# MyEPO Portfolio

User guide

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# 1. Getting started

MyEPO Portfolio is an online service for registered users who are parties to proceedings before the EPO that provides access to patent procedural information and tasks.

To use MyEPO Portfolio, you will need a valid smart card issued by the EPO. Link to more information about EPO smart cards and how to enrol for one

To access MyEPO Portfolio, sign in using your smart card.

## 2. Main functionalities and user roles

MyEPO Portfolio has two main functionalities:

- **Mailbox**. This is available to users who are given access to their company's EPO mailbox by their company administrators[1].
- **Applications and patents**. This is available to registered professional representatives and registered legal practitioners (we will call them "representatives" in the following). It shows the portfolios of patent applications and granted patents for which you are appointed as a representative, and a list of procedural acts for those applications. Representatives can delegate access to this functionality to others in their company[2].

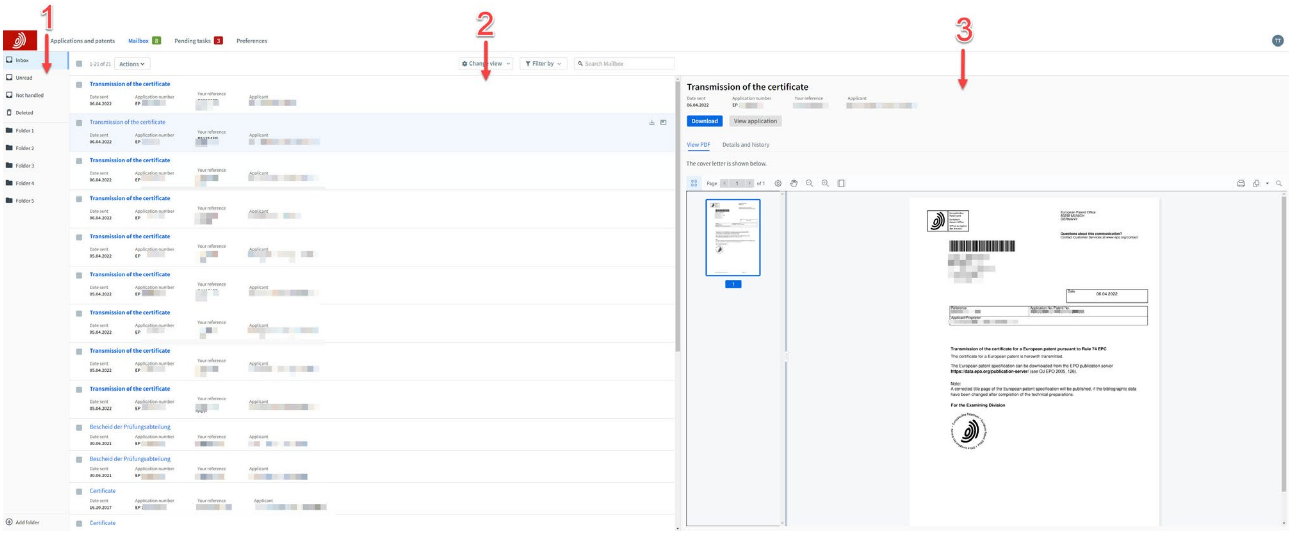
[1] For the time being, access to the EPO Mailbox is managed in the admin section of the legacy Mailbox service.

[2] Users whose smart card is registered as being with the same company as the representative.

# 3. Mailbox

MyEPO Portfolio allows you to receive and process your company Mailbox electronic notifications in EPO proceedings, and is an alternative to the current legacy Mailbox service. The legacy Mailbox service and MyEPO Portfolio are compatible and receive the same communications. We are assuming that you are familiar with the legacy Mailbox service.

The **Mailbox** is divided into three main sections: folder side bar **(1),** communications list **(2)**, and communication panel **(3)**. If your screen is large, you will see the three sections shown below.




If your screen is smaller, you will see the folder side bar and the communications list when you open **Mailbox**, and will see the communication panel when viewing a specific communication.

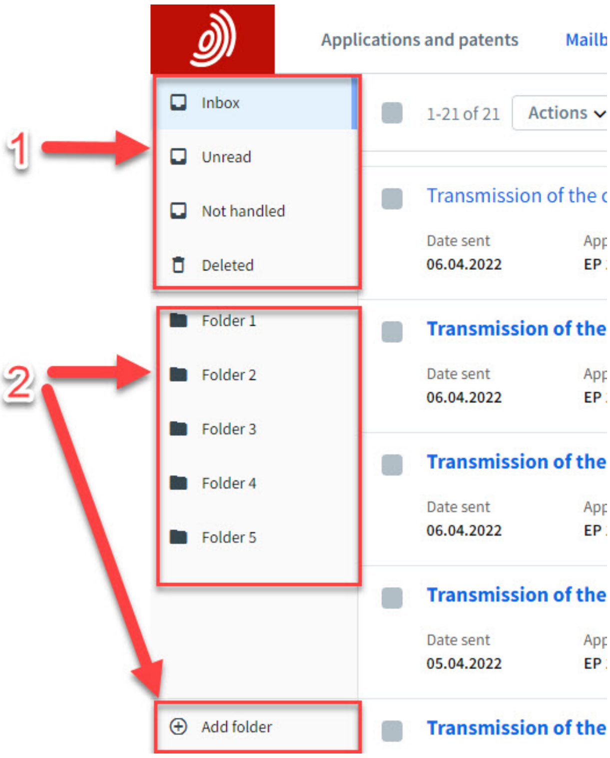
## 3.1 Folder side bar

Like the legacy Mailbox service, MyEPO Portfolio allows you to put the communications sent to your company Mailbox into folders.

The folders in the legacy Mailbox service and MyEPO Portfolio behave in the same way, and all folder operations described below are visible to all users of the company Mailbox, whether they access from MyEPO Portfolio or from the legacy Mailbox service.

Selecting a folder will show the communications assigned to that folder in the communications list to the right of the folder side bar.

MyEPO Portfolio provides the same four standard folders **(1)** as in the legacy Mailbox service, and Mailbox users can create custom folders **(2)** that are visible for any Mailbox user in the company.




**Inbox** contains all communications that are not assigned to a custom folder.

**Unread** shows a subset of the **Inbox** with the communications that have not yet been marked as read. When you view or download the files for a communication, move the communication to a custom folder, or mark the communication as handled, that communication is considered as read and will disappear from **Unread**.

**Not handled** contains all the communications in **Inbox** or the custom folders that have not been marked as handled by one of the Mailbox users. Marking a communication as handled removes it from **Not handled**.

The **Deleted** folder contains all the communications that have been deleted by a Mailbox user.

### 3.1.1 Custom folders

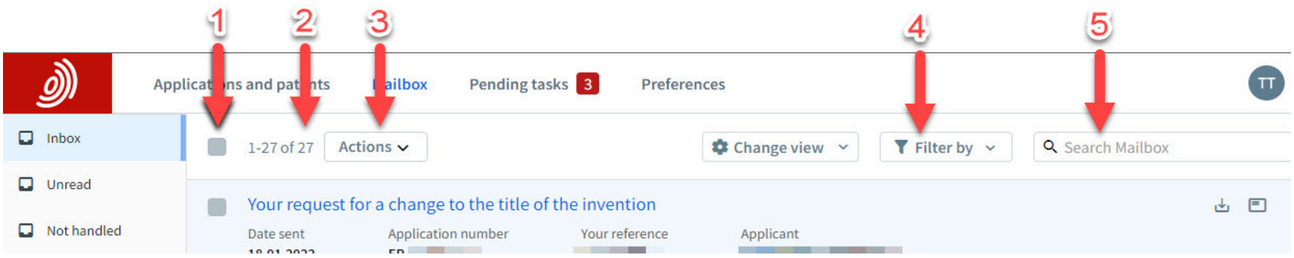
You can create custom folders, and those folders will be seen by all users of the company Mailbox, whether they access the Mailbox via MyEPO Portfolio or via the legacy Mailbox service. To create a new folder, select **Add folder** at the bottom of the folder side bar.

You can move any communication to a custom folder. The communication will be marked as read and will disappear from **Inbox**.

## 3.2 Communications list

The communications list shows all the communications in the selected folder. As a Mailbox user, you get taken straight to **Inbox**. The communications list displays a ribbon at the top with the following features:

- Select all communications on a page **(1)**
- Number of communications on a page **(2)**
- Handling options **(3)**
- Filter **(4)**
- Search bar **(5)**



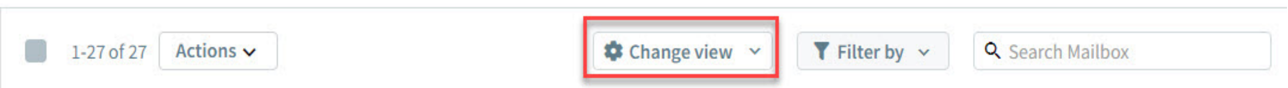

**(1)** This checkbox allows you to select all the communications displayed in the current page of the communications list.

**(2)** This shows the number of communications displayed on the current page and the total number.

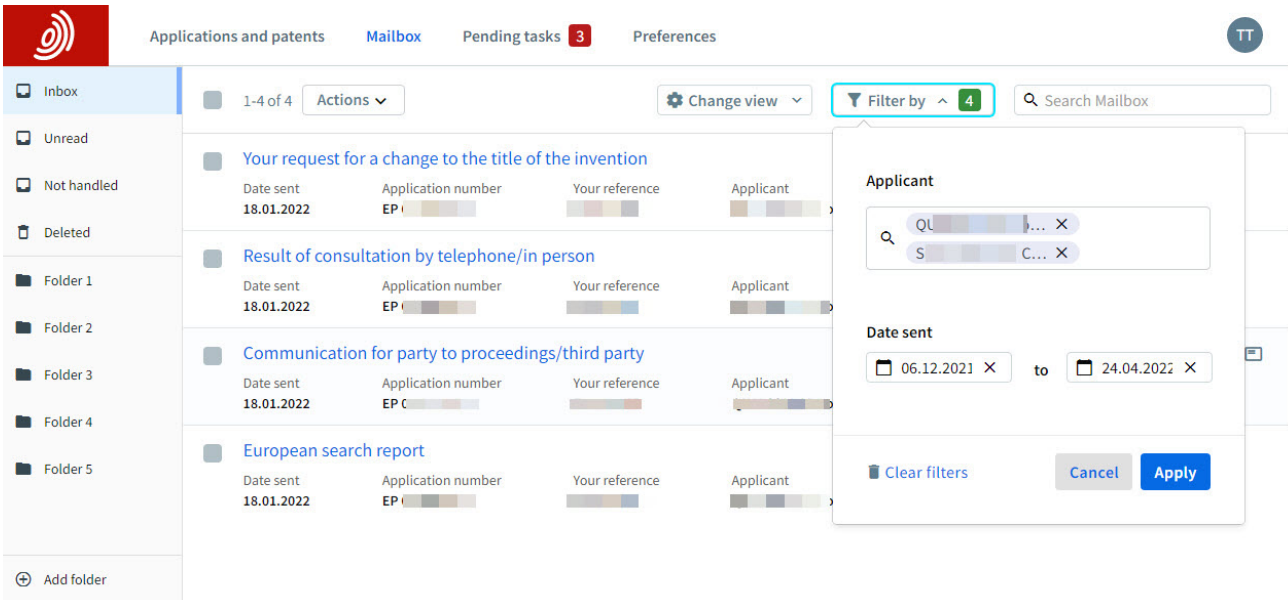
**(3)** This dropdown becomes active when you have selected at least one communication, and allows you to download the selected communications, assign them to a custom folder, mark them as handled, or delete them.

**(4)** You can filter the contents of the folder you are viewing by applicant, and you can introduce a date range as an additional filter. The applicant and the date filter are combined with an AND combination.

You can change the number of communications displayed in a single page (max. 200) by selecting **Change view**.




In the example below, the folder contents are filtered showing only communications for which the communications match one of the search terms, and with a date sent falling within the range selected.



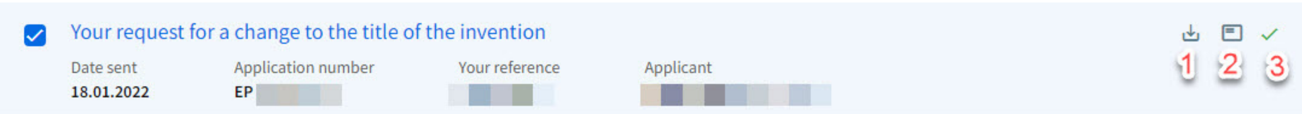

**(5)** The search bar allows you to search all folders by title, applicant, application number and reference fields. When a filter is applied to the contents of the folder, only the communications matching the filter are displayed.

### 3.2.1 Communication details

For each communication in the current folder, you will see the following information in the communications list: title, date sent, application number, applicant and reference.

A checkbox on the left of the title field allows you to select each application in order to trigger one of the actions available on the ribbon at the top: you can download the selected communications, move them to a custom folder, mark them as handled, or delete them.

On the right side of each communication you can download the communication **(1)** or view the contents of the digital file for the application to which the communication is related to **(2)**. A green check mark **(3)** indicates that the communication has been marked as handled.



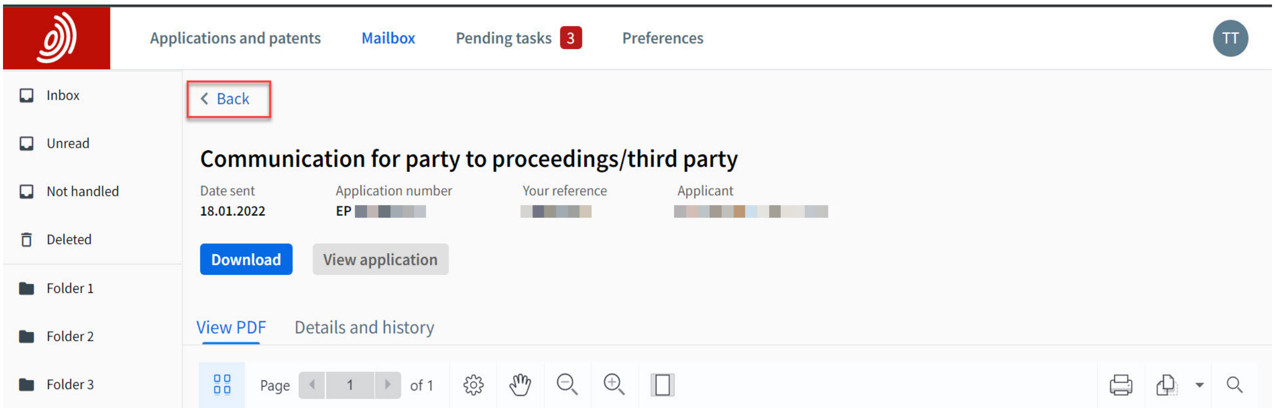

When you select a communication, it will be highlighted in light blue, and the communication panel will show the details and pdf file for that communication.

## 3.3 Communication panel

The communication panel presents information and links relevant to the communication that you have selected in the communications list.

**Important note:** previewing a communication marks it as read, so it disappears from **Unread**.

On smaller screens such as a laptop, the communication panel will substitute the communications list when you select a communication, and you can go back to the communications list by selecting **Back** at the top left of the communication panel:




The communication panel has a header with information about the communication and the application it is associated with, and buttons to download the files of the communication – a pdf or a zip file – and to view the contents of the digital file.

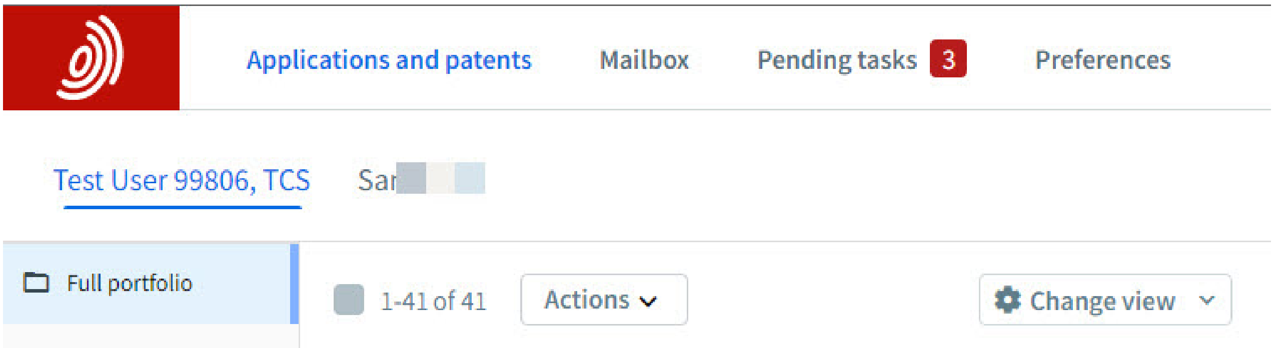
Below the header, you can view the communication as a pdf and the handling history for this specific communication. The handling history shows all the actions taken by users of the company Mailbox with regard to this communication, whether done in the legacy Mailbox service or in MyEPO Portfolio. The actions that are recorded are: viewing or downloading the files, marking as handled, and moving to a folder. The list of actions is displayed from oldest to newest.

# 4. Applications and patents

As a representative, you will have this functionality as standard. It provides access to the portfolio of all European patent applications and patents for which you have been appointed, including non-public applications.

**Important note:** when more than one representative has been appointed for a given patent application, only the representative indicated in box 15 of the Request for grant of a European patent (EPO Form 1001) or box 2 of the Request for entry into the European phase (EPO Form 1200) will see the application in their portfolio.
As a member of an association (Rule 152(11) EPC), you will see the portfolio of European patent applications for which that association is appointed as representative. You will be able to see the contents of the digital file, including non-public documents, and will be able to file procedural acts for said patent. All members of an association will have access to the association portfolio in MyEPO Portfolio.

**Important note:** representatives will see the portfolios of **all** associations of which they are a member as per the records of Legal Division of the EPO, including associations that are not added to the company Mailbox. Link to more information about authorisation of an association




In the example above, the representative is a member of one Rule 152(11) EPC association, so the representative can see two portfolios of applications. Selecting the representative's name or the name of an association will show the corresponding portfolio.

## 4.1 Delegating access to a portfolio

As a representative, you can delegate access to your portfolio of applications to any user whose smart card is registered in the same company as you (we will call them "delegated users" in the following).

In the case of a Rule 152(11) EPC association, we have seen that all the representatives who are members of the association have access to the portfolio of the association. So it follows that any of the members of the association can grant access to other users in the same company.

### 4.1.1 How to delegate access to a portfolio

In **Applications and patents**, there is a **Manage access** option on the lower left side of the screen.

The manage access page shows a list of the users whose smart cards are registered as belonging to the same company as you. A dropdown menu allows you to grant access to the entire portfolio to anyone else in the company.

### 4.1.2 Consequences of delegating a portfolio

As a delegated user, you can see a list of the applications in the portfolio of the representative or the association, including non-public applications, and

- can see the digital file for those applications, including non-public documents
- can see the tasks related to applications in the portfolios for which you have been delegated access and **prepare** a submission associated with a given task.

**But you cannot perform a procedural act related to a task, i.e. sign and submit. Only the appointed representative(s) can do this.**

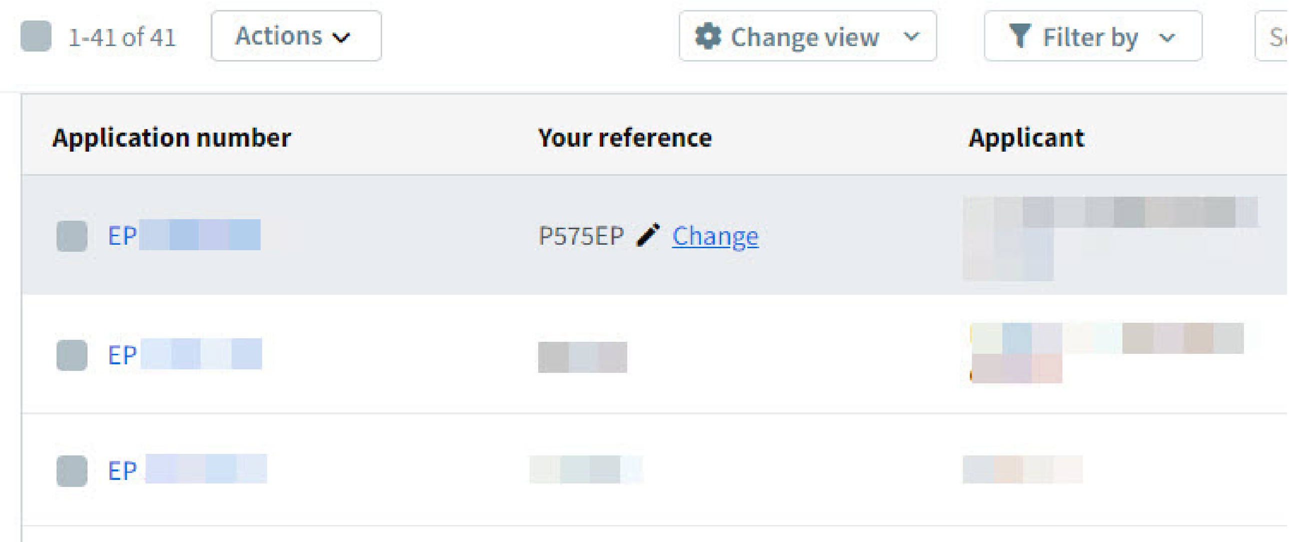
### 4.1.3 Delegation of access to the portfolio of an association

As a representative who is a member of an association viewing the **Manage access** menu, you can see a list of other people in the company and grant them access in the same way as they can do in respect of their individual portfolio. Any member of an association can delegate access in their company.

Associations do not necessarily need to be formed by representatives from the same company. If you are viewing the **Manage access** page for an association to which you belong, any members of the association who are not in your company are shown below the list of users in your company.

## 4.2 Changing your reference

As a representative or delegated user you can change the reference for an application by selecting and updating **Your reference.** A confirmation message appears once the reference is updated.



## 4.3 Viewing the application

Selecting the application number takes you to the Application workbench of that specific application, where you can view the contents of the digital file and perform tasks for that application.

## 4.4 Exporting data

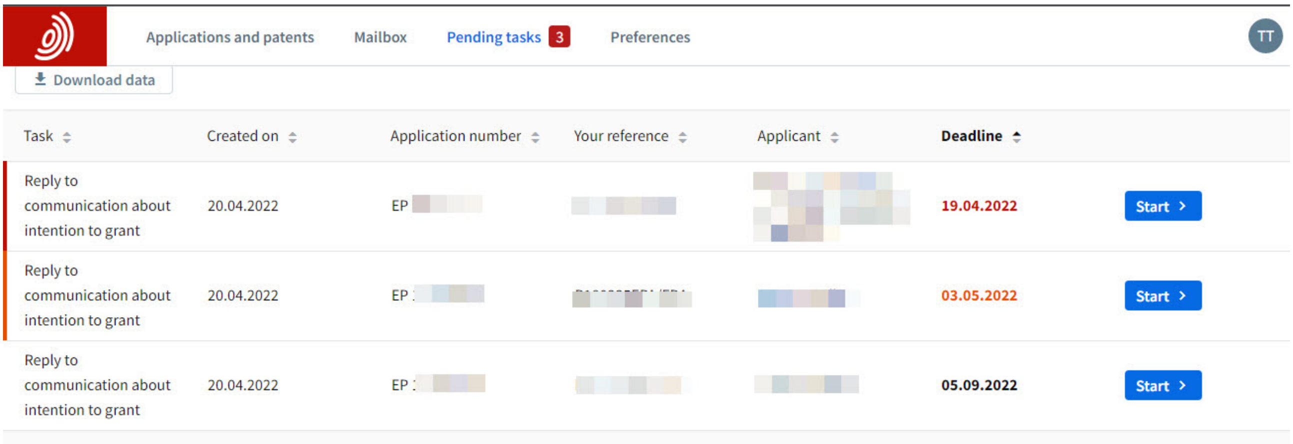
As a representative or delegated user, you can select one or more applications and download the data for the selected applications, including all the columns and the link to the digital file, as a csv file. The digital link consists of a link to the Application workbench of a specific application.

# 5. Pending tasks

As a representative or delegated user, you can see a list of all the tasks associated with applications in the portfolios that you can see in **Applications and patents**.

These tasks allow you to prepare certain procedural acts within the prescribed period in reply to a communication from the EPO and, in the case of the representative, to sign and submit documents accompanying these tasks.

The number of pending tasks is indicated by a red badge in the ribbon at the top. The deadline of overdue tasks appears in red in the **Pending tasks** view. These tasks have a deadline before the current day. The tasks that are due within the next two weeks appear in orange. These tasks have a deadline on the current day or on one of the following 13 days.



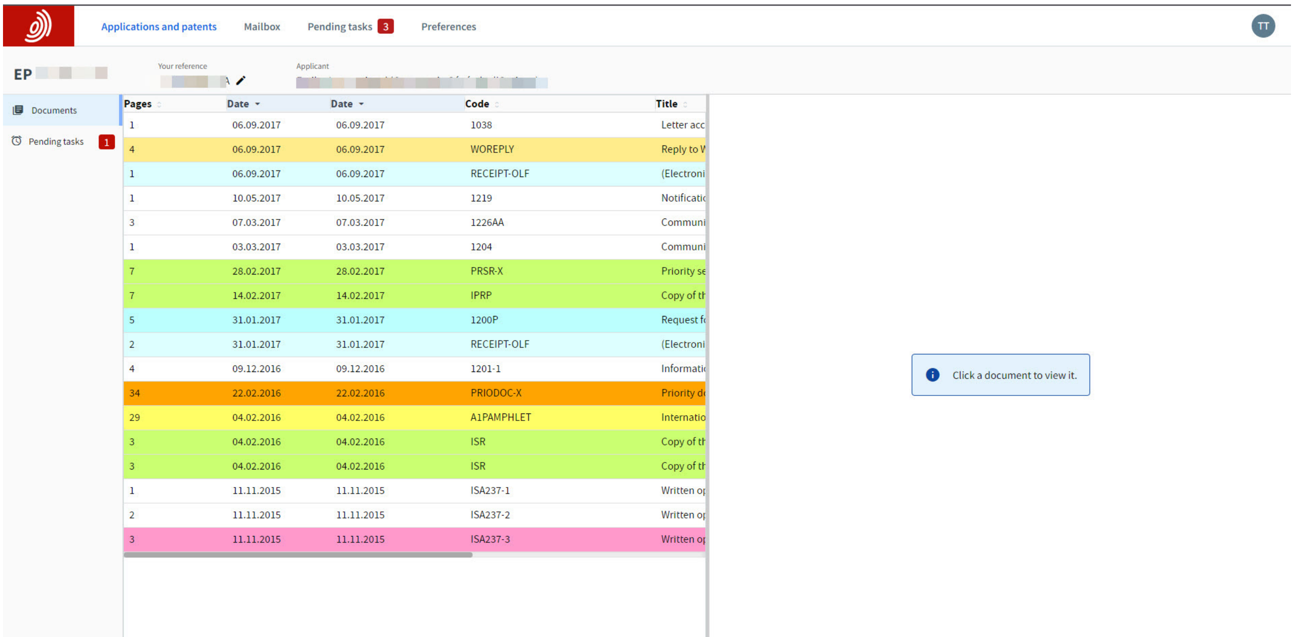

The task list shows information about each task, including the final date for performing each task. The list can be sorted by any of the fields shown, and you can select to start a task. For smaller screens, select the name of the task to start it.

Select **Download data** to download the tasks that you, as a representative, can see in **Pending tasks**. All columns, including a link to the digital file of the application in question, are exported to a csv file.

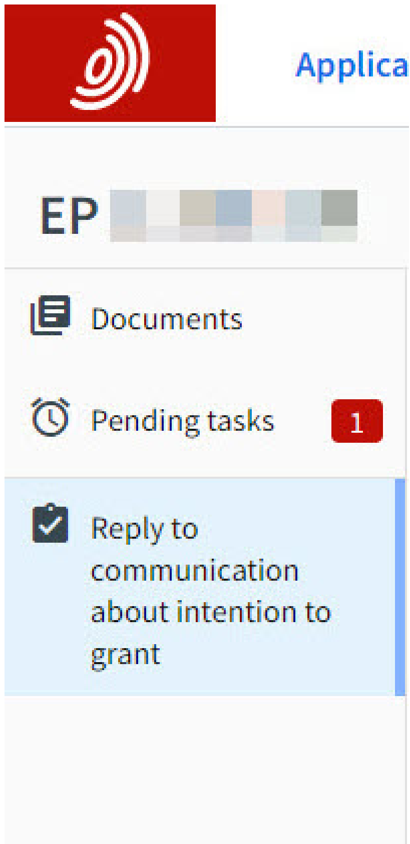
When you start a task, you will see the Application workbench for the relevant application, with the task loaded.

# 6. Application workbench

Select **View application** in **Mailbox**, or an application number in **Applications and patents** to get to the application workbench. The application workbench is where you can view the digital file for an application, and where you, as a representative or delegated user, can perform work on procedural acts pending for the relevant application.




When you have an application open in application workbench, you will see that application's URL displayed in your browser's search bar. You can also use that URL to access the digital file directly.



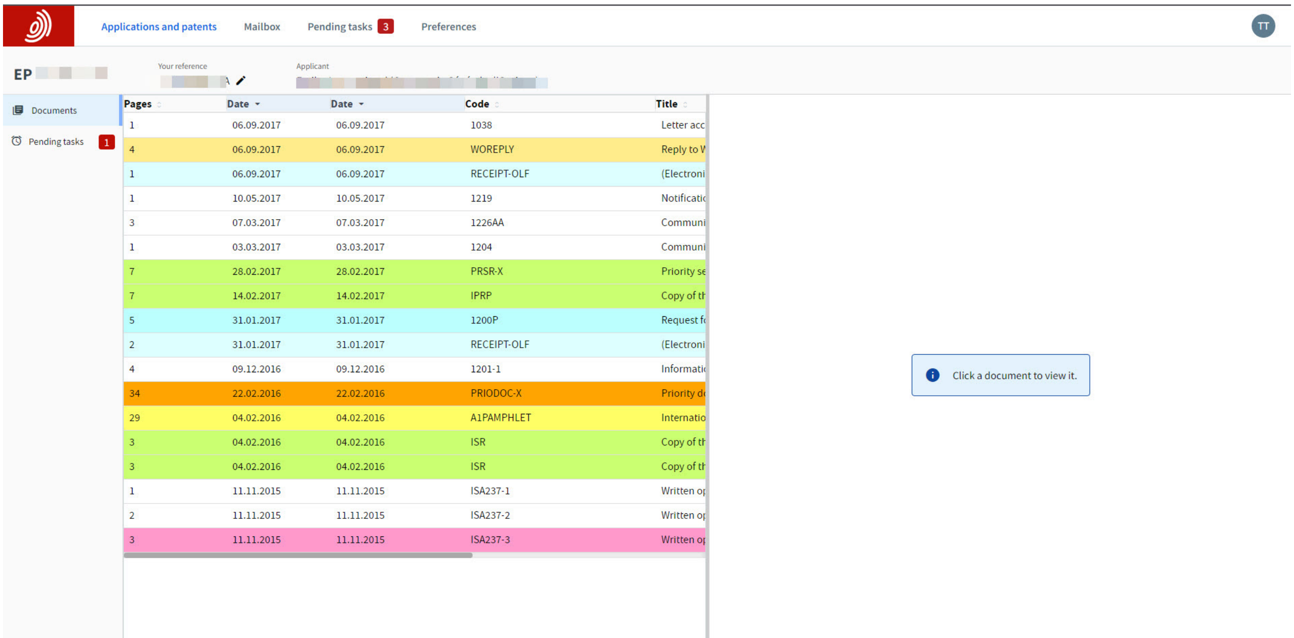

The application workbench has a side bar displaying options for the application that you are viewing. **Documents** is where you can inspect the contents of the digital file. Both Mailbox users and representatives can see this option in the application workbench.

You will only be able to see **Pending tasks** if you can see the respective application in **Applications and patents**. When there are tasks associated with the application that you are viewing, a red badge indicating the number of pending tasks is displayed. Selecting the icon shows the pending tasks, and you can trigger them directly from the side bar.

When you trigger a task, an icon representing that task appears. In the screenshot on the left, the representative has triggered a task and is currently viewing it. While working on a task, you can select **Documents** to view the digital file, and the icon representing the task remains available so that you can return to the task after consulting the documents.

## 6.1 Application documents

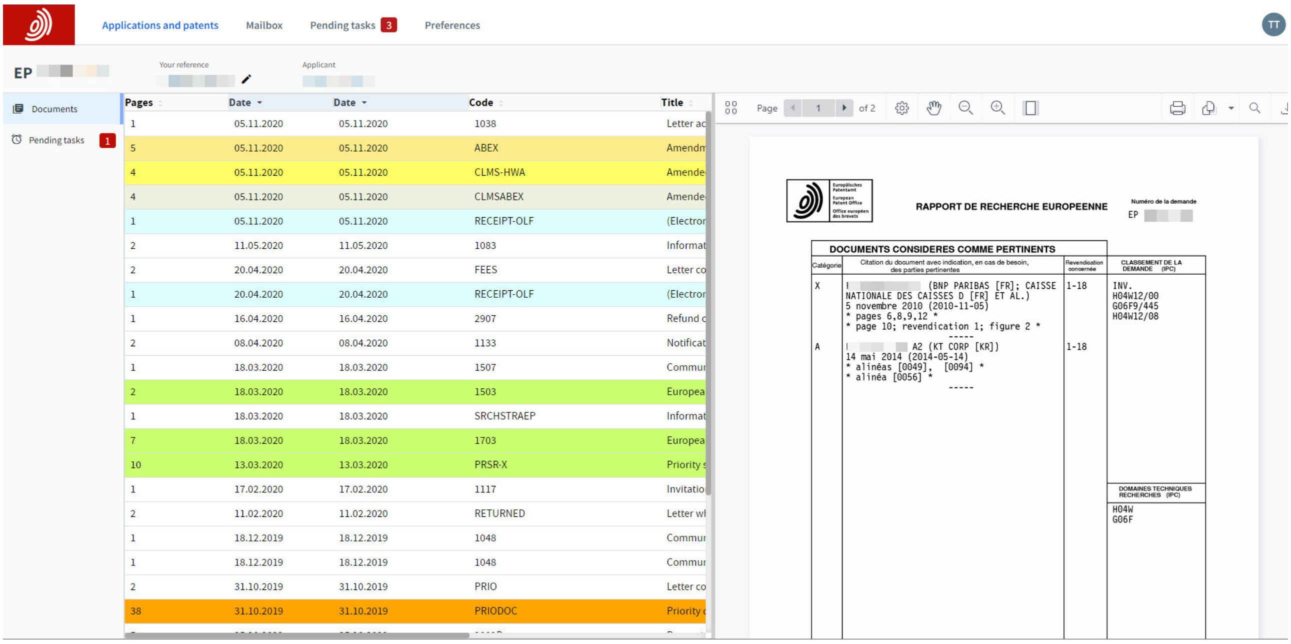
You can see the contents of the digital file for a given application in the workbench. All Mailbox users can see the public documents of the file for an application, when they select **View application** in the communication panel of the Mailbox. The documents shown to Mailbox users are those shown in the European Patent Register for that application.




You can also see the non-public documents in the digital file for applications for which you – or an association of which you are a member – are appointed as representative. Representatives who select an application in **Applications and patents** will get to the workbench for that application, with the **Documents** view open.

Users with delegated access to a given application will also see the non-public documents for that application.

There are two sections in the **Documents** view: the table of contents (ToC) and the document viewer. For large screens, the ToC and the document viewer are presented next to each other, and for smaller screens you only see the ToC. The ToC shows a list of the documents contained in the digital file of the application, with the title, code, procedural stage, number of pages and date when it was added to the digital file.




You can sort the ToC by any of the fields shown in the table header, in ascending or descending order. Choose the field you want to sort by. The arrow next to the field label will appear in bold. Change the sort order by selecting the arrow.

When you select a document in the ToC, that document will be shown in the document viewer. If your screen is large, the selected document will appear in the document viewer on the right side of the ToC. If your screen is smaller, you will be presented with the document viewer instead of the ToC, with the option to go back to the ToC by selecting **Back** at the top left of the document viewer. You can download the documents from the document viewer.

## 6.2 Working with tasks

You will be able to work on certain procedural acts within the prescribed period in reply to a communication from the EPO as tasks, and to upload documents accompanying these procedural acts. However, only the representative(s) appointed for that application will be able to perform, i.e. sign and submit, the procedural act.

When you trigger a task from the **Pending tasks** list, or from the side bar of the application workbench, you will be presented with the selected procedural act and an icon representing that task will become visible in the side bar.

In a task, you are presented with options, information, and the legal background for the relevant procedural act, and are guided through the completion of said act. At any time, you can consult the documents in the digital file by selecting **Documents** on the side bar, and then resume your work by selecting the icon of the task you are working on.

You can close a task at any time by selecting the × close icon at the top right, and the work that has been done in relation to the procedural act is autosaved, so you can resume that work at a later time.

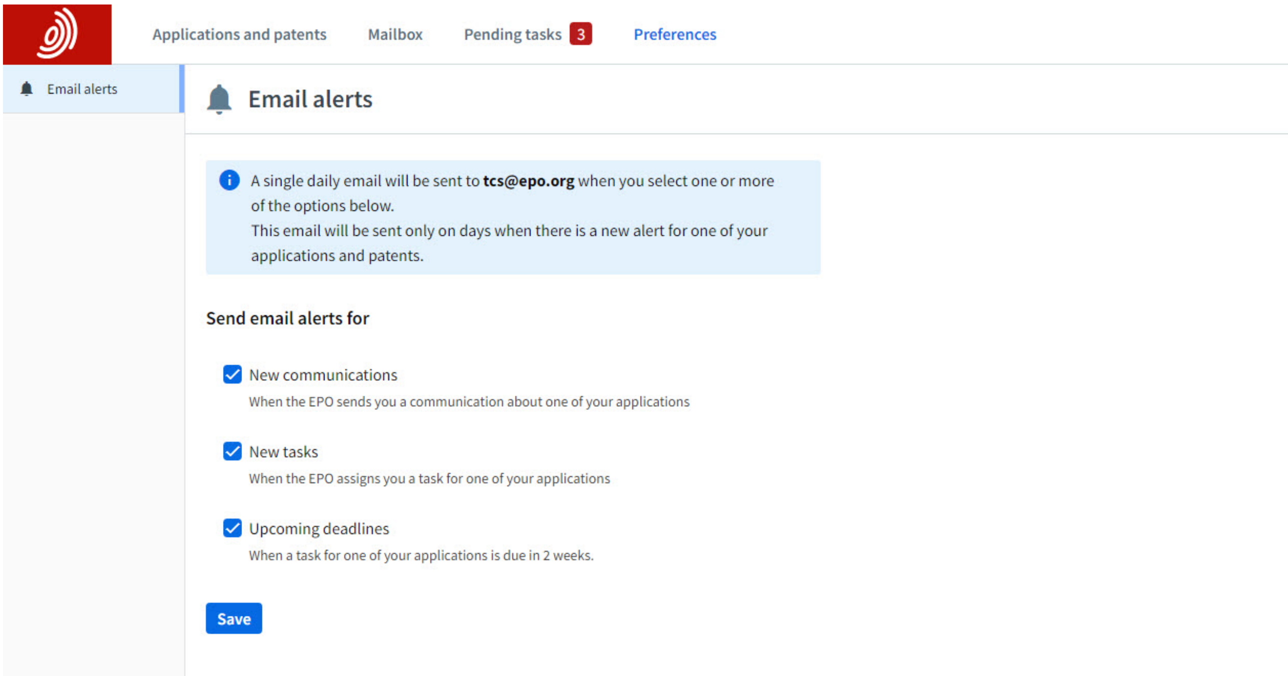
Once you, as a representative, complete a procedural act / task, you can download a zip file containing the submission package, and any document in the digital file resulting from the completed procedural act will be visible in **Application documents**.

**Important information**: you cannot download the submission package after the task is closed.

# 7. Preferences

## 7.1 Email alerts

You can set up email alerts for activity in your MyEPO Portfolio. By default, no email alerts are pre-selected. Mailbox users can turn on alerts for new communications delivered to their mailbox. Representatives can set up alerts for new tasks related to applications in their portfolio(s) and/or for when those tasks are about to be overdue.




The email alerts are sent daily, on days where there is at least one item that matches the criteria you have set. You will not receive more than one email per day.

The email address used for the alerts is the address that you provided when signing up for your smart card. If you wish to change that email, please contact your key account manager or support@epo.org.