Madrid eFiling

New office quick start guide

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1 Quick start guide
This document is intended to guide offices interested in Madrid eFiling (MeF) through the first uses of the system.

1.1 Step 1 - Authenticate
If your office is not yet integrated with the MeF SSO (Single Sign On) mechanism, you can use the MeF SSO Authenticator to connect to the Madrid eFiling service with pre-configured users.

1.1.1 Configure proxy settings
If you need to go through a proxy to reach Internet and then MeF, you can configure the corresponding settings in Proxy settings tab:

![Proxy settings screenshot]

1.1.2 Choose a user
The SSO Authenticator comes with different preconfigured users as depicted in the screenshot below. Choose the user you want to connect with:

![User selection screenshot]
1.1.3 Connect

Click on get ticket.

A connection link is generated. You can copy it to your clipboard to paste it in your browser or directly open the link in the default browser.
1.2  Step 2 – Configure office settings

1.2.1  Landing screen
The first thing to do is to configure the office settings. To do so, connect with the office Administrator (Joel Griffin)
1.2.2 Open office settings

Click on office settings to configure the MeF environment and user permissions as suited for your office.
When configuring the validation rules, please note that there are a set of rules for office e-filers and application e-filers.
1.3 Step 3 – File as an applicant

1.3.1 Applicant dashboard

Upon logging in the applicant is directed to their dashboard – essentially a list of all the applications in their various states. By clicking on the cog icon, the user is able to display a request that has already been submitted to their national office or WIPO. In additional, the WIPO service request is available once an application reaches the *WIPO Processing* stage.
1.3.2 Importing a trade mark

After clicking on New request on the landing page, the user is redirected to the trademark import page. Clicking on Import trademark launches a dialogue box into which the user can import one of the following trademarks. These have been preconfigured until the office is ready to use their web services.

An Apple one : application number=67271, registration number=468158
An Coke one : application number=695165, registration number=434155
A Nestlé one : application number=695941, registration number=152752
1.3.3 Designated contracting parties

The user completes the process much like they would an MM2 form starting with their designations.
1.3.4 Applicants

To proceed from the applicant page, the user must enter a fictitious email address and indicate their state of entitlement.
1.3.5 Representative

The user needs to complete the email and telephone fields before being allowed to proceed.
1.3.6 Languages and correspondence

The user indicates their preferred language of communication with WIPO and their national office. Additionally, a correspondence address must be provided if the user has elected not use a representative.
1.3.7 Mark

The user indicates specific attributes of the mark
1.3.8 Goods and services

The user can check the list of terms against the MGS, adjust the terms and add a limitation.
1.3.9 Limitations

1.3.10 Claimed priorities

A claimed priority can be added
1.3.11 Attachments

The user has the ability to upload any file relevant to their applicant. Additionally, they can download, complete and upload MM17 and MM18 forms if so required by their DCP.
1.3.12 Fee calculations

A fee summary and detailed breakdown
1.3.13 Method of payment

The user selects their preferred method of payment from the dropdown list.
1.3.14 Summary and validation

A PDF summary is now available to download as reference. The user sends the completed application to their national office by clicking on send.

The completed application is now showing the Submitted to Office status on the user’s dashboard.
1.4  Step 4 – Office examination

This will take an office user through the steps required to send an application to WIPO

1.4.1  Retrieving a file

To assign a file, and depending on permissions, the examiner clicks on the cog, then on *Assign to me*
1.4.2 Starting the examination process

Do get started, the examiner goes to *My tasks*, clicks on the MeF number and is then redirected to the application.

A reception date can be copied or manually entered. An office reference can be set.
1.4.3 Performing the office examination

The intent is for the office examiner to verify that all the provided information is correct. Tick boxes are available for the examiner to indicate once examination in a section is complete.

The examiner should save their work periodically and they must save it before exiting the application otherwise the work will be lost.
1.4.4 Checking validation rules

Once the examiner has signed-off on all the sections for review, they can confirm they are ready to proceed by checking the validation rules.
1.4.5 Finalizing an application

Once the examination process is complete, the examiner (provided the necessary rights are enabled) can move to the Decision screen by opening the dropdown list shown below and selecting *Decision*.

The examiner can elect to send the application to WIPO or refuse it back to the applicant.

Note – there must be a green tick against each section in order to send the application to WIPO.
1.5  Step 5 -

1.5.1  Step 6 -
Record of changes

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References

Abbreviations