CPC training
(for users external to the EPO)

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Outline

Roles and responsibilities

What kind of training will be provided and how

When will it become available
European Patent Academy

Mission

Promoting and supporting education and training in patent-related Intellectual Property (IP)

Approach

- ensure overall co-ordination of the external education and training activities of the European Patent Office
- building on partnerships with other organisations/institutions
- complement existing training initiatives according to the principles of complementarity and subsidiarity
Future CPC users to receive training

US:
Colleagues at USPTO
(plus external contractor performing pre-classification work)

EPC contracting states:
• Patent searchers using ECLA
• Classifiers

National offices of the EPC contracting states
for own applications
for the reclassification purposes

(NB: Colleagues at EPO trained by the EPO internal training department, L&D)
Joint development of CPC training for USPTO

Preparation is key

Differing starting points:

- IPC/ECLA practice at EPO
- USPC practice at USPTO

Since October 2011, the Academy takes part in the Bilateral Team on Quality Assurance and Training that holds regular sessions (almost weekly).

One of the goals: jointly develop training concept, syllabus, and implementation
Instructional design - requirements

Training on CPC must:

- cover different needs at different points in time
- fit into users' expectations and learning habits
- offer sufficient flexibility to integrate upcoming new topics
- ensure achievement of learning objectives
- be provided to large no. of people, must therefore take into account a cascading approach (e.g. train the trainer)
Instructional design - solutions

Training on CPC for USPTO will be:

- Distance Learning (e-learning accompanied by Virtual Classroom sessions)
- modularised
  (4 blocks comprising 3-6 modules each)
- provided by means of specific courseware design (measuring learning progress)
- following a "train the trainers" approach - distinguishing between course design for future trainers and users
Didactic approach

In this case, each of the main parts corresponds to a didactical function/stage, i.e. a specific intention according to which specific training activities (no matter whether on-line or on-site) is been carried out:

- **Preparation**
  - Generate Awareness/readiness

- **Contextualisation**
  - (Connection to participants’ experience)

- **Acquisition**
  - Assimilation and cross-linking of concepts, use of cognitive tools

- **Content**
  - (generic, but referred to in contextualisation part)

- **Consolidation**
  - Self-assessment and recapitulation

- **Practical exercises**
  - (referring to initial contextualisation)
Content organisation

Typically, content is organised in a pyramidal structure.

**in terms of depth**

*Key concepts*  
(One phrase, one figure, one screen)

*Second-level information*  
(complementary information chunks available on demand)

*Deepening*  
(extensive contents, specifically dedicated to one theme)
Syllabus

• **CPC structure**: hierarchy; syntax; annotations; rules of classification

• **Complete classification**: disclosure and classification; invention information vs. additional information; product vs. process; function vs. application; combination of subject matter of different nature

• **Practical matters and tools**: IPC compliance and additional information; the right class?

• **Tools for consultation**

• **Introduction to CPC Definitions**
CPC Training pilot (2012)

- Training pilot together with USPTO is currently being prepared:
  ~ 100 external contractors (pre-classification of A documents)
  and ~ 150 future trainers (the latter will also be trained on the use of the material developed)

- Hosted on the Academy's Learning Management System

- USPTO trainers will gain experience and can fine-tune the material for the final roll-out at their office

- Field specific training on CPC Definitions will complement the general introductory training

- Training material for later re-use
Training products

In the course of the training pilot, the following will be tested:

- e-learning modules
- reference material

This material may be used and adapted for further practical training of as well as awareness creation among European users after CPC launch.

The Academy is planning to organise (in 2013):

- a comprehensive distance learning course on CPC for searchers/classifiers
- dedicated workshops for classifiers (including CPC Definitions)
- e-learning modules explaining the impact of CPC on EPO tools, e.g. EPOQUE.Net, Espacenet, GPI
### Training products time-line

<table>
<thead>
<tr>
<th>Product</th>
<th>Production</th>
<th>Roll-out</th>
<th>Target group</th>
</tr>
</thead>
<tbody>
<tr>
<td>training pilot US</td>
<td>Q1/Q2 2012</td>
<td>Q3 2012</td>
<td>USPTO and contractors</td>
</tr>
<tr>
<td>Field specific training USPTO</td>
<td>Q2-Q3 2012</td>
<td>Q4 2012</td>
<td>USPTO and contractors</td>
</tr>
<tr>
<td>e-learning module CPC</td>
<td>Q3 2012</td>
<td>Q1 2013</td>
<td>General public</td>
</tr>
<tr>
<td>DL course on CPC</td>
<td>Q4 2012 - Q1 2013</td>
<td>Q2 2013</td>
<td>EPC contracting states (searchers and classifiers)</td>
</tr>
<tr>
<td>e-learning modules on tools, e.g. EPOQUE.Net, Espacenet, GPI</td>
<td>Q4 2012 - Q2 2013</td>
<td>Q1 - Q3 2013</td>
<td>General public users of the tools</td>
</tr>
<tr>
<td>Workshop(s) for classifiers (including CPC Definitions)</td>
<td>Q2 -Q3 2013</td>
<td>Q4 2013</td>
<td>EPC contracting states (NPOs)</td>
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</tbody>
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Thank you!!

For questions revert to:

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