

In order to access the Case Management System (CMS) and to sign documents, users need to equip themselves with both a client authentication (hard device: smart card or USB stick) and a qualified electronic signature certificates (hard device or software).



To be able to create your account, you must already have in your possession your Smart Card or USB Key containing your authentication certificate

1. Create one new account

- a) Insert your smart card or usb stick containing your authentication certificate
- b) Access the CMS login page

- For Production : <https://cms.unified-patent-court.org/login>

- c) On this login page, select the action “Create user”
- d) Select your authentication certificate
- e) Enter your PIN code

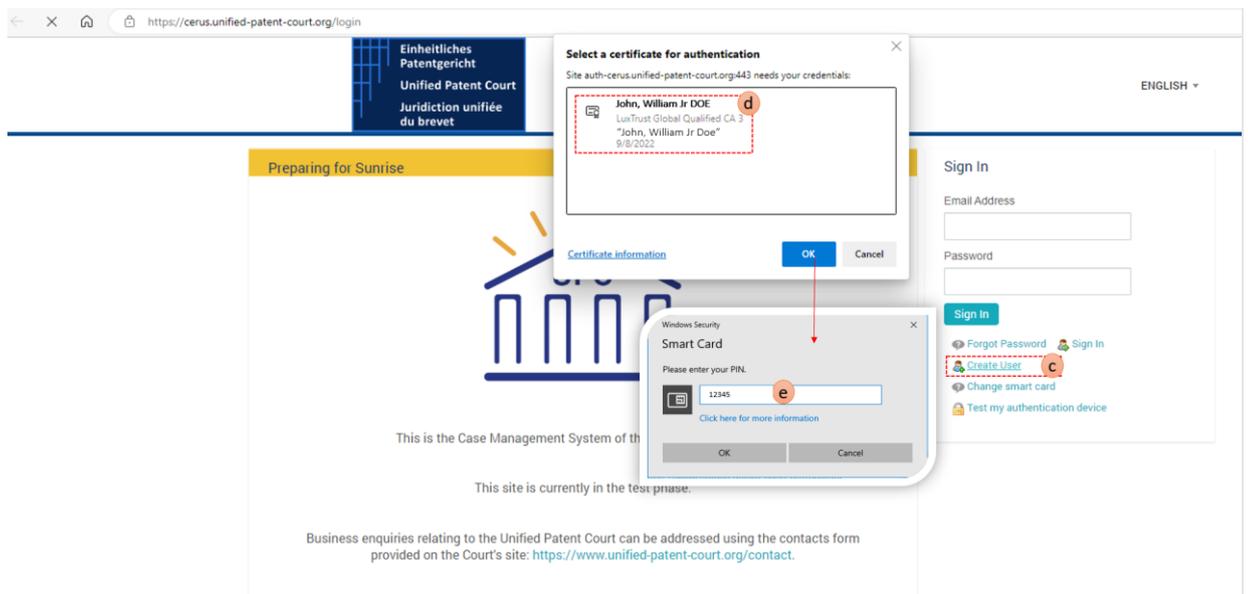


Figure 1- CMS's login page

Once the PIN is entered you will be redirected to the **Sign Up** page.

- a) On this **Sign Up** you need to enter your details:
- First Name
 - Last Name
 - An email for CMS account



Please note that the entered email will be used as an ID in the system (you cannot use an email already associated to a user in the CMS).

- b) Check the box “I have read the Site Policy”
c) Click on “sign up” Button

The screenshot shows the 'Sign Up' page of the UPC Case Management System. The page header includes the logo of the Unified Patent Court and the text 'UPC Case Management System Sign In ENGLISH'. The main content area contains a 'Sign Up' form with the following fields: 'First Name *' (John), 'Last Name *' (DOE), and 'Email for CMS account *' (John.doe@myemail.com). Below the form, there is a 'Site Policy' section with a link to 'Site Policies' and a checkbox labeled 'I have read the Site Policy' which is checked. A 'SIGN UP' button is located at the bottom right of the form. Red circles 'a', 'b', and 'c' are overlaid on the form to indicate the steps described in the text: 'a' points to the input fields, 'b' points to the checkbox, and 'c' points to the SIGN UP button.

Figure 2 - Insert your details in the Sign-Up page

Once these details have been “completed”, you will be redirected to the “Sign up Case Personal details” page, where you will have to enter some additional details

Sign up Case Personal details

No. AUTHL16827/2022

Sign up

Confirm Personal Data **TO DO**

Registry Number: AUTHL16827/2022

Proceeding Type: Sign up

Documents: 0

Language: English

Case Data

Contact e-mail: John.doe@myemail.com

First Name: John

Last Name: Doe

Figure 3 - Confirm your data

- a) Click on “To do”
- b) Please enter:
 - First Name
 - Last Name
 - And a recovery code



Please record and store this recovery code. This one will be asked in case you need to change / replace your smart card / usb stick containing your authentication certificate.

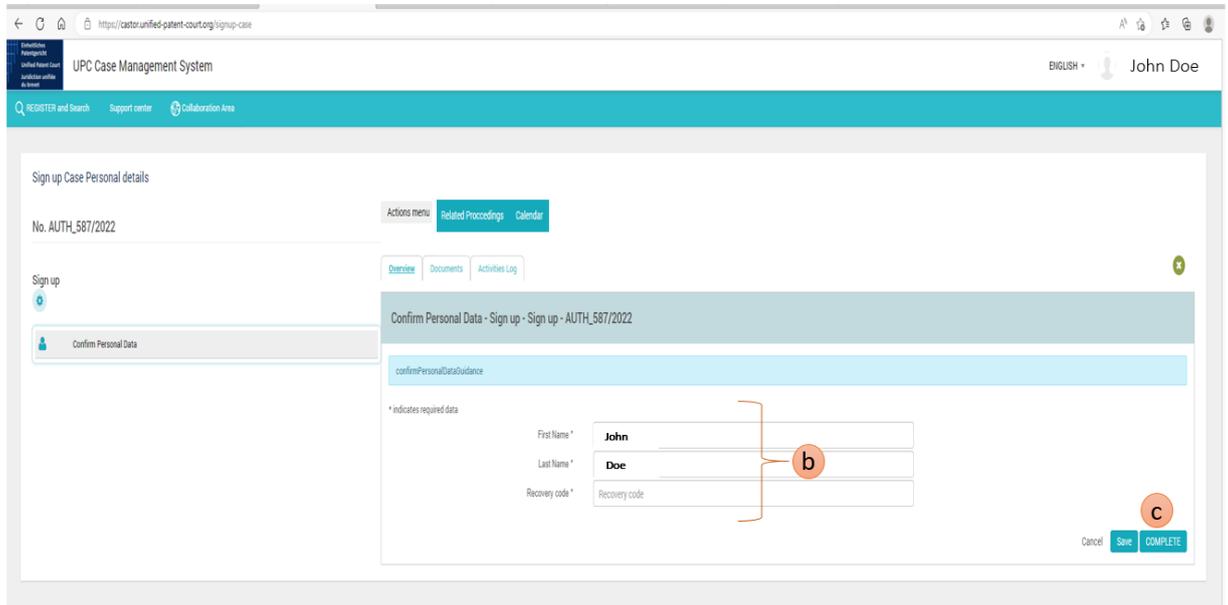


Figure 4- CMS's User Account creation - Enter user details

- The system generates and sends one mail containing a Secret Code
You will receive one email containing a Secret Code. This code will be used in the next activation step



Figure 5 - Sample of email containing the Secret Code

Note: The “point” after the code is not part of the code (it is a punctuation).

3. The user, enters this Secret Code
 - a) Enter your **SECRET** Code (*received from mail*) or ask for a new secret code
 - b) Click on button “COMPLETE”

The screenshot shows the 'Enter Secret Code' page in the UPC Case Management System. The page title is 'Enter Secret Code - Sign up - Sign up - AUTH_587/2022'. Below the title, there is a note: '* indicates required data'. The main instruction reads: 'You will receive an email at your CMS email account giving you a secret access code. You must enter this code and press "Complete". If you request a new code select "Request a new secret code" and press "Complete". Enter the new code as above.' Below this, it says 'The required secret code was sent to your CMS account email address'. There are two dropdown menus: 'Request a new secret code' (set to 'No') and 'Secret Code' (containing a long alphanumeric string). A red dashed box highlights the 'Secret Code' field, with a red circle 'a' next to it. At the bottom right, there are three buttons: 'Cancel', 'Save', and 'COMPLETE'. A red circle 'b' is next to the 'COMPLETE' button.

Figure 6 - Entering your Secret Code



If for any reason you did not get the email containing your secret code, you can ask for a new one by clicking on the “Request a new secret code” and set the value to “Yes”.

4. The system generates an acknowledgement document that the user needs to sign. This “Acceptance Document” must be downloaded, signed by you and uploaded to the system to complete the activation procedure.
 - 4.1 The “Acceptance Document” must be downloaded
 - a. Click on the document within the “Documents” tab folder
 - b. From the document details pane, click on the document name
 - c. The document is displayed within the CMS’s built-in PDF viewer

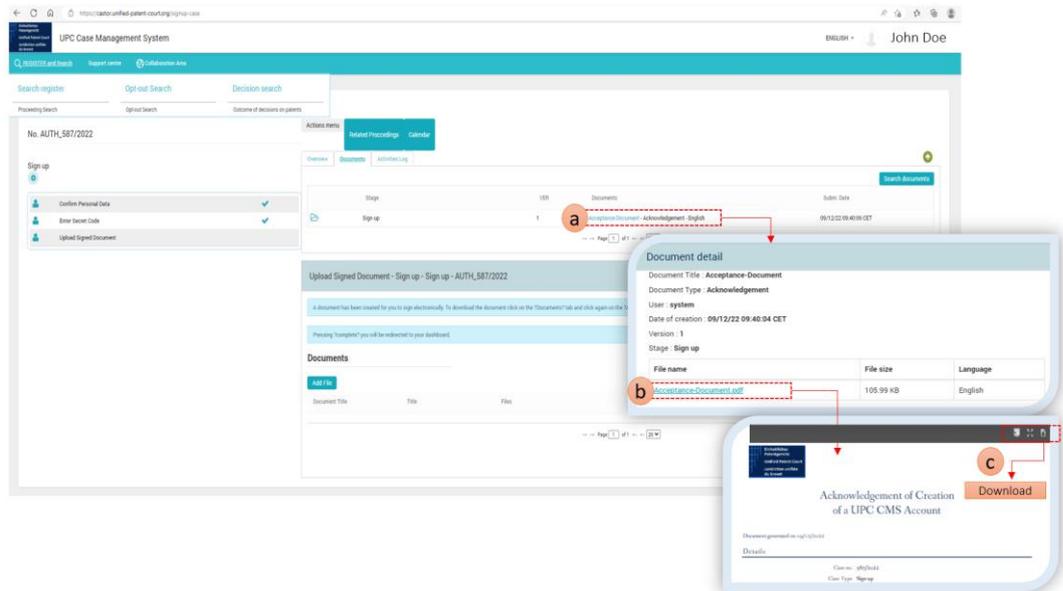


Figure 7 - Download the Acceptance Document

4.2 Sign this downloaded document

Once the file has been downloaded, open it with a PDF Viewer (allowing to add a signature to the PDF). We show, here after as example, the usage with Adobe Acrobat Reader.

Within Acrobat,

- Select the additional tool bar (with actions).
- Select the “Certificates” icon

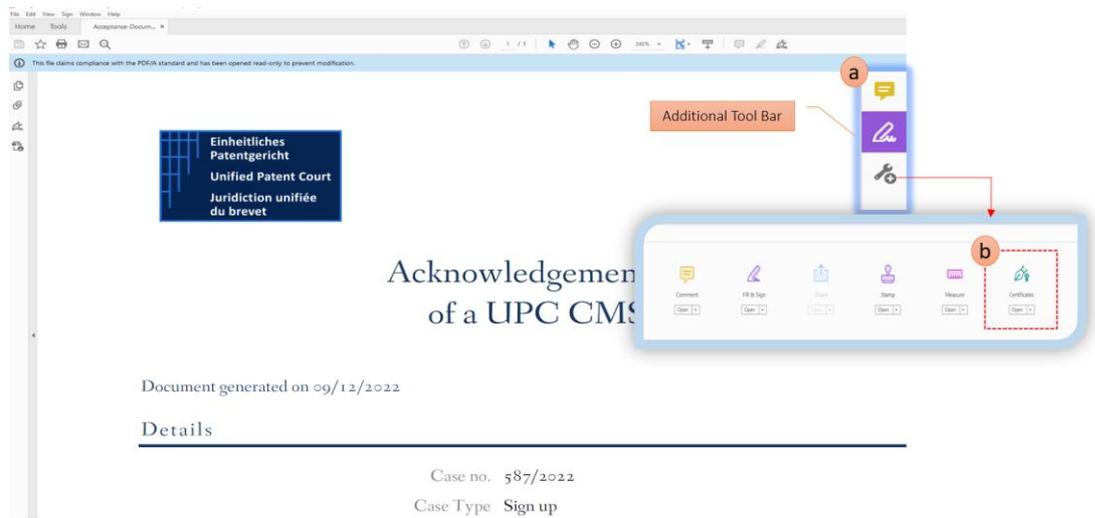


Figure 8 - Open the document with Adobe Acrobat for signature

Acrobat Reader displays additional “options”.

- Select the option “Digitally Sign”
- Select the authentication certificate. This certificate has as “intended usage” : **Non-Repudiation**

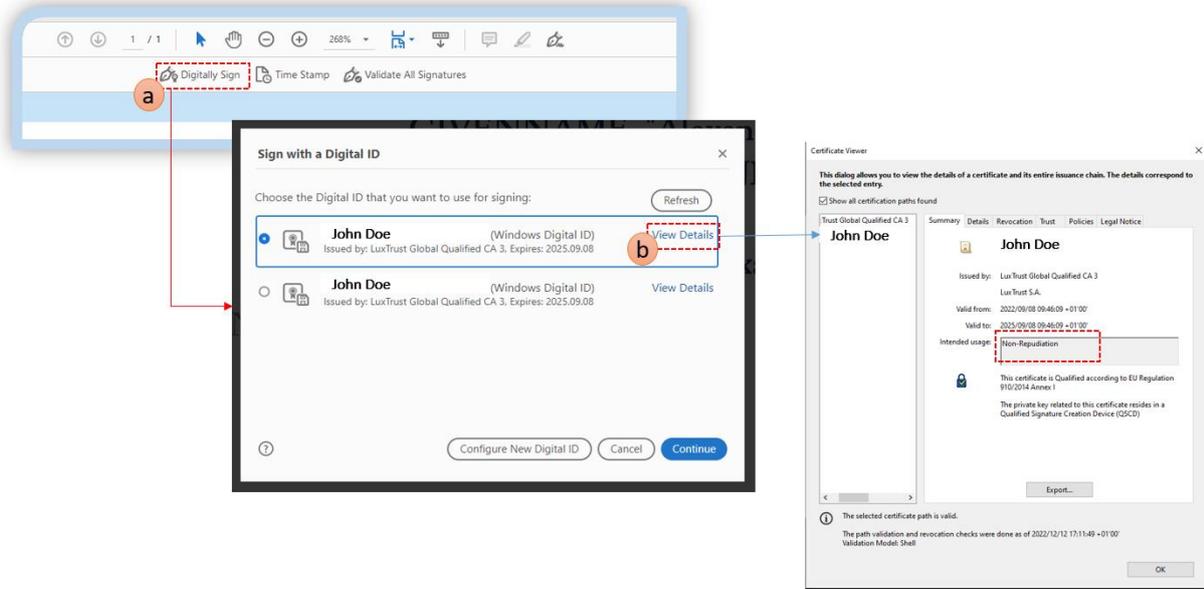


Figure 9- Certificate Selection for signature

- Select the area and appearance of you signature.
- Enter your PIN Code when the system prompt such dialog box

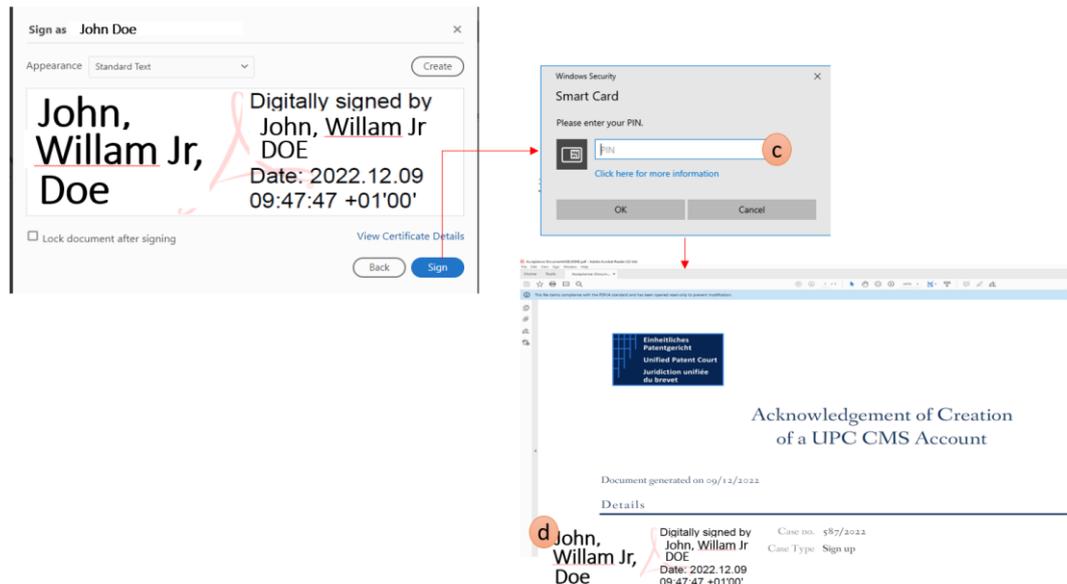


Figure 10 - Signature of the document

4.3 Upload this signed document

Once the document has been signed, you need to upload this document to the CMS in order to complete the activation of your account.

- Click on “Add file” within the Documents tab folder
- Select the file (signed Acceptance Document)
- Click on “Complete” button

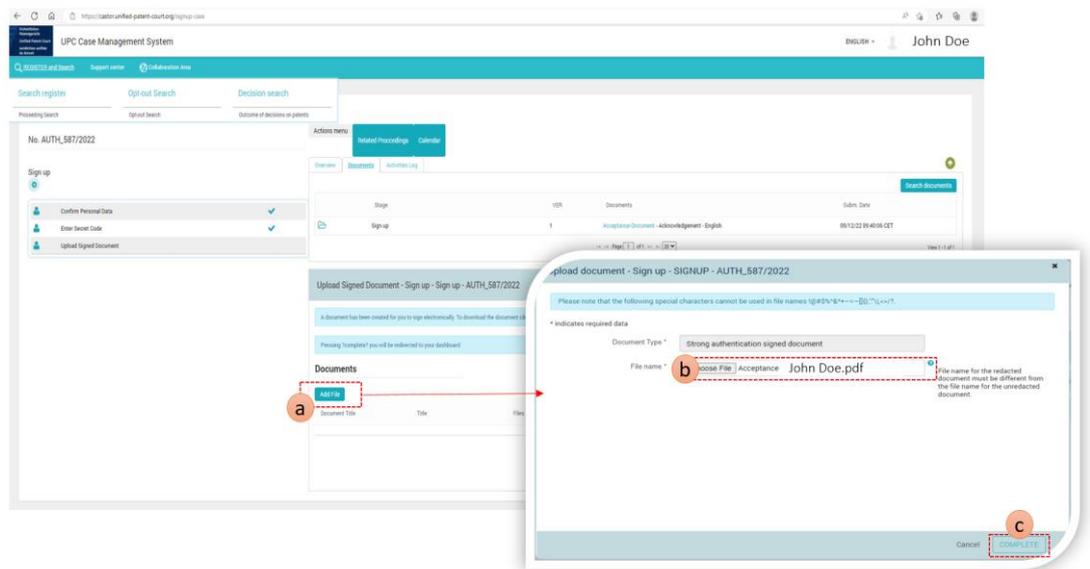


Figure 11 - Upload the Sign Document to the CMS

The system checks this submitted signed document. If everything is fine, you will be prompted with a message, displayed in green, saying that the activation of your account is validated and you will be redirected to the dashboard page. In case of problem(s), the system will prompt you with an error message (displayed in red).

If you manage to reach this point, your account is now validated and you can start to work with the CMS.

In case of issue, please check our corporate website in the FAQ section or contact our support team via the contact form.

4.4 Details concerning this Acceptance Document

This document will be signed by UPC during its generation, using a certificate Qualified Seal. This will guarantee the user that this acceptance document has really been issued by UPC for the user.

In the Signature panel Information, you can find information about the UPC's signature (displayed here after under item "Rev.1" and once you have applied your signature, your's is displayed under item "Rev.2" as shown on the following screenshot.

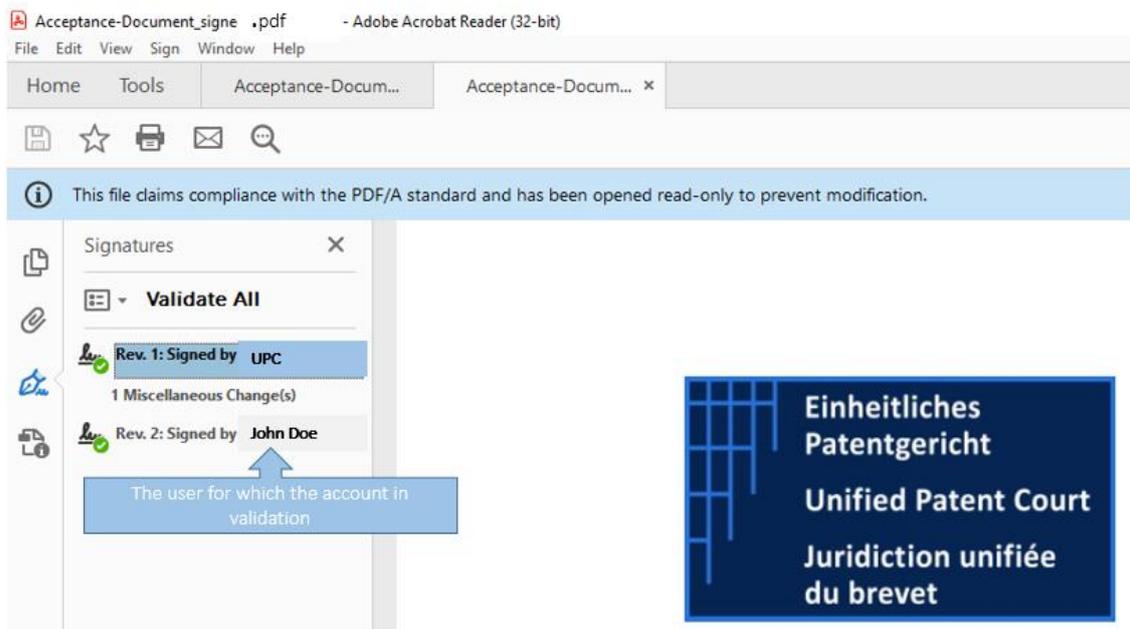


Figure 12 - Acrobat's information panel about the signatures

You can display additional details regarding the certificate (QSeal) used by Unified Patent Court to certify this document,

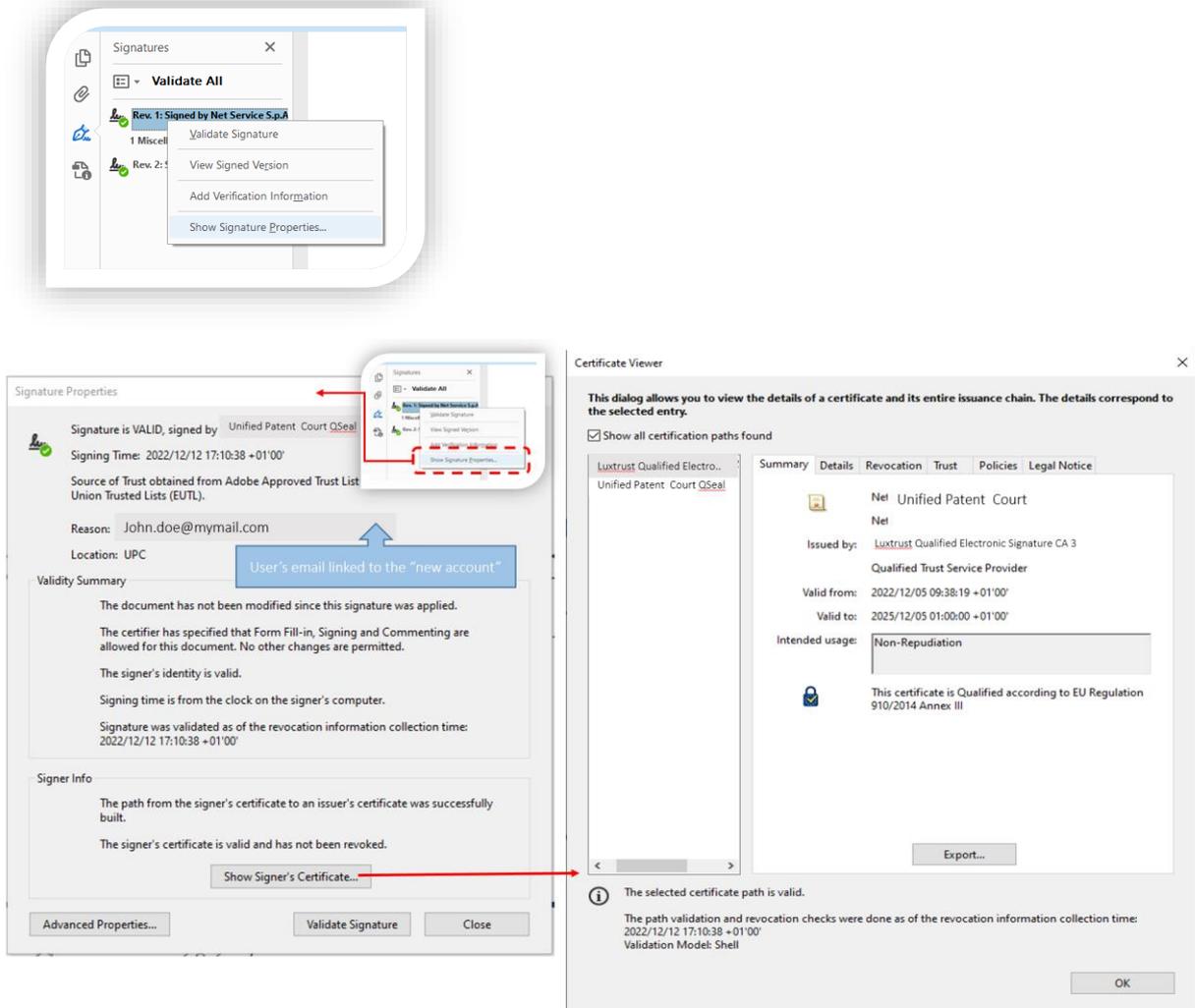


Figure 13 - UPC's E-Seal Certificate Information