



IGE | IPI

Access Guide with a user account

The IPI's Data Exchange Platform

Table of contents

1	Introduction	3
2	Access	3
a)	Login information	3
3	Functions	3
a)	Dashboard	3
1)	Shared with me	4
2)	Notifications	4
3)	Activities	4
4)	Search	4
5)	Settings	4
b)	Overview of workspace	4
1)	Folder Actions	5
2)	Sort By	5
3)	Page number	5
4)	Filter	5
5)	Navigation	5
6)	Details/Activity panel	5
c)	Main file and folder actions	5
aa)	Upload files and folders	6
bb)	File options for several files	6
cc)	File options for individual files	6
1)	Copy	7
2)	Move	7
3)	Delete	7
4)	Rename	7
5)	Share Options	7
6)	Direct Link	8
7)	Preview	8
8)	Download	8
d)	Search	8
aa)	Advanced Search	8
bb)	Indexing	9
cc)	Search within a folder	9
e)	User settings	9
aa)	Language settings	10
bb)	Change password and profile image	10

1 Introduction

For secure and simple data sharing, the Swiss Federal Institute of Intellectual Property (IPI) now offers a Data Exchange Platform (DEP). It is administered by the IPI and operates on its infrastructure. All data is transmitted and stored in encrypted form.

It is particularly important to us that the IPI's DEP is used solely for data transfer and not for long-term data storage. For this reason, files which have not been accessed in more than 60 days are automatically sent to the owner's recycle bin.

2 Access

a) Login information

Your initial login credentials were sent to you by email when you first created an account. The username is your email address. When you first log in, you will be asked to change your initial password.

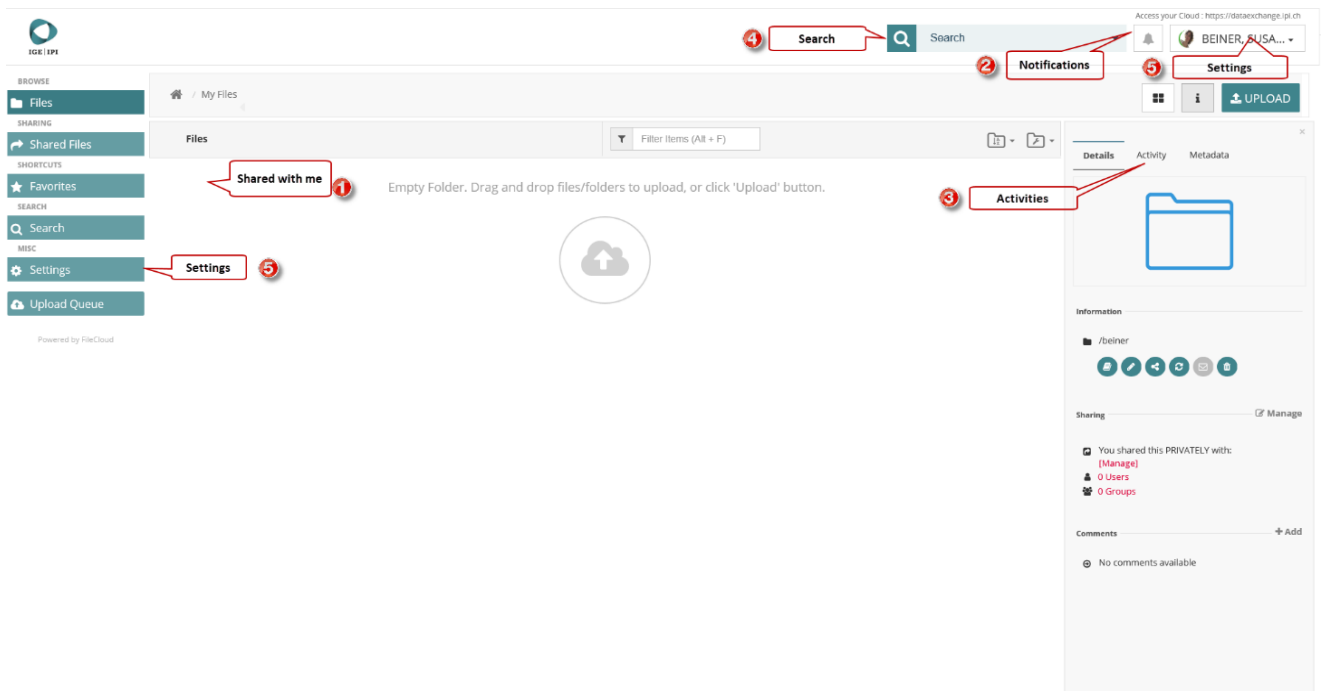
The web address of the IPI's DEP is <https://dataexchange.ipi.ch>.

By accessing the above link, you agree to the General Terms of Use of the IPI's DEP.

3 Functions

a) Dashboard

The following image shows the workspace of the IPI's DEP. The most important functions are explained on the following pages.



If you do not see a 'Shared with Me' folder, it means that no files have been shared with you yet.

1) Shared with me

Here you will find one folder for each user who has shared files/folders with you. Located in this folder are all files which have been shared with you by respective users.

2) Notifications

Here you will be notified of various occurrences such as “File failed to upload”, “File uploaded was identified as a virus and removed by the system” etc.

For ip-search customers

For actions performed in folders shared with you by administration@ip-search.swiss, notifications are automatically sent to the relevant persons at the IPI. For example, if you upload a file, you will not be required to inform your contact person as they will have already received a notification. If the IPI uploads data for you, you will always be notified by email.

3) Activities

The activity list displays the latest activities in chronological order.

4) Search

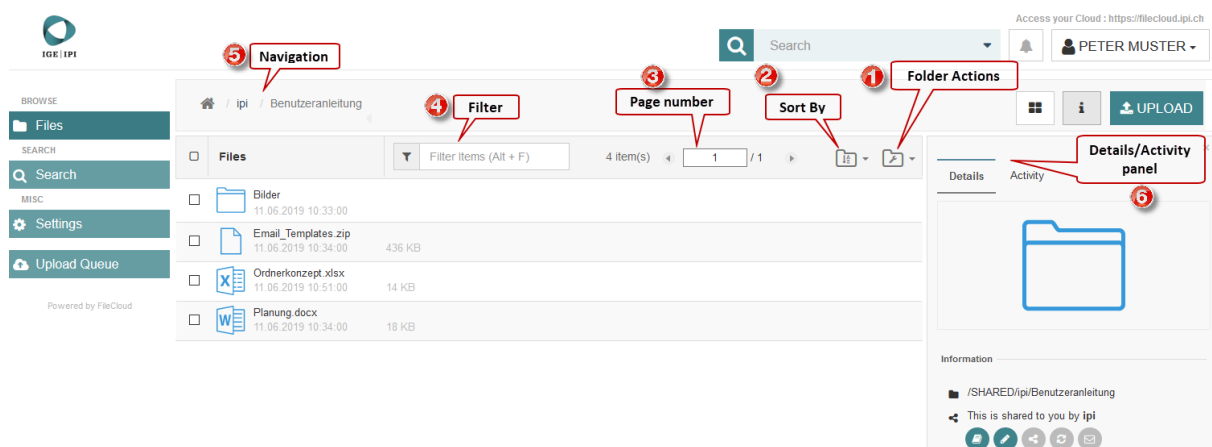
In the search box, you can input specific terms to search for files, either globally or using selected paths. Instructions for this function can be found under the heading ‘Search’.

5) Settings

The user settings enable you, for example, to change the language of the interface or to change your password. You can find a description of all setting options under ‘User settings’.

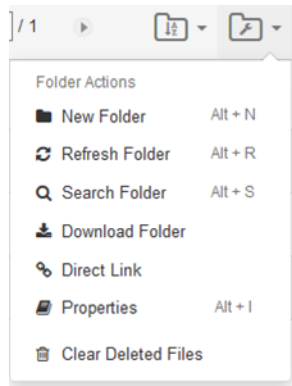
b) Overview of workspace

The following image shows the workspace of the IPI’s DEP. The most important functions are explained on the following pages.



1) Folder Actions

It is important to ensure that no file is selected as certain folder actions will be otherwise unavailable (greyed out).



New Folder: creates a subfolder in the current folder

Refresh Folder: updates the view

Search Folder: searches within the selected folder

Download Folder: download the selected folder as a ZIP file

Direct Link: copies a link/URL from the selected folder (e.g. for browser bookmarks)

Properties: folder properties such as folder size, file size, size of previous versions, size of incomplete downloads, file/folder count

Clear deleted files: removes deleted file

2) Sort By

You can sort the contents of your workspace based on various properties (name, date, size). You can also choose the number of items displayed per page.

3) Page number

If the current path contains more entries than shown on the workspace, you can click here to switch between pages.

4) Filter

Filters items in the current view. This is a recursive search, meaning that items of subfolders are not displayed.

5) Navigation

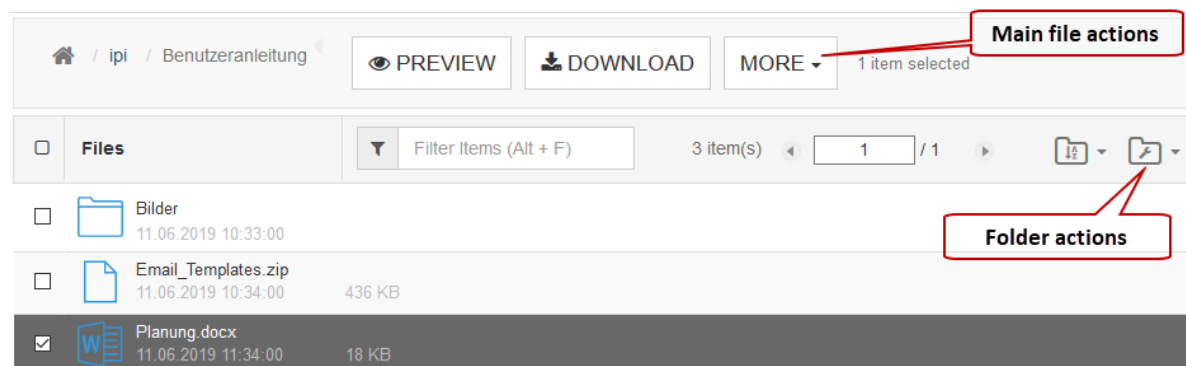
Displays the current path and allows users to navigate to higher-level folders.

6) Details/Activity panel

Details view: displays more information about the current folder or item.

Activity view: displays the latest activities in chronological order.

c) Main file and folder actions



To select several files, hold Ctrl + click or use the check box.

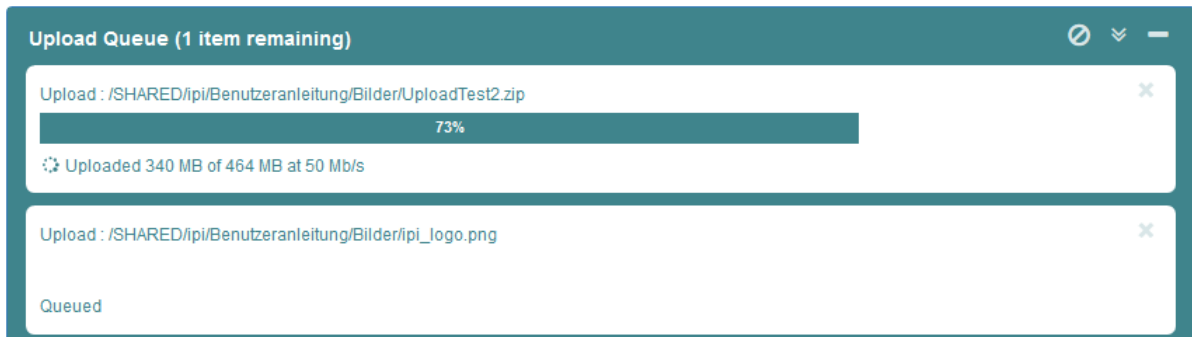
To view the actions available, right click or click 'MORE'.

aa) Upload files and folders

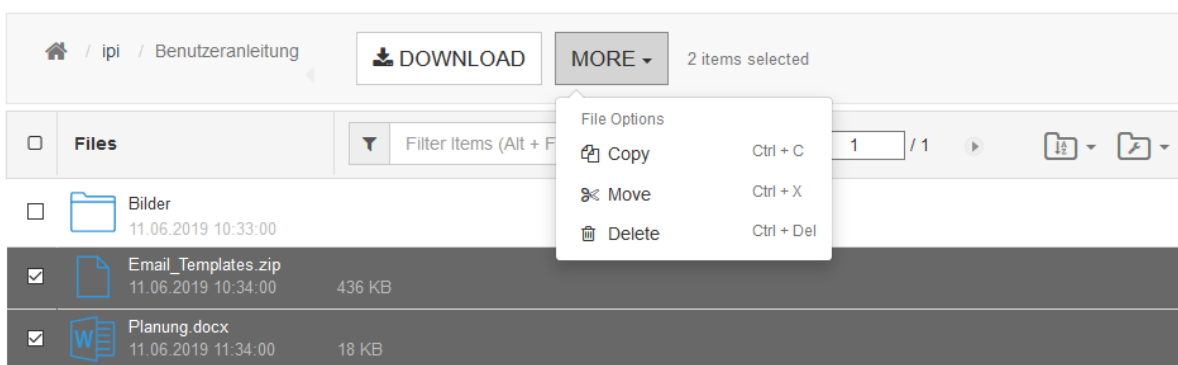
The easiest way to upload one or several files is to drag and drop the files into the browser window. This is supported by all common browsers.

Currently, folders can only be uploaded using Google Chrome and Mozilla Firefox.

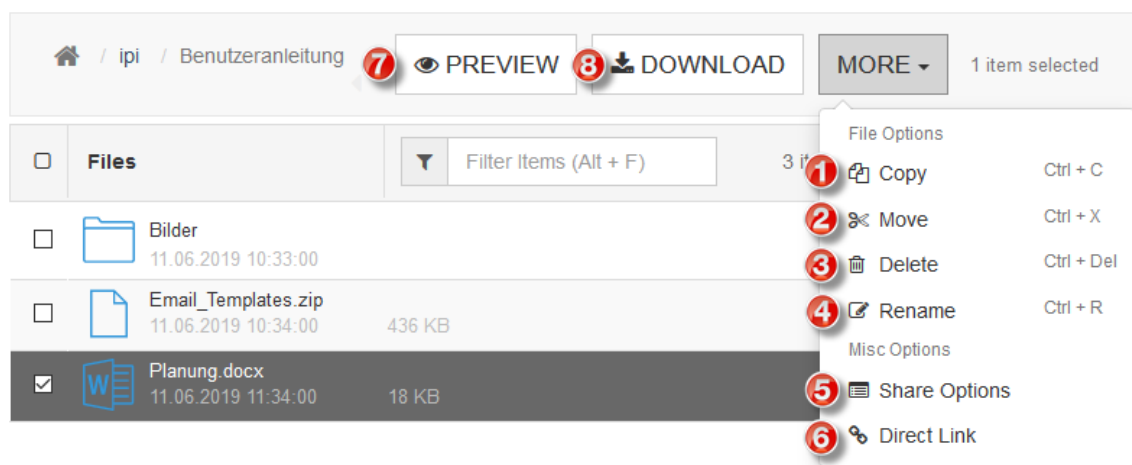
You can view the progress of your upload on the progress bar.



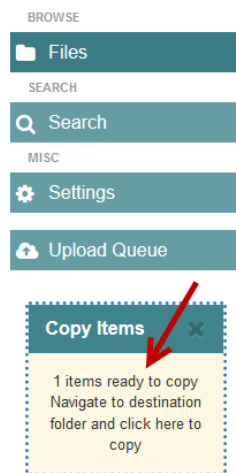
bb) File options for several files



cc) File options for individual files



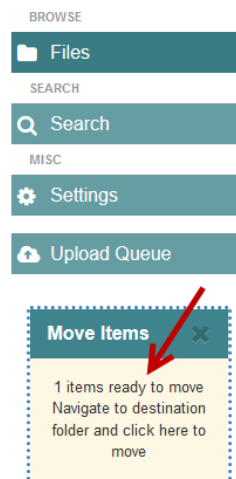
1) Copy



You can select one or a number of files to be copied.

1. Choose the files to be copied
2. Click on 'Copy'
3. The files will be copied to the clipboard
4. Navigate to the destination folder
5. Click on the box that appeared when the files were copied

2) Move



You can select one or a number of files to be moved.

1. Select the files to be moved
2. Click on 'Move'
3. The files will be moved to the clipboard
4. Navigate to the destination folder
5. Click on the box that appeared when the files were moved to the clipboard

3) Delete

You can select one or a number of files to be deleted. You will be asked to confirm the deletion in advance. Deleted files are moved by default to the user's recycle bin. After 30 days, they are permanently deleted by the system.

4) Rename

You can use this function to rename files/folders. Please do not rename files and folders created by the IPI as it could lead to allocation issues.

5) Share Options

You have the option of leaving a shared folder, i.e. you will then no longer be able to access the folder. Automatic email notifications have been deactivated for our clients at global level because we wish to avoid sending you a notification for every single action we perform. We will specifically inform you by email if content has been made available for you to download.

6) Direct Link

Copy a link/URL for the selected file (e.g. for browser bookmarks).

7) Preview

It is possible to preview a file in the browser, without having to download it. This function is supported for the following file types:

- PDF: pdf
- Text files: txt
- Word: doc, docx
- PowerPoint: ppt, pptx
- Excel: xls, xlsx

Other file types must be downloaded in order to display the content.

8) Download

Download the selected folder or file as a ZIP archive

d) Search

This function enables you to search all shared files using a key word from the file name. If you select one of the search results, the other file options become available to you.

aa) Advanced Search

The Advanced Search can be opened by clicking on the arrow to the right of the search box.

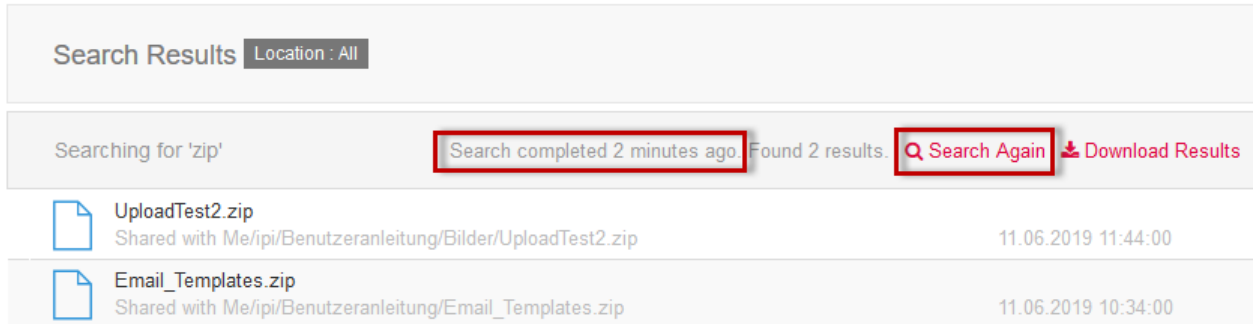
The screenshot shows the 'Advanced Search' dialog box. At the top, there is a search input field containing the text 'zip'. To the right of this field is a small downward-pointing arrow, which is highlighted with a red square. Below the search field, the dialog is titled 'Advanced Search' and contains several sections of options:

- Term:** A text input field containing 'zip'.
- Scope:** Radio buttons for 'All', 'Name Only' (selected), 'Content Only', and 'Metadata'.
- Search Type:** Radio buttons for 'All files/folders' (selected), 'Files Only', and 'Folders Only'.
- Path Selection:** Radio buttons for 'All' (selected) and 'Selected'.
- Selected Path:** A dropdown menu currently showing 'Search all locations' with a folder icon.
- Date:** Two input fields labeled 'Modified From' and 'Modified To'.
- Results Count:** Radio buttons for 'Limit 50' (selected) and 'All'.

At the bottom of the dialog, there are two buttons: 'CLEAR' and 'SEARCH'.

bb) Indexing

The search indexes findings for key words to display results more quickly. If you search for a word that you have searched for at least once before, the result of the last search will be presented with an indication of when this search was completed.



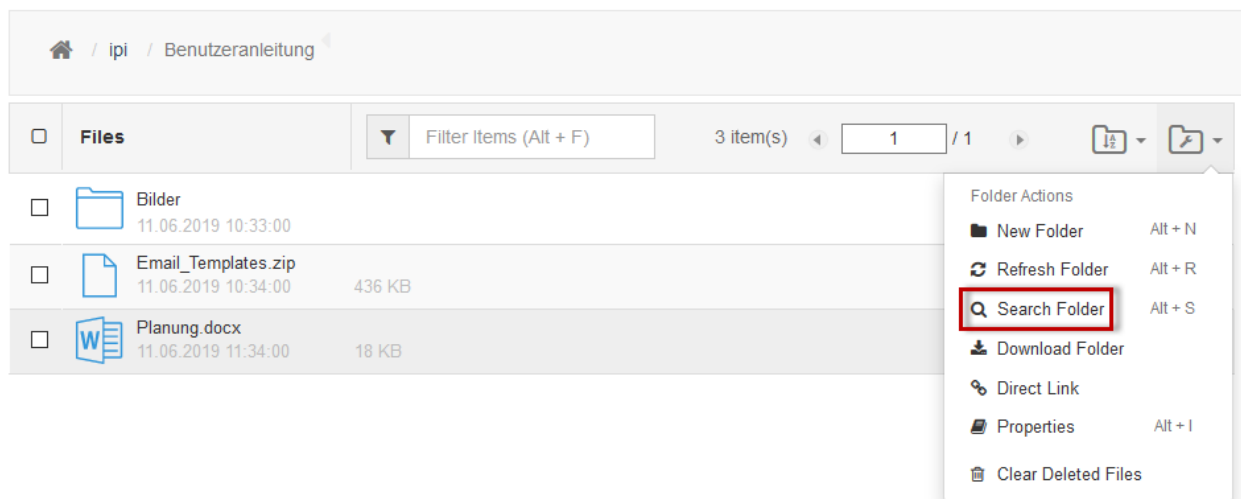
The screenshot shows a search results interface. At the top, it says "Search Results" with a dropdown menu set to "Location: All". Below this, it indicates "Searching for 'zip'" and "Search completed 2 minutes ago. Found 2 results." There are two buttons: "Search Again" and "Download Results". The results list two files:

File Name	Location	Date and Time
UploadTest2.zip	Shared with Me/ipi/Benutzeranleitung/Bilder/UploadTest2.zip	11.06.2019 11:44:00
Email_Templates.zip	Shared with Me/ipi/Benutzeranleitung/Email_Templates.zip	11.06.2019 10:34:00

If the file you searched for does not appear, you can start again by clicking on 'Search Again' to search for results which have not been indexed.

cc) Search within a folder

If you would like to search within a particular folder, you can do so in the Advanced Search (Path Type) or in Folder Actions:



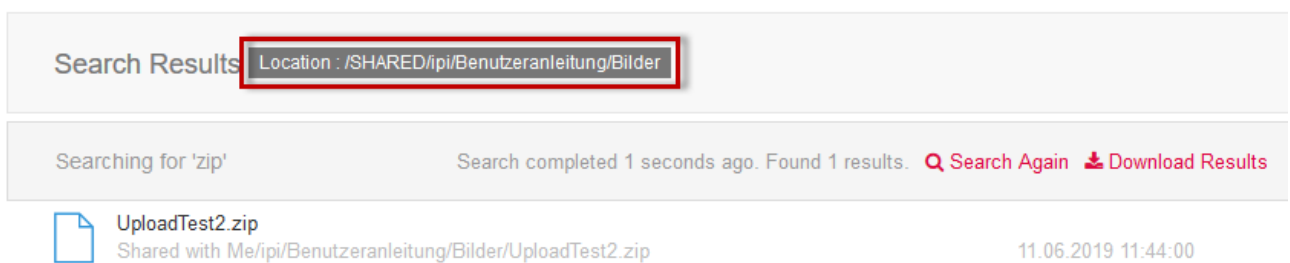
The screenshot shows a file explorer window with the path "/ ipi / Benutzeranleitung". The file list includes:

Item	Name	Date and Time	Size
Folder	Bilder	11.06.2019 10:33:00	
File	Email_Templates.zip	11.06.2019 10:34:00	436 KB
File	Planung.docx	11.06.2019 11:34:00	18 KB

A context menu is open over the "Bilder" folder, showing "Folder Actions" with the following options:

- New Folder (Alt + N)
- Refresh Folder (Alt + R)
- Search Folder (Alt + S)**
- Download Folder
- Direct Link
- Properties (Alt + I)
- Clear Deleted Files

The search results show which folder was searched:



The screenshot shows a search results interface. At the top, it says "Search Results" with a dropdown menu set to "Location: /SHARED/ipi/Benutzeranleitung/Bilder". Below this, it indicates "Searching for 'zip'" and "Search completed 1 seconds ago. Found 1 results." There are two buttons: "Search Again" and "Download Results". The results list one file:

File Name	Location	Date and Time
UploadTest2.zip	Shared with Me/ipi/Benutzeranleitung/Bilder/UploadTest2.zip	11.06.2019 11:44:00

If the file you searched for does not appear, you can start again by clicking on 'Search Again' to search for results which have not been indexed.

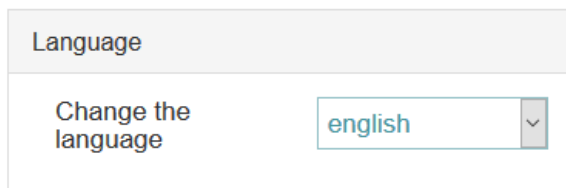
e) User settings

You can access the user settings at any time from the top right corner of the screen or from the Menu on the left side.



aa) Language settings

Located underneath the account information are the user-specific language settings for the web interface.



bb) Change password and profile image

Under the 'Account' tab in Settings, you can add a profile image or change your password.

