UNITED STATES
PATENT AND TRADEMARK OFFICE

WebEx Interviews

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WebEx Interview Overview

- Video Conferencing Benefits
- Video Conference Policy and Procedures Refresher
- WebEx Interview Demo
- Additional Resources

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Video Conferencing Through WebEx

- Enables face-to-face communication
- Available to all examiners and attorneys/applicant
- Applicant can hold a video conference in their own office, or, when on a USPTO campus, from a public interview room
- Allows sharing of documents as appropriate

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WebEx Interviews

- Face-to-face video conference through WebEx is a great alternative to in-person interviews for hotelers
- Should be offered to all applicants when an in-person interview is not available or possible

WebEx Interviews

All video conference interviews must be hosted by the USPTO. Examiners are not permitted to join a video conference originating outside the USPTO. Examiners will establish the WebEx session for an interview and send invitations to all other parties.

WebEx Interviews

- Obtain written/oral authorization from applicant prior to sending Outlook/WebEx meeting invite (see MPEP § 502.03 and 713.01)

How WebEx Works

- WebEx is a web-based service, so you can use it from any computer (Windows, Mac, Linux, or Solaris).
- No software needs to be downloaded to participate in an online WebEx meeting. You need a computer and a high-speed Internet connection is recommended.
- A telephone will be used to join the audio component of the meeting while a video camera may be used as part of the visual component.

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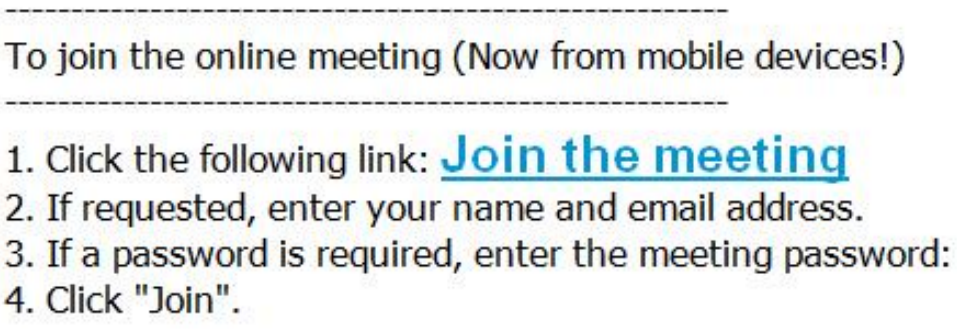
WebEx Demo

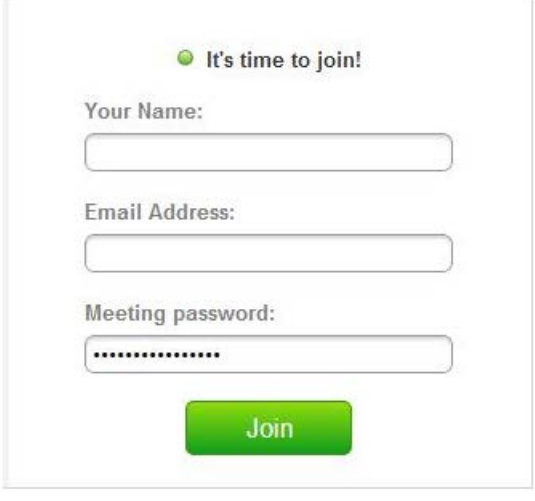
Step 1: Click Emailed Link

Open the email containing the WebEx online meeting invitation and click on the link to join the visual component of the online meeting.



Step 2: Sign In

Enter 'Your name' and 'Email address' in the Meeting Center window and click 'Join'.

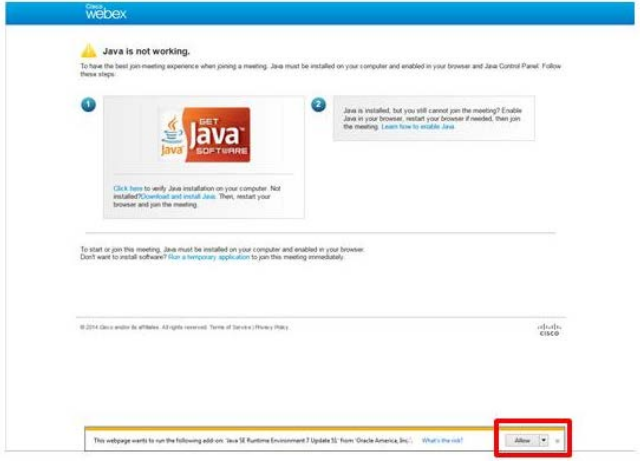


Step 3: Allow plug-in

If an Add-On or Plug-In appears and you have administrative privileges to install the application, select 'Allow' or 'Download' to install and launch the WebEx Application. (Depending on which browser you are using, the dialog box may appear different.)

Internet Explorer:

Google Chrome:



Step 4: Java Admin Option

If Administrative privileges are not available, users can ‘Use Java’ on Internet Explorer or ‘Run a temporary application’ on Google Chrome and Mozilla Firefox.

Step 5: Call In

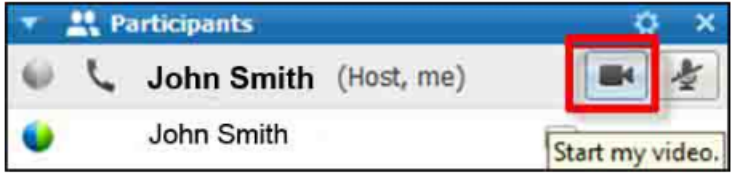
To join the audio component of the online meeting, enter your 10 digit phone number in the Audio Conference Window and click on ‘Call Me’. WebEx will call the entered phone number.

Step 6: Answer Phone

Your phone will ring. Answer it and when prompted, press '1' on the phone dial pad to enter the audio portion of the conference.

Step 7: Start Video

To join the visual component of the online meeting, when the WebEx Meeting starts, click the ‘Start my video’ button next to your name in the participants list.

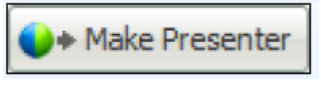


Conducting WebEx Interview

- ## Conducting the Video Conference – Presenter

Designating a presenter

The first person to arrive is made the presenter, but the Host can assign a Participant the Presenter's role.

1. On the Participants panel, select a name to designate as the Presenter.
2. Click the Make Presenter button. 

3. To reclaim the Presenter's role, select your own name and click the Make Presenter button.

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WebEx Interview – (Cont'd)

- ## Conducting the Video Conference - Sharing

Sharing Files and Applications

- Share a File to present information that will not be edited.
- Share an Application to demonstrate software, edit a document, or train attendees on using an application.

Click to expand the Share drop-down menu from the main Quick Start tab, or the Share drop-down menu; see Figures 16 and 17.

- Note: Desktop sharing is not available for
- external meetings (interviews)

- Note: File must be open for you to share it.

- Note: Participant must be Presenter to share

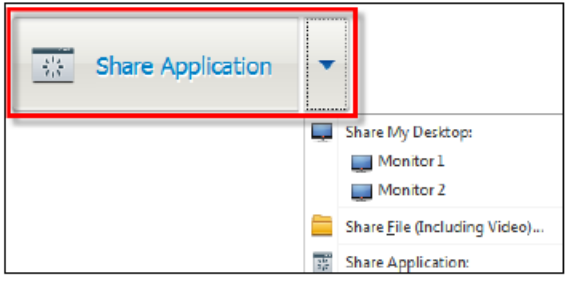


Figure 16. Share Application Menu

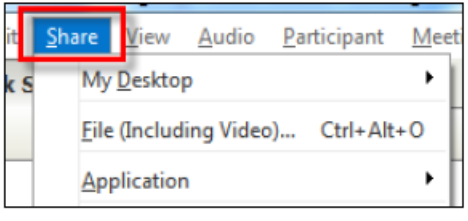
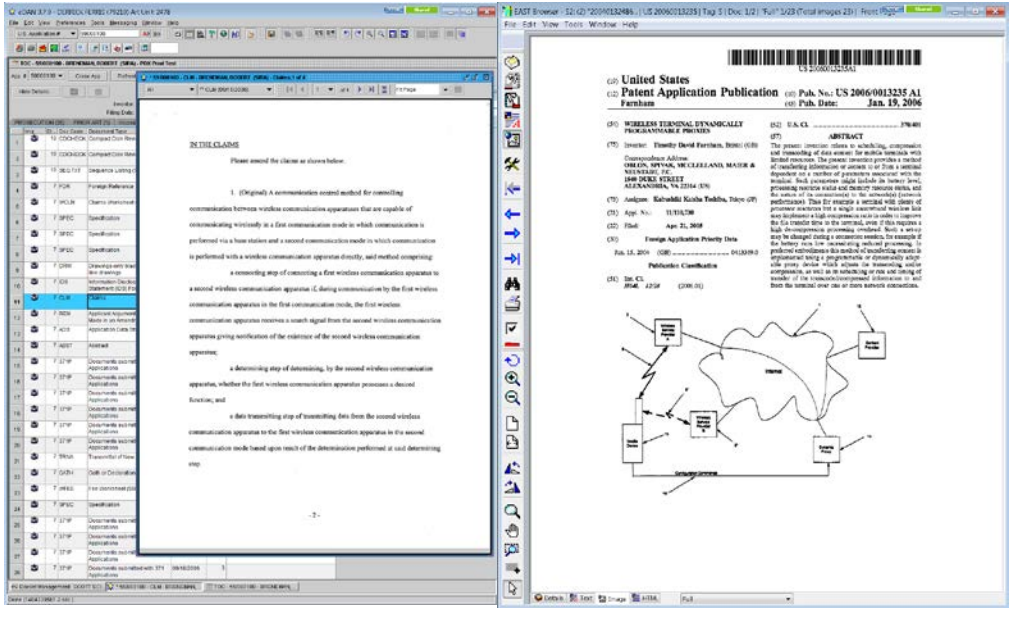


Figure 17. Share Menu

WebEx Interview – (Cont'd)

- Sharing Examples

During an interview, an Examiner can share their DAV application to e.g., view claims, or EAST application to e.g., discuss a cited reference.



WebEx Interview – (Cont'd)

- Conducting the Video Conference - Sharing

When viewing a document in full-screen mode, or when sharing an application or desktop, use the WebEx Sharing toolbar to access annotation tools. Hover the cursor over the sharing note at top center of the monitor to bring up the Control Panel; see Figure 18.

The Annotate button will display annotation tools that can be used in conjunction with shared materials to call out specific elements; see Figure 19.

Figure 18. WebEx Sharing Toolbar

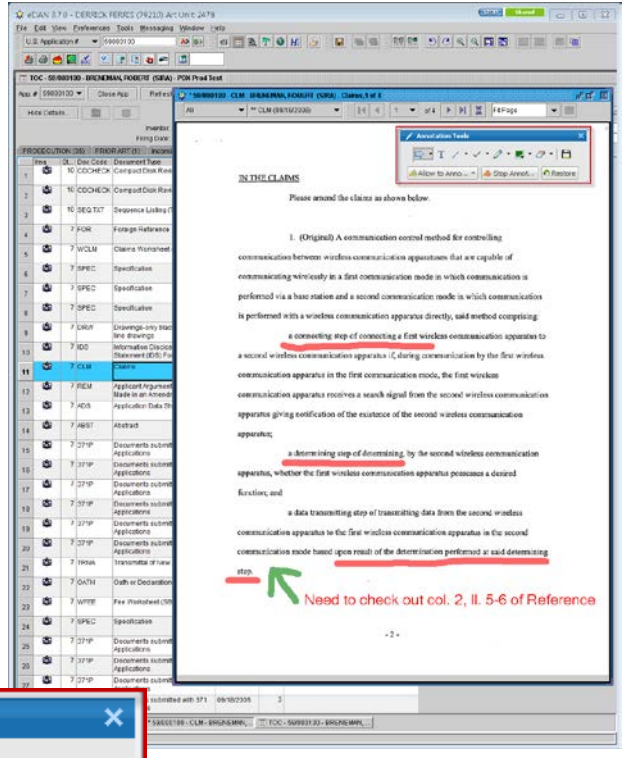
Figure 19. Annotation Tools

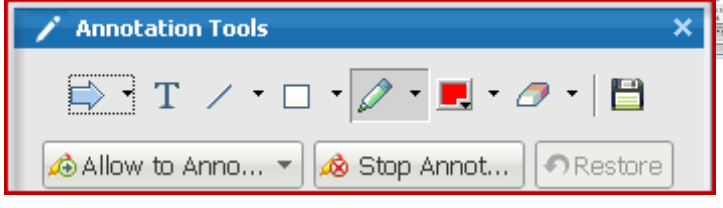
WebEx Interview – (Cont'd)

- Annotate Example

During an interview, an Examiner can annotate a shared document, e.g., markup a copy of the claims.

An Examiner can also use the pointer tool to e.g., show applicant where a claimed feature is not positively recited or point to where a claimed feature is taught in a reference.



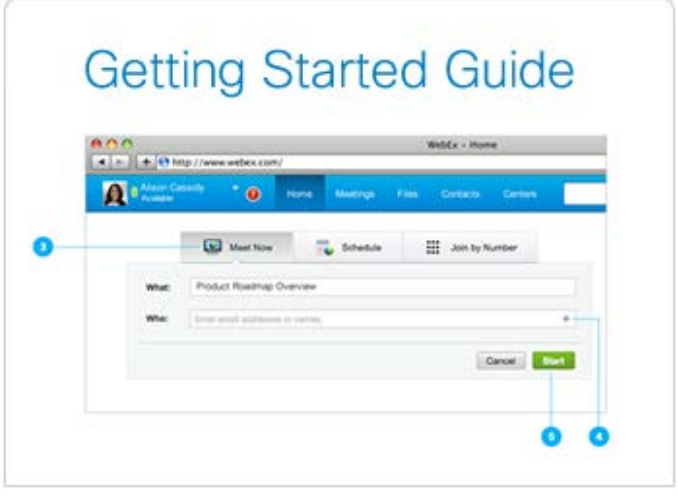


WebEx Resources

- **WebEx.com Website**

Provides many short "how to" instructional videos

http://www.webex.com/how-to/index.html



Examples:

- Use Sharing
- Share a File or Video
- Share a Whiteboard
- Share a Web Browser
- Use Annotation Tools
- Assignee Attendee Privileges
- Transfer My Host Role
- End a Meeting
- Advanced WebEx Tips

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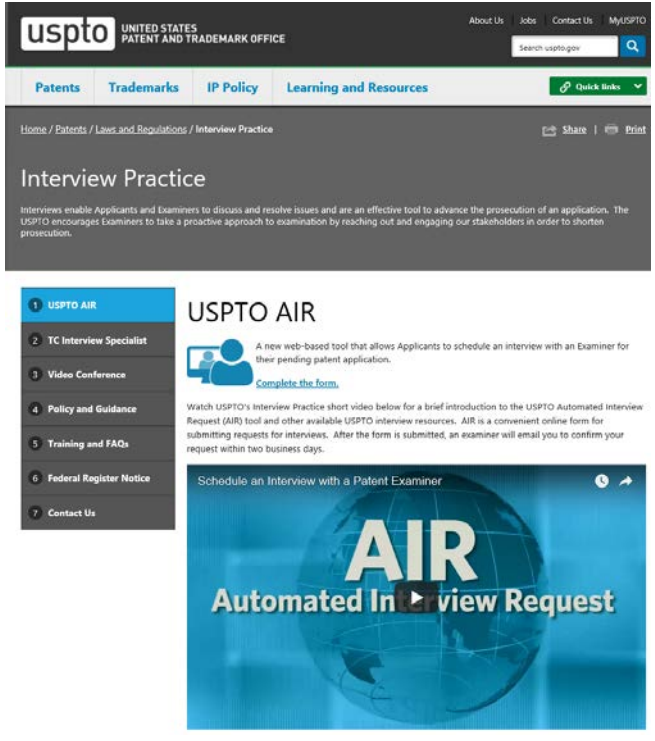
External Interview Practice Website

http://www.uspto.gov/interviewpractice

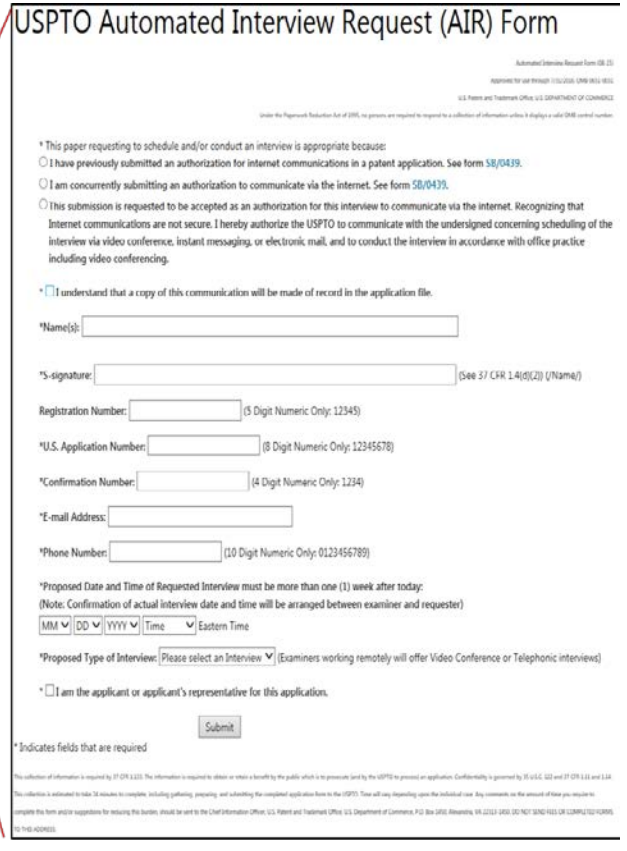
Great interview practice resource. Includes interview FAQs and Best Practices.

Instructions for participating in a WebEx interview can also be found on the web page.



AIR Form

- New web-based tool
- Permits Applicants to schedule an interview with an examiner



New Form Paragraph

Starting January 2017 – New paragraph in Office Actions:

Examiner interviews are available via telephone, in-person, and video conferencing using a USPTO supplied web-based collaboration tool. To schedule an interview, applicant is encouraged to use the USPTO Automated Interview Request (AIR) at http://www.uspto.gov/interviewpractice.

Video Conferencing Interviews

- Internet Usage Policy has been updated to permit oral authorization for video conferencing interviews
- MPEP § 502.03 now allows a oral request to authorize a video conferencing interview, instead of submitting a written request.
- USPTO also has a new form PTO/SB/439 which makes it easier to give internet authorization and is available via EFS-WEB.
- One-on-one WebEx training with an interview specialist is available by request to ExaminerInterviewPractice@uspto.gov

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TC Interview Specialists

- Subject matter expert on interview practice and policy in each Technology Center
- To assist Examiners and Applicants in facilitating effective interviews
- The list of TC Specialists can be found here:
  http://www.uspto.gov/patent/laws-and-regulations/interview-practice/interview-specialist

Public Interview Rooms

- When an Applicant is visiting a USPTO campus, Video conference rooms are available to facilitate meetings with remote examiners.
- Video conferencing is also available anytime anywhere from your own office.
- There is a Public Interview Room at every USPTO campus.

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