft Windows 8/8.1, 32-bit and 64-bit
- Microsoft Windows 10, 32-bit and 64-bit
- Microsoft Windows 11, 64-bit
- Microsoft Windows Server 2008, 32-bit
- Microsoft Windows Server 2008 R2, 64-bit
- Microsoft Windows Server 2012/2012 R2, 64-bit
- Microsoft Windows Server 2016, 64-bit
- Microsoft Windows Server 2019, 64-bit
- Microsoft Windows Server 2022, 64-bit

Arial Unicode font
Online Filing requires the ***Arial Unicode MS (TTF)*** font for both the server installation and the client installation. This font is automatically installed if you are using Microsoft Office 2013 or a previous version.

> (i) Microsoft Office 365 subscriptions and Microsoft Office 2016 do not provide the Arial Unicode font anymore. If you have a brand new computer, you have to install the font from another source, e. g. a computer which has one of the previous versions of Microsoft Office installed.

The Arial Unicode MS font is currently a requirement for installing Online Filing. However, it is no longer available as part of Windows 7 / 10 or current versions of MS Office. You can obtain this font from various websites.

Additional software for the thin client

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

- Adobe Acrobat Reader version 11 or higher.
- cryptovision sc/interface software
  There are different installation files for 32-bit and 64-bit systems.
- Driver for the smart card reader (optional, if using smart card for signing)
  The drivers are normally automatically installed if the cryptovision sc/interface was installed and the smart card reader was connected to the computer.

When you enrol for a smart card, the EPO provides you with the relevant smart card, a smart card reader and information material with direct links for downloading the additional software such as the latest version of the cryptovision software.

4.4 Windows user rights

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

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

Action	Account type / group
Install the OLF software	Administrator / Administrators
Start Server Manager (network version / stand-alone version)	Administrator / Administrators
Start the thin client (network version / stand-alone version)	Standard user / Users

Adapting rights

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

Run as administrator

A standard user who is logged on can start programs with administrator rights without having to first log off. Windows prompts you to enter an administrator username and password when starting certain programs or changing system settings. Once authentication is complete, you can proceed as an administrator.

ⓘ Even if you are already logged on as an administrator, you must start OLF Server Manager with the option **Run as administrator**; see Testing the server (Navigate to section).

4.5 Further information

Service status in Windows

The services used by Online Filing are configured during installation to start automatically with Windows; see <u>Checking the status of the OLF server and OLF services</u> (Navigate to section). Make sure that your system allows you to configure services that start automatically before you install the OLF software.

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 *100%*; see <u>Optimising the display settings</u> (Navigate to section).

5 Initial installation

The following chapters describe how to install EPO Online Filing on Windows 7 (64-bit). Any deviations from this procedure for installation on other Windows versions are indicated at the appropriate place in the text.

- Read <u>Checklist: Initial installation for client/server mode</u> (Navigate to section) or <u>Checklist: Initial installation for stand-alone mode</u> (Navigate to section) if you have never installed any earlier versions of Online Filing on the target machine and you want to install Online Filing for the first time.
- If you want to operate Online Filing in a network, first install the server; see <u>Server installation</u> (Navigate to section). Then install the thin client for each user; see <u>Thin client installation</u> (Navigate to section).
- If you only want to operate Online Filing on a single PC, select <u>Stand-alone installation</u> (Navigate to section) as the installation mode.
- If you have already installed Online Filing and now want to update it, refer to the chapter <u>Installation maintenance</u> (Navigate to section).

5.1 Digitally signed packages

Starting with new patches from spring 2021, EPO online services packages, including OLF packages, will be digitally signed.
When you download, "signed" software gives you the assurance that the package is from the European Patent Office and is still valid, and that code has not been tampered with since being published.
EPO digital certificates are issued by the European Patent Organisation and the European Patent Office.
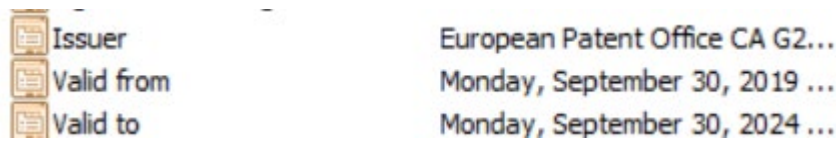
Figure 2 Digital certificates

In Windows, the identity of the software publisher can be seen in the file properties. Additionally, when the downloaded executable file is opened, the following alert may appear: "This file does not have a valid digital signature that verifies its publisher. You should only run software from publishers you trust."
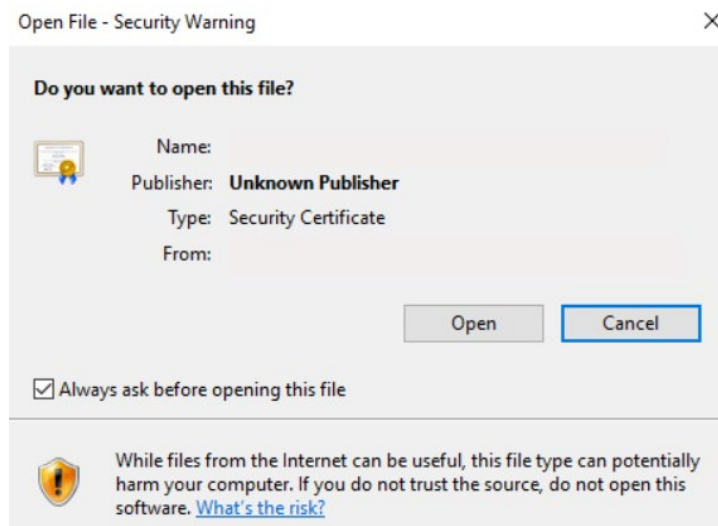

Figure 3 Security warning

Additional information about the file is also shown.

If the package is unsigned, the publisher is shown as unknown.

If the package is signed, but the EPO digital certificates have not been correctly saved in Windows, the publisher is shown as unknown.

If the package is signed and the EPO digital certificates have been correctly saved in Windows with the trusted root certificates, the publisher will be shown as "EPO".

The EPO digital certificates can be downloaded from epo.org.

Using Windows Explorer, open the location of the downloaded certificate.

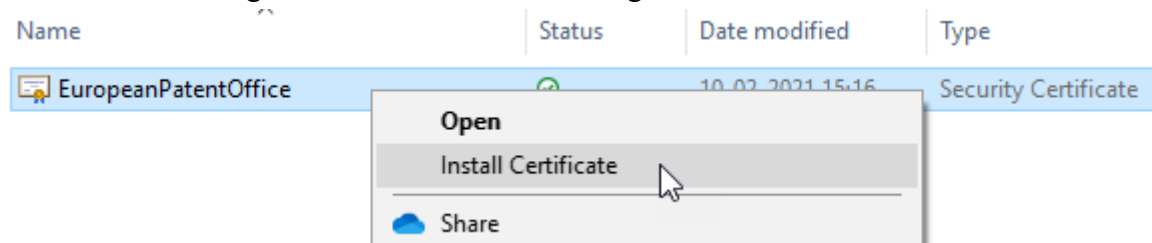Select the file and right-click to view the following menu:

Figure 4 Install certificate

Left-click Install Certificate to open the Windows Certificate Import Wizard.
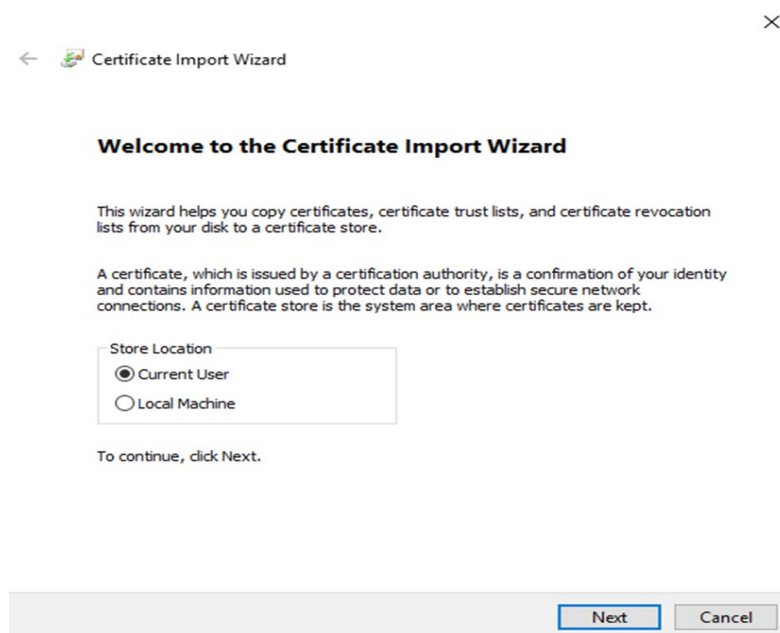
Figure 5 Certificate import wizard

Note: To install a certificate, administration rights are required.

Select Current User to import the certificate into our personal store or Local Machine (for all users), then Next.

Figure 6 Certificate store

In the Certificate Store, select Place all certificates in the following store and click Browse.

Figure 7 Trusted Root Certification Authorities

Select the certificate store Trusted Root Certification Authorities and click OK, then Next.

Figure 8 Completing the certificate import wizard

Click Finish to complete the import.

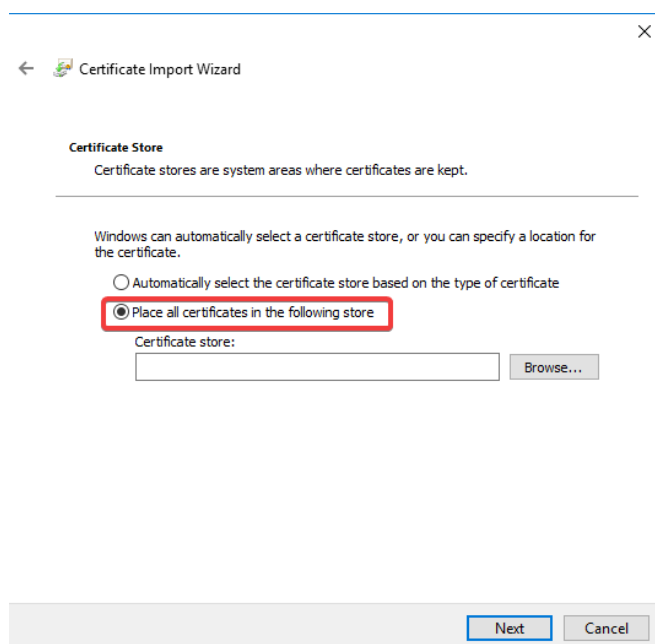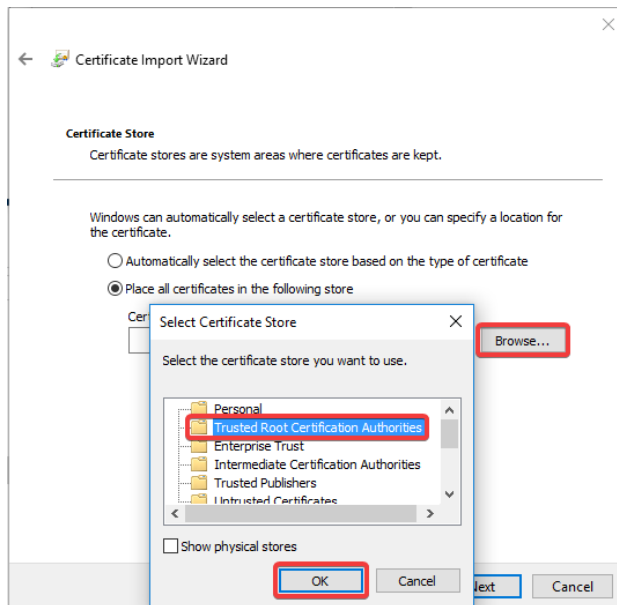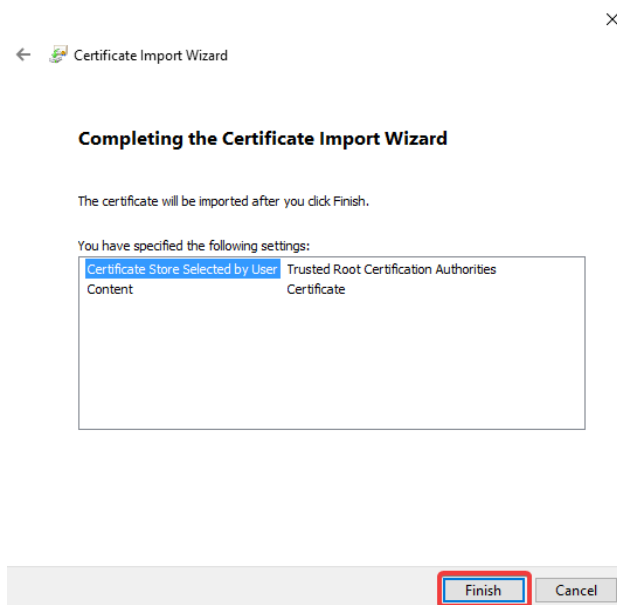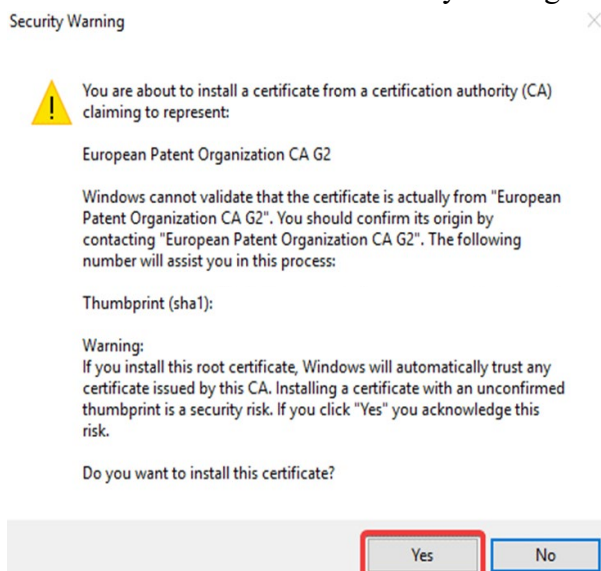Windows will then show a security message:

Figure 9 Security warning - certificate

Click Yes.

If the import was successful, the following message will be shown:
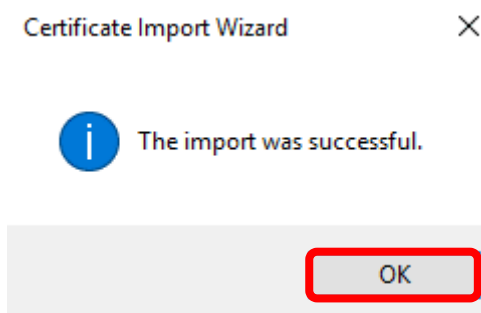
Figure 10 Import was successful

Click OK to close.

Both EPO digital signatures should be downloaded and imported.

This action does not need to be repeated with each package. Users will be informed when the certificates used to sign EPO online services packages are changed so that they can update the certificates at their end.

Once the EPO digital certificate has been installed, the identity of the software publisher will be shown in the file properties as "EPO".

Additionally, when the downloaded executable file is opened, the alert regarding unsigned executable files is removed.

Users can choose not to install the digital certificates.

Furthermore, users updating via OLF Live Update do not need to take any further action.

The file will download and install as normal.

Users choosing to manually download OLF packages from epo.org can choose to install the digital certificates and be able to view the publisher information when installing packages by verifying the digital signature.

Users can also choose to install the digital certificates only centrally and not locally, to verify the digital signature of packages before proceeding with a distributed installation. This means that where a server installation has verified publisher information, thin clients that also have verified publisher information via locally installed digital certificates are not required.

An EPO smart card is not a requirement for the download and installation of EPO digital certificates or for the download of EPO online services packages.

5.2 Checklist: Initial installation for client/server mode

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

➜ Make sure you have the latest installation files to hand; see <u>Latest version of the OLF software</u> (Navigate to section)

➜ Choose how you want to use the application, i.e. in a network with server and client(s) or in stand-alone mode; see <u>How Online Filing works</u> (Navigate to section)

➜ Ask future users where (i.e. with which national office) they want to file applications online so that the relevant plug-ins are activated when OLF is installed

➜ Install any additional software necessary; see <u>Software requirements</u> (Navigate to section)

– Arial Unicode font (for server and client)
– Adobe Acrobat Reader (for client)
– cryptovision sc/interface software and smart card driver (for client), if you plan to use a smart card for signing

➜ Make note of the data for configuring the OLF server in your network:

– IP address and host name of the server computer
– HTTP port number on the server to be used for OLF online help
– CORBA and SOAP ports on the server that are available (or disabled or already in use)
– IP address, host name and port of the proxy server (if a proxy server is used to set up the internet connection to the EPO)
– If necessary, username and password for the proxy server

➜ Give all users in your network ample warning of the impending server disruption as it will have to be restarted after the OLF server has been installed

➜ Install the OLF server; see <u>Server installation</u> (Navigate to section)

➜ Start Server Manager and check the status of all OLF services; see <u>Testing the server</u> (Navigate to section)

➜ Use *Live Update* to check if there are any updates or patches available for Online Filing; see <u>Performing a live update</u> (Navigate to section)

– Download all updates
– Install all updates
– Restart all OLF services in Server Manager
– If necessary, restart the OLF server machine

➜ <u>Install a thin client</u> (see "<u>Thin client installation</u>" Navigate to section) for the Online Filing administrator first. Then, in demo mode, send a test application to a filing office's OLF demo server; see <u>Testing the thin client</u> (Navigate to section)

→ Configure all users and groups for your company staff under User Administration in the OLF File Manager

→ Install the thin clients for all users and any additional software that is necessary

→ Test the client/server connection; see Testing the thin client (Navigate to section)

5.3 Checklist: Initial installation for stand-alone mode

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

➔ Make sure you have the latest installation files to hand: see Latest version of the OLF software (Navigate to section)

➔ Choose how you want to use the application, i.e. in a network with server and client(s) or in stand-alone mode; see How Online Filing works (Navigate to section)

➔ Ask future users where (i.e. with which national office) they want to file applications online so that the relevant plug-ins are activated when OLF is installed

➔ Install any additional software necessary; see Software requirements (Navigate to section)

  – Arial Unicode font
  – Adobe Acrobat Reader
  – cryptovision sc/interface and smart card driver, if you plan to use a smart card for signing

➔ Make note of the data for the configuration in your network:

  – IP address, host name and port of the proxy server (if a proxy server is used to set up the internet connection to the EPO)
  – If necessary, username and password for the proxy server

➔ Install the OLF software; see Stand-alone installation (Navigate to section)

➔ Start Server Manager and check the status of all OLF services; see Testing the server (Navigate to section)

➔ Use *Live Update* to check if there are any updates or patches available for Online Filing; see Performing a live update (Navigate to section)

  – Download all updates
  – Install all updates
  – Restart all OLF services in Server Manager
  – If necessary, restart the stand-alone machine too

5.4 Starting installation

➔ Log on to the computer as a Windows administrator; see Windows user rights (Navigate to section).

➔ Quit all Windows programs.

Running the downloaded installation file

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

➔ To run the installer, right-click the **OLF515_**exe file and select *Run as administrator*.

ⓘ Even if you are already logged on as a Windows administrator, you must start the OLF installation explicitly with the option *Run as administrator*.

➔ To confirm the security warning, click *Yes* in the *User Account Control* window. Windows Installer starts the installation wizard.

Selecting the language

→ Select the language for the installation process in the next window.

The default setting is *EN* for English.

This initial language setting applies for the installation process only. You can change the language of the Online Filing user interface later in File Manager.

→ Click *OK*.

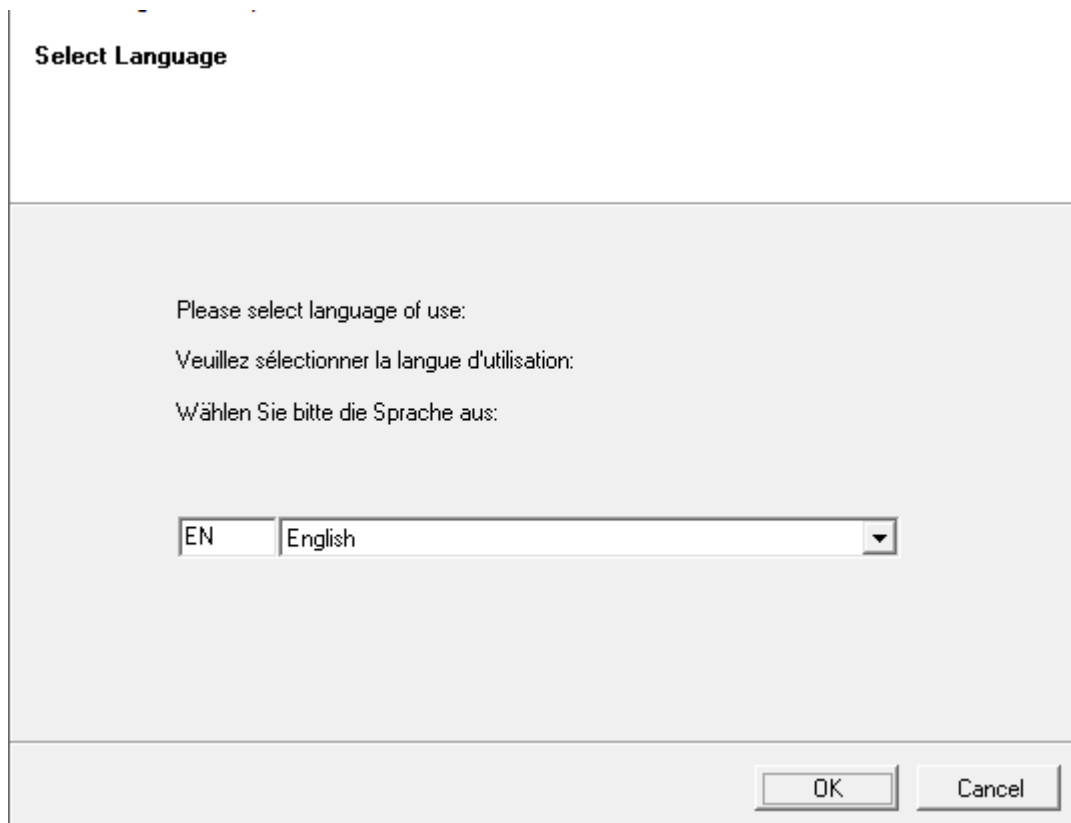*Figure* 11*: Selecting the language for installation*

The window *Welcome to the Online Filing 5.15 Installation Wizard* appears.

→ Please read the legal notices and the terms of use for the Online Filing software.

→ If you do not want to start the installation now, click **Cancel**.
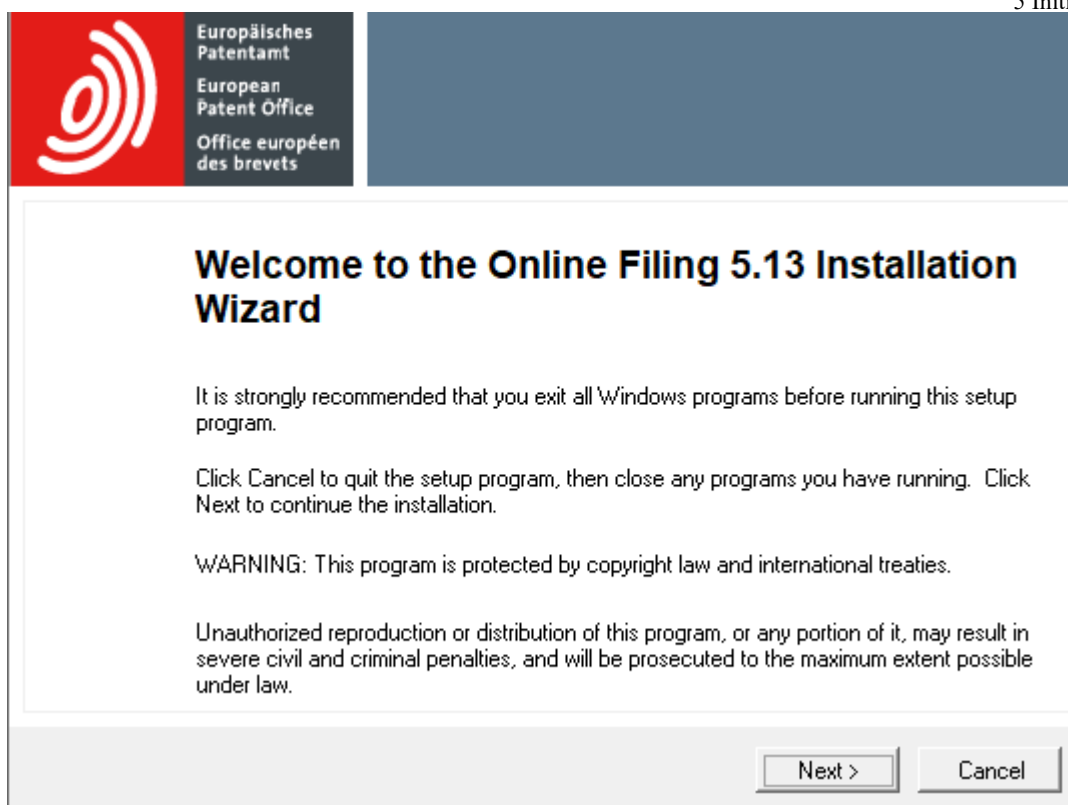
→ To start the installation, click *Next*.

Figure 12*: Welcome to the Installation Wizard*

5.5   Installation mode

➔ Select the installation mode in the following window.

   The default setting is ***Stand alone installation***.

Select Installation Mode
Select the desired installation mode.

⦿ **Stand alone installation**
All components will be installed on the local machine. Client/server mode will not be available.

○ **Server installation**
Only server components of the system will be installed on the local machine.

○ **Client installation**
Only client components of the system will be installed on the local machine.

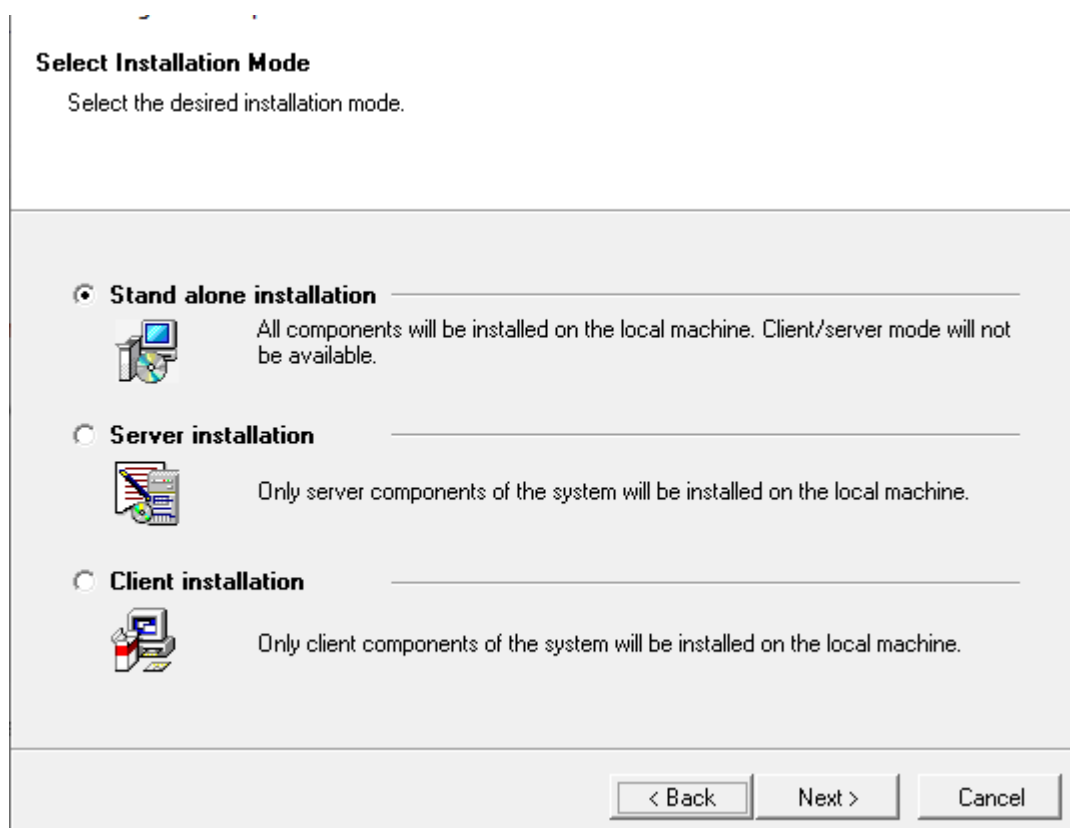[< Back] [Next >] [Cancel]

Figure 13*: Selecting installation mode*

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

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

5.6   Server installation

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

➔ Select **Server installation** as the mode of installation; see <u>Installation mode</u> (Navigate to section).

➔ Click *Next*.

Specifying the destination folder

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

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

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

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

➡ Click the second *Browse* button to modify the database location.

➡ Click *Next* to use the selected folders or the default destination folders.

Figure 14: Selecting the destination folder for installation

5.6.1   Installation type

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

The *Select installation type* window offers two options:

- **Typical**
  - Installs the default services: File Manager, Server Manager, EP(1001E), Euro-PCT(1200E), EP(1038E), EP(OPPO), PCT/RO/101, PCT-DEMAND (PCT/IPEA/401) and PCT-SFD.
  - Installs all national plug-ins without activating them.
- **Custom**
  - Installs the default services and all national plug-ins.
  - Also activates selected national plug-in; see Activating national plug-ins (Navigate to section).

→ Select the appropriate option.
→ Click *Next*.
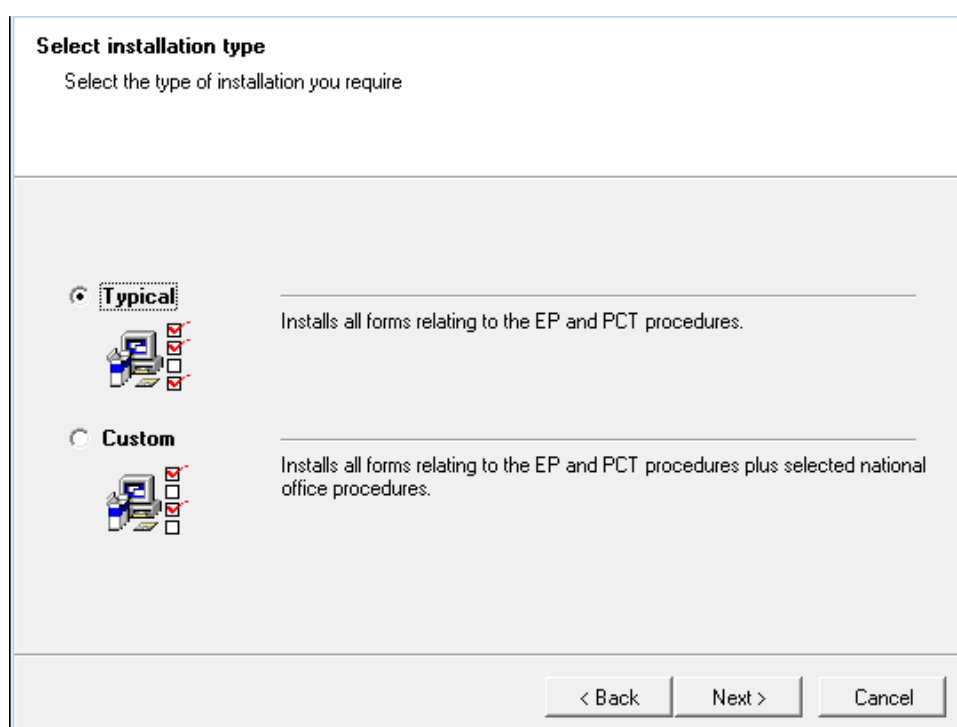
Figure 15*: Selecting installation type*

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

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

For more information on Server Manager features, refer to the online help for Server Manager or the user guide for Online Filing version 5.15.

5.6.2   Activating national plug-ins

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

The Online Filing features (i.e. services) available are displayed in a tree structure on the left. A feature description, including version number, is displayed on the right.

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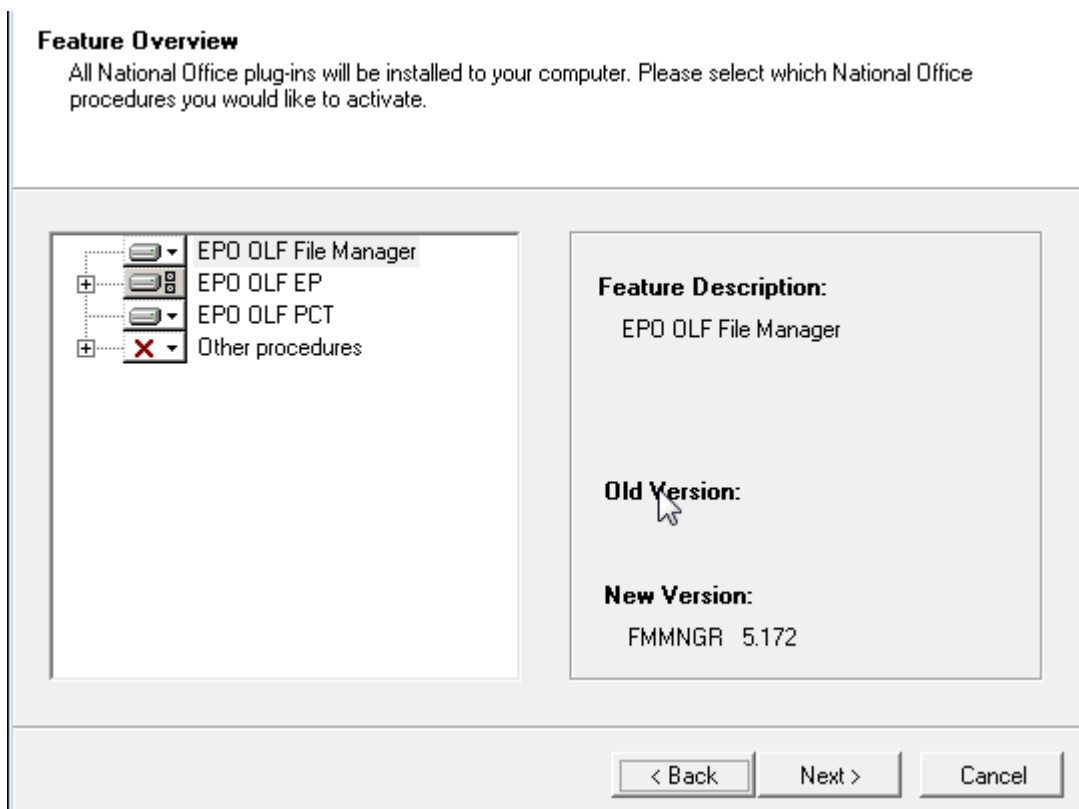

Figure 16*: Overview of the EPO OLF plug-ins*

The icons in the installation tree have the following meaning:

Control	Function
⊞	Show child items in tree.
⊟	Hide child items.
▣▾	Feature will be installed on local hard drive.
▣▾	Feature will be installed with some of its child features.
▣▾	Feature will be installed with all child features.
▢▾	Feature will be left unchanged
✖▾	Feature will not be installed/will be uninstalled.

➜   Expand the tree under **Other procedures** to open the list of national plug-ins.
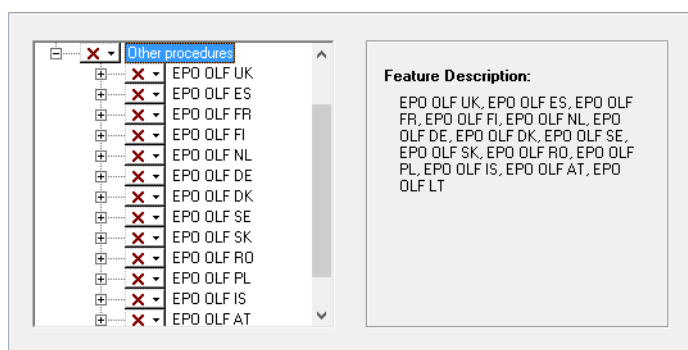
Figure 8: All national plug-ins installed with Online Filing

➜ Select the plug-in you want to activate, either in groups or individually.
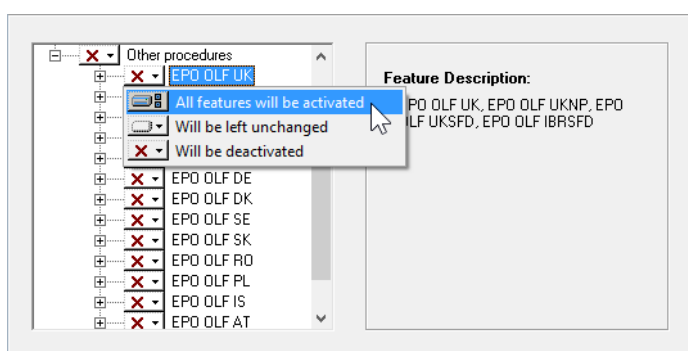
Figure 9: Activating national plug-ins

➜ When you are ready, click **Next** to continue.
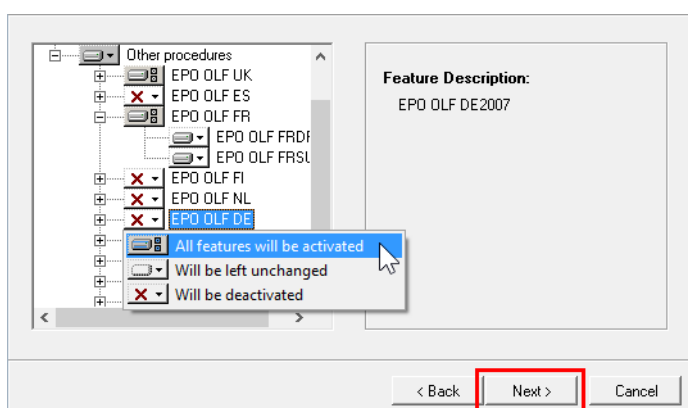
Figure 17: Multiple national plug-ins selected for activation

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

➜ If you are installing the software for the first time, click **Next**, because the warning does not apply in this case.

➜ If you are unsure and would like to save your data before proceeding with the installation, click **Cancel**.
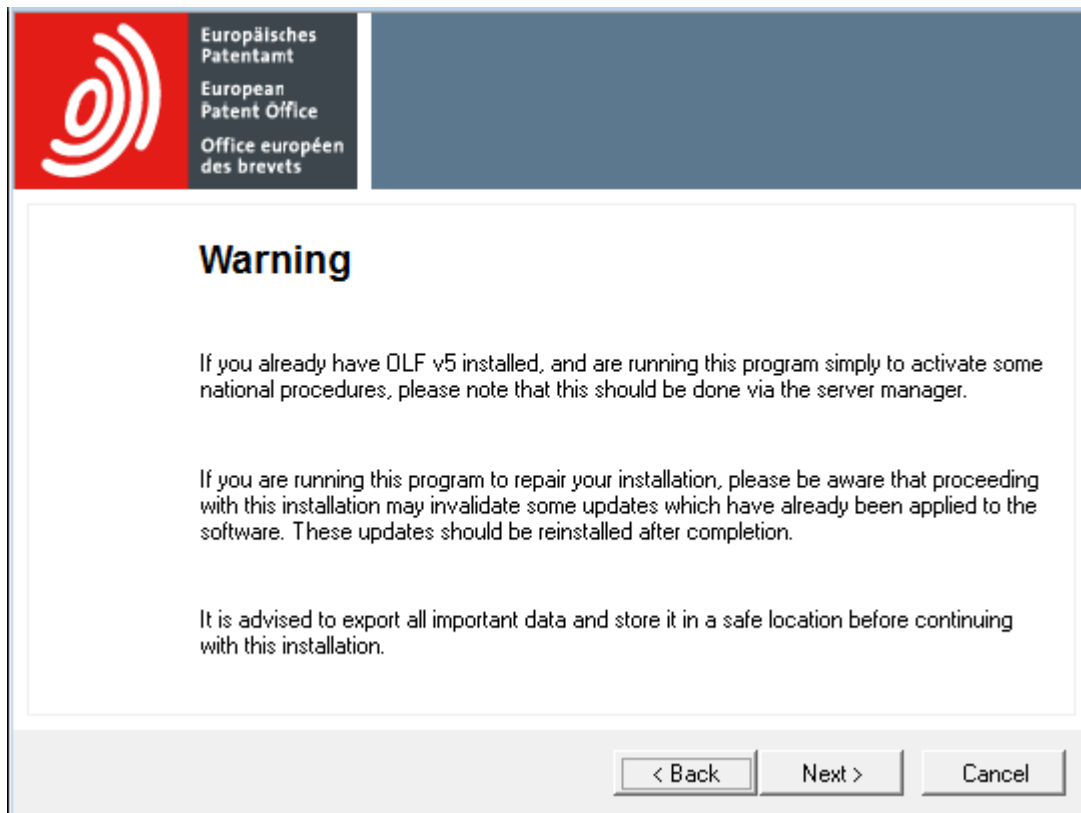
Figure 18*: Warning in the case of user-defined installation*

5.6.3   Confirming installation settings

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

The ***Ready to Install the Application*** window provides three options:

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

→   Click ***Next*** to continue.

Figure 19: Options still available to begin installation, cancel it or go back

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

Figure 20*: Installation progress*

5.6.4 Enabling user management

The access to Online Filing can be protected by assigning an administrator password. For the purposes of data security, this is highly recommended, as otherwise, any random user could modify important data and settings in Online Filing.
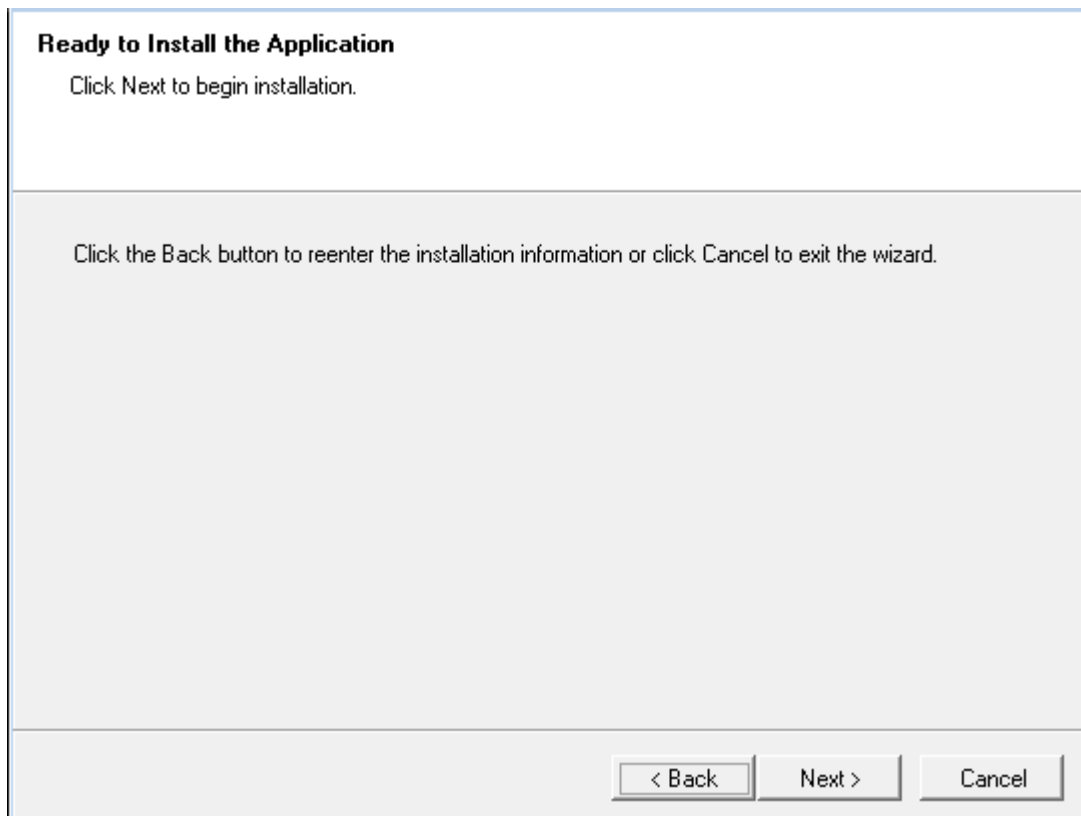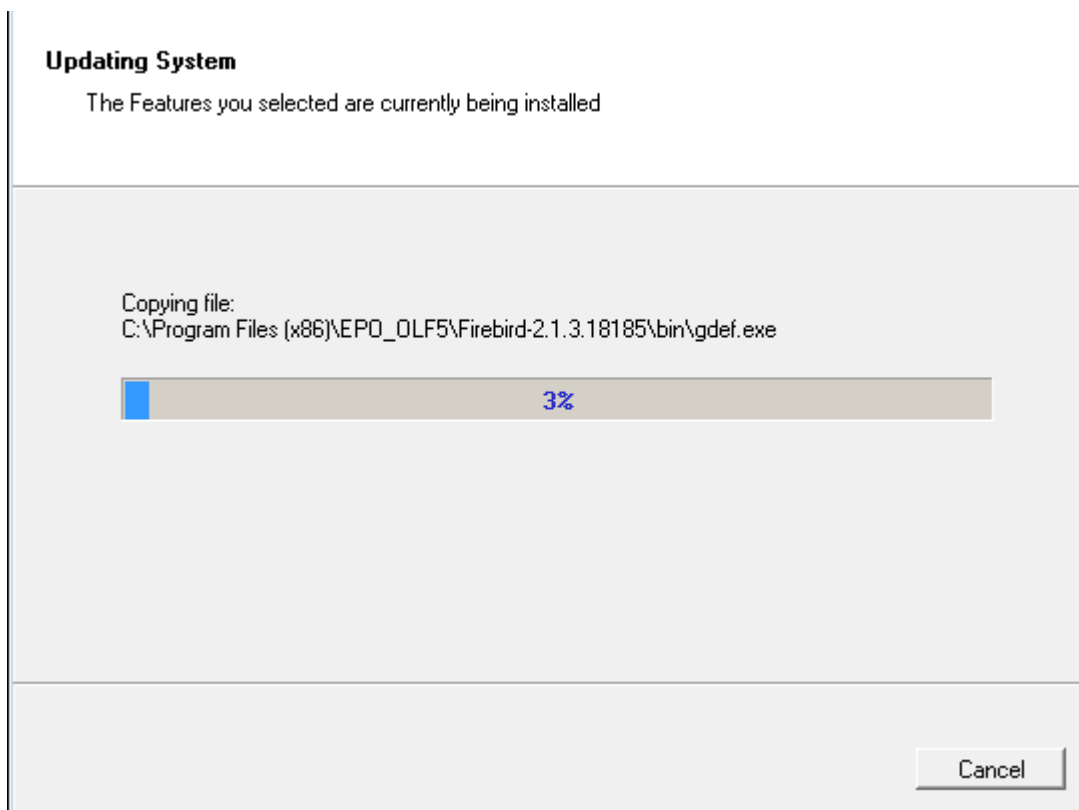For more information on user management, refer to the user guide for Online Filing
version 5.15.

User management not enabled
The option *is not protected by password* is selected by default. This means that user management is not enabled for Online Filing.
If you do not enable user management when installing the software you can do so afterwards in File Manager's system preferences.

Enabling user management and entering the Administrator's password
When you install Online Filing, an initial user named *Administrator* is automatically created. This user can then create additional users and groups and assign them specific privileges under User Administration in OLF File Manager. The *Administrator* user can be neither modified nor deleted.
Only the *Administrator* user or another user from the *Administrators* group in production mode is authorised to run Server Manager and administer the OLF services and OLF database.

> (i) When installation is complete, make sure you start File Manager in production mode and create a second user with full administrator rights. This user will be able to unblock the initial administrator if his or her access to Online Filing is blocked after entering the wrong password three times in succession.

→ Select the option *is protected by the following password*.

    The *Administrator* user name cannot be changed.

→ Enter the *Password* for the administrator.

→ Re-enter the password in the *Confirm password* field.

→ Click *Next*.

Online Filing 5.13 Access

Select the mode of Online Filing 5.13 access. If you want protect the access enter the User Name and Password

○ is not protected by password

○ is protected by the following password:

User name: Administrator

Password:

Confirm password:

[Next >]   [Cancel]

Figure 21: Setting password protection for Online Filing access

5.6.5   Enabling password policy

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

➜   Click ***Next***.
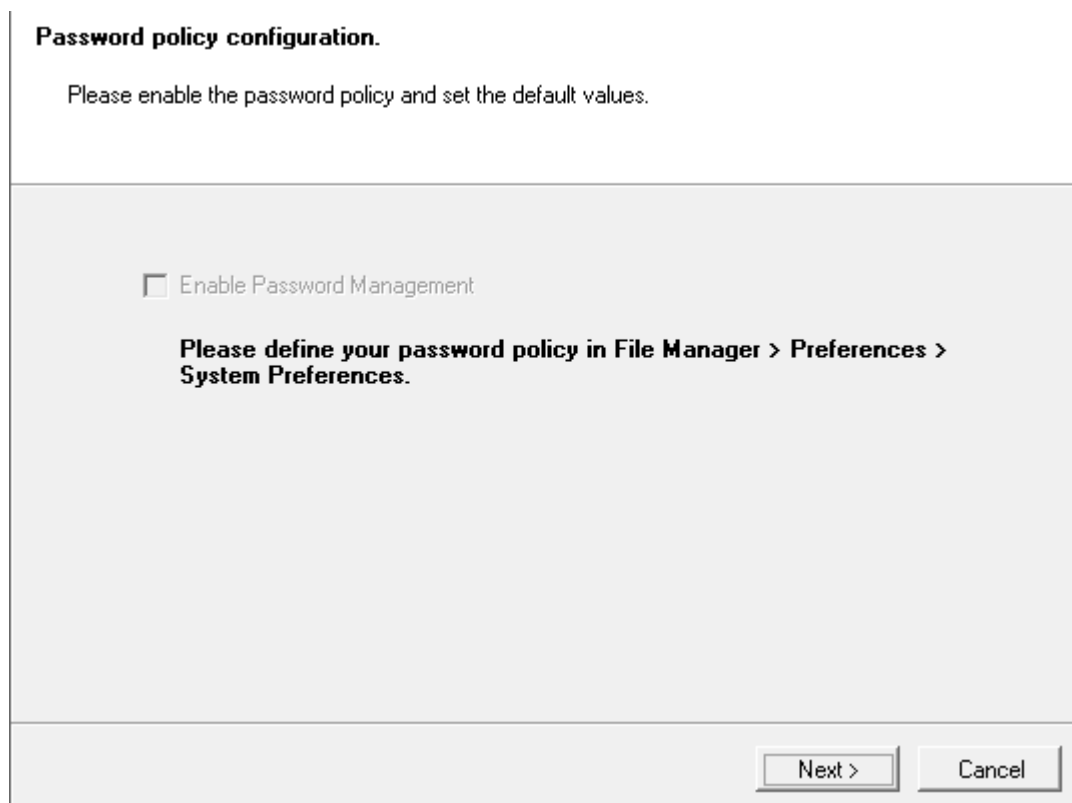
Figure 22: Password policy is automatically enabled

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

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

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

5.6.6 Setting CORBA and SOAP ports

In this window, you can change the CORBA and SOAP ports for the individual OLF services. For example, the default CORBA port for the EPO OLF File Manager service (File Manager) is 11000 and the default SOAP port is 21000. The EPO OLF PCT service (PCT/RO/101 plug-in) can only be used with CORBA. A SOAP port is thus not provided for it.

CORBA/SOAP ports
Please set the CORBA/SOAP port numbers for the respective features, if you want to modify them.

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
EPO OLF ES3101	12701	22701

Next >   Cancel

Figure 23: CORBA and SOAP communication ports

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

You will find a list of all plug-ins and the default ports used by Online Filing in the annex under <u>OLF services and ports</u> (Navigate to section).

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

5.6.7 Network settings

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

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

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

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

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

The ***SSL Version*** is set to ***TLSv1*** by default and cannot be changed. Online Filing will automatically choose the highest TLS version available on your computer when connecting to the EPO OLF server for submissions.

Figure 24: *HTTP settings for the OLF server*

5.6.8 Proxy settings

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

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

You can change these settings later in Server Manager.

> ⓘ **Attention:** The username and password for the proxy user are saved in unencrypted form in the file **OLFfm.conf**. As a result, these credentials should not be identical to your Windows login credentials.

Figure 25: Settings for internet access via a proxy server

Applying the browser's connection settings

If you are not familiar with the proxy settings in your network, try using your browser settings.

➜ In the Windows Control Panel: Go to *Network and Internet > Internet Options > Connections > LAN settings*

➜ *Internet Explorer:* Select *Tools > Internet Options > Connections > LAN settings*

  If your system uses a proxy server, you will find the address and the port here; see Error: "Connection aborted on request" (Navigate to section).

➜ *Mozilla Firefox:* Select *Tools > Options > Advanced > Network > Settings*

  Additional information is displayed here depending on the configuration.
  If *Use system proxy settings* is selected, Firefox applies the settings under Internet Options in the Windows Control Panel, see above.

➜ If in doubt, consult your network administrator.

5.6.9 Configuring Live Update for national procedures

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

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

➜ Select additional countries so that the corresponding plug-ins are also updated regularly.

 – You can also select countries here for which an OLF plug-in does not yet exist.
 – You can change the countries later in Server Manager.

➜ Click *Next*.

Figure 26: Selecting countries for Live Update

5.6.10 Completing the server installation

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

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

Reminder for thin client update/installation

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

The installation file for the thin client (`OLF515client.exe or OLF515client.msi`) is located in the installation directory `C:\Program Files (x86)\EPO_OLF5\ThinClient_v500`.

Alternatively, you can download the installation file; see <u>Latest version of the OLF software</u> (Navigate to section).

➜ Click *OK* in the message box.

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

➜ Click *Finish*.
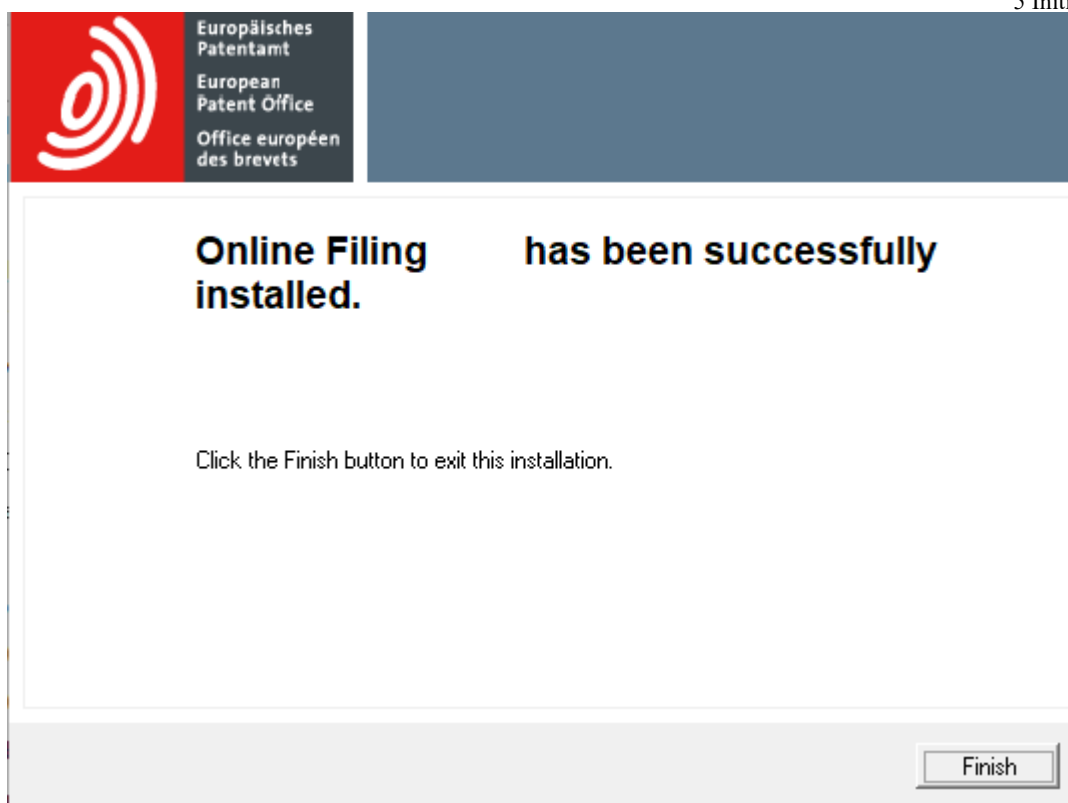
Figure 27: Online Filing has been successfully installed

You are prompted to restart the computer.
➜ Click **Restart now**.
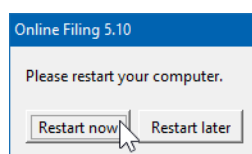
Figure 28: Restarting your computer to complete the installation process

If you cannot see this window, it might be hidden behind other windows on your screen.
➜ Press **ALT+TAB** to toggle between the windows.

5.6.11   Testing the server
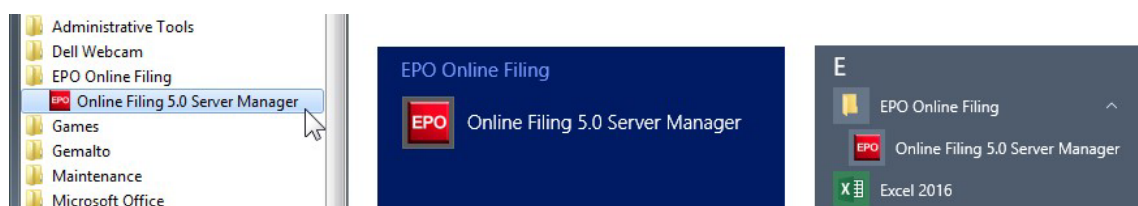
The installation program creates the *EPO Online Filing* program group in the Windows Start menu, containing the *Online Filing 5.0 Server Manager* item. In Windows 8.1, you will find a new app group on the *Apps* screen.

Figure 29: Shortcuts in Windows 7 (Start menu), Windows 8.1 (Apps screen) and Windows 10 (Start menu)

Starting Server Manager
➜ Right-click the *Online Filing 5.0 Server Manager* item.

– In Windows 7 and Windows 8.1, select *Run as administrator* in the shortcut menu.
– In Windows 10, select *More > Run as administrator* in the shortcut menu.

➜ Click *Yes* in the *User Account Control* window.
➜ If you are not the Windows administrator, you must now enter his or her Windows username and password.

Saving shortcut properties

You can save the option *Run as administrator* in the *Online Filing 5.0 Server Manager* shortcut so that you don't have to remember to right-click every time.
➜ To edit the shortcut properties, do one of the following:

– In Windows 7, locate the shortcut in the Start menu.
– In Windows 8.1, right-click the item in the *Apps* screen and select *Open file location* to locate the shortcut.
– In Windows 10, right-click the item in the Start menu and select *More > Open file location* to locate the shortcut.

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

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

Checking the status of services in Server Manager
➜ Log on as *Administrator* in the login window using the administrator password set during installation.

Server Manager opens at the *Services* tab.
➜ Check if all OLF services are running, i.e. *Running* should appear in the *Status* column.

If you activated national plug-ins during custom installation, their status should also be **Running**.
➜ If you want to activate an additional national plug-in now, select it and click the *Activate Service* icon.
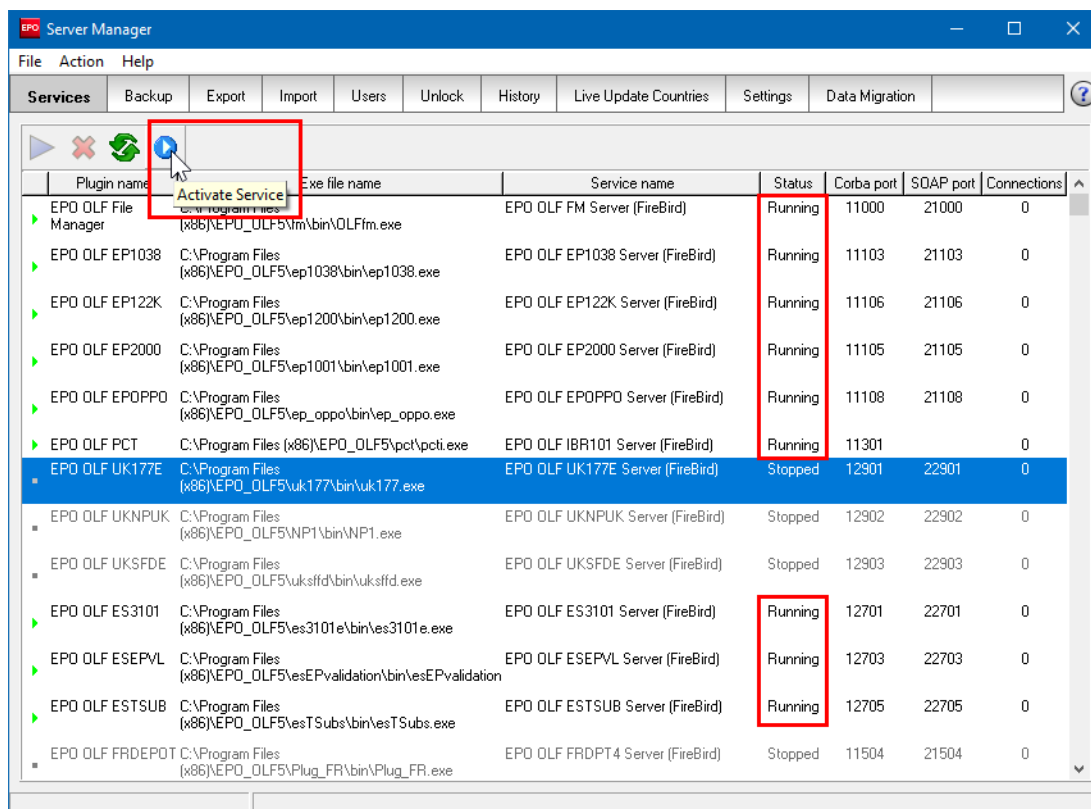
Figure 30*: Checking services running in Server Manager and activating services*

➔ To start the service you just activated, click the **Start as service** icon.
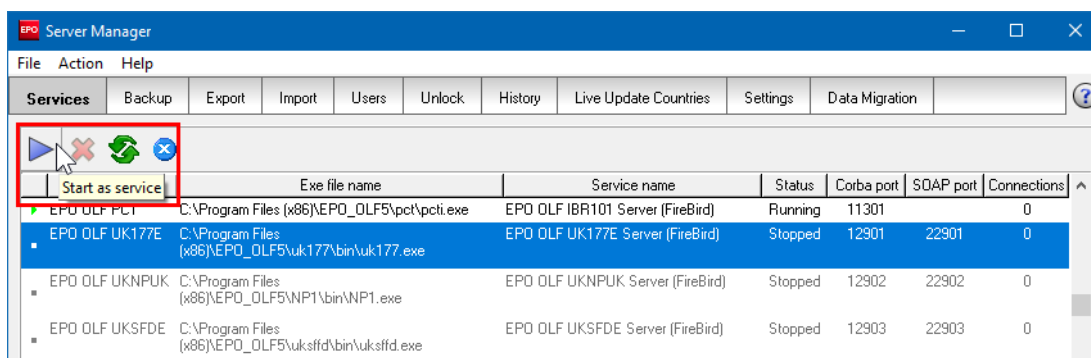
Figure 31*: Starting an activated service in Server Manager*

5.6.12 Performing a live update

Before starting to install the thin clients for your users, you should first check your server installation for updates. To do so, use the **Live Update** function in Server Manager.
➔ Start Server Manager as the **Administrator** user.
➔ Click the **Settings** tab.
➔ Click **Check Now** in the lower part of the Server Manager window.

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

➜ In the message, click *Yes* to continue.

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

➜ Download the updates or patches one after the other (*Download*), and then install them (*Install*).
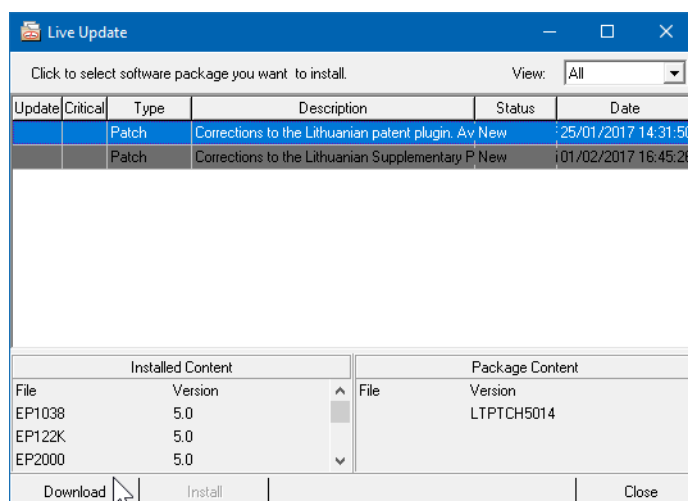
Figure 32: *Downloading patches via Live Update*

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

For more information on how to use Live Update, refer to the online help for Server Manager or the user guide for Online Filing version 5.15.

5.7 Thin client installation

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

To install the thin client, you can either revert to the installation file `OLF515.exe` or the thin client installation files. You can find the thin client installation files `OLF515client.exe` or `OLF515client.msi` in the program folder `C:\Program Files (x86)\EPO_OLF5\ThinClient_v500` (`C:\Program Files\EPO_OLF5\ThinClient_v500` on 32-bit systems) on the server PC following OLF server installation.

You can also download the latest version of the thin client installation files from the EPO website; see Latest version of the OLF software (Navigate to section).

Installation with the .exe file

The **.exe** file can be used to install and update the thin client on all Windows operating systems. You can update the thin client directly with the **.exe** file without having to uninstall it first.

Most established automated software distribution systems are able to distribute this file type.

Installation with the .msi package

The `.msi` file can be used to install the client for the first time, particularly in remote mode. Should installation with the `.msi` package fail, use the `.exe` file instead.

If you want to update the thin client with a new `.msi` file, you must first uninstall the older version completely. Otherwise, the installation routine will output an appropriate message. As system administrator, you can save a lot of time by installing the client on all workstations from a batch file in silent mode. For more information; see <u>Installing the thin client in silent</u> <u>mode</u> (Navigate to section).

5.7.1 Starting thin client installation

The following steps describe how to install the thin client with `OLF515client.exe`.
➔ Log on to the computer as a Windows administrator.
➔ Right-click the installation file and select **Run as administrator**.
➔ To confirm the security warning, click **Yes** in the **User Account Control** window.

Windows Installer starts the installation wizard.

Selecting the language
➔ Select the language for the installation process in the next window.

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

➔ Select the language you want from the list. The default setting is **EN** for English.
➔ Click **OK**.
The **Welcome to the Online Filing Client 5.0 Installation Wizard** appears.
➔ Click **Next**.

Specifying the destination folder
The default program folder for installing the thin client is `C:\Program Files (x86)\EPO_OLF5-TC` (`C:\Program Files\EPO_OLF5-TC` on 32-bit systems).
➔ Click **Next** to use this destination folder. or
Click **Browse** to select or create a different folder for installation, for instance, on another drive.

Confirming the settings for installation
You are given a last chance to change your settings or cancel installation before the installation proper begins.
The **Ready to Install the Application** window provides three options:
▪ *Back* – check (and where necessary change) settings
▪ *Next* – start installation

▪ *Cancel* – cancel installation without copying files to your computer
➜ Click *Next* to continue.

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

5.7.2 Setting the connection to the server

The *Server address information* window prompts you to enter the IP address of the OLF server component to which the thin client should set up a connection.
You can select CORBA or SOAP as the method of connection for communication with the server; see Communication via CORBA or SOAP (Navigate to section).

> (i) 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 (Navigate to section).
    The default setting is 11000 in CORBA and 21000 in SOAP.
➜ Click *Connect* to start the client immediately and thereby test the File Manager connection to the OLF Server.
➜ Click *Cancel* to defer configuring the setting.
➜ Click *Save* to proceed with installation.
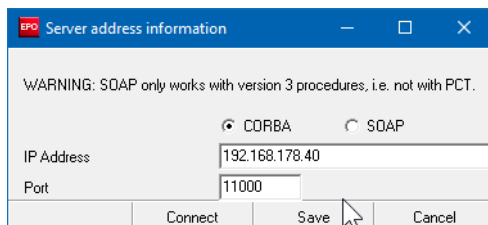
Figure 33: Data for the connection to the server

A window will appear at the end of the process to inform you that the Online Filing client 5.0 has been successfully installed.
➜ Click *Finish*.

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

5.7.3   Testing the thin client

The installation program creates the **EPO Online Filing** program group in the Windows Start menu, containing the items **Online Filing 5.0 Client** and **Online Filing Client 5.0 settings**. In Windows 8.1, you will find a new app group on the **Apps** screen.

Figure 34: Shortcuts in Windows 7 (Start menu), Windows 8.1 (Apps screen) and Windows 10 (Start menu)

Starting the thin client
➜   Click **Online Filing Client 5.0**.

 The Online Filing File Manager starts.
➜   Log on with your username and password.
➜   Select either **production mode** or **demo mode**.

 Production mode and demo mode each have a separate user management system. As a result, a username and password has to be set for every user in both modes.

Changing connection settings for the thin client
If the client is unable to set up a connection to the server, check the OLF server data, i.e. IP address or server name and port number (CORBA or SOAP) for File Manager.
➜   Click **Online Filing Client 5.0 settings**.

 The **Server address information** window appears; see Setting the connection to the server (Navigate to section).
➜   Change the connection data as required.

Sending an application to the demo server
➜   Start File Manager in demo mode from a client PC.
➜   Create a new application, for instance, with the Form EP(1038E).
➜   Attach a document.
➜   Authenticate using your EPO account to digitally sign the application (if you plan on using a smart card, insert it 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 acknowledgement of receipt, everything is in order.

5.8   Stand-alone installation

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

Preparation
➜ Log on to the computer as a Windows administrator; see <u>Windows user rights</u> (Navigate to section).
➜ Install the additional software; see <u>Software requirements</u> (Navigate to section).

The installation process
Stand-alone installation is basically identical to server installation, but it also installs the thin client.
➜ Start the installation with **OLF543.**exe; see <u>Starting installation</u> (Navigate to section).
➜ Select the *standalone installation* option as the mode of installation; see <u>Installation mode</u> (Navigate to section).
➜ Follow the instructions as described under <u>Server installation</u> (Navigate to section).

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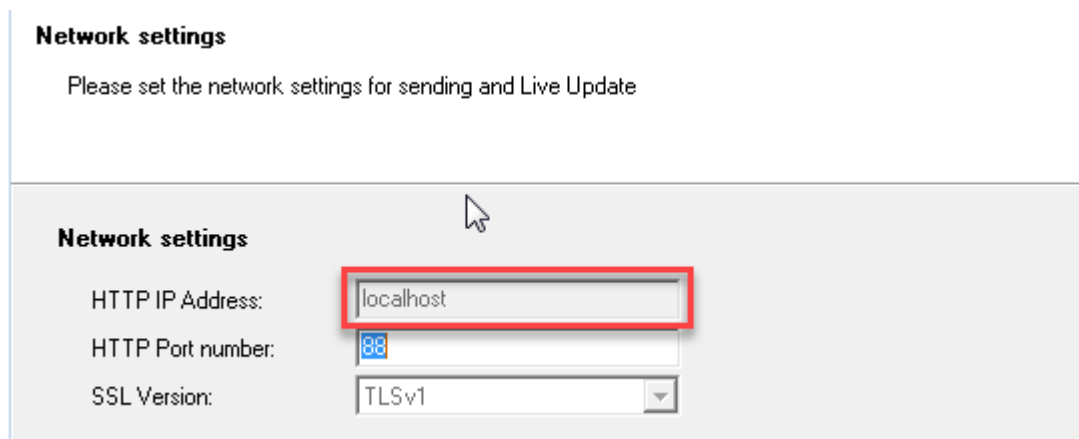

Figure 35: Server address set to localhost in the stand-alone version

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

Testing the stand-alone version

The installation program creates the **EPO Online Filing** program group in the Windows Start menu, containing the **Online Filing 5.0** item. In Windows 8.1, you will find a new app group on the **Apps** screen.

Figure 36: Shortcuts in Windows 7 (Start menu), Windows 8.1 (Apps screen) and Windows 10 (Start menu)

Starting Server Manager and running Live Update

See <u>Testing the server</u> (Navigate to section) and <u>Performing a live update</u> (Navigate to section) for installing the server.

Starting Online Filing (client)

➜ *Select* Programs > EPO Online Filing > Online Filing 5.0*.*

➜ Log on to File Manager with your username and password.

➜ Send a demo application to the EPO; see <u>Testing the thin client</u> (Navigate to section).

6   Installation maintenance

The following chapters describe how to update the Online Filing software. Software maintenance or updating using the installation program is mainly required in three situations:

A) Updating to a new version

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

➜ For more information, refer to the chapters <u>Updating the server</u> (Navigate to section), <u>Updating the thin client</u> (Navigate to section) and <u>Updating the stand-alone version</u> (Navigate to section).

B) Repairing the installation in the event of a malfunction

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

➜ For more information, refer to the chapter <u>Repairing national plug-ins</u> (Navigate to section).

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

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

➜ For more information, refer to the chapter <u>Converting from stand-alone to server mode</u> (Navigate to section).

6.1   Checklist: Maintenance

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

➜ Finalise the applications that are still being processed and send them all to the relevant filing office

➜ Create a database backup in Server Manager (production database and demo database)

➜ Give all users ample warning of the impending disruption

➜ Start the installation program and proceed as described for updating the server (Navigate to section) and updating the stand-alone version (Navigate to section)

➜ Install all updates, either via Live Update or from the downloaded patch files; see Performing a live update (Navigate to section)

➜ Update the thin client for the administrator, start File Manager and check if all the same data is available as before

➜ If using customised templates, these have to be updated; see Updating templates (Navigate to section)

➜ Reinstall all thin clients too after updating the OLF server; see Updating the thin client (Navigate to section)

6.2   Updating the server

ⓘ If updating from an earlier version of OLF, first finalise all applications still being processed and submit them to the EPO. Then use Server Manager to create a backup of the OLF-database; see Backing up data (Navigate to section).

➜ Quit all Windows programs.

➜ To start the installation program on the server computer, right click the **OLF515‿**exe file and select *Run as administrator*.

Entering access data

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

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

➜ Enter the *User name* and *Password* for one of the users in the *Administrators* group.

➜ Click *Next*.

Figure 37: Entering the password for accessing an existing OLF installation

Selecting the installation mode

→ In the *Welcome* window 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*.
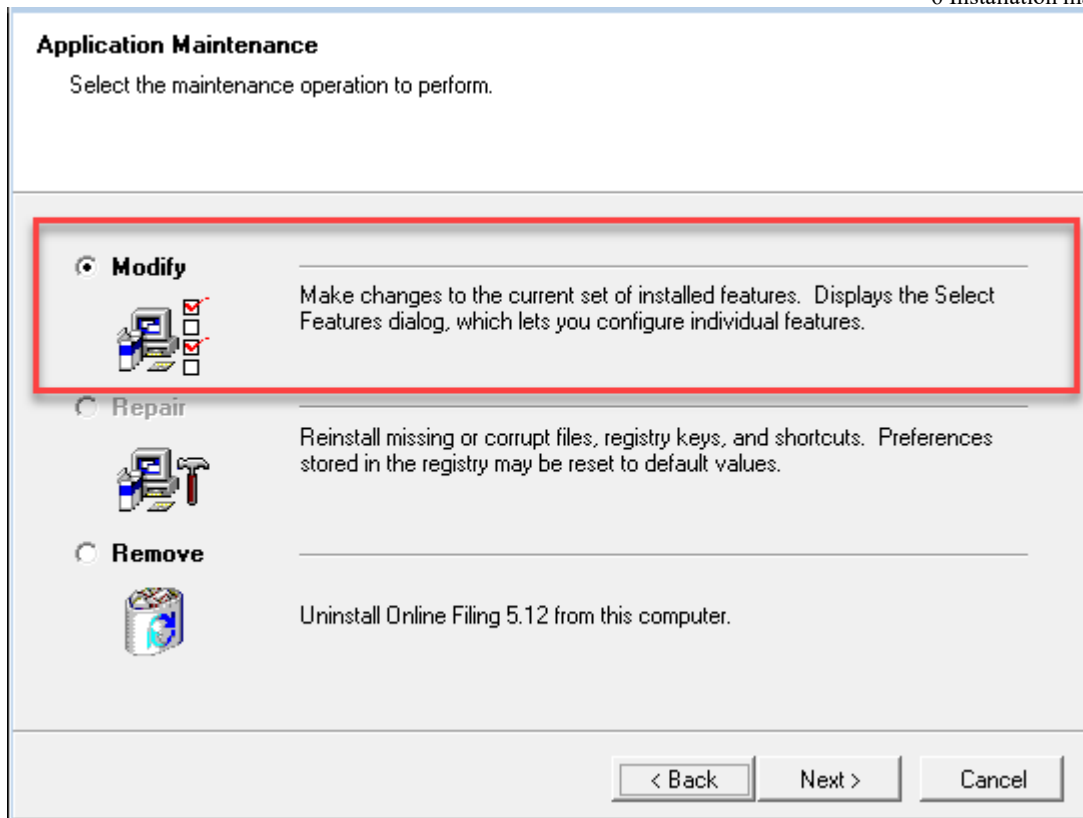
Figure 38: Modifying the Online Filing installation

Shutting down OLF services

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

➔ Give all logged-on users ample warning (at the latest now) of the impending service disruption.

➔ Click Next if there are no longer any applications still being processed.
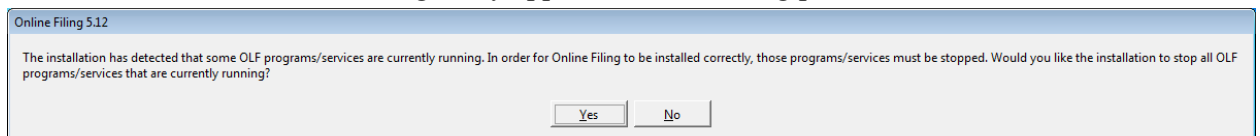
Click *Yes* in the following message to stop all OLF programs or services that are currently running.

Figure 39: OLF services that are currently running must be stopped to continue the installation

➔ To shut down the InterBase server, click *Yes*.
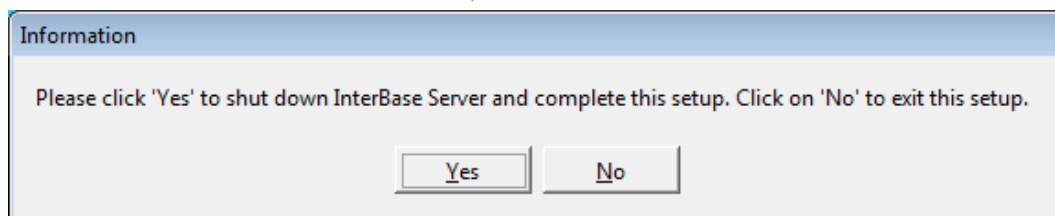
Figure 40: Shutdown InterBase (Firebird) Server

Updating the database

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

The *Database Update* window lets you select which parts of the previous installation you want to have carried over. All check boxes 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*.
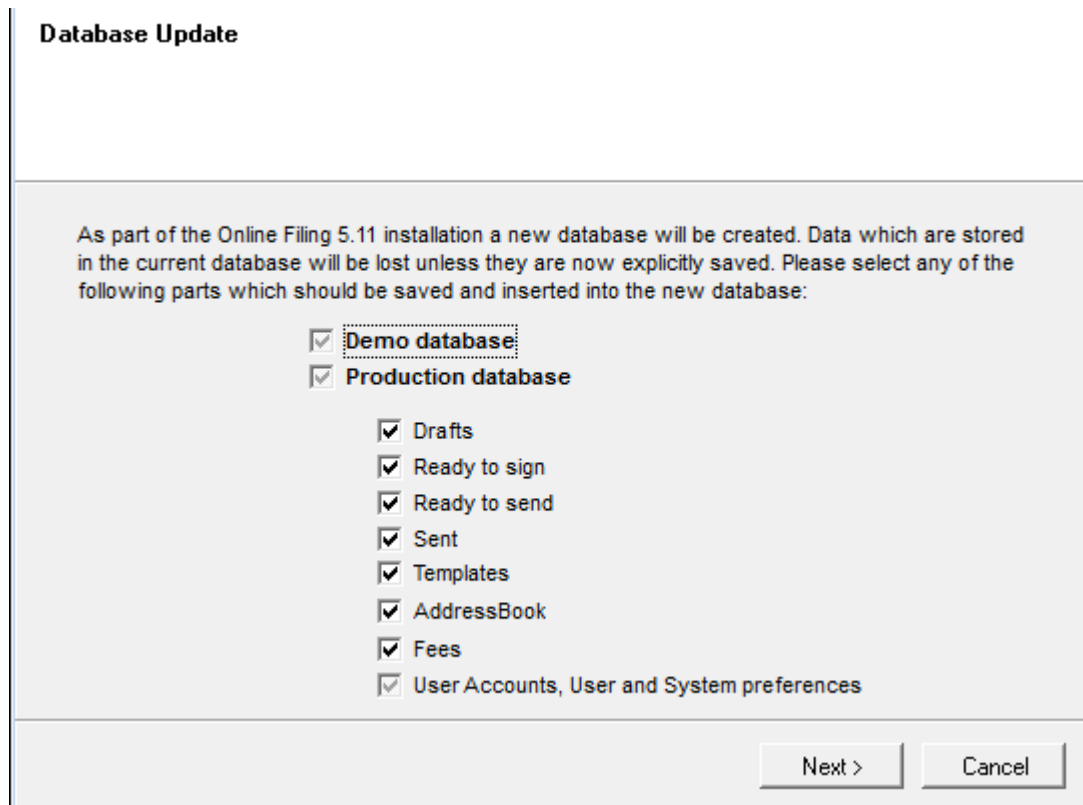
Figure 41: *Database update*

The copies of the production database (**eOLFi.gdb**) and the demo database (**eOLFdi.gdb**) will be stored in a new sub-folder in the **Unload** folder of the installation directory (default:

C:\Program Files (x86)\EPO_OLF5\Unload). This new sub-folder is labelled with the creation date and time during installation, e.g. 20150120_130305.

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

6.3 Changing the server settings

The settings for Online Filing can be changed as required within the framework of installation maintenance. The steps are the same as for the initial installation:

➜ Administrator password; see <u>Enabling user management</u> (Navigate to section)

➜ Password management; see <u>Enabling password policy</u> (Navigate to section)

➜ CORBA and SOAP port numbers; see <u>Setting CORBA and SOAP ports</u> (Navigate to section)

➜ Network connection; see <u>Network settings</u> (Navigate to section)

➜ Connection via the proxy server; see <u>Proxy settings</u> (Navigate to section)

➜ Countries for Live Update; see <u>Configuring Live Update for national procedures</u> (Navigate to section) After this, the system is updated and the database is repopulated with the previously exported data. The progress indicator lets you monitor the installation progress.

➜ Click *Finish* in the final window.

➜ Restart your computer.

6.4 Repairing national plug-ins

In Online Filing, all national plug-ins are automatically installed during initial installation. All you have to do is select whether or not the plug-in should be activated; see <u>Activating national plug-ins</u> (Navigate to section).

If at a later stage you want to use a national plug-in that is not available in the *Forms* folder in File Manager, you can simply activate it in Server Manager. This makes it available to all Online Filing users. If you would like Live Update to perform regular checks for updates of this plug-in, select the appropriate country in the *Live Update Countries* tab in Server Manager. You should therefore only use the installation program if a plug-in is no longer working properly and has to be repaired.

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

➜ Read chapter <u>Checklist: Maintenance</u> (Navigate to section) in preparation for this step.

➔ Make note of the current build number of all plug-ins and the current updates installed.

You will find these under *Help > Info* in the *About File Manager* window.
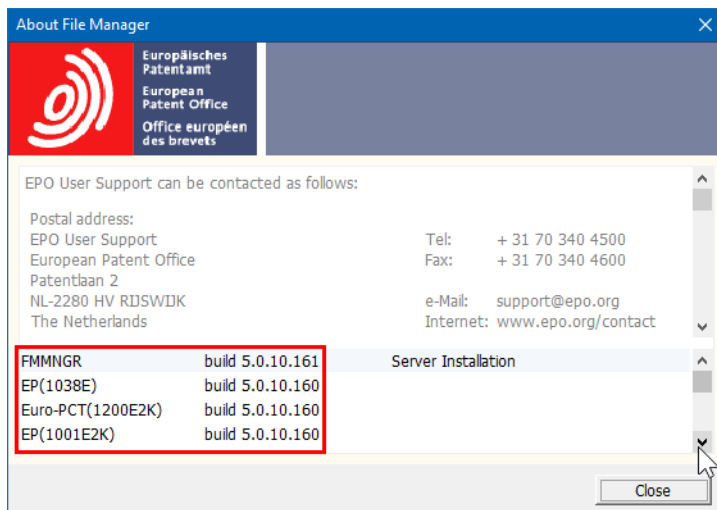
Figure 42*: Versions of Online Filing and all plug-ins currently installed*

➔ Scroll to the end of the lower list to see the updates or patches.

ⓘ These are the precise updates you will have to reinstall later to bring your OLF installation up to date.

➔ Make note of the exact sequence of all updates as displayed in this window.
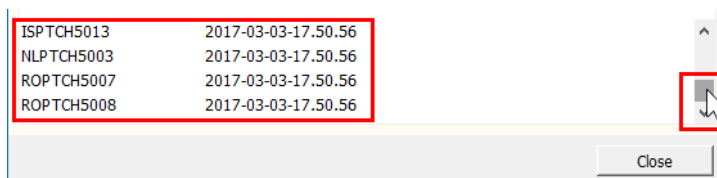
Figure 43*: List of patches already installed*

➔ Make sure that you use the same installation file as for initial installation, otherwise the OLF database will not integrate properly.

➔ Now proceed as described under Updating the server (Navigate to section) to repair plug-ins.

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

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

Figure 37: Comparison of the old and new version of EPO OLF File Manager

The plug-ins activated in your installation are automatically selected by default.
➜ Check the settings for the plug-ins you want to repair.

In this example, the old and the new version are identical so the plug-ins can be reinstalled.
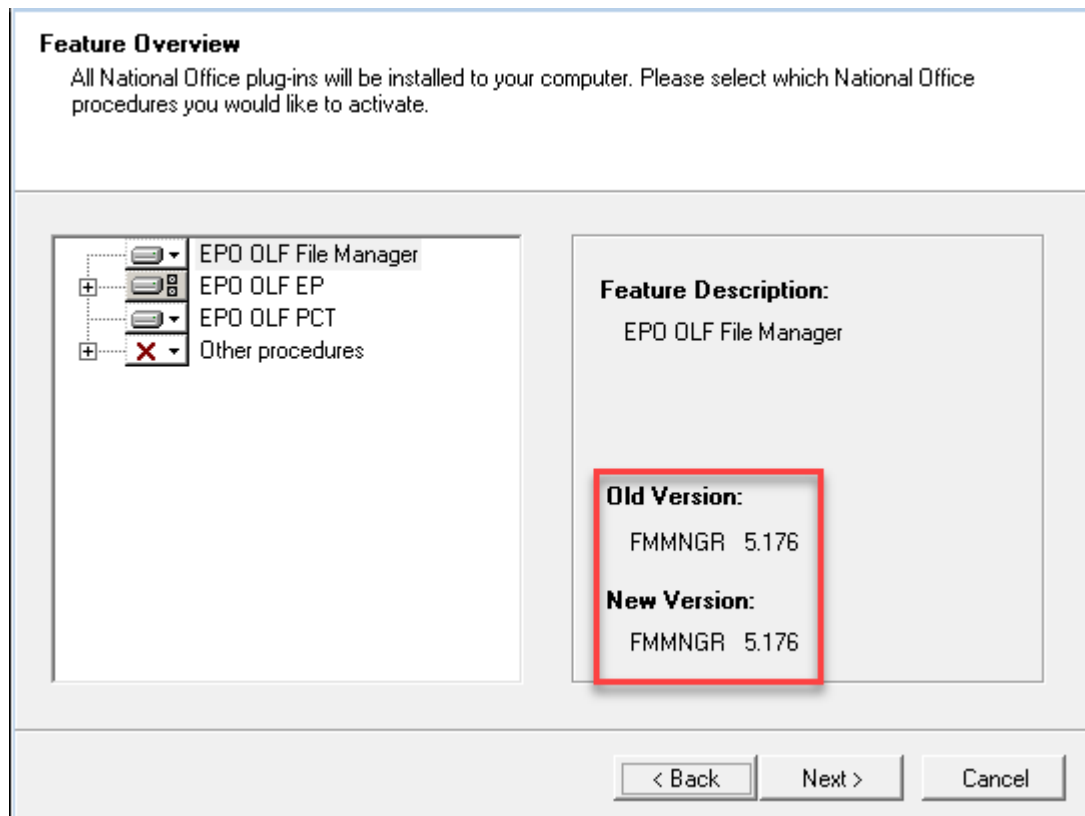
Figure 44*: Comparison of the old and new version of the activated plug-ins*

➜ Make sure that you read the warning. Following installation, you will have to reinstall all patches and updates you previously downloaded.
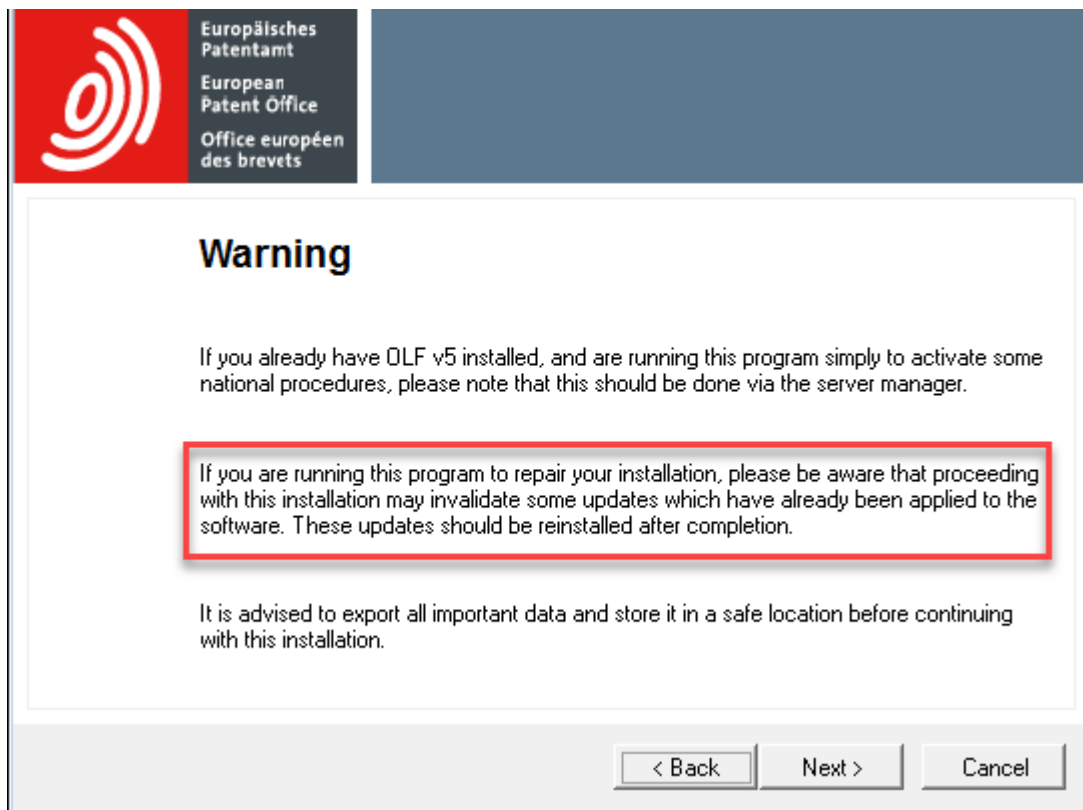
Figure 45*: Warning about the reinstallation of plug-ins*

➜ Proceed as described under <u>Updating the server</u> (Navigate to section).

➜ Download all the updates and patches that previously were installed from the EPO website.

➜ Install the updates one by one in the correct sequence (see the figure "List of patches already installed" above).

6.5 Updating the thin client

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

➜ Start the OLF515client.exe installation file with the option *Run as administrator*; see <u>Thin client installation</u> (Navigate to section).

ⓘ If you want to use the **OLF515client.msi**, it is recommended that you uninstall all thin clients first. For more information, see <u>Installing the thin client in silent mode</u> (Navigate to section).

The *Modify* option is already selected in the *Application Maintenance* window.

➜ Click *Next*.
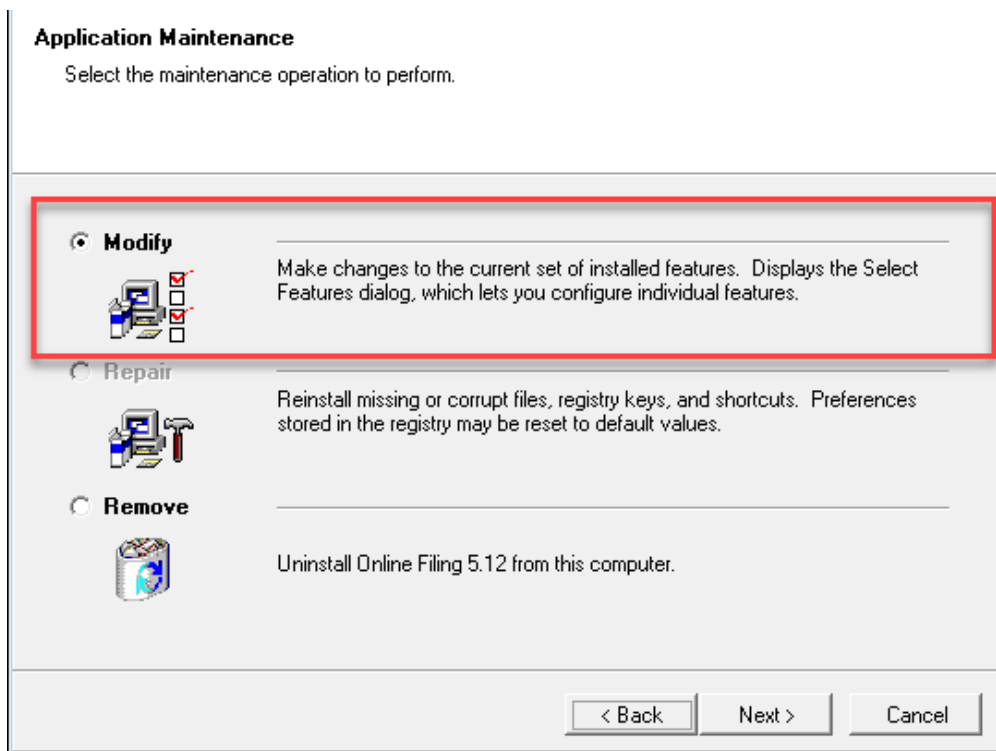
Figure 46: Modifying thin client installation

➔ Change the OLF server connection data as required; see Setting the connection to the server (Navigate to section).

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

6.6   Changing the thin client settings

You can change the connection parameters between the thin client and the OLF server in the *Server address information* window; see Setting the connection to the server (Navigate to section).

➔ Open the **Online Filing Client 5.0 settings**:

– In Windows 7, go to the Windows Start menu and select **Programs > EPO Online Filing > Online Filing Client 5.0 settings**.

– In Windows 8.1, go to the Apps screen, locate the **EPO Online Filing** group and click **Online Filing Client 5.0 settings.**

– In Windows 10, go to the Start menu, click **All apps**, locate the **EPO Online Filing** group and click **Online Filing 5.0 settings**.

➔ Right-click the item and select **Run as administrator** from the shortcut menu.

➔ Change the settings, e.g. enter the server name instead of the IP address.

➔ Click **Save**.

➜
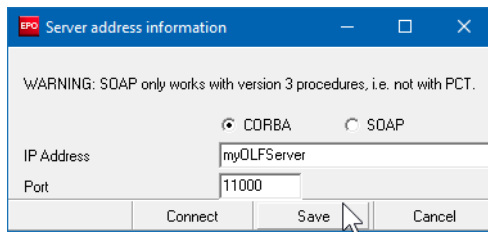
Figure 47: Changing the server address in the thin client settings

6.7   Updating the stand-alone version

The procedure for updating a stand-alone version is for the most part identical to that for
updating the server.
➜   Finalise the applications that are still being processed and send them all to the relevant
      filing office.
➜   Create a database backup in Server Manager (production mode and demo mode).
➜   Start the installation program with the option *Run as administrator*.
➜   Select *Standalone installation* as the mode of installation.
➜   Proceed as described in Updating the server (Navigate to section).

   In the *Network settings* window, *localhost* is set as the server's IP address and cannot be
   changed.

➜   Install all updates, either via Live Update or from the downloaded patch files; see
      Performing a live update (Navigate to section).

6.8   Converting from stand-alone to server mode

If you installed Online Filing in stand-alone mode and are already operating the software
successfully, you may want to make it available to additional staff in your company. For this to
work, you must leave the OLF-database on the same computer but make the computer accessible
via the network.
You do not have to reinstall the OLF server in this case. If the OLF database is installed on a
sufficiently powerful computer, you can simply convert your stand-alone version into a server
installation. Then install the latest OLF thin client on the computers of the relevant staff.

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

Phase 1: Preparation and data backup
➜   In preparation for this step, re-read chapter Checklist: Initial installation for client/server
      mode (Navigate to section) so that you have all necessary data to hand.
➜   Finalise the applications that are still being processed and send them all to the relevant
      filing office.
➜   Create a database backup in Server Manager (production and demo modes).
➜   Stop the *Firebird Server – OLF* service in the Windows Services Manager. This will
      also terminate all other OLF services; see Checking the status of the OLF server and

OLF services (Navigate to section).

➜ For added safety, copy the databases **eOLFi.gdb** and **eOLFdi.gdb** to a secure location.

You will find the databases in the program folder `C:\Program Files (x86)\EPO_OLF5\db\`. If anything goes wrong when converting your stand-alone version, you can use these database copies to restore your data.

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

➜ Start the installation program with the option *Run as administrator*.

➜ Select *Server installation* as the installation mode.

➜ Proceed through the ensuing steps until the *Application Maintenance* window appears.

➜ Select *Modify*.

➜ Proceed as described in chapter Updating the server (Navigate to section), making sure you observe the following:

  – Enter the computer's IP address or server name in the *Network settings* window. The *localhost* setting from the stand-alone installation is still entered as the *HTTP IP Address*.

  – In the *CORBA/SOAP ports* window, check if all these ports are accessible on the computer and, where necessary, change the firewall settings.

➜ Install all updates, either via Live Update or with the downloaded patch files; see Performing a live update (Navigate to section).

Phase 3: Configuring user administration and installing thin clients

➜ First install a thin client for the Online Filing administrator; see Thin client installation (Navigate to section).

➜ In demo mode, send a test application to a filing office's OLF demo server.

➜ Configure all users and groups for your company staff under User Administration in the OLF File Manager.

➜ Install the thin clients for all users and any additional software that is necessary.

➜ Test the client/server connection; see Testing the thin client (Navigate to section).

6.9   Updating templates

ⓘ Updating Online Filing often results in changes to the data structure in the individual plug-ins, i.e. in the forms. Remember to also update your templates after a major update, e.g. from version 5.14 to 5.15.

➜ Start File Manager and go to the *Templates* folder.

➜ Right-click a template and select *Edit template* in the shortcut menu.

➜ If a warning about changing fee information appears, click *OK*.

➜ Save and close the template.

➜ Repeat this step for all templates that are still in use.

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

6.10   Compressing the database

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

The OLF database is not designed as a storage system for data from all applications ever created. Every time changes are made to procedures, the data structure of the forms also changes in Online Filing, but not the data structure in the applications and templates you created. This means that in version 5.15 you may not be able to open and correctly display older applications, i.e. those created in prior OLF software versions.

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

For detailed information on performing backups, exports and imports refer to the online help for both Server Manager and File Manager or the user guide for Online Filing version 5.15.

Exporting and archiving data with Server Manager

You can use the export filter in Server Manager to selectively export applications at set intervals. For instance, you can export all applications sent in 2016 and then import them again afterwards, or you can export the applications sent prior to 2016 and then remove them permanently from the database.

➔ Start Server Manager and click the ***Export*** tab.

   The ***All Applications*** view shows all applications.
➔ To see only the applications already filed, click ***Sent*** in the left pane.
➔ Select the check box ***Delete items from database after archiving***.
➔ Select the check box ***Enable Filter***.
➔ Using the two calendar icons 🗓 select the first day (the date corresponds to the applications' last save date) and the last day of the interval you want to set.
➔ Click ***Apply Filter***.

   The list is updated accordingly.
➔ To select all applications, click ✔ in the column heading.
➔ Click the ***Export*** icon.

The selected applications are exported to the default export directory `C:\Program Files (x86)\EPO_OLF5\tools\smanager\data\` and simultaneously deleted from the database.
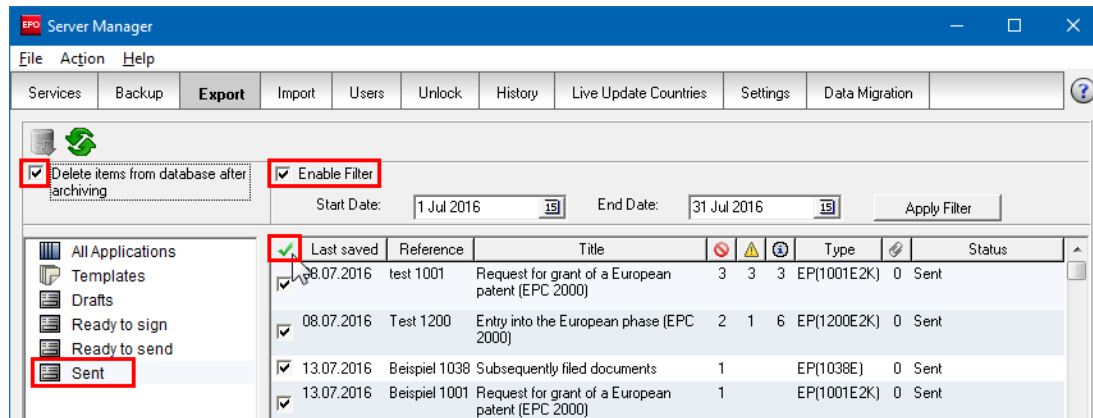
Figure 48: All applications sent in July 2011 are marked for export followed by deletion

Creating a new database in Server Manager
➔ In the ***Backup*** tab, click the ***Empty Database*** icon.

➔ Select which data should be copied from the old database to the new one.
➔ Click ***OK***.

The database will now be compressed; this may take a few minutes.
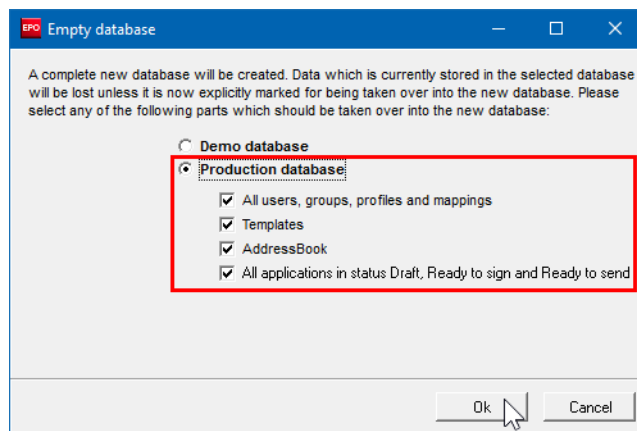
Figure 49: Selecting the data to be copied to the new database following compression

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

Importing data with Server Manager
If you want to open sent applications that you already exported, you can re-import them via Server Manager. We recommend that you start by creating a new folder in File Manager for the re-imported applications. Set this folder then as the destination import directory:
➔ Start Server Manager and click the ***Settings*** tab.
➔ To select the folder to be used in File Manager, click the folder icon beside the field ***Import directory - destination***.

The default setting is *Default Folder*.

➜ Select the folder to be used for importing applications and click *OK*.

➜ Then click the *Import* tab.

All applications in the source import directory (*Import directory - source*) are displayed. The default directory is `C:\Program Files (x86)\EPO_OLF5\tools\smanager\data\`.

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

➜ Click the *Import* icon.

Deleting old database versions

When updating Online Filing, e.g. from version 5.10 to 5.11, the entire database is copied to the OLF program folder and restored once installation is complete. During the update, you can choose which parts should be copied to the new database; see Updating the server (40). In this way, you can remove unwanted data and reduce the size of the database.

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

➜ Open the program folder `C:\Program Files (x86)\EPO_OLF5\Unload` in Windows Explorer.

This folder contains one or more subfolders created during previous updates. The subfolders are named after the creation date, e.g. **20150125_145257** relates to an update performed on 25.01.2015 at 14.52.57 hrs. Both the production database **eOLFi.gdb** and the demo database **eOLFdi.gdb** are stored in these subfolders.

➜ Delete all but the newest subfolders.

7 Uninstalling

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

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

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

Saving data for reuse

Before removing the software (and therefore also the OLF database) from the computer, you should export any data that you still need from Online Filing including, above all, the address book, the User Administration, the templates and the filed applications. For detailed

information on the various export methods, refer to the user guide for Online Filing, version 5.15 or the online help for File Manager and Server Manager.

7.1 Checklist: Uninstallation

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

➔ Make sure you have to hand the installation file you used to install or last update the Online Filing software:
- – OLF515.exe for uninstalling the OLF server
- – OLF515client.exe for uninstalling the OLF thin client
➔ Check if specific data is still needed for archiving or the import into other programs.
➔ Create a database backup or the relevant export files; see <u>Backing up data</u> (Navigate to section).
➔ In a network version, start by uninstalling the thin clients; see <u>Uninstalling the thin client</u> (Navigate to section). Then uninstall the OLF server; see <u>Uninstalling the server</u> (Navigate to section).

   The procedure for uninstalling the stand-alone version is similar to that for the server.
➔ Delete any files which are no longer required; see <u>Removing OLF program files and folders</u> (Navigate to section).

7.2 Uninstalling the thin client

The user rights needed to uninstall the OLF software in Windows are the same as those needed to install it; see <u>Windows user rights</u> (Navigate to section).

Uninstalling with the installation file
➔ Start the installation program with the file OLF515client.exe. You will find the file in the program folder C:\Program Files (x86)\EPO_OLF5\ThinClient_v500 on the server computer.
➔ For the first steps, proceed as described for installation; see <u>Starting thin client installation</u> (Navigate to section).
➔ Select Remove when the *Application Maintenance* window appears.
➔ Click Next.
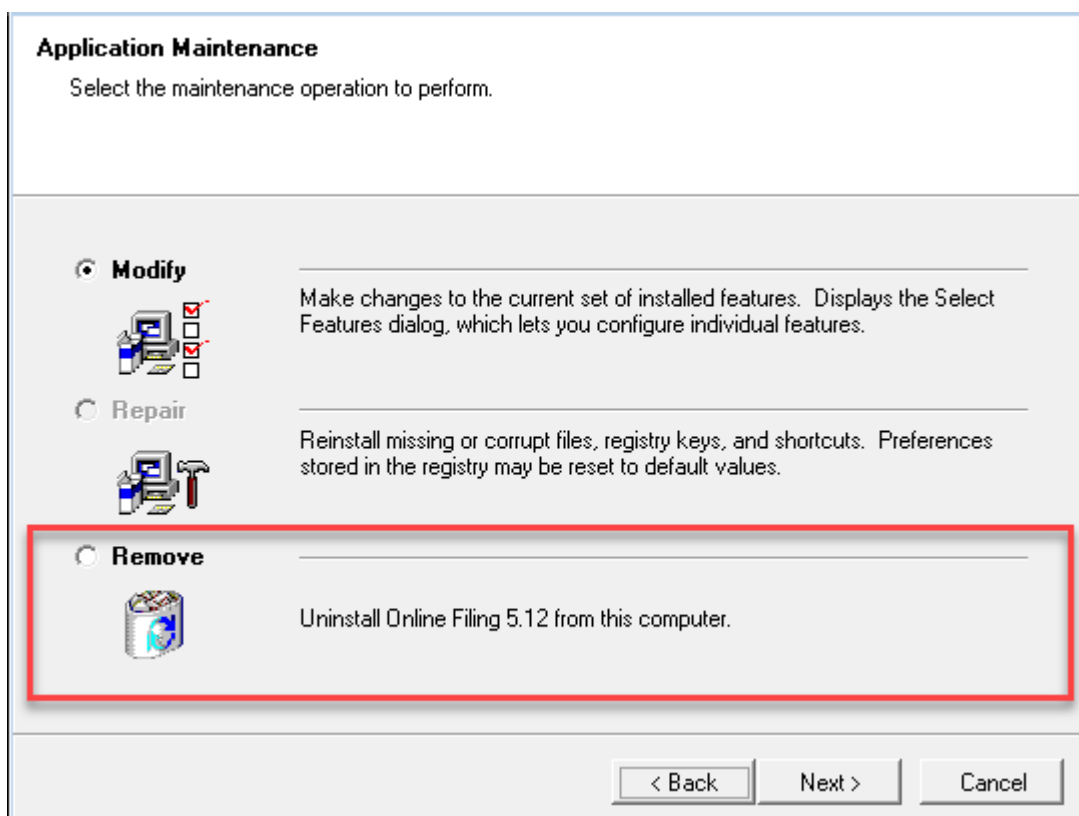
Figure 50*: Option for removing Online Filing Client 5.0*

The uninstallation routine starts.

➜ In the *Online Filing Client 5.0 Uninstall* window, click *Next*.

➜ In the *Online Filing Client 5.0 has been successfully uninstalled* window, click *Finish*.
You are prompted to delete the folder **C:\Program Files (x86)\EP0_0LF5-TC**.

➜ Click *Yes* to confirm.

Figure 51*: Delete the Online Filing Client program folder after uninstalling*

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

➜ If the window does not appear, check if the folder **C:\Program Files (x86)\EP0_0LF5-TC** was removed.

➜ If the folder still exists, delete it manually.

Uninstalling via the Windows Control Panel

➜ Open the Windows *Control Panel*.

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

➜ Select *Online Filing Client 5.0*.

➜ Click *Uninstall/Change*.

➜ Proceed as described above when the uninstallation program starts.

7.3 Uninstalling the server

The user rights needed to uninstall the OLF software in Windows are the same as those needed to install it; see <u>Windows user rights</u> (Navigate to section).

Uninstalling with the installation file
- To start the installation program, right-click the installation file **0LF515.**exe and select Run as administrator.
- Confirm the security warning for user account control.

The Wise Installation Wizard is initialised.
- Select the required language and click **Next**.
- Enter the Administrator password if login with user name and password is activated in your OLF installation, and click **Next**.
- Click **Next** in the **Welcome** window.

The option **Server installation** is already selected in the **Installation Mode** window.
- Click **Next**.
- Select **Remove** in the **Application Maintenance** window.
- Click **Next**.
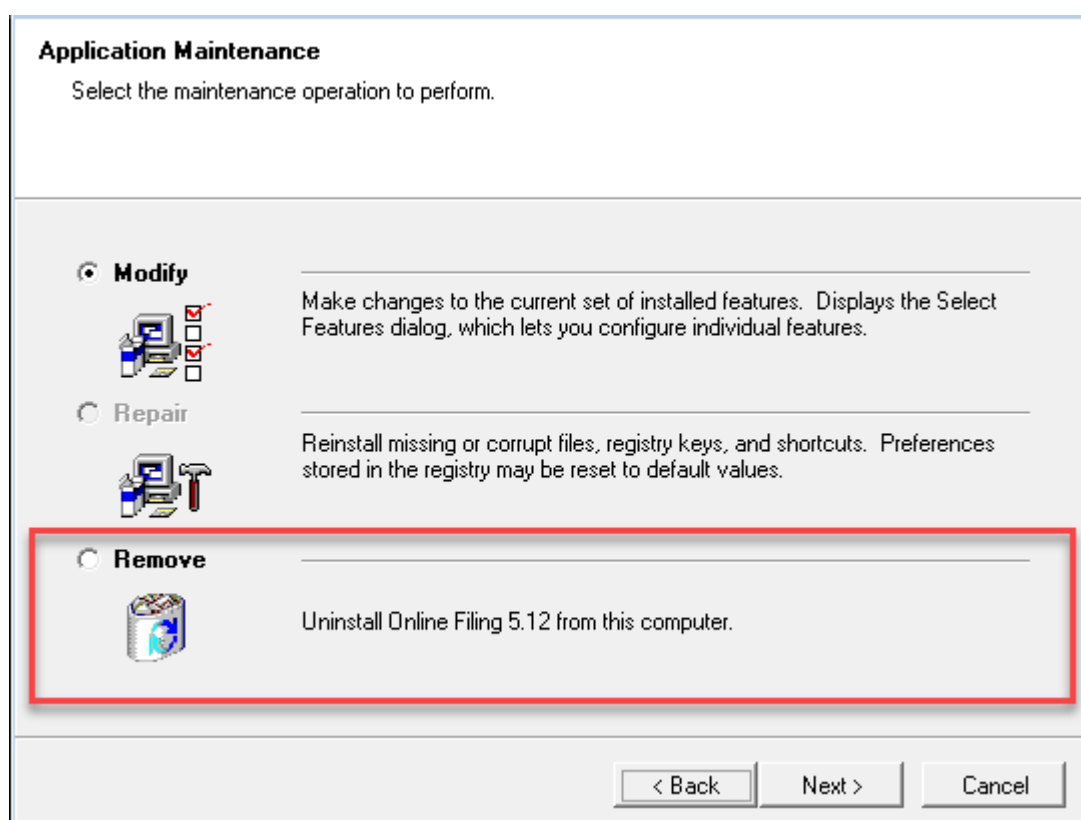
Figure 52*: Option for removing Online Filing*

➜ If you are sure you want to uninstall Online Filing, click *Next* in the ***Online Filing 5.15 Uninstall*** window.

➜ If you want to modify your settings, click ***Back***.

➜ To exit the uninstall process, click ***Cancel***.
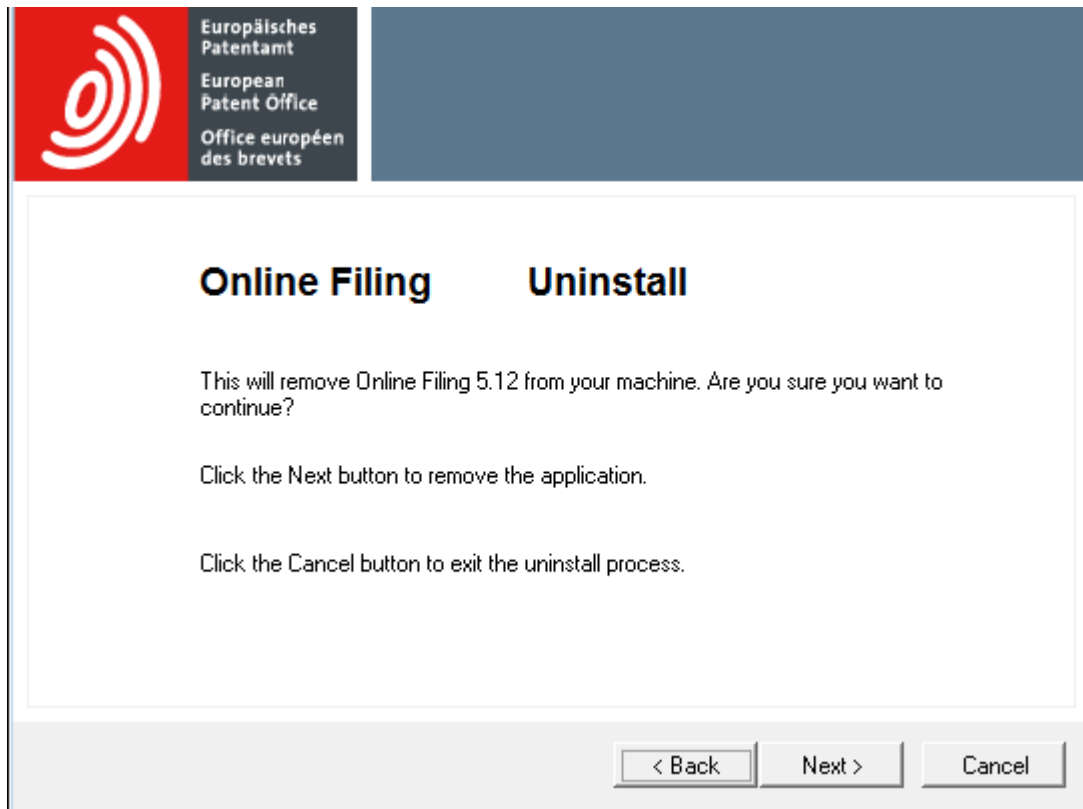
Figure 53: Starting the uninstall process

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

➜ To re-confirm your wish to uninstall Online Filing, click ***Next***. This starts the process which cannot be stopped.

➜ If you decide you do not want to uninstall the software, you can still click ***Cancel*** here.
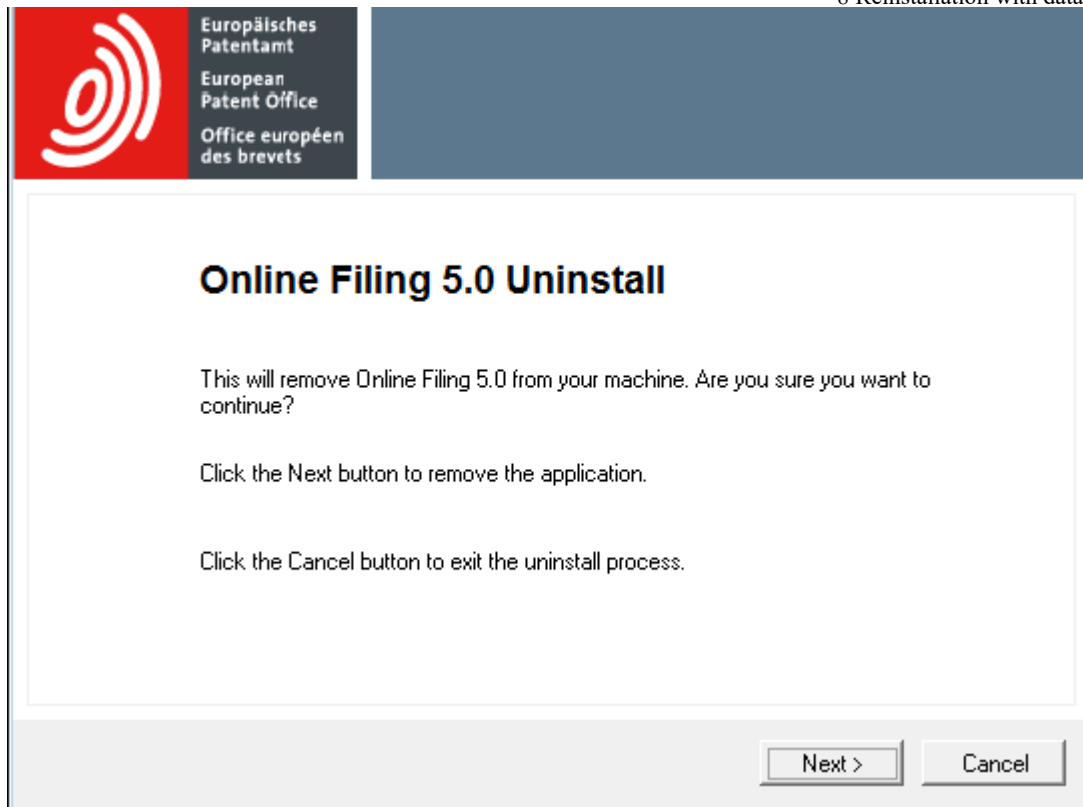
Figure 54*: Second confirmation for uninstallation*

The uninstallation program starts.
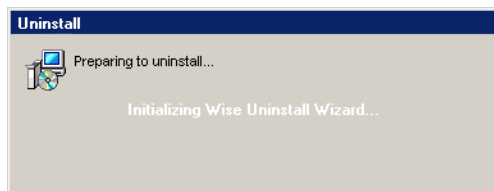
Figure 55*: Wise Installation Wizard is initialised for the uninstallation routine*

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

➔ In the **Online Filing has been successfully uninstalled** window, click **Finish**. You are prompted to delete the folder `C:\Program Files (x86)\EPO_OLF5`.
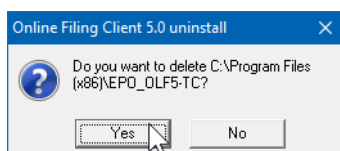
➔ Click **Yes** to confirm.
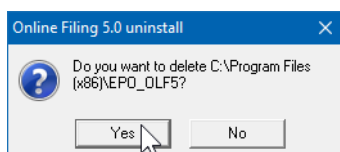
Figure 56*: Deleting the Online Filing program folder after uninstalling the server*

If you cannot see this window, it might be hidden behind other application windows on your screen.

➔ Restart your computer when uninstallation is complete.

Uninstalling via the Windows Control Panel

➔ Open the Windows **Control Panel**.

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

➔ Select **Online Filing 5.15**.

➔ Click **Uninstall/Change**.

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

7.4 Uninstalling the stand-alone version

➜ To uninstall the stand-alone version, proceed exactly as described for uninstalling the OLF server; see <u>Uninstalling the server</u> (Navigate to section).

7.5 Removing OLF program files and folders

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

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

By default, OLF version 5.15 uses the installation path `C:\Program Files (x86)\EPO_OLF5` for the server or the stand-alone version and the path `C:\Program Files (x86)\EPO_OLF5-TC` for the thin client.

➜ Check Windows Explorer to see if the **EPO_OLF5** folder is still present after restarting the computer.

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

➜ Delete the **EPO_OLF5-TC** folder, too, if it is still present after uninstalling the thin client.

➜ Delete the folders **epoline3** and **EPO_OLF**, if present.

➜ Delete the files `GDS32.dll` and `fbclient.dll`, if present in the directory `WINDOWS\system32`.

8 Reinstallation with data migration

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

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

➜ Refer to chapter <u>Checklist: Restore</u> (Navigate to section).

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

➜ Refer to chapter <u>Checklist: Migration</u> (Navigate to section).

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

You want to install a new operating system on the computer used for Online Filing, e.g. upgrade from Windows Server 2008 (32-bit version) to Microsoft Windows 2012 R2 Server (64-bit version). This entails reinstalling Online Filing on the new operating system and then importing the data from the old database.

➜ Refer also to chapter <u>Checklist: Migration</u> (Navigate to section).

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

8.1   Checklist: Restore

Proceed as follows to reinstall Online Filing following a system error:
➜ Create a backup of the OLF database and additional copies of the database files; see Backing up data (Navigate to section).
  – If Server Manager is no longer working, refer to the information on how to copy the database manually.
➜ Make note of the version numbers of the current installation, including all plug-ins; see Checklist: Maintenance (Navigate to section).
➜ Uninstall the OLF server; see Uninstalling the server (Navigate to section).
  – If uninstallation is no longer working, proceed with the following two steps.
➜ Remove any remaining program folders and files; see Removing OLF program files and folders (Navigate to section).
➜ Prepare the software installation files; see Latest version of the OLF software (Navigate to section).
➜ Reinstall the OLF server; see Server installation (Navigate to section).
➜ Reinstall the exact same version of the OLF server and all plug-ins as you already had.
➜ Restore your database; see Restoring data (Navigate to section).
➜ If necessary, reinstall all thin clients; see Updating the thin client (Navigate to section).

8.2   Checklist: Migration

This checklist describes the steps needed to install OLF on a new computer or new operating system and then migrate the data.
➜ Create a backup of the OLF database on the old computer or operating system and copy the backup files and database to a secure location; see Backing up data (Navigate to section).
➜ Make note of the version numbers of the OLF installation on the old computer, including all plug-ins; see Checklist: Maintenance (Navigate to section).
➜ Prepare the new computer or the computer with the new operating system; see Installation requirements (Navigate to section).
➜ Install the OLF server on the new computer; see Checklist: Initial installation for client/server mode (Navigate to section).
➜ Reinstall the exact same version of the OLF server and all plug-ins as you had on the old computer.
➜ Restore your database on the new computer; see Restoring data (Navigate to section).
➜ Check that the Online Filing functions are working; see Testing the server (Navigate to section) and Testing the thin client (Navigate to section).
➜ If necessary, reinstall all thin clients; see Updating the thin client (Navigate to section).
➜ If you do not reinstall the thin clients, change the connection data to the new server for the thin clients; see Changing the thin client settings (Navigate to section).
➜ As soon as the new OLF server is working correctly, uninstall the OLF server from the old computer; see Uninstalling the server (Navigate to section).

8.3   Backing up data

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

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

➔ Start Server Manager as a user in the *Administrators* group.

➔ Click the *Settings* tab.

➔ Check the settings for the *Backup and restore directory*.

 The default path is `C:\Program Files (x86)\EPO_OLF5\tools\smanager\data`.

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

➔ To change the backup path, click the folder icon.

 📁

➔ Select the new backup directory and click *OK*.

➔ Click the *Backup* tab.

 A list of all Server Manager database backups available in the selected backup folder is displayed.

➔ To create a new backup, click the *Backup* icon.

 💾

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

The new backup files are labelled with the time and date, e. g. 20150125_113210.prod.bak for the production database backup. You will find the associated physical files as **20150125_113210.prod.bk** and **20150125_113210.prod.sha1** in the backup folder set under *Settings*.

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

ⓘ **Attention:** To restore a database at a later date, always use a backup created with the same build number or the same OLF version. If not, you run the risk data inconsistencies because the database structure changes from one version to another. For example, it would be impossible to restore the database from a backup created with version 5.09 in an installation of OLF version 5.15.

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

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

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

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

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

Manual database copy for emergencies

If none of the above-mentioned backup and export functions are working, you may be able to restore the database using a backup copy of the OLF database from an automatic backup. If possible, do not use the current database because this may already be corrupt as a result of the program crash. Before performing an OLF migration make sure you create an extra copy of the current database in case an error occurs when restoring the database.

→ Before copying the database, terminate the service *Firebird Server - OLF* under Windows *Control Panel > Administrative Tools > Services*; see Checking the status of the OLF server and OLF services (65).

→ Copy the databases **eOLFi.gdb** (production) and **eOLFdi.gdb** (demo) from the default folder `C:\Program Files (x86)\EPO_OLF5\db\` to a secure location.

> ⓘ **Attention:** You can only restore a database with the database copy if the Online Filing version reinstalled is the one that was last used by the database.

For detailed information on Backup/Restore and Export/Import, refer to the online help for Server Manager and File Manager and the user guide for Online Filing version 5.15.

8.4   Restoring data

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

Restoring the entire database with Server Manager's Restore function

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

→ Copy the four backup files to the new computer (i.e. the ***.bk** and ***.sha1** files for both the production database and the demo database) and place them in the folder `C:\Program Files (x86)\EPO_OLF5\tools\smanager\data` (default path) or in the folder set in Server Manager as the *Backup and restore directory*.

→ Start Server Manager as a user in the *Administrators* group; see Enabling user management (Navigate to section).

➜ Click the *Backup* tab.

Two available backup copies are displayed: the production database and the demo database.

➜ Select the database you want to restore: *Demo* or *Production*.

➜ Click the *Restore* icon.

➜ Restore both databases.

Importing applications and templates with Server Manager

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

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

Importing the Address Book with File Manager

➜ Copy the CSV file already exported to the new computer.

➜ Start File Manager and open the Address Book.

➜ Import the CSV file.

Importing a manually generated database copy

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

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

➜ Before copying the database, terminate the service *Firebird Server - OLF* under Windows *Control Panel > Administrative Tools > Services*; see <u>Checking the status of the OLF server and OLF services</u> (Navigate to section).

➜ Copy the databases **eOLFi.gdb** (production) and **eOLFdi.gdb** (demo) to the default folder `C:\Program Files (x86)\EPO_OLF5\db\`, i.e. overwrite the newer databases created during installation.

9   Using the PMS gateway interface

> ⓘ It is advisable to coordinate your technical details with Customer Services before using the PMS gateway interface for filing. The smooth operation of the PMS gateway is guaranteed only with PMS software tested and approved by the EPO as Online Filing-compatible.

Users operating a separate patent management system (PMS) can install Online Filing's PMS gateway interface on both a stand-alone workstation and a server in the corporate network. This gateway sets up a connection from the PMS to the OLF receiving server installed on the office side and uses Online Filing mechanisms for data validation and transmission.
An installation guide and description of how the PMS gateway works is provided in the "Online Filing V5 PMS development kit (for applicants and PMS providers)". This kit is available under *Applying for a patent > Online services > Online filing > Download software for filing with the EPO* (epo.org/applying/online-services/online-filing/download.html). In addition to documentation, the kit also contains the necessary program files, Java classes, and DTDs.

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

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

9.1   Technical coordination with the EPO

Enabling the Patent Management Systems (PMS) gateway interface requires prior approval of the PMS software by the patent office(s) where an application is to be filed. Using the PMS gateway interface without prior approval of the software may result in malfunctions or technical/procedural errors.
In the case of standard PMS software, the supplier may already have obtained the necessary approval. For custom-made PMS software, or where no approval has yet been obtained for

the standard version, approval must be obtained from the support desk(s) of the patent office(s) concerned. With regard to the EP F1001 and PCT/RO/101 procedures, approval must also be requested from Customer Services before patent offices are contacted. Please refer to the latest information on the EPO website (epo.org/online-services), before activating the PMS gateway and filing applications.

Testing the PMS gateway

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

➜ Start the OLF File Manager in *Production mode*.

    – If necessary, enable user management under *System Preferences* and restart File Manager.

➜ Open *System Preferences* and click *PMS gateway interface*.

➜ To activate the PMS gateway interface, select the *Smart card* option and enter the data as appropriate.

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

➜ Monitor the response from your PMS.

If everything works as expected, contact Customer Services (see "Online Filing help" p. 7) for further coordination. Customer Services 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*.

➜ Open *System Preferences* and click *PMS gateway interface*.

➜ 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.

9.2   PMS gateway features

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

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

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

10   Troubleshooting

The following chapters propose solutions for a number of typical problems in Online Filing.

ⓘ If your problem is not listed here, please contact Customer Services or search the Online Filing discussion forum; see <u>Online Filing help</u> (Navigate to section).

10.1   Checking the status of the OLF server and OLF services

If you are unable to start File Manager from a client computer or activate plug-ins, it may be because those services do not run on the server computer.
The following services are configured when you install Online Filing version 5.15:
▪ Firebird server (Firebird Guardian OLF)
▪ Firebird database server (Firebird server OLF)
▪ File Manager (EPO OLF FM server)
▪ a service for each procedure (plug-in)
The same services are used in both production and demo mode. The Firebird server connects to either the production database or the demo database, depending on the mode selected.
You can monitor and control the OLF services in OLF Server Manager or in the Windows Services Manager.

Checking the status of OLF services in Server Manager

➔ Start Server Manager with the option Run as administrator via the ***Online Filing 5.0 Server Manager*** shortcut.

➔ Check the ***Services*** tab in Server Manager to see if the standard OLF services and the services related to the national plug-ins you activated are running (status is ***Running***); see paragraph "Checking the status of services in Server Manager" under Testing the server (Navigate to section).

Checking the status of OLF services in the Windows Services Manager

All services automatically start as Windows processes when the computer starts. Depending on your configuration, it may take some time for OLF services to start up after Windows has started. Once start-up is complete, the services will be continuouslyavailable.

➔ Open the Windows Control Panel and select ***Administrative Tools > Services***.

➔ Check if all standard OLF services (EP1038, EP122K, EP2000, EPOPPO, FM Server, IBR101, IBR401 and IBRSFD) and those related to the national plug-ins started are running, i.e. ***Running*** appears in the ***Status*** column.

  – The national plug-ins not activated are not running.

  – The ***startup type*** for the national plug-ins activated is ***Automatic***, while it is ***Manual*** for the plug-ins not activated.
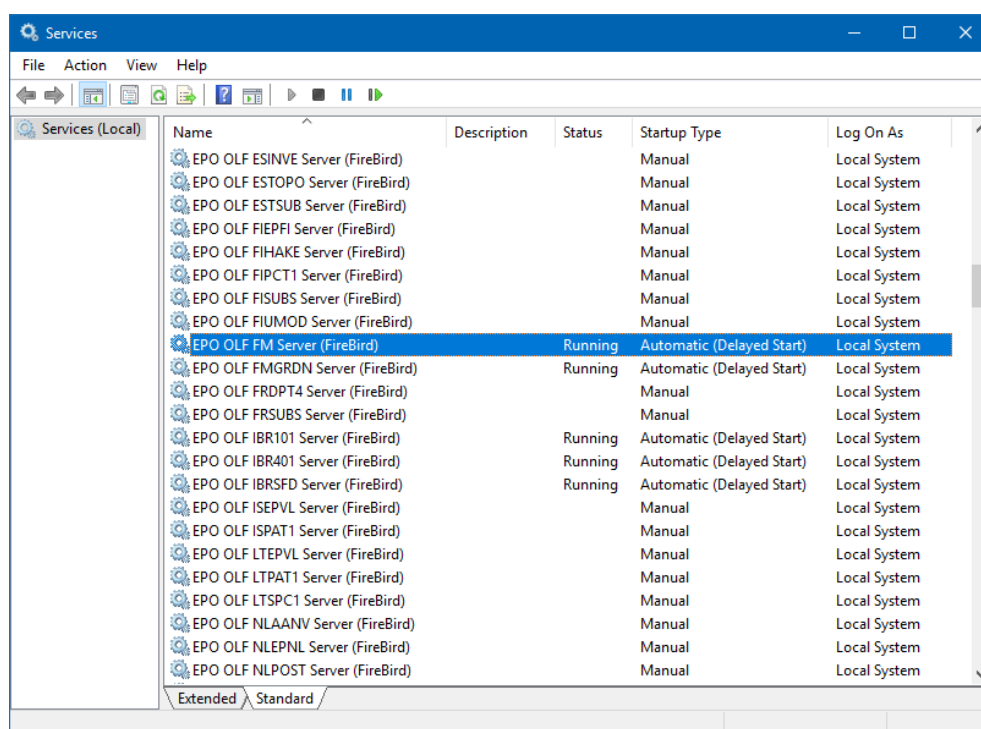

Figure 57: Checking OLF services in Windows

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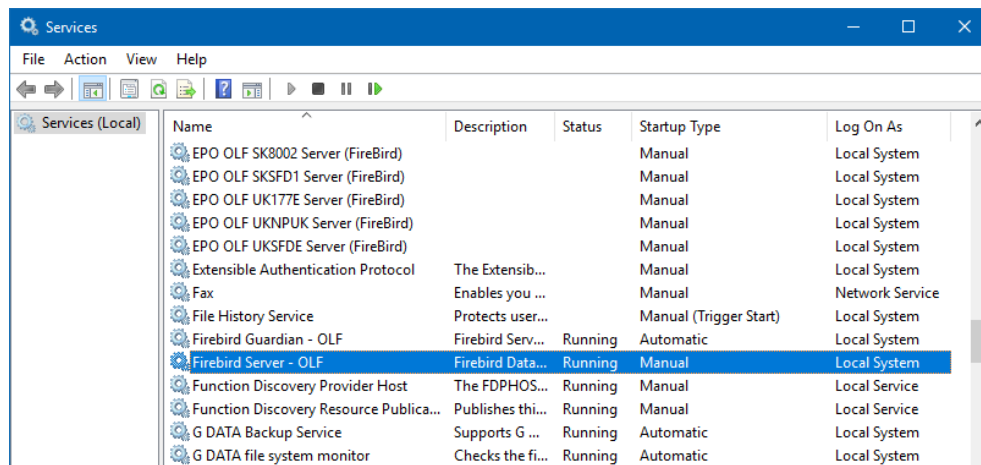

Figure 58: Status of Firebird Server - OLF in Windows

If you terminate Firebird Server - OLF, all dependent OLF services will also terminate, i.e. the OLF service will shut down completely.
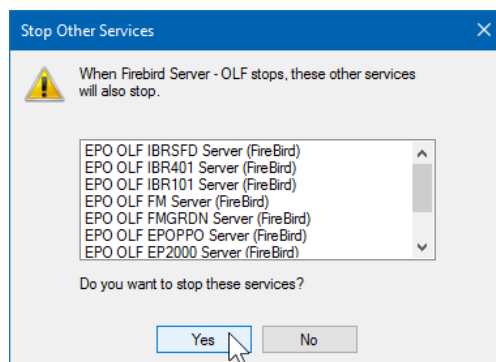
Figure 59: Terminating all OLF services by stopping the Firebird server

10.2   Checking ports used by OLF

To verify that the ports are available, you can check in the Command Prompt.
➔ Open the ***Command Prompt***.
  –   In Windows 7, go to the Start menu and select ***Programs > Accessories > Command Prompt***.
  –   In Windows 8.1, go to the ***Apps*** screen, locate the ***Windows System*** group and click **Command Prompt.**
  –   In Windows 10, right-click the Start button (Windows icon) and click ***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 60: Checking port status with the command "netstat -an"

10.3   Finding out the server's IP address

If you do not know the server's IP address, you can use the command **ipconfig**.
➜ Log on to the OLF server.
➜ Open the ***Command Prompt***.

–   In Windows 7, go to the Start menu and select ***Programs > Accessories > Command Prompt***.

–   In Windows 8.1, go to the ***Apps*** screen, locate the ***Windows System*** group and click ***Command Prompt***.

–   In Windows 10, right-click the Start button (Windows icon) and click ***Command Prompt***.

➜ Enter the command **ipconfig**.

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

Figure 61: Querying the computer's IP address

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

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

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

Ping

You can also use the command **ping** in the Command Prompt to check that the network connection to the server machine is possible.
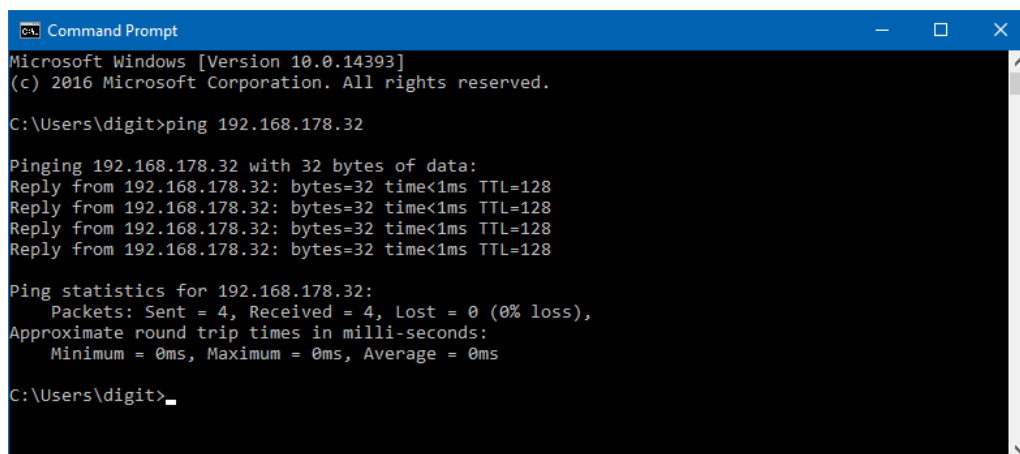
➔ Open the *Command Prompt*.

– In Windows 7, go to the Start menu and select *Programs > Accessories > Command Prompt*.

– In Windows 8.1, go to the *Apps* screen, locate the *Windows System* group and click **Command Prompt.**

– In Windows 10, right-click the Start button (Windows icon) and click *Command Prompt*.

➔ Type the command **ping [IP address of your Online Filing server]**.

Example: **ping 192.169.178.32**

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

```
Command Prompt                                              —    □    ×
Microsoft Windows [Version 10.0.14393]
(c) 2016 Microsoft Corporation. All rights reserved.

C:\Users\digit>ping 192.168.178.32

Pinging 192.168.178.32 with 32 bytes of data:
Reply from 192.168.178.32: bytes=32 time<1ms TTL=128
Reply from 192.168.178.32: bytes=32 time<1ms TTL=128
Reply from 192.168.178.32: bytes=32 time<1ms TTL=128
Reply from 192.168.178.32: bytes=32 time<1ms TTL=128

Ping statistics for 192.168.178.32:
    Packets: Sent = 4, Received = 4, Lost = 0 (0% loss),
Approximate round trip times in milli-seconds:
    Minimum = 0ms, Maximum = 0ms, Average = 0ms

C:\Users\digit>_
```

Figure 62: Testing the connection to the OLF server with the command "ping"

Telnet

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

ⓘ   If the **telnet** command is not recognised in the Command Prompt, activate the Telnet Client and the Telnet Server under *Control panel > Programs and Features > Turn Windows features on or off*.

➔ Open the *Command Prompt.*

➜ Enter the command **telnet [IP Address of your OLF server] [CORBA or SOAP port number]**.
 Example: **telnet 192.168.178.32** 11000 to query the CORBA port for File Manager.
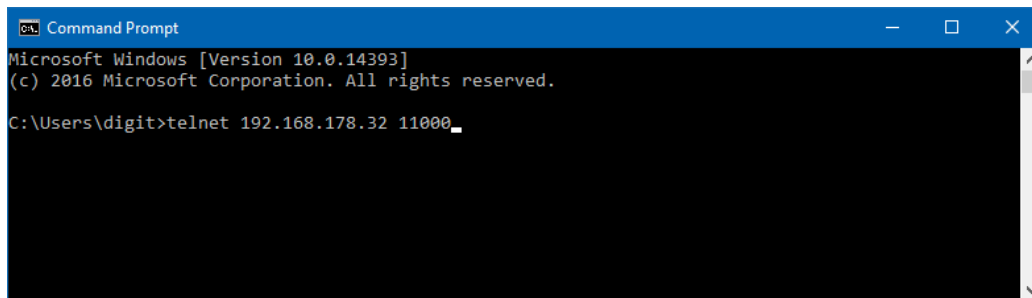
Figure 63: Starting a telnet connection

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

Figure 64: Connection to the OLF server set up via telnet

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

Figure 65: CORBA connection to the server terminated

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

Figure 66: SOAP connection to the server terminated

10.5   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 and Windows 8.1
➔ Open the *Control Panel*.
➔ Go to *Appearance and Personalization > Display.*
➔ Select the *Smaller – 100% (default)* option.

–   If you do not see these options in Windows 8.1, select the check box *Let me choose one scaling level for all my displays*.

➔ Click *Apply*.
➔ To activate the new settings, log off Windows and log in again.

Windows 10
➔ Go to the Start menu and click *Settings*.
➔ Click *System > Display*.
➔ Under *Change the size of text, apps and other items*, drag the slider knob all the way to the left.

 100% (Recommended) should then be displayed.

 The new settings are applied immediately.

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*.
➔ To activate the new settings, restart your computer.

10.6   Configuring PDF display in Adobe Reader

The following error message may appear when you are trying to preview a form or open a form you want to sign (but no PDF is displayed):
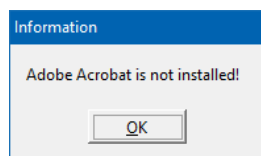
Figure 67: OLF cannot open Adobe Acrobat Reader

If, however, Adobe Reader or Adobe Acrobat is installed on your computer and you have no problem opening other PDF files, please check the Windows Internet options.

Adobe Reader 11.x or Adobe Acrobat XI

If Adobe product versions 11 and above are installed, PDF display in Internet Explorer (and in Online Filing) is configured by managing the browser add-ons.

➜ Open the Windows *Control Panel* and go to *Network and Internet > Internet Options*.

➜ Click the *Programs* tab and click *Manage add-ons*.

➜ Under *Add-on Types* on the left, select *Toolbars and Extensions*.

➜ Make sure that *All add-ons* is selected.

➜ Select the *Adobe PDF Reader* add-on and check if the status is *Enabled*.

➜ If the status is *Disabled*, click the *Enable* button at the bottom right of the window.

➜ Click *Close*.
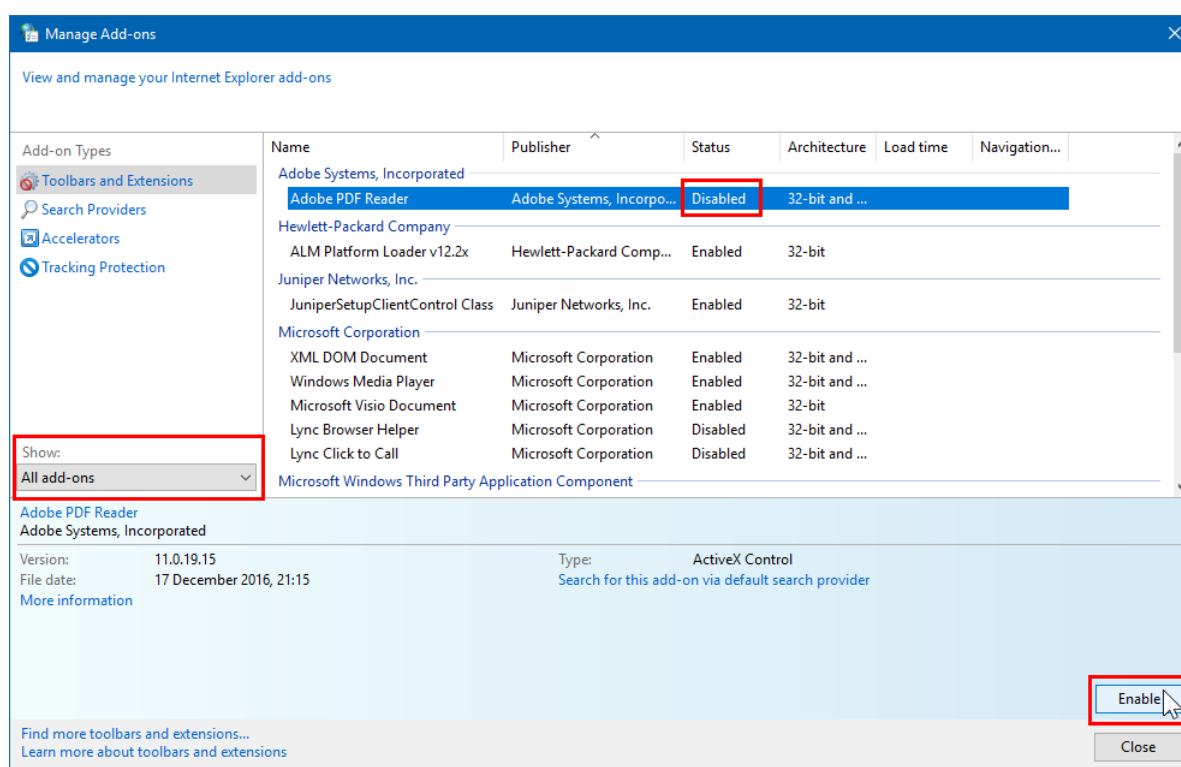
Figure 68: Status of the Adobe PDF Reader browser add-on

10.7   Error: "Connection aborted on request"

The following error message may appear when an application you are trying to send fails to transfer and the sending process is aborted at 0% after some time:
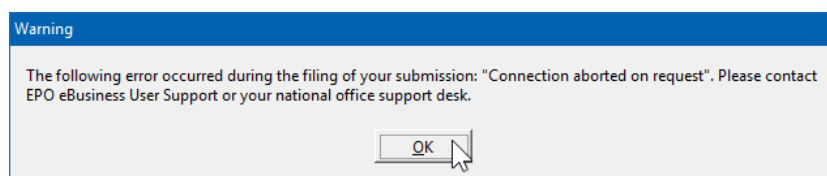
Figure 69: Error message: "Connection aborted on request"

Changing the network settings in Server Manager

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

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

   You will find the proxy server settings under ***Default Network Settings***.

➜ If you are familiar with your proxy settings, enter them correctly here.
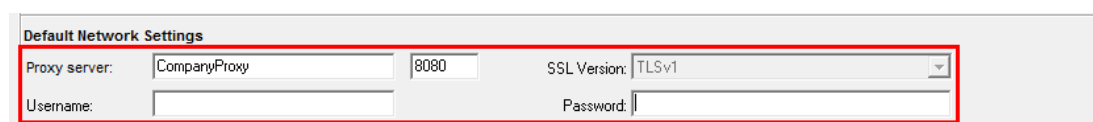
Figure 70: Settings for connecting to the internet over a proxy server in Server Manager

➜ If you are not familiar with this data, try using your browser settings. You can find them at the following locations:

–   In the Windows Control Panel under: ***Network and Internet > Internet Options > Connections > LAN settings***

–   In Internet Explorer under: ***Tools > Internet Options > Connections > LAN settings***

If your system uses a proxy server, you will find the address and the port here.
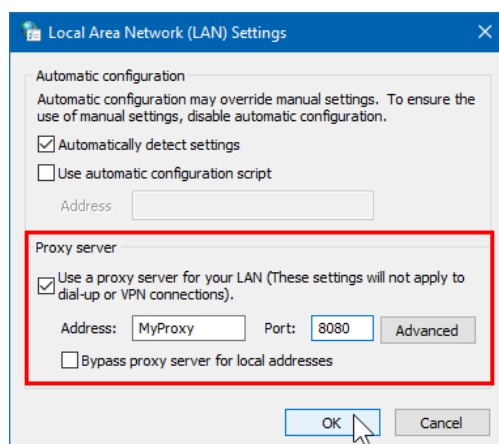
Figure 71: Proxy server settings under Windows Internet Options

➜ Change the proxy settings in Server Manager as appropriate.

   This setting affects all Online Filing users connected to this OLF server.

➔ Close Server Manager.

Changing network settings in File Manager

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

➔ Start File Manager (***Online Filing 5.0 Client***).

➔ Select ***Tools > Preferences > User Preferences***.

➔ Check if ***Use Default Network Settings*** is selected under ***Network Settings***.

If it is selected, the Server Manager settings are used.

➔ Clear this check box.

This enables the fields for the proxy settings for editing.

➔ Enter the proxy data (if you do not have this data, see above).

➔ Click ***OK***.

You will be prompted to restart File Manager.
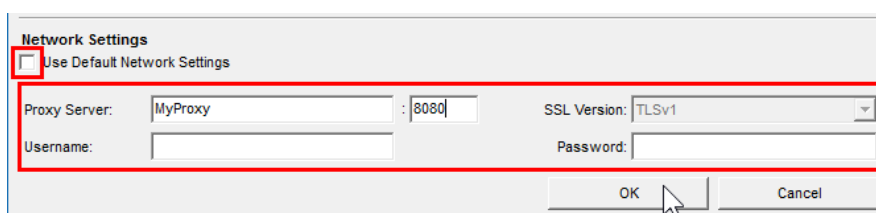
Figure 72: Individual setting for the proxy server in File Manager

10.8   Error: "Connection to server lost"

This or a similar error message appears if data retrieval suddenly fails while you are working in File Manager or in a form in Online Filing:
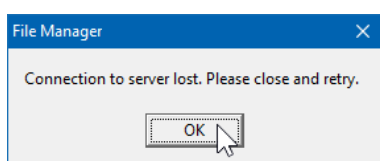
Figure 73: The client lost the connection to the server

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

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

▪ The OLF server is no longer running.

▪ The requested service is not running on the OLF server.

▪ The thin client is unable to set up a connection to the server because the network configuration is not correct.

Proceed as follows to solve the problem:

1. Is the relevant service running?

➜ See <u>Checking the status of the OLF server and OLF services</u> (Navigate to section).

➜ If the services are stopped, restart all of them on the server.

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

➜ See <u>Testing the connection between the client computer and the OLF server</u> (Navigate to section).

➜ If you do not receive an answer with the IP address known to you, try using **ping** or **telnet** to query the server name of the OLF server.

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

➜ Correct the IP address here or enter the server name; see <u>Changing the thin client settings</u> (Navigate to section).

➜ Start File Manager.

➜ Check if you can open all forms.

10.9   Whitelisting

To ensure full access to OLF functionality, we recommend that the following be whitelisted:

- http://www.epo.org
- http://www.epoline.org
- https://secure2.epoline.org/olf/receiver
- https://my.epoline.org/portal/classic/
- http://www.epo.org/searching-for-patents/legal/ebd/ebd/st-36.html
- https://my.epoline.org/epoline-portal/classic
- https://filing.epo.org/splash
- https://filing.epo.org/dashboard
- *.okta.com
- *.mtls.okta.com
- *.oktapreview.com
- *.mtls.oktapreview.com
- *.oktacdn.com
- *.okta-emea.com
- *.mtls.okta-emea.com

For further information about EPO Account, please consult the dedicated FAQ (ciam.epo.org/help/faq_EN.html)

11 Annex

11.1 Installation scenarios

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

- Initial installation of Online
  Filing see <u>Initial installation</u>
  (Navigate to section)
- Updating an installation
  see <u>Installation maintenance</u> (Navigate to section)
- Converting a stand-alone installation into a network
  installation see <u>Converting from stand-alone to server mode</u>
  (Navigate to section)
- Migrating data to a new computer or a new operating system
  see <u>Reinstallation with data migration</u> (Navigate to section) and <u>Checklist: Migration</u> (
  Navigate to section)
- Restoring Online Filing including the database after a system crash
  see <u>Reinstallation with data migration</u> (Navigate to section) and <u>Checklist: Restore</u> (Navigate
  to section)
- Replicating the OLF server at a second site (mirror)
  see <u>Replicating the OLF server</u> (Navigate to
  section)
- Migrating the configuration of user rights from an existing OLF server to a new
  OLF installation
  see <u>Migrating user data</u> (Navigate to section)
- Migrating the OLF database of an existing OLF network installation to a different hard
  disk location
  see <u>Migrating databases</u> (Navigate to section)

11.1.1 Replicating the OLF server

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

A) Automatic script-based client configuration
The script must run in such a way that it is able to change the settings in the configuration file
OLFClient.ini on all client computers at the same time. The
parameters that must be changed are:

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

Example: Server A works with CORBA, server B with SOAP
The script must change the **CORBA** parameter in the following manner:

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

In
`OLFClient.ini`:
[Common]
...
CORBA=
1
[CORBA
]
`ORBBINDADDR=inet:IPAddressServerA:11000`
...
[SOAP
]
`ORBBINDADDR=inet:IPAddressServerB:21000`

B) Manual server selection over the second thin client

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

➜ Install the first thin client in the usual way.

➜ Program the client for the connection to server A.

➜ Copy the entire folder `EPO_OLF5-TC` to a different location on the client computer.

➜ Edit the `OLFClient.ini` file in this folder such that the connection to server B uses either CORBA or SOAP (see above).

➜ Create a shortcut for both clients on the Windows desktop.

Note for Windows standard users

Do not install thin clients in or copy them to the system folder `C:\Program Files (x86)` or `C:\Program Files`. Instead, choose a folder with write access for Windows standard users. Otherwise manual editing is impossible in `OLFClient.ini`.

What is more, changes made via ***Online Filing Client 5.0 settings*** are not written to `OLFClient.ini` if the thin client was installed in the folder `C:\Program Files (x86)\EPO_OLF5-TC`.

11.1.2 Migrating user data

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

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

➜ Start Server Manager as a user who is a member of the ***Administrators*** group.

➜ Click the ***Data Migration*** tab.

➜ There are three options available under ***User Data Migration***:

- Copy the complete user administration from the production server to the demo server.
- Export the user administration from the production server to a file.

–   Import the user administration from a file to the production server.

➜ To migrate the data from the old machine to the new machine, first export the user administration from the old machine and then import it into the new machine.

ⓘ Migrating the user administration from one physical server to another only works for the production server.

Exporting the user administration from the old machine

➜ Start Server Manager on the old machine and go to the ***Data Migration*** tab.

➜ Select the option ***Export the user administration from the production server to a file***.

➜ Click ***Execute***.
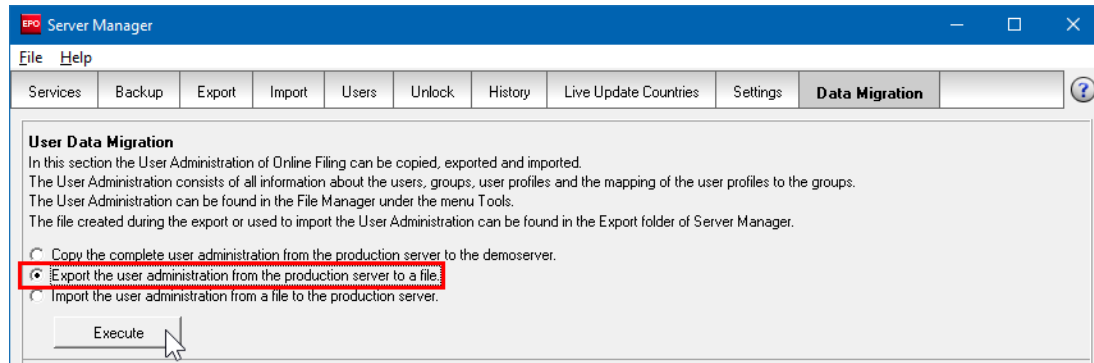
Figure 74: Exporting the user administration from the existing OLF installation

The export operation creates a ZIP file in the Server Manager's default export directory. The ZIP file is named **useradministration[date]_[time].zip**, e.g. **useradministration20150120_153414.zip** and contains three files, **um.tmp**, **uma.tmp** and **umr.tmp**.

➜ Copy this ZIP file to the target machine.

Importing the user administration into the new machine

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

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

➜ Click ***Execute***.

➜ Select the appropriate ZIP file from the file system.

 The Data Migration function opens Server Manager's import directory by default.
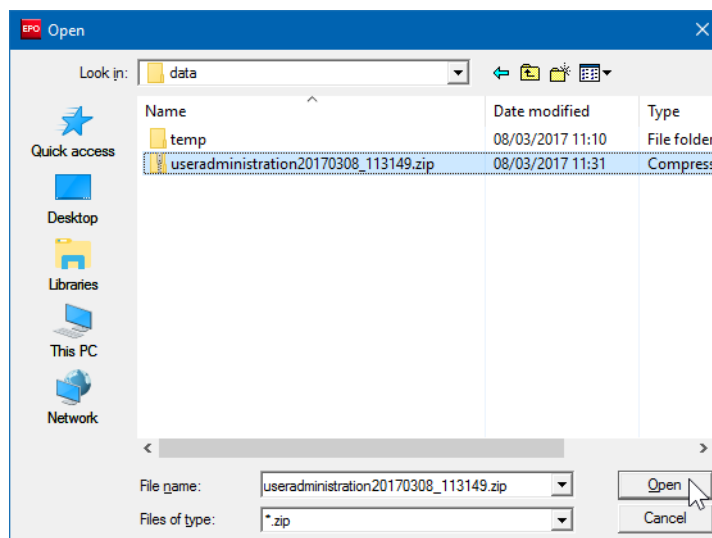
➜ Click ***Open***.

Figure 75: Selecting the user administration file to be imported

A message informs you when the import operation is complete.
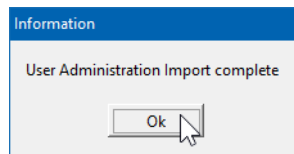
Figure 76: User administration was successfully imported

11.1.3 Migrating databases

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

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

➔ Start Server Manager as a user who is a member of the *Administrators* group.

➔ Click the *Data Migration* tab.

➔ Under *Database Migration*, select the appropriate option:

- Leave the copy of the database in the former location after successful migration (default)

- Delete the copy of the database in the former location after successful migration

It is recommended to leave the copy of the database in the former location until you are sure that everything works correctly in the new location.
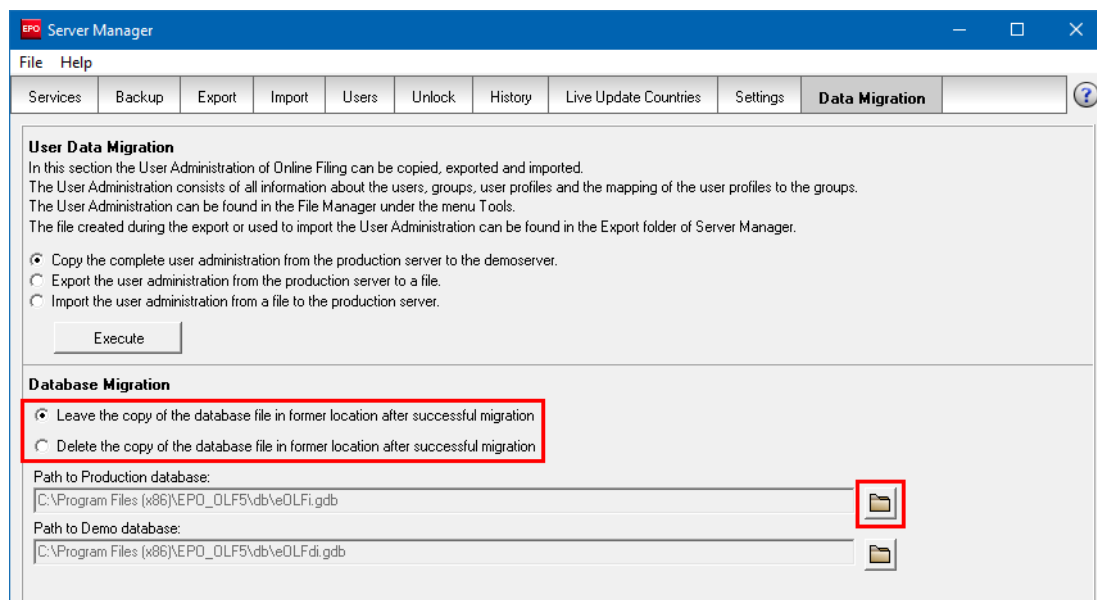
Figure 77: Options for migrating the OLF database

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

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

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

➜ Click *OK*.
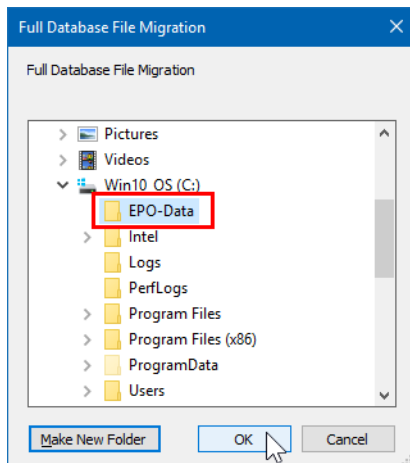
Figure 78: Selecting a new location for the OLF database

➜ Wait until the *Information* window appears.

If the database is very large, the process of copying and verifying the database could take some time.

The new path is displayed in the message.
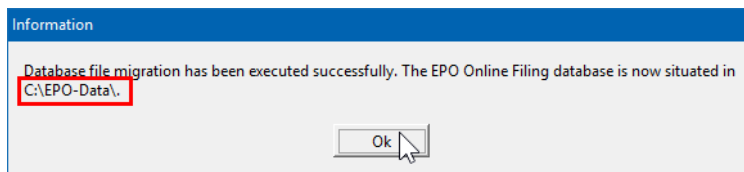
Figure 79: Confirmation of successful database migration

11.2 OLF services and ports

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

- There is a separate folder for every plug-in in the program folder **C:\Program Files (x86)\EPO_OLF5**.
- The program file for every plug-in is always located in the plug-in folder's **bin** subfolder.
- The configuration file for every plug-in is always located in the plug-in folder's **config** subfolder.

Example for the EP122K plug-in, Euro-PCT procedure (EP1200E2K)
Program file: **C:\Program Files (x86)\EPO_OLF5\ep1200\bin\ep1200.exe**
Configuration file: **C:\Program Files (x86)\EPO_OLF5\ep1200\config\ep1200.conf**

Exception: PCT/RO/101 plug-in

The PCT/RO/101 plug-in's plug-in folder does not have separate **bin** and **config** folders. Rather, the program file **pcti.exe** and the configuration file **pcti.ini** are stored directly under `C:\Program Files (x86)\EP0_0LF5\pct\`.

Plug-in list

Plug-in	Program file	CORBA port	SOAP port	Configuration file
Standard				
FMMNGR (File Manager)	OLFfm.exe	11000	21000	OLFfm.conf
EP1038	ep1038.exe	11103	21103	ep1038.conf
EP122K	ep1200.exe	11106	21106	ep1200.conf
EP2000	ep1001.exe	11105	21105	ep1001.conf
EPOPPO	ep_oppo.exe	11108	21108	ep_oppo.conf
IBR101 (PCT-plugin)	pcti.exe	11301	n.a.	pcti.ini
IBR401 (PCT-DEMAND)	PCT_Demand.exe	14121	24121	PCT_Demand.conf
IBRSFD (PCT-SFD)	PCTSFD.exe	14122	24122	PCTSFD.conf
UP7000	up7000.exe	15901	25901	up7000.conf
UP7038	up7038.exe	15902	25902	up7038.conf
National				
FIHAKE	FIPlugin.exe	11701	21701	FIPlugin.conf
FIEPFI	FIEPPlugin.exe	11702	21702	FIEPPlugin.conf
FIPCT1	FIPCTPlugin.exe	11703	21703	FIPCTPlugin.conf
FISUBS	FISFDPlugin.exe	11704	21704	FISFDPlugin.conf
FIUMOD	FIUMPlugin.exe	11705	21705	FIUMPlugin.conf
ES3101	es3101e.exe	12701	22701	es3101e.conf
ESEPVL	esEPvalidation.exe	12703	22703	esEPvalidation.conf
ESTSUB	esTSubs.exe	12705	22705	esTSubs.conf
ESCCPS	ESCCPS.exe	12706	22706	ESCCPS.conf
ESINVE	ESINVE.exe	12707	22707	ESINVE.conf
ESTOPO	ESTOPO.exe	12708	22708	ESTOPO.conf
UK177E	uk177.exe	12901	22901	uk177.conf
UKNPUK	NP1.exe	12902	22902	NP1.conf
UKSFDE	uksffd.exe	12903	22903	uksffd.conf
DE2007	de2007.exe	13102	23102	de2007.conf
ATPAT1	AT_Pat.exe	13401	23401	AT_Pat.conf
ATUMOD	AT_UM.exe	13402	23402	AT_UM.conf
ATSFD1	AT_SFD.exe	13403	23403	AT_SFD.conf
BEPAT1	berequete.exe	13501	23501	berequete.conf
BEPOST	be_post.exe	13502	23502	be_post.conf
BEEPVL	be_epval.exe	13503	23503	be_epval.conf

Plug-in	Program file	CORBA port	SOAP port	Configuration file
DKPAT1	DK_plugin.exe	13901	23901	DK_plugin.conf
ISPAT1	IS_plugin.exe	14401	24401	IS_plugin.conf
ISEPVL	IS-EPval.exe	14402	24402	IS-EPval.conf
LTPAT1	LT_plugin.exe	14701	24701	LT_plugin.conf
LTSPC1	LTSPC.exe	14702	24702	LTSPC.conf
LTEPVL	LTEPVAL.exe	14703	24703	LTEPVAL.conf
NLAANV	nl_aanvraag.exe	15001	25001	nl_aanvraag.conf
LUPAT1	LU_patent.exe	14801	24801	LU_patent.conf
LUPOST	LU_post.exe	14803	24803	LU_post.conf
NLPOST	nl_post.exe	15002	25002	nl_post.conf
NLEPNL	nlepnl_post.exe	15003	25003	nlepnl_post.conf
ROB01A	ROb01a.exe	15301	25301	ROb01a.conf
ROPCT1	ROpct.exe	15303	25303	ROpct.conf
ROEPRO	roepro.exe	15304	25304	roepro.conf
SEPAT1	SEClient141.exe	15401	25401	SEClient141.conf
SEVAL1	SEValidering.exe	15402	25402	SEValidering.conf
SESFD1	SESFD.exe	15403	25403	SESFD.conf
SK8001	sk8001.exe	15601	25601	sk8001.conf
SK8002	sk8002.exe	15602	25602	sk8002.conf
SKSFD1	skSFD.exe	15603	25603	skSFD.conf
SK4001	SK4001.exe	15604	25604	SK4001.conf

11.3   Executable files to be allowed

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

1. Installation
time deploy.exe
i5Backup.exe
i5Restore.exe
i5Setup.exe

2. Run time, EP and PCT plug-ins (default set)
OLFClient.exe
OLFfm.exe
LUClient.exe
fbguard.exe
OLFSManager.exe
mclient.exe

ep1001.exe
ep1038.exe
ep1200.exe
ep_oppo.exe
pcti.exe
PCT_Demand.exe
PCTSFD.exe
cl_cm.exe
OLFSCard.exe

3. Run time, NO plug-ins
berequete.exe (BE)
be_post.exe (BE)
be_epval.exe (BE)
de2007.exe (DE)
DK_plugin.exe (DK)
e3fr.exe (FR)
Plug_FR.exe (FR)
es3101e.exe (ES)
esEPvalidation.exe (ES)
esTSubs.exe (ES)
ESCCPS.exe (ES)
ESINVE.exe (ES)
ESTOPO.exe (ES)
FIEPPlugin.exe (FI)
FIPCTPlugin.exe (FI)
FIPlugin.exe (FI)
FISFDPlugin.exe (FI)
IS-plugin.exe (IS) IS-
EPval.exe (IS)
LT_plugin.exe (LT)
LTSPC.exe LT)
LTEPVAL.exe (LT)
LU Patent LUPAT1
LULU(POST)
nl_aanvraag.exe (NL)
nl_post.exe (NL)
nlepnl_post.exe (NL)
Patenty.exe (PL)
WzoUzyt.exe (PL)
ROb01a.exe (RO)
roepro.exe (RO)
ROpct.exe (RO)

SEClient141.exe (SE)

SEValidering.exe (SE)

SESFD.exe (SE)

sk8001.exe   (SK)

sk8002.exe   (SK)

skSFD.exe   (SK)

SK4001.exe (SK)

uk177.exe (UK)

uksffd.exe (UK)

NP1.exe (UK)

11.4   Installing the thin client in silent mode

In silent mode, installation takes place in the background without any inputs by or interaction with the user.

You can add the command line shown here to a batch file or invoke it directly via the Command Prompt.

Syntax:

msiexec /faumsv OLF515client.msi /quiet soap=[soap parameter] port=[port number] host=[host name]

/faumsv	f: force the update
	a: including all files
	u: include user specific Reg files
	m: include machine specific Reg files
	s: all shortcuts
	v: run from source and re-cache local package
/quiet	perform installation in silent mode
soap=0	use Corba
soap=1	use SOAP
port	port number for File Manager, i.e. either CORBA or SOAP port
host	server name or IP address of the OLF server in the network

Example:

msiexec /faumsv OLF515client.msi /quiet soap=0 port=11000 host=192.168.178.27

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

11.5   Filing office host names and IP addresses

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

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

➔ Start File Manager.

➔ In the menu, select *Tools > Maintenance Table Viewer > Common Maintenance*.

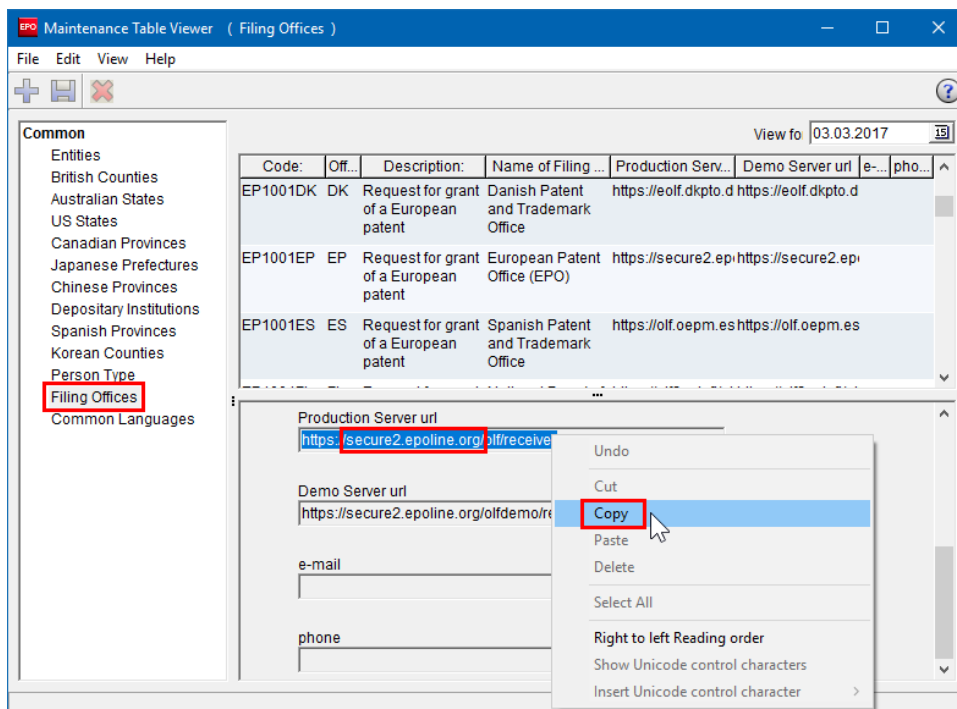➜ In the Maintenance Table Viewer, click ***Filing Offices***.

Figure 80: Maintenance Table Viewer listing the Filing Offices

➜ Select the office that you require from the list on the right.

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. The host name is contained in the field ***Production Server url***.

➜ Select the host name by dragging the mouse pointer, then right-click and select ***Copy*** from the shortcut menu.

➜ Paste that name into a text file if you wish to save it for further use.

➜ Look for the IP address if your firewall needs an IP address rather than a host name.

You can search one of the IP lookup services on the Internet or use the command `ping`. The filing office's server will probably block the `ping` request but will return the IP address.

➜ Open port 443 for that IP address.

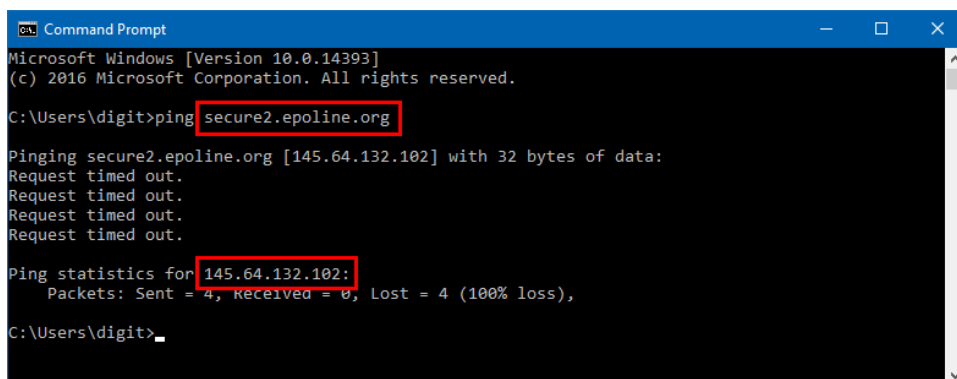➜ Repeat the above steps for all filing offices concerned.

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

12 Glossary

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

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

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

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

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

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

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

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

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

PMS
Patent Management System.

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

Proxy server
A firewall component that manages internet traffic to and from a network.

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

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

TCP
Transmission Control Protocol.
Used to manage data exchange between computers via network connections.

URL

Uniform Resource Locator.

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

WAN

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