MyEPO services

Feature guide: managing user access in MyEPO Portfolio

Content

1. Introduction

The EPO takes the security and confidentiality of your information very seriously.

That's why, before allowing you to access confidential patent procedure-related information online using our MyEPO services (like MyEPO Portfolio, Online Filing 2.0, Central Fee Payment), we require you first to create an EPO account with two-step verification and also to confirm to us your identity and company.

We also require someone from the company associated with your account to go into MyEPO Portfolio to grant you access rights. That person is a "**company administrator**",

A company administrator is any user shown as having administration rights in the **Admin area** of MyEPO Portfolio, and every company must have at least one company administrator.

Note: if you are applying for a patent as a private person, and not on behalf of a company or through a professional representative, then you will have administration rights for yourself.

Company administrators can grant other users:

- administration rights
- access to the company mailbox
- the right to pay fees and view payment plans
- access to view portfolios of applications, including non-public documents
- access to draft and send submissions, duly signed by the appointed representative

They can do this for all users whose EPO account was associated with the administrator's company when they registered to use MyEPO services.

Administrators are also responsible for

- informing the EPO about changes concerning the company
- regularly checking whether access has been correctly granted to users
- removing access immediately when users leave the company or change roles
- identifying "recipients" (representatives, associations or self-representing parties) whose EPO communications will be sent to the company mailbox and whose portfolios can be accessed using MyEPO Portfolio

In summary: company administrators have a vital role to play in ensuring that online access to confidential patent procedure-related information is only granted to those members of staff who should have access.

Section 2.1 of this guide explains how company administrators can manage general user rights and recipients in the **Admin area** of MyEPO Portfolio.

Section 2.2 explains how they can manage permissions to view portfolios of applications in the **Applications and patents** area of MyEPO Portfolio.

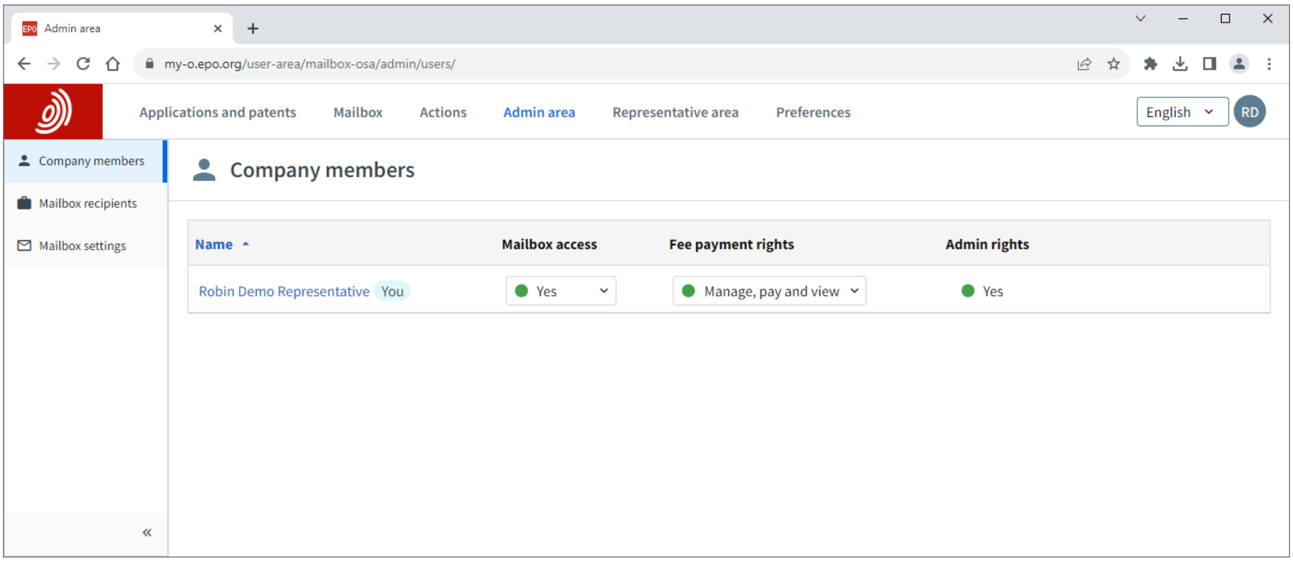
To guide you further, we have also published some “frequently asked questions” (FAQs), and you can always get in touch with support@epo.org or your key account manager if you still aren’t sure about something.

2. How to manage user access in MyEPO Portfolio

2.1 Managing general user rights and recipients

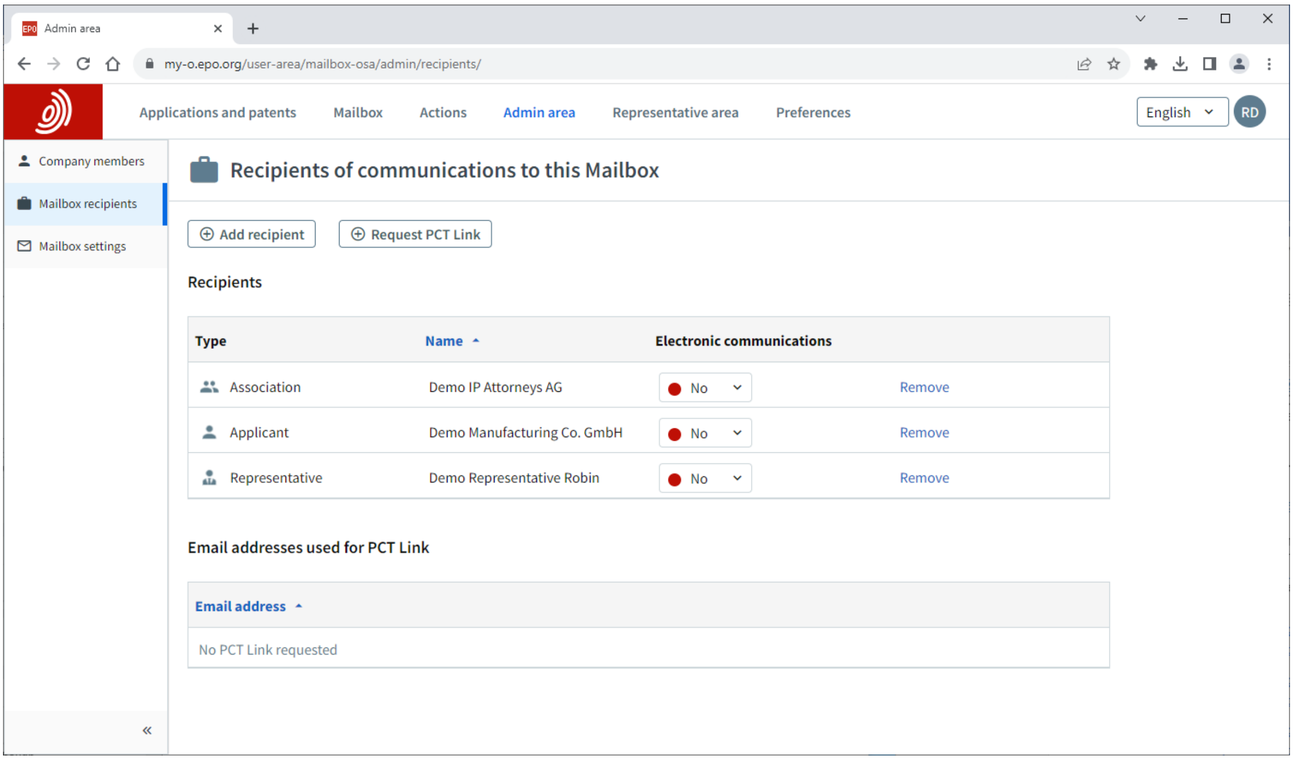
As a company administrator, you will see **Admin area** appear as one of the menu options in MyEPO Portfolio.

In the **Company members** tab, you can see the list of users associated with your company and specify which of them have mailbox access, fee payment rights and administration rights. You can also check who else is a company administrator for your company.

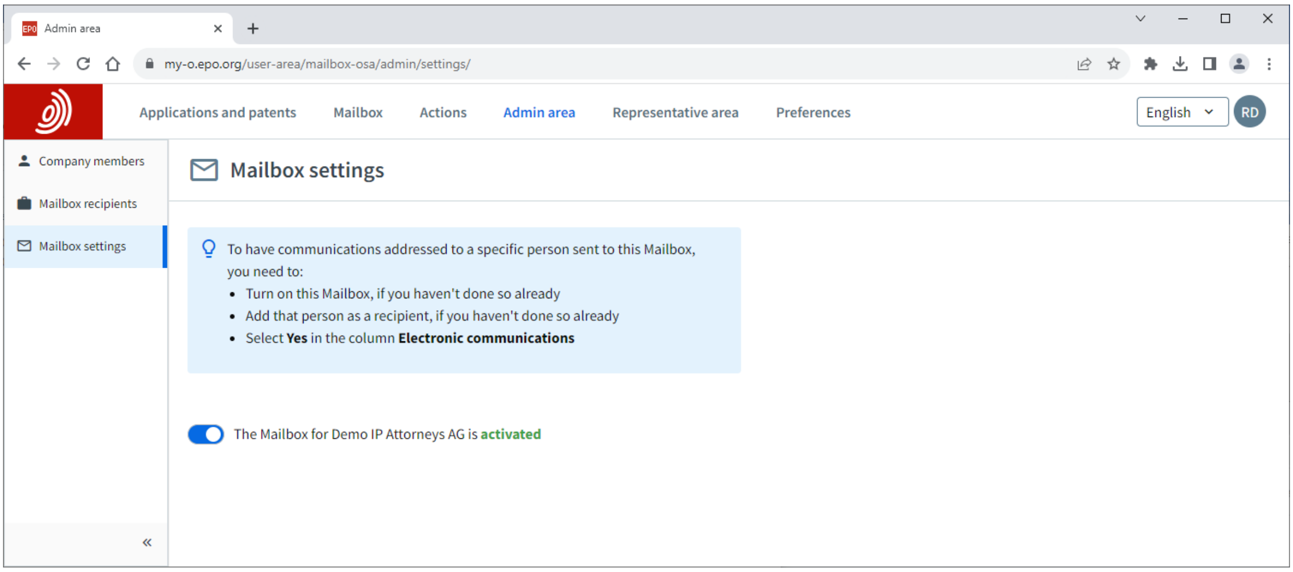


In the **Mailbox recipients tab**, you can request and manage “recipients” for whom electronic communications can be sent to the company mailbox and whose portfolios can be accessed in MyEPO Portfolio. A “recipient” can be a representative, an association, a self-representing applicant, or a self-representing opponent.

You can also request PCT Links, allowing electronic communications to be sent to the company mailbox for PCT applications linked to the corresponding email address. See the feature guide for PCT Link for more information.



In the **Mailbox settings** tab, you can activate and deactivate the mailbox for your company.



<u>Note</u>:

A "recipient" can be a representative, a Rule 156(11) association or a self-representing party (applicant or opponent). Once a recipient has been added to your company, access to their portfolio of applications will be available in MyEPO Portfolio for users with viewing permissions to the portfolio (see section 2.2).

If the recipient is a MyEPO Portfolio user in the same company, the company administrator can give them access to their own portfolio.

If you have activated any PCT Links, the corresponding portfolios of applications in the PCT international phase cannot be viewed yet in the current version of MyEPO Portfolio.

2.2 Managing permission to view portfolios of applications

As a company administrator, you will see **Applications and patents** appear as one of the menu options in MyEPO Portfolio.

When you select Applications and patents, on the left you will see a list of representatives and associations that have been added as recipients for your company (see section 2.1).

When you select one of these representatives or associations, their portfolio of applications appears.

You can then grant access to users within your company to view the portfolio in question by selecting **Manage permissions**. When you grant "Full control" to a user, they will be able to

- See applications for the representative or association, including unpublished applications.
- See documents for those applications, including non-public documents.
- Perform pending procedural actions for the applications: draft submissions and fee payments, sign and send to the EPO