



**IGE | IPI**

# **Access guide (with a user account)**

## The IPI's Data Exchange Platform

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# 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 IPI infrastructure. All data to be shared 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 edited for 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. Your email address is also your user name. When you first log in, you will be asked to change your initial password.

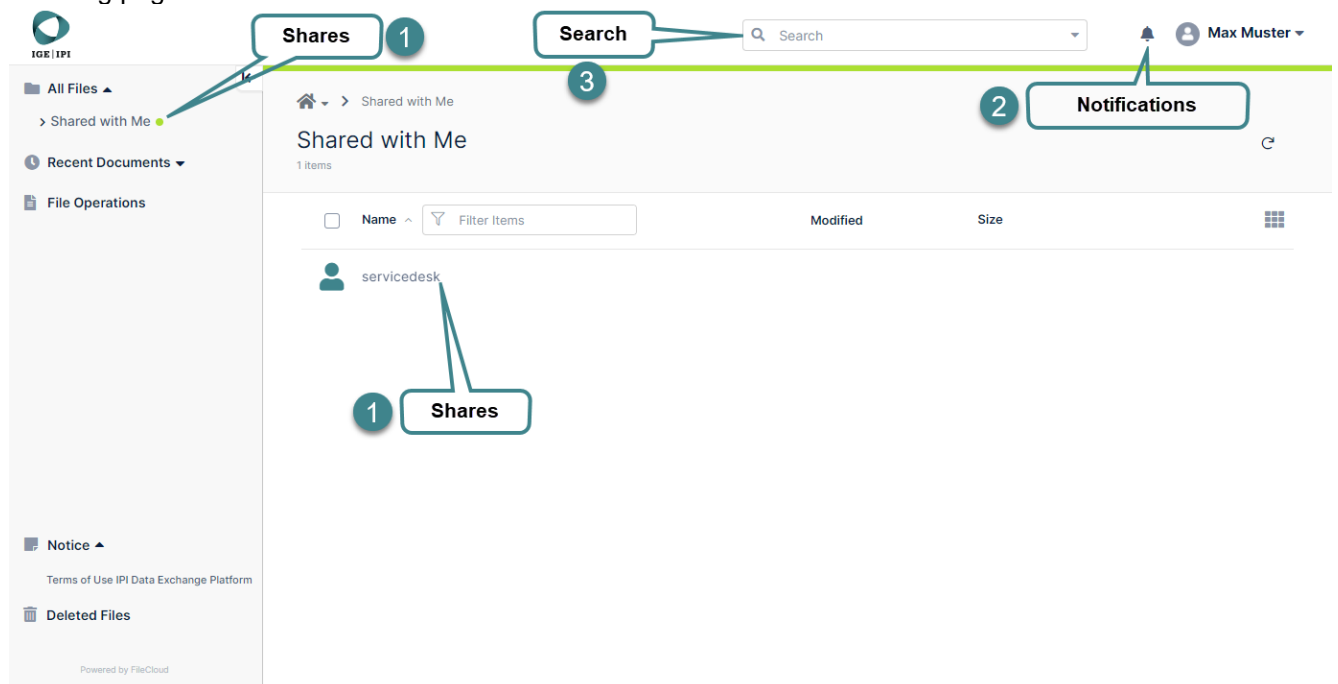
The web address of the IPI's DEP is: <https://dataexchange.ipi.ch>

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

## 3 Functions

### a) User dashboard

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



## 1) Shared with Me

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

If 'Shared with Me' is empty, it means that no files have been made accessible to you yet. Please get in touch with your contact person at the IPI in this case.

## 2) Notifications

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

## For ip-search customers

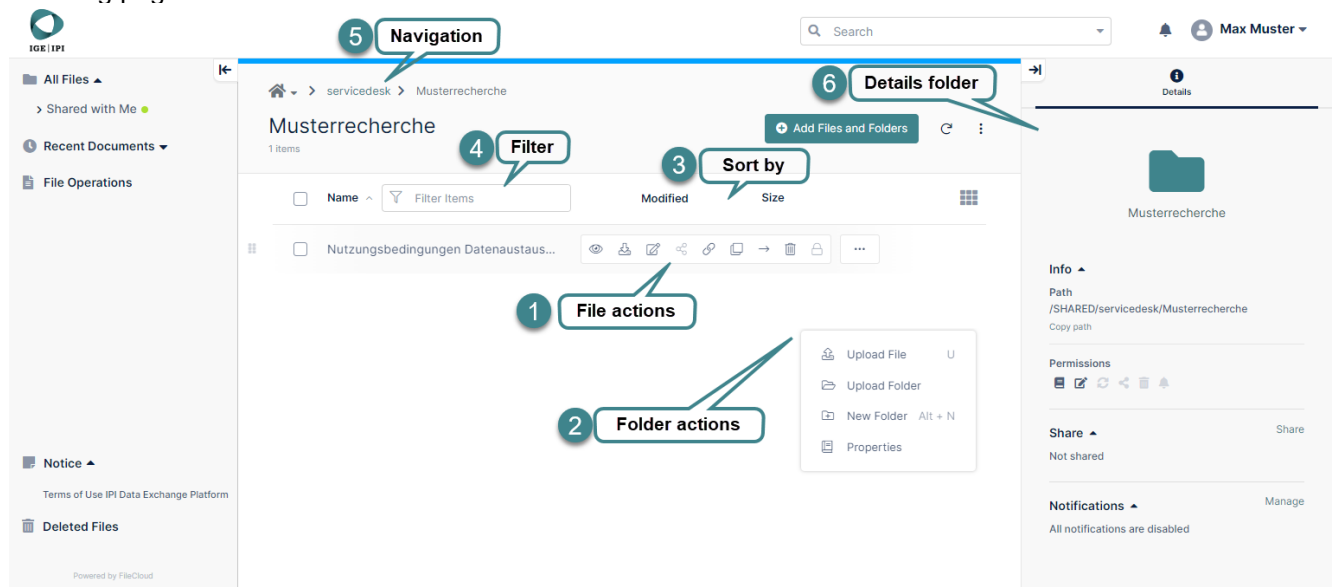
If you perform actions in folders shared with you by administration@ip-search.swiss, notifications are automatically sent to the relevant persons at the IPI. If you upload a file, for example, you will not need to inform your contact person as well, since they will receive a notification automatically. If the IPI uploads data for you, you will always be notified by email.

## 3) 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 [Search](#)

## 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) File actions

Hover the cursor over a file to display a bar with the actions available.

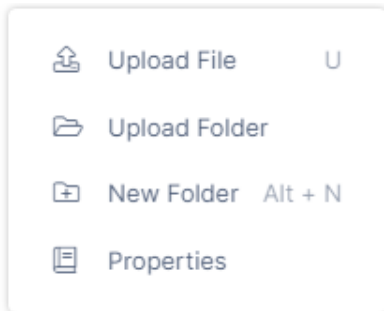


Excluding the greyed-out buttons, the actions are as follows from left to right:

- Preview
- Download
- Edit
- Copy a direct link to the file
- Copy
- Move
- Delete

## 2) Folder actions

Right click on a blank area to make the actions for the current folder visible.



**Upload File:** uploads a file to the current folder

**Upload Folder:** uploads a folder to the current folder

**New Folder:** creates a subfolder in the current folder

**Properties:** displays folder details

## 3) Sort By

Click on a column (e.g. 'Name' or 'Modified') to sort alphabetically or by the last change date.

## 4) Filter

Filters items in the current view. This is not a recursive search, so subfolder items are not displayed.

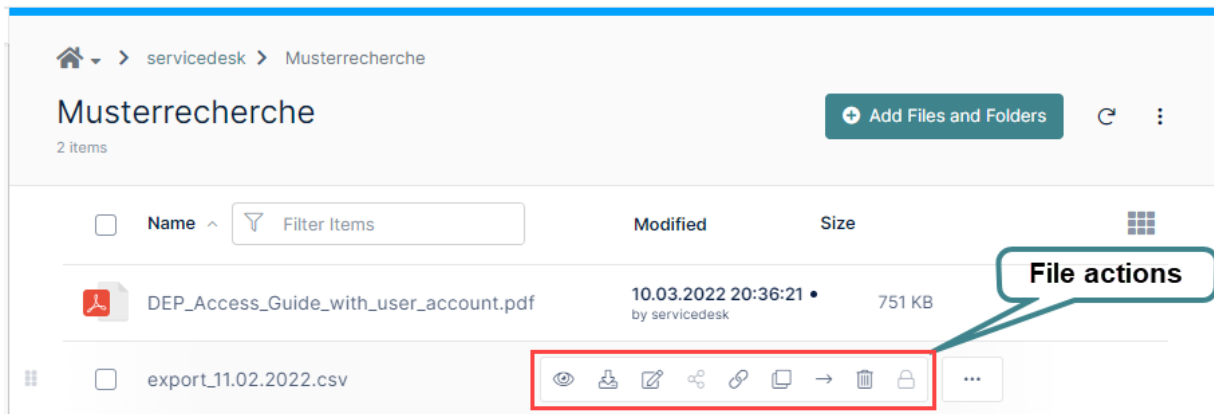
## 5) Navigation

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

## 6) Details folder

Displays more information about the current folder or item.

## c) Main file and folder actions

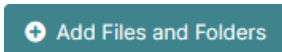


- Use the check box to select several files.
- Right click on a blank area to make the actions for the current folder visible.

## aa) Upload files and folders

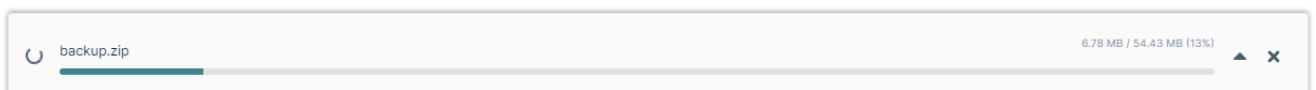
The easiest way to upload one or more files is to drag and drop the selected files into the browser window. This is supported by all common browsers.

You can also use the Add Files and Folders button.



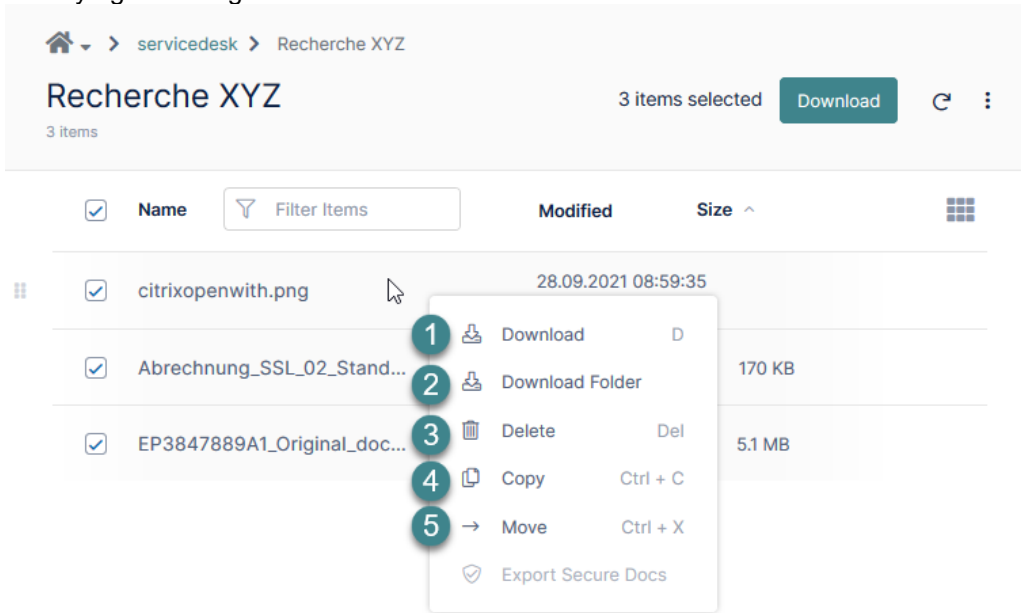
Uploads of folders and their contents are only supported by modern browsers, such as Mozilla Firefox, Microsoft Edge and Google Chrome.

You can view the progress of your upload on the progress bar that appears:



## bb) File actions for one or more files

Tick the box to the left of each file to select more than one file. You can then display the options for all selected files by right clicking on one of the files:



### 1) Download

Downloads all selected files in the current folder as a ZIP archive.

### 2) Download folder

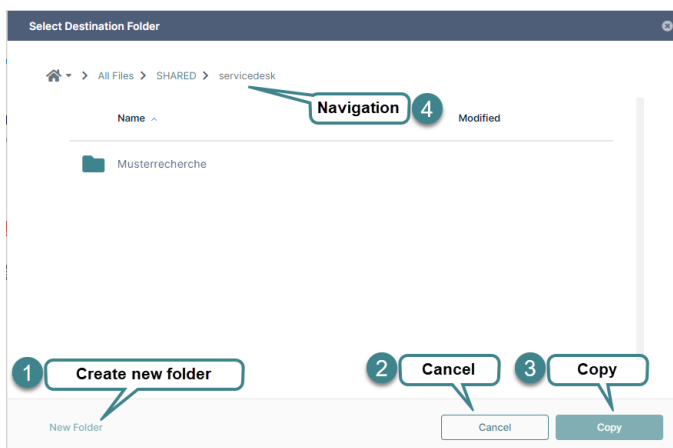
Downloads the entire folder as a ZIP archive.

### 3) Delete

You can select one or more files to delete. 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) Copy

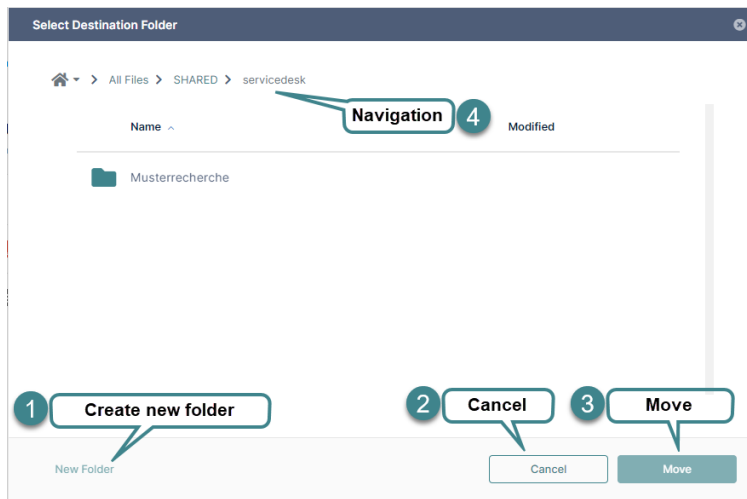
You can select one or more files to be copied.



- Choose the files to be copied
  - Click on 'Copy'
  - An additional window appears, in which you can select the destination
- This button can be used to create a new folder
  - Cancels the action
  - Copies the files to the selected location
  - Displays the current path and allows users to navigate to other folders.

## 5) Move

You can select one or more files to be moved.



- Select the files to be moved
  - Click on 'Move'
  - The files will be moved to the clipboard
- This button can be used to create a new folder
  - Cancel the action
  - Copies the files to the selected location
  - Displays the current path and allows users to navigate to other folders.

## cc) Exclusive file actions for one file

### 6) 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

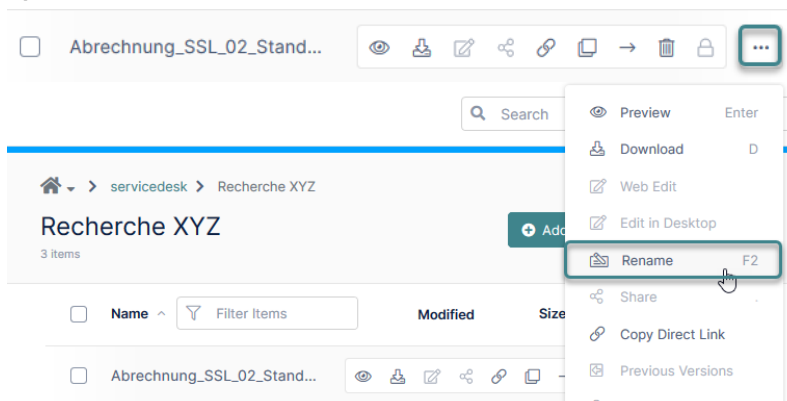
Other file types must be downloaded in order to display the content.

### 7) Direct Link



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

### 8) 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.



## d) Search

This function enables you to search all shared files using a keyword 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.

#### Advanced Search

**Search Term**

**Scope**

All  Name Only  Content Only  Metadata


**Search Type**

All Folders and Files  Folders Only  Files Only



**Path Selection**

All  Selected

**Selected Path**

**Modified Date**

**Results Count**

Limit to 50  All

Use Cached Results

### bb) Indexing


The search indexes results for keywords so that they can be displayed 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:

1 Results for "seed"

Completed on: Tue, 31 Aug 2021 10:24:23 GMT  
Location: Everywhere

...

pre-seed pre-final (1).zip 13.01.2021 08:20:18 5.69 MB

 [SHARED](#) > [servicedesk](#) > [Muster Recherche](#) > [pre-seed pre-final \(1\).zip](#)

If the file you searched for does not appear, you can start again by clicking on 'Search Again' and searching 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 the folder actions:

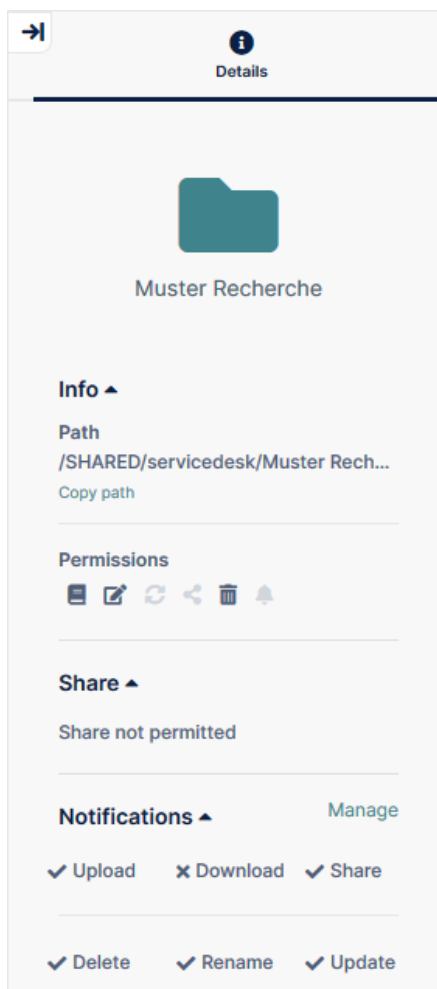
The search results show which folder was searched:



### e) Details tab

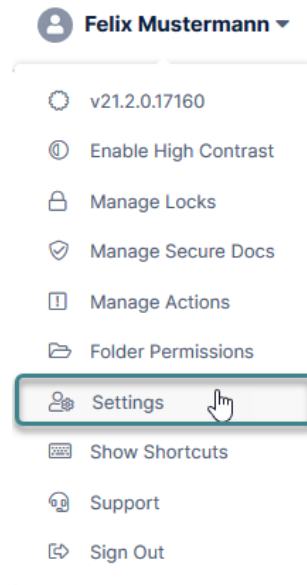
The Details tab shows additional information about the current folder, such as the path, permissions and the people with whom the folder was shared.

You can hide and unhide the Details folders using the horizontal arrow.



## f) User settings

You can access the user settings at any time from the top right corner of the screen.



## aa) Language settings

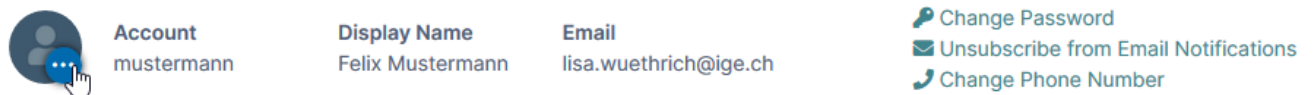
The user-specific language settings for the web interface are located underneath the account information.

### Language



## bb) Change password and profile image

Under the 'General' tab in Settings, you can set a profile image for the IPI's DEP by clicking on the profile image, and you can change your password (on the right-hand side). You can also deactivate email notifications and change your telephone number.



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