

OSIM PORTAL

USERS GUIDE

Version: 1.0.0



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1. Introduction

The document is a guide with instructions for using the OSIM electronic portal. This guide is written for the users of the portal. Every person who wants to apply, or is somehow related to an IP object and wants to communicate with OSIM in an electronic way with respect to this object, will find a lot of benefits from using the portal. The guide is organized in sections and each section describes a particular part of the portal. In addition to the text instructions, there are screenshots of the pages. This approach improves the process of understating the material by readers.

OSIM electronic portal is designed to play a key role in the interaction with the external users and provides personal user area (dashboard) protected by secure authentication and authorization functionalities. In addition, the portal is a provider of Single sign-on (SSO) service so that other software components (like eFiling and eServices applications) be able to authenticate their users through this service. This way the newly submitted applications will be automatically added to the personal user's dashboard.

It is not only about the electronically filed applications. The portal users can request their older IP objects to be included in their personal user area in order to continue the communication with OSIM related to these objects in an electronic way.

All these concepts are described in the chapters 6 and 7. The following chapters 2-5 present the basic user interface structure and conventions in order to provide better understanding of the portal usage.

2. Header and footer

Every page of OSIM portal website contains header and footer elements which are positioned on the top and the bottom of the page. These elements are special and they give direct access to some important functionalities like logout, login, language change and etc.

2.1. Header

The header is always positioned on the top of the page and it stays there even after scroll operation. This behavior is popular with the name "Sticky header".



Elements:

- Logo official OSIM logo
- Account menu provides access to some pages, related to user account like "Sign in", "Create account",
 "Forgotten password", "Logout" (available only for logged in users) and more. This menu is different for the logged in users and the users which is not logged into the portal.
- Resources menu provides access to pages which contain portal resources like "Resources Library".
- Contacts menu provides access to pages which are used for sending messages to portal administrators like "Feedback".
- Language menu this menu is used for changing the portal language.



2.2. Footer

The footer is the opposite of the header. It is positioned on the bottom of the page.

	☑ office@osim.ro ∰ +4021-312.38.19	OSIM Electronic portal State Office for Inventions and Trademarks	
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Elements:

- Logo official OSIM logo
- OSIM Phone
- OSIM Address
- OSIM Official website
- OSIM Mail
- OSIM Fax

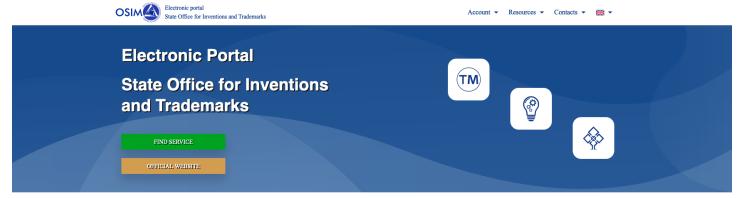
3. Home page

This is the main page of the OSIM portal and probably it is the most important page in the whole website. The home page contains navigation to the most important pages and functionalities and it is the first loaded page after accessing the website. The page is constructed by several sections:

- Animations
- Important messages
- Registers
- Services
- Restricted user area

3.1. Animations

This section contains some animations for better user interface experience. The animated elements are the portal name, few icons representing some of the IP objects supported by OSIM and a button that provides fast access to "Services" section.





3.2. Important messages

It is a section for showing important messages to the users. The messages are written by portal administrators and there are different types of them. Each message type has unique title and its own color. This section is very useful when there is really important information about the portal that should be seen by all users. Some of the message types are: "Important", "Warning", "Info" and "Alert".

In the picture below, we can see how a "Warning" message look like:



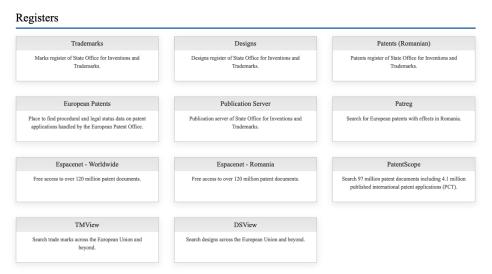
BETA TEST

This version of the portal is only for beta testing. That means, the portal is not connected to the the real databases and all of the data will be deleted when the real version of th portal is released. Beta test environment is the best place to try all of the features of the portal without affecting the real data.



3.3. Registers

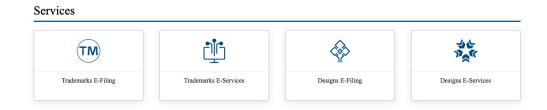
Registers section contains list with all available registers. Every element from this section redirects the user to a different place where he/she could search for the IP object and get some more detailed information about it. These registers are public and they don't need authentication.



3.4. Services

Services section is probably one of the most important part of the home page. It contains links to the elements of the EUIPO Consolidated front office containing tools for electronic filing of trademarks and designs, as well as requesting subsequent recordals to existing trademarks and designs. The usage of those services is presented in a separate useré guide.

eFiling and eServices are integrated with the portal authentication. This authentication is optional – the users can continue to file without logging in to the portal, but there are a number of benefits for the people who are logged in to the portal when they use these services. One of the benefits is that, the IP object will be added automatically to their portal account and they could see some details about the requested IP object which are typically hidden for the not authenticated users. More information about the advantages of the authenticated access to the e-services can be found in OSIM FO Authenticated access document.





3.5. Restricted user area

Restricted user area is a special place which is available only for logged in users with *verified identity*. Verified identity means that the user has explicitly verified that he/she is really the person with the name and address specified in the portal account. Verification is a legal/administrative act of providing certain documents at OSIM. The users who have not verified their identity will have very limited access permissions — e-Filing, e-Services and the respective "My eFilings" only. All other functionalities will be made available to the users with a verified identity. Identity verification flag can be set on or off only by an authorized internal OSIM user after receiving of the documents proving the identity. The external user can only view if his identity is verified or not. Once a user's identity id verified, he will no longer be able to modify his identification data in the portal account.

This section contains links to pages which are accessible only for users with special permissions. Some of the pages that are part of this section are:

- My e-filings
- My Legacy requests
- My IP objects
- Online payments

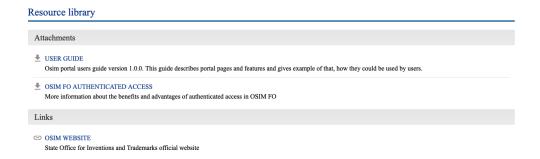




4. Resources

Resources page provides fast access to important resources that are available for the users (including this guide). These resources could be accessed by all users (authenticated or not). There are different types of resources and they are separated in few sections. Some of the types are:

- Attachments this is a file resource. On click, this file will be downloaded on user computer.
- Links links are just redirects to a different website or page.



In the header, there is a menu with name "Resources". This menu has a link with name "Resources library". The user could access the resources page by clicking on "Resources library" link.





5. Languages

OSIM portal supports 2 languages: romanian and english. There is a menu in the header that gives opportunity to change the portal language. Typically this menu contains a flag which shows the currently selected language.



6. Account

For the people who want to have access to more features and to use the whole power of the OSIM portal, creating a portal account is required. Account ownership gives a personalized experience for every user. This is the preferred way of using the portal. Creation of new account is easy, but it may require some personal information which is processed and used in compliance with General Data Protection Regulation (GDPR).

6.1. User types

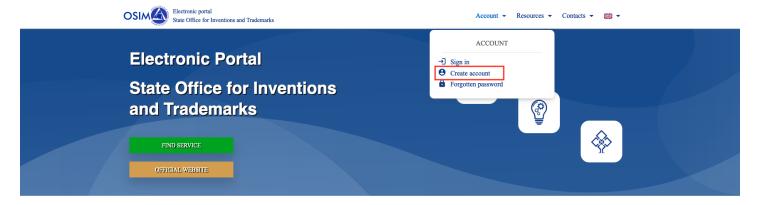
There are different user types in the OSIM portal. The main difference between them is that, they have different permissions which means they could use different features of the portal. It is true to say that, OSIM portal user types are separated on 3 main categories.

- Anonymous user this is a user that is not logged into the portal or in other words "Guest". This kind of users are super restricted and they have access only to the publicly available pages like "Registers", "Services" and "Resources"
- User without verified identity (see section 6.8 for explanation of the verified identity) this is a registered user which is logged in to the portal but his account identity is not verified yet. This kind of users has access to more pages compared with the anonymous users, but they have more restrictions compared with the users with verified identity. The main purpose of the registered users without identity verification should be to verify their identity. That will lead to better portal experience and many new features and services.
- User with verified identity (see section 6.8 for explanation of the verified identity) this kind of users have access to the most features in the portal compared with the other categories. They have access to special pages which provide functionalities like storing users IP objects in the portal account and see detailed information about them which is not publicly available, online payments, electronic correspondence and more.



6.2. Create account

The starting point of new account creation is accessing the "Create account" page. There is a link in the header, under the "Account" menu which redirects to that page. The link name is "Create account".



Clicking the link above will redirect the user to a new page which contains a registration form. The form is separated into 3 sections: Account, Contacts and Filling data.

- Account this section contains fields which are tightly coupled with the user account and there is no account
 which could exist without them. The fields from this section are:
 - Username
 - Email
 - Password
 - Repeat password
 - First name
 - Middle name (optional)
 - Last name
- Contacts it is a section for filling the contacts information of the user. That information will be used for identity verification and for automatically filling of the person details in the forms which are part of the electronic services. The fields from this section are:
 - Nationality country
 - Residence country
 - City
 - Address
 - Postal code
 - Phone number
- Filling data it is the last section of the registration form and it contains the fields which are very important for the e-filing process. The fields from this section are:
 - User role in portal this is a select with couple of options that contain "Applicant/Owner",
 "Representative", "Creator", "Inventor" and etc. The user should select the role which represents his
 role in the IP objects filling process.

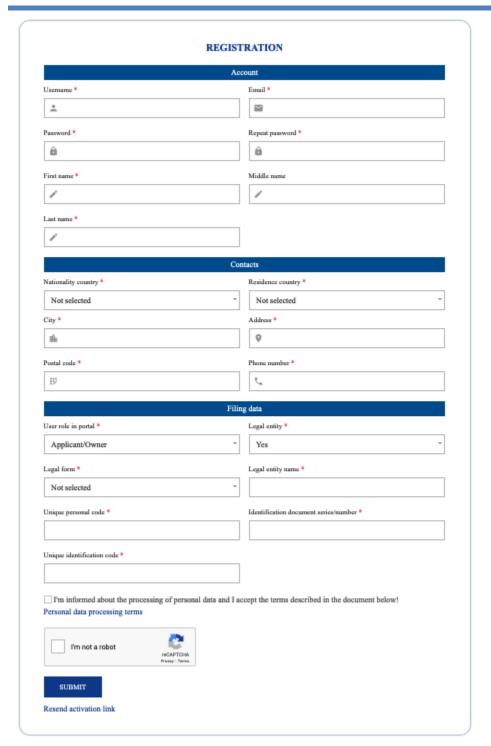


- Legal entity this is another select with just two options: yes and no. This field is connected with the previous one (User role in portal) and in some cases it is automatically filled by our system.
- Legal form it is visible only if the option "Yes" is selected in the "Legal entity" field. This field contains a
 list with the possible legal forms for legal entities.
- Legal entity name it is visible only if the option "Yes" is selected in the "Legal entity" field. This field should be filled with legal entity name.
- Unique personal code
- Identification document series/number
- Unique identification code it is visible only for legal entities

In addition to the sections above, there are 2 more fields for filing.

- Personal data processing confirmation this is a confirmation checkbox which confirms that the user understands the terms of processing the personal data in the OSIM portal. The terms could be read by clicking the link below the confirmation checkbox.
- Anti-robot captcha





6.3. Account activation

After the successful account creation (submission of the registration form), the user will receive an email with a special link for account activation.

The newly created account will stay "Inactive" until clicking on this special link.

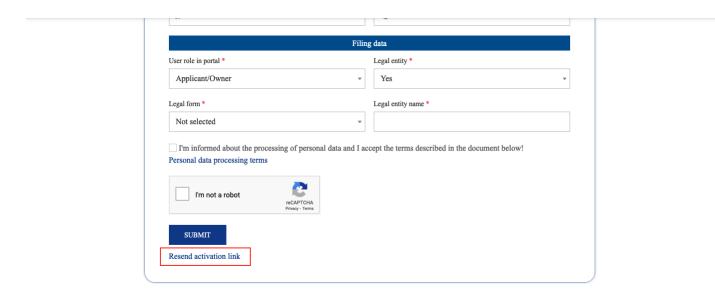


6.4. Resend activation link

There are few cases in which the user would need to get another activation link that is different from the firstly sent activation link after the registration process. These cases include:

- Expired activation link every activation link has an expiration date. Typically these links have a short lifetime which is about 15 30 minutes. After reaching the expiration date, the link will become inactive and the user should request another link.
- Email send error it is rare but it is not impossible to occur an error on sending email operation after the registration process. In this case the user will not receive an activation link and he/she will need to request another link from the resend activation link page.

Resend activation link page could be accessed by a link which is positioned on the bottom of the registration page.



Clicking on this link will open a new page with a simple form. The form contains only one field for email address and an "Anti-robot captcha".





6.5. Sign in

Portal users which own an account in the portal could "Sign in" into the portal by clicking on "Sign in" link in the header under the "Account" menu.



This link leads to a new page which contains a login form. The form is constructed by just two fields and a submit button. The fields are:

- Username
- Password

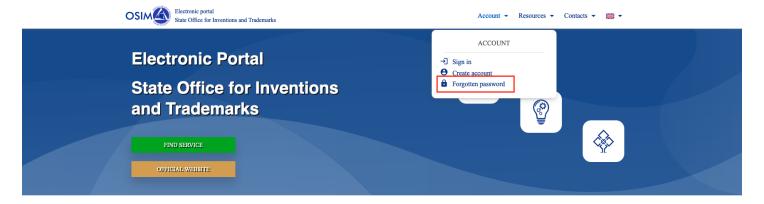
Submitting of the form successfully will redirect the user again to the portal home page, but in this case he/she will have access to a different features of the portal.





6.6. Forgotten password

Forgetting of the password is a common case and probably every user has experienced that in his life. OSIM portal has a special page from where a user could recover the password of his account. This page can be accessed from the header under the "Account" menu.



"Forgotten password" page contains a form with only one field for email address and an "Anti-robot captcha". After successfully submission of the form, the user will receive an email with instructions how to change the password of his account.



6.7. My account

My account page is available only for logged in users. This page is part of the "Account" menu for logged in users which has different structure compared to the "Account" menu for anonymous users.





For the users without identity verification, there is a message on the top of the page that reminds them to verify identity of their accounts. In addition to this message, there are a couple of sections which contain all of the information for the user account. The information in these sections is similar to the information filled in the registration form, but there are some additional fields and actions which are very important for the user.

- User portal number this is a unique number, assigned to the user account after its creation. It is very important and it will be used in the e-filing process. Simply said, this number will be the connection between the IP objects from our database and the portal user accounts.
- Identity verified it is an indication field for identity verification (see section 6.8 for explanation of the verified identity).
- Change password this functionality is part of the "Special actions" section. It provides easy way for change the account password.
- Change email address this functionality is part of the "Special actions" section. It provides easy way for change the account email address.



My account

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Identity verification

Identity of the user has not been verified yet. Filling of the fields in section 'Additional data' is required step for successful verification. Verified accounts have access to more information and services!

M	aı.	ш	u	aι	а	

User portal number Username
1234567 admin

Email Email verified Identity verified

bg_duosoft@gmail.com Yes No

First name Middle name Last name
OSIM Admin Admin

Additional data

 User role in portal
 Legal entity
 Legal entity name

 Representative
 Yes
 Example

Legal form

SRL

 Nationality country
 Residence country
 City

 Romania
 Romania
 Example

AddressPostal codePhone numberExample0000000000000

Special actions

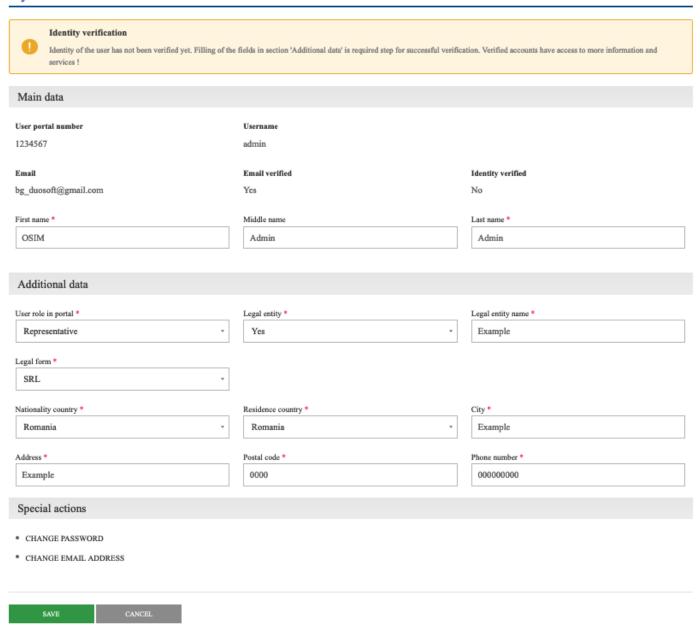
- CHANGE PASSWORD
- CHANGE EMAIL ADDRESS

EDIT

On the bottom of the page, there is a button with label "Edit". This button is for editing the data of the user which is initially provided from the registration form. Only some of the fields could be edited and this option is available only for users without verified identity. Clicking on this button will change the user interface of the "My account" page, because initially this page is in "Read only" mode.



My account



6.8. Identity verification

Identity verification is a process which could be explained as "Comparing the data, provided by the person in his portal account with the real data of the person and verifying that they are identical". This process is managed by OSIM portal administrators, but the user have to provide all of the information they need to finish the process.

Verified identity means that the user has explicitly verified that he/she is really the person with the name and address specified in the portal account. Verification is a legal/administrative act of providing certain documents at OSIM. The users who have not verified their identity will have very limited access permissions — e-Filing, e-Services and the respective "My eFilings" only. All other functionalities will be made available to the users with a verified identity. Identity verification flag can be set on or off only by an authorized internal OSIM user after receiving of the documents proving the



identity. The external user can only view if his identity is verified or not. Once a user's identity id verified, he will no longer be able to modify his identification data in the portal account.

Accounts with verified identity have access to additional features and they could take advantage of the full power of the OSIM portal.

7. Restricted user area

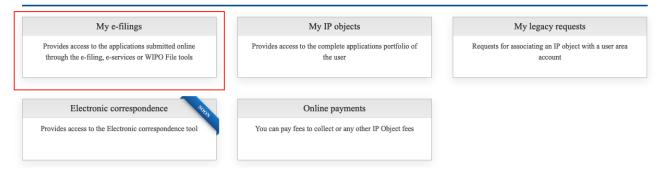
Restricted user area is a special place that contains functionalities available only for users with completed identity verification process. Elements in this section are probably the reason for most users to decide to use the OSIM portal. The content of this section will grow over time and it will include more and more fascinating functionalities. Some of the available functionalities now are "My e-filings", "My legacy requests", "My IP objects" and "Online payments".

7.1. My E-filings

The "My e-filings" module provides access to the applications submitted online through the e-filing, e-services or WIPO File tools. After the submission of the e-filing form the submitted application is added to the portal user account automatically. The scope of "My e-filings" is restricted only to electronically submitted applications.

The main page could be accessed from the section "Restricted user area" which is positioned on the home page for users with verified identity.

Restricted user area



There are three page types which are part of this functionality:

- IP object categories – this page contains a list with links. Each link refers to a different object category. After clicking on a chosen link, the user is redirected to the "IP objects list" page. The content there is filtered by the selected object type.



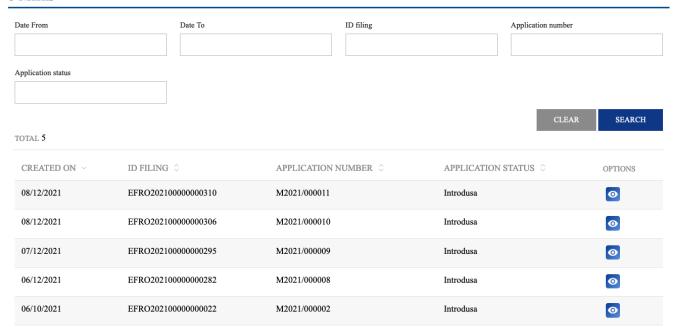
My e-Filings

To browse your apps, select one of the following categories:



- IP objects list this page contains a list with all electronically submitted requests of the user. It is constructed by two important parts: filters and table with results.
 - Filters they are positioned on the top of the page just above the list with results. The filters are used for filtering the data in the results table.
 - Results table it is a table with electronically submitted requests. Structure of the table could be different for the different object types, but it always shows some important fields and a button for open the details page of the selected object from the table.

e-Marks

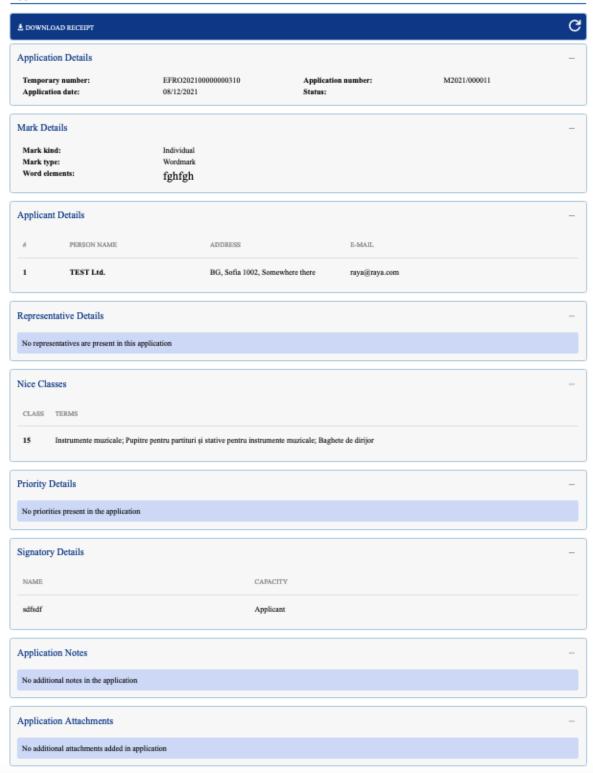




- IP object details – this page contains detailed information about the selected object. The content is different for the different object types and it is logically separated into many sections. Typically, each section is responsible for a specific type of information.



Application M2021/000011



Important: "My e-filings" functionality saves the state of submitted application in the moment of submission. This means, the information there never changes. It is just a snapshot of the initially filled data!



7.2. My IP objects

"My IP objects" module provides access to the complete applications portfolio of the user. Unlike "My e-filings" the scope of "My IP objects" is not restricted only to some kind of applications. The main page could be accessed from the section "Restricted user area" which is positioned on the home page for users with verified identity.

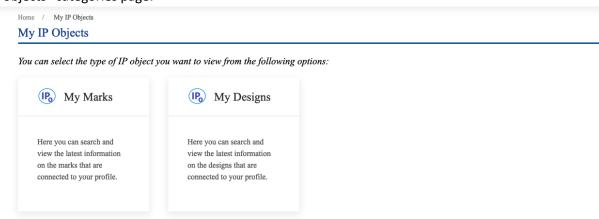
Restricted user area



The structure of this module is similar to "My e-filings" structure, but the information presented on the pages is different. Unlike "My e-filings", the data for the objects which are part of "My IP objects" module is updated every day. Every update on IP object from an administrator or OSIM expert will be reflected to details page of the object on the next day. That gives a perfect opportunity for the users to follow the IP object changes and state over time. In the perfect situation all objects which are part of the user portfolio should be added to this module.

In the next example, we can see a screenshots of the pages, part of "My IP objects" module. This example is focused on mark pages, but there are similar pages for every IP object.

"My IP objects" categories page:





"My IP objects" lists page:

Home / My IP Objects / My Marks

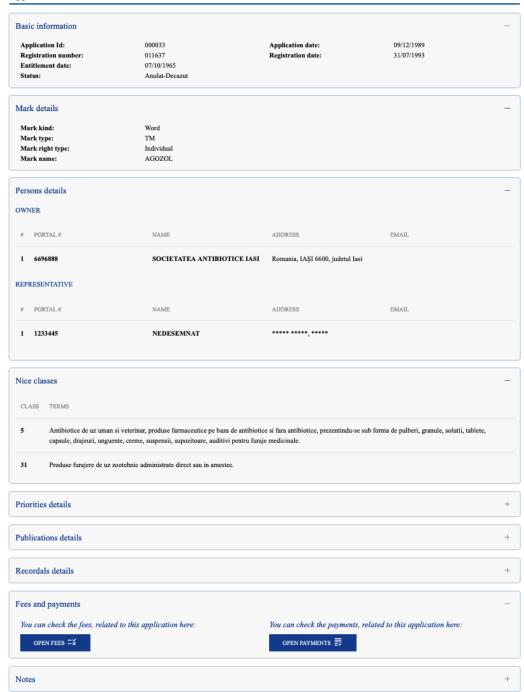
My Marks

Deposit number		Registration number		Status		*	Title	
Deposit date from		Deposit date to		Filing date fron	1		Filing date to	
Registration date from		Registration date to		Expiration date	from		Expiration date to	
TOTAL 217							CLEAR	SEARCH
DEPOSIT ONUMBER	DEPOSIT DATE	REGISTRATION NUMBER	© REGISTE DATE	RATION	○ NAME ○	STATUS	EXPIRATION DATE	OPTIONS
000033	07/10/1965	011637	31/07/199	93	AGOZOL	Anulat- Decazut		0
001758	29/12/1967	014819	12/08/199	91	AESCULAP	Anulat- Decazut		0
002614	30/09/1966	015678	09/02/199	93	FAURIAS	Anulat- Decazut		0
003932	23/06/1967	001139	12/02/199	01	CARBICOL	Renewed		o
003958	01/08/1967	001208	23/03/199	01	CAVIT 9	Renewed		0
	Page size	e 5 v (1 of 44)	<< \ 1	2 3 4	5 6 7 8	9 >	>>	



"My IP objects" details page:

Application 000033





7.3. My legacy requests

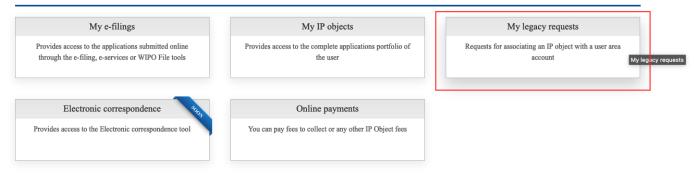
"My legacy requests" is one of the most important functionalities in the portal. It provides an easy way to connect an IP object to a user account. Each approved request will add one or more objects to the "My IP objects" module. This functionality is specially designed to handle the cases where a person, who is part of some IP objects, cannot access them in the portal and they are not part of his "My IP objects" module. The reason for these cases could be:

- The IP object is not submitted electronically and there are no way to know in which portal account should be added
- The IP object is submitted electronically but the user is not logged in to the portal
- System error in the moment of online submission

The connection between the IP object and the portal account is created using the "Portal user number" of the user. This special number is assigned to the person which is part of the IP object. In many cases one person record in the database is connected to many IP objects. As a result one approved legacy request could add many IP objects to the account of the user even if he is requested only one of these objects. It is an effect which will help for faster filling of the user application portfolio. If the user has 100 applications for example, it is very possible to add all of them to his account by creating legacy request for only some of them, not for the whole list of 100 objects.

There is a link on the home page which redirects to the "My legacy requests" page.

Restricted user area



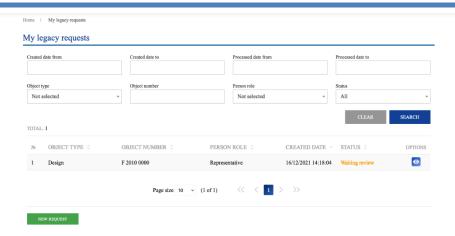
"My legacy requests" page contains three main parts:

- Filters fields for filtering the requests
- Result table list with all legacy requests, created by the user.
- Button for new legacy request creation

There is a column in the results table with name "Status" which shows the current status of the request. There are 3 possible statuses:

- Waiting review initial status, assigned after the submission of the request
- Approved status assigned to approved requests
- Rejected status assigned to rejected requests



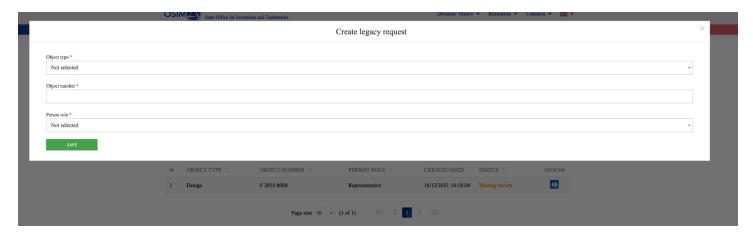


Important: Portal administrators are responsible for approving or rejecting of the legacy requests! The approved requests are processed automatically by OSIM portal on the next day. That means the IP objects which are part from the legacy requests will be added to the user "My IP objects" module not in the moment of approving but on the next day after the approving process.

"New request" button opens a modal with a form. This form has only 3 fields:

- Object type the type of the IP object (Mark, Design and etc.)
- Object number the number of the IP object
- Person role the role of the person in IP object (Owner, Representative, Inventor, Creator and etc.)

After successfully submission of the form, a new row will be added to the results table and this request will be sent to portal administrators for review.



Important: The user will receive an email after each rejection or approval of the legacy request.



7.4. Online payment

8. Feedback

Feedback functionality is used for sending a message to portal administrators. This message should be some kind of feedback about the user portal experience. Every good idea for improving the portal will be highly appreciated as well. Feedback page can be accessed from the header under "Contacts" menu.



This page contains a form for sending a message. The form fields are:

- Name the name of the author
- Email the email of the author
- Feedback the message
- Anti-robot captcha

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