| ePCT for receiving Offices and International Authorities | Getting Started |
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INTRODUCTION

Offices that wish to use ePCT should first contact the international Bureau, by sending an email to epct@wipo.int or the PCT International Cooperation Division pcticd@wipo.int, and provide the details of a nominated main contact person.

The Office main contact person will be responsible for all communications with WIPO regarding the access of Office users to ePCT, and any other ePCT related subjects.

The following bullets describe the steps to be performed before an Office user can start using the ePCT system:

1. The Office user creates a WIPO user account (see how to create a WIPO user account)
2. The Office user requests and uploads a digital certificate (see how to obtain a WIPO digital certificate)
3. The Office main contact person requests the IB to grant access rights to that Office user (access role corresponding to the capacity of the Office e.g. RO, DO, ISA or IPEA) by sending an email to epct@wipo.int
4. The WIPO ePCT team grants access rights and informs the Office main contact person and the user
5. The Office users can then logon and start using ePCT as described in the Office user guide

Please refer to the next paragraphs in this document for more details about each step.
HOW TO CREATE A WIPO USER ACCOUNT

IMPORTANT: Users who already have a WIPO account can directly go to the next chapter ‘How to obtain and upload a digital certificate’

To create a new WIPO user account please use the following link: https://pct.wipo.int/ePCT and then click on ‘Create an account’

You are directed to the WIPO Accounts web page where you can fill in your details and confirm the creation of your WIPO online user account.
Create Account screen

**Note:** User accounts are personal and not generic – please provide your own personal details and your Office e-mail address when creating an account, noting that the same e-mail address cannot be used with more than one user account.

Please pay particular attention to type your e-mail address accurately, or you will not receive notification containing the link that is required to validate the account creation process!
Example of notification to confirm the creation of your WIPO user account

If you do not receive an e-mail within a few minutes, please check your spam filters and ensure that no.reply@wipo.int is white-listed otherwise you may also fail to receive further system messages in the future.

After you have clicked on the link to confirm the validation of your WIPO user account, you will be prompted to upload your certificate to your user account in order to be able to access ePCT for Offices.
Confirm user account

Username: epc1test1

Verification: Type the characters displayed below.

Characters: horsed

Confirm account

Note: After the creation of your account you must start by obtaining and uploading a valid certificate in order to authenticate your Office user account for ePCT private services.
HOW TO OBTAIN AND UPLOAD A WIPO DIGITAL CERTIFICATE

IMPORTANT NOTICE ON DIGITAL CERTIFICATE

WIPO CA Customer Digital Certificates

As a general rule, users should have only one valid digital certificate issued in their name at any time. Each WIPO CA Customer Digital Certificate has a validity period of two years and can be renewed for two years. Three weeks prior to the expiration date an e-mail notification will be sent to you to remind you to renew it.

WIPO CA Customer digital certificates can only be issued to individuals and not to companies. The two supported browsers for WIPO Customer CA digital certificates are Mozilla Firefox (recommended) and Internet Explorer 9.0 to 10.0. Internet Explorer version 11.0 and other browsers e.g. Google Chrome, Safari etc... will not work.

Once your request for a digital certificate has been approved by the PCT eServices Unit, you will receive an e-mail notification with a PIN code and instructions for the retrieval of your digital certificate from the VeriSign website.

IMPORTANT: Please use the same computer and the same browser for the enrollment and retrieval of your digital certificate otherwise you will not be able to use it.

Once your new certificate is installed in your internet browser, please make a copy of it in order to have it available outside the browser, saving it e.g. on a portable memory device in case you need to use it on another computer or browser. To do so, please follow the instructions in the ePCT user guide page 35: http://www.wipo.int/pct/en/epct/pdf/pct_wipo_accounts_user_guide.pdf. Certificate user guides and tutorial videos are also available at http://www.wipo.int/pct-safe/en/certificates.html.

For further information on digital certificates, please visit: http://www.wipo.int/pct-safe/en/certificates.html where you will find step-by-step guides on how to obtain a digital ID, remove your digital certificate from your browser and how to renew it. The Certification policy statement is also available on this page.

EPO Smart Card

For further information on Smart cards issued by the European Patent Office please visit: http://www.epo.org/applying/online-services/security/smart-cards.html.
REQUEST A WIPO DIGITAL CERTIFICATE

A digital certificate is required in order to be able to access ePCT for Offices and use most of the ePCT functions. If you do not have already a digital certificate then please refer to this page https://pct.wipo.int/ePCT

1. Click on ‘Obtain/Upload a certificate’

2. Enter your user account Username and password to log in to your WIPO Account
3. Click on WIPO Digital Certificate to enroll for a new WIPO digital certificate

Digital Certificates

My Digital Certificates
You have not uploaded any certificate yet.
- Upload certificate
- Upload certificate (for Smartcard holders Using Internet Explorer)

Request new Digital Certificate
If you do not have a digital certificate, please obtain one from the following link: [WIPO Digital Certificate]

4. You will be directed to the following enrollment form. Your details will be prefilled by default. You will be requested to enter a ‘Challenge phrase’ and then Submit.

The Challenge Phrase is a password you use when you want to manage your Digital ID throughout the Digital ID Center.
Complete Enrollment Form

Enter your Digital ID information
Fill in all required fields. Fields marked with an asterisk (*) are included with your Digital ID and are viewable in the certificate’s details.

First Name: * (required)
Nickname or middle initial allowed
(Example: Jack B.)
AAL

Last Name: * (required)
(Example: Doe)
Office

E-mail Address: * (required)
(example -- jbdoe@verizon.com)
epctdesk@gmail.com

Challenge Phrase
The Challenge Phrase is a unique phrase that protects you against unauthorized action on your Digital ID. Do not share it with anyone. Do not lose it. You will need it when you want to revoke or renew your Digital ID.

Enter Challenge Phrase: (required)
Do not use any punctuation.

Optional: Choose Your Encryption Strength
The encryption strength indicated below is the maximum allowed by your browser software. We recommend that you leave this as it is.

Optional: Enter Comments
In some cases, your administrator will instruct you to enter Shared Secret information (known only to you and the administrator) in this field. The administrator uses this shared secret to verify that it really is you submitting the application. This comment will not be included in your Digital ID.

Digital ID Subscriber Agreement
By applying for, submitting, or using a Digital ID, you are agreeing to the terms of the VeriSign Subscriber Agreement.

If all the information above is correct, click Submit to continue.
Note: When a request for a digital certificate is made, the approval of the request requires manual intervention from the WIPO PCT e-Services Unit during WIPO business hours. You will receive an e-mail notification as soon as your digital certificate request is approved.

PICK UP YOUR WIPO DIGITAL CERTIFICATE

The e-mail notification you received contains the link to a secure web site, your Personal Identification Number (PIN) and the steps to follow in order to retrieve your WIPO Digital Certificate:

Dear XXXX,

Your WIPO Digital Certificate request has been approved and is ready to be picked up. To ensure that no-one else can obtain a Digital certificate that contains your personal information, you must retrieve your certificate from a secure web site using a unique Personal Identification Number (PIN). You can retrieve it by following these simple steps:

Step 1: Visit, with the same browser used to request the Digital Certificate, the link below:

Step 2: In the online form, enter your Personal Identification Number (PIN):

Your PIN is: 961443690783

Step 3: Follow the instructions on the page to retrieve your WIPO Digital Certificate.

1. Click on the link to access the secure web page of the digital ID center

World Intellectual Property Organization
WIPO Customer CA V2 Digital ID Center

**ENROLL**
Choose this option to enroll for a client Digital ID.

**PICK UP ID**
Choose this option if you enrolled for a Digital ID but did not pick it up.

**SEARCH**
Choose this option to search for a Digital ID. This function is useful for determining whether a Digital ID is valid, expired, or revoked. You may also download IDs from this option.

**RENEW**
Choose this option to renew a Digital ID which is expiring or which has already expired. You should generally start renewing your Digital ID at least one month before your Digital ID is due to expire.

**REVOKE**
Choose this option to revoke your Digital ID. Digital IDs should be revoked immediately for any suspected compromise, including lost or stolen private keys, corrupted key pairs, change in site ownership, or suspected fraud.
2. Click on PICK UP ID, Enter your PIN code and then submit

**Pick Up Digital ID**

*Important*: This step must be completed using the same computer you used to submit the enrollment form.

You need the Personal Identification Number (PIN) to complete this step. You received it in an e-mail message sent immediately after you submitted the enrollment form.

This was sent by the administrator to the e-mail address entered in the enrollment form.

Copy (Ctrl + c) the PIN number from the e-mail, paste (Ctrl + v) it into the box below, and click **SUBMIT**.

After you submit the PIN, it will take up to three minutes to generate the Digital ID. Do not interrupt the browser until there is a response.

**Enter the Personal Identification Number (PIN):**

![Submit button]

**UPLOAD YOUR DIGITAL CERTIFICATE TO YOUR EPCT USER ACCOUNT**

Once your digital certificate or EPO Smart card is installed in your browser

1. If you are not already logged in to your account, go to the ePCT Portal web page: https://pct.wipo.int/ePCT and click on ‘Obtain/upload a certificate’ (see below).
2. Enter your user account Username and password to log in to your WIPO Account

3. You will be directed to the Digital Certificates screen.
4. Click ‘Upload Certificate’ to upload your certificate if it is already installed in your internet browser. If your WIPO digital certificate/EPO Smart card is the only certificate installed in your browser, the system will automatically detect it and confirm that it was successfully uploaded. If you have more than one certificate installed, you will be prompted to select the one you want to upload.

5. Once the certificate upload is complete, the system will display the details of the digital certificate on the ‘Manage Digital Certificates’ page of your user account.

6. Click on ‘View details’ to see the details of your certificate (see screenshot below).

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1 Although the WIPO Customer certification authority policy allows each PCT user to have only one valid WIPO Customer digital certificate at any given time, users may have different types of digital certificates issued by other certification authorities also installed on their computer for purposes other than the PCT, or there could be more than one user operating from the same computer, each of them having their own digital certificate.
If the digital certificate that is installed in your ePCT user account has been revoked and you have now obtained a new digital certificate that you would like to upload to your ePCT account to replace the revoked one, please ask the PCT eServices Unit to upload your new certificate to your user account.
GRANT ACCESS ROLE TO EPCT

The access to ePCT for Offices is role based. There are four possible roles defined in ePCT that reflect Office capacities (ePCT-DO, ePCT-RO, ePCT-ISA and/or ePCT-IPEA).

An Office acting as receiving Office only will have ‘ePCT-RO’ defined as access role for all its users. The access roles are mainly assigned by the WIPO PCT eServices Unit (Offices with more than five ePCT users might be granted Administrator right by nominating two administrators to manage the access role of their Office users).

For both cases the Office main contact person should first make sure that each user account is successfully created and has a valid certificate associated with it before sending an email to epct@wipo.int to request the access rights.

For Offices with less than five (5) users: the main contact person should send the list of all users including the First name, last name, ePCT username, email address and the access role in case the Office has more than one role (e.g. PCT RO only).

For Offices with more than five (5) users: the main contact person should send the same details of at least two administrators (or more if needed)

Once the access roles are assigned to the Office users the main contact person should receive a notification from epct@wipo.int informing that the accounts are activated and ready for use.
USING EPCT

The latest version of the user guide is available under ‘SHORTCUTS FOR OFFICES’ on ePCT Portal web page: https://pct.wipo.int/LoginForms/epct.jsp
WHOM TO CONTACT

For any questions or queries about the creation of an ePCT user account, digital certificate or access role, please send a detailed e-mail to epct@wipo.int or contact the PCT eServices Help Desk by filling in the web form, via the “Contact us” link, in the top right corner of the screen.