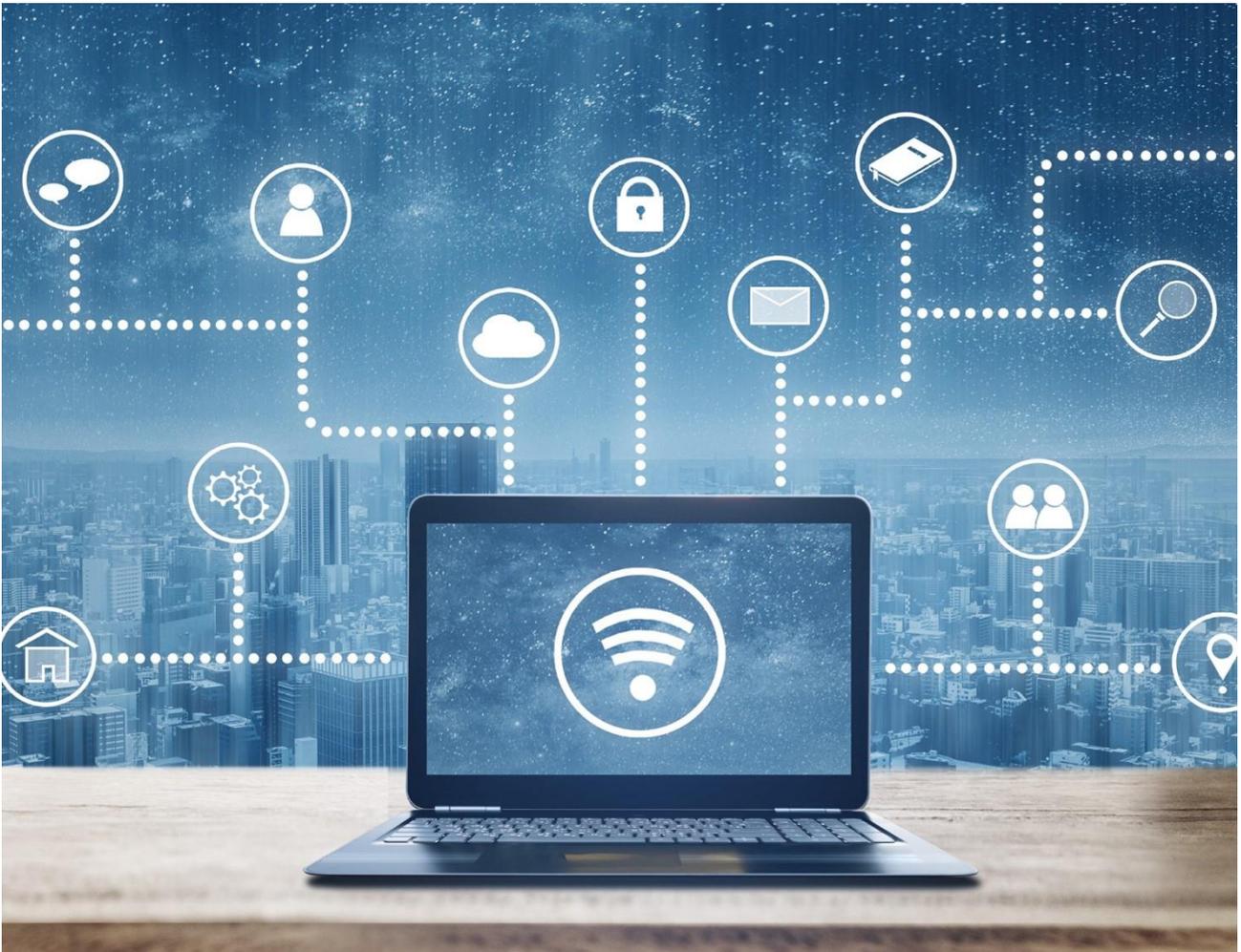


# MyEPO Portfolio

Feature guide: shared area



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### 1. Introduction

During European proceedings (EP, UP and Euro-PCT) questions naturally arise about the substantive content of application documents like claims, descriptions, etc.

Personal consultation between the applicant and the examiner can be helpful to clarify these questions and [EPC guideline C-VII, 2](#) provides for such informal consultations to take place.

Consultations are preferably held by videoconference so that, where necessary, documents can be presented, other persons can participate, and the identity of those attending can be verified.

The **Shared Area** in MyEPO Portfolio provides a space for applicants and examiners to upload documents, jointly edit them during a consultation and informally discuss changes.

Participants in an informal consultation can view, edit, annotate documents together in real time, which makes it easy to exchange suggestions, comments and clarifications about specific parts of the text. "Track Changes" is on by default, showing you what changes were made to the document, who made them and when. There is also a chat function. As a result, informal consultations are more efficient and deliver higher-quality outcomes.

As for any consultation, there will be minutes summarising the main results. If relevant for the result of a consultation, documents modified during the consultation can be downloaded and attached to the minutes of the conversation or to the reply to an EPO communication.

Please note that documents uploaded to the shared area, as well as any documents edited there, will not be considered as filed with the EPO or notified by the EPO, and will not be included in the electronic file for the application. Any submissions or changes arising from an informal consultation will have to be filed using the usual channels.

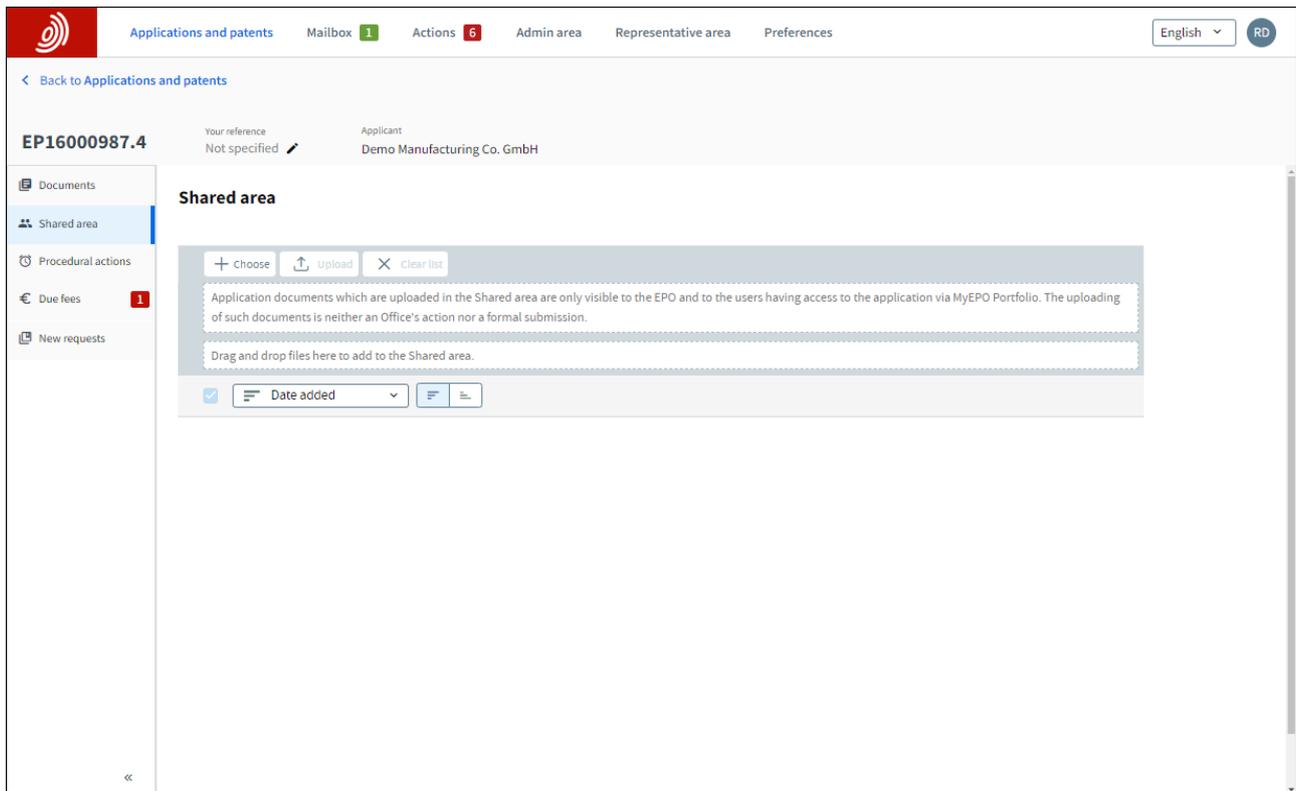
This feature guide explains how to use the shared area, and you can find full details of legal and procedural framework for conducting informal consultations using the shared area in [EPC guideline C-VII, 2](#)

We have also published some [frequently asked questions \(FAQs\)](#), and you can always get in touch with [support@epo.org](mailto:support@epo.org) or your key account manager if you're still not sure about something.

## 2. How to access the shared area

The shared area for a specific patent application can be found in the application detail screen in MyEPO Portfolio, which you can reach by clicking on the application number in the **Applications and Patents** area.

It is only available to company members that have been granted access to the corresponding application portfolio by the company administrator. If you aren't sure if you have access, please contact your company administrator.



### 3. Using the shared area

Each application in your portfolio has its own shared area.

Any user with access to the application can upload documents to the shared area for discussion in an informal consultation with the EPO. EPO examiners can also upload documents for discussion.

During the consultation, all participants in the call with access to the shared area can open a document, edit and annotate it at the same time, and see the comments and changes being made by other participants.

As for any consultation, there will be minutes summarising the main results. If relevant for the result of a consultation, documents modified during the consultation can be downloaded and attached to the minutes of the conversation or to the reply to an EPO communication.

Please note that documents uploaded to the shared area, as well as any documents edited there, will not be considered as filed with the EPO or notified by the EPO, and will not be included in the electronic file for the application. Any submissions or changes arising from an informal consultation will have to be filed using the usual channels.

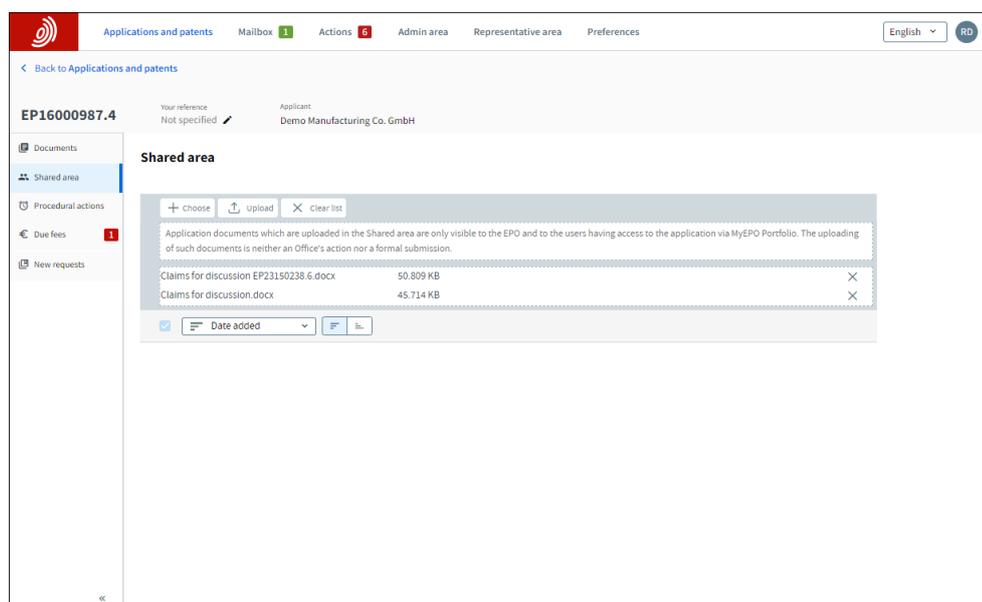
For full details of the legal and procedural framework for conducting informal consultations using the shared area, please see [EPC guideline C-VII, 2](#).

#### 3.1 Uploading documents

You should only upload Microsoft Word documents (.docx files) to the shared area. Other file types can be uploaded, but collaborative editing in the shared area is not supported.

There are two ways to select documents for upload. You can click on the Choose button which opens a windows explorer menu from where users can select the files to be uploaded. Alternatively, you can drag and drop files into the area indicated.

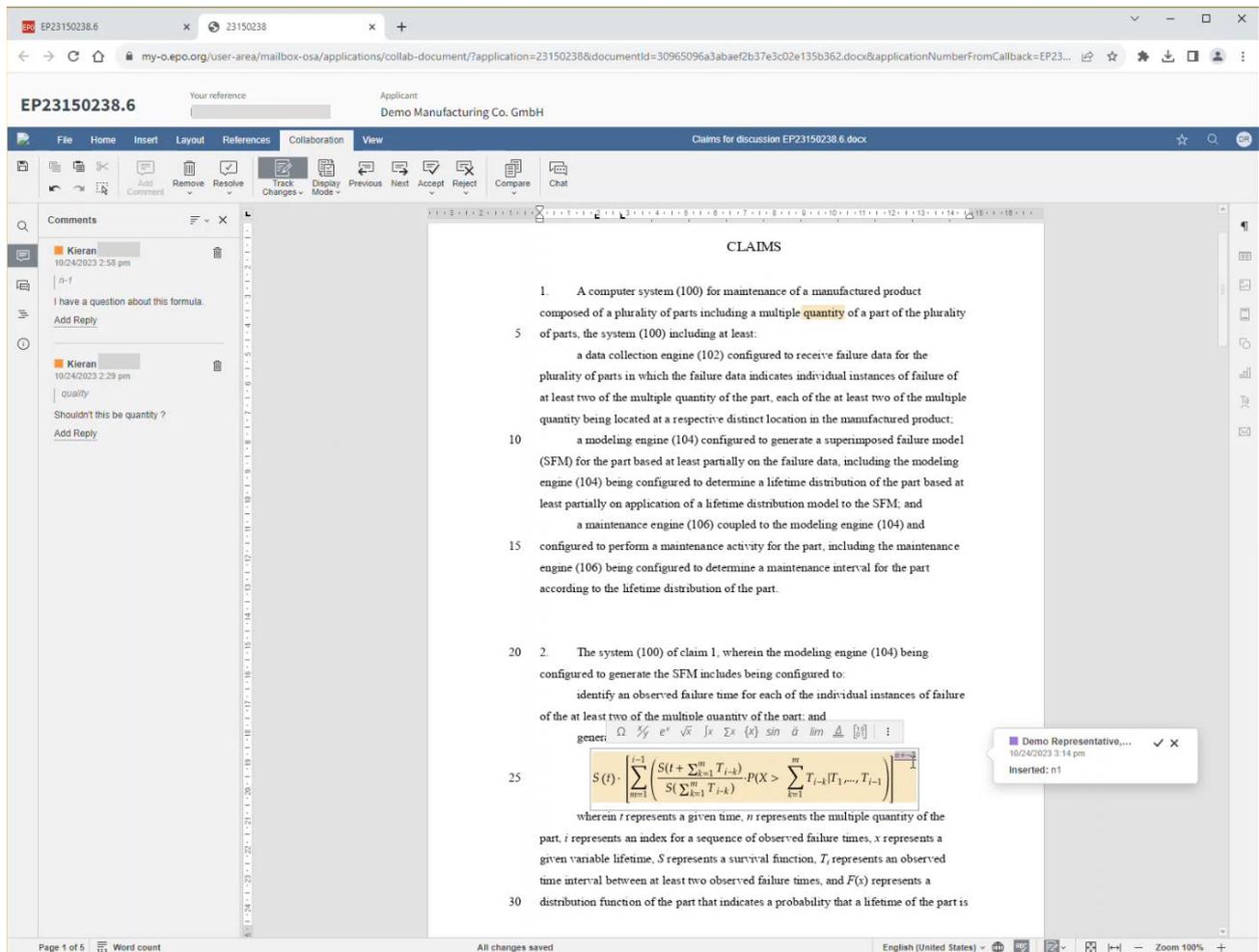
After selecting the documents, click on Upload to continue.



Application documents which are uploaded in the Shared area are only visible to the EPO and to users with access to the corresponding application portfolio in MyEPO Portfolio.

### 3.2 Working with documents during a consultation

When you click on a document in the shared area, a new browser tab opens with the document loaded in an online editor. All participants in the consultation that have access to the shared area can work on the document at the same time and see what other participants are doing.



Here are some of the “collaborative editing” features available in the shared area.

#### Autosave

The user can edit the document and comment on specific sections. All changes made are constantly autosaved and the text “All changes saved” appears at the bottom of the editor.

#### Viewing changes being made by another user

A different colour cursor appears at the text position that another user is editing. The other user’s name is visible.

## **Track and trace**

Users can activate the track and trace feature to keep track of what changes are made from the original text. Once active, changes of text are underlined and coloured and the name of the user that made the change appears together with the timestamp of the change.

All users can accept or reject the changes. The accepted changes become part of the text while the rejected ones are removed.

Users can also review the tracked changes one-by-one and navigate to each of them with the review menu or via the collaboration tab buttons:

## **Comments**

Users can add comments about the text that will be visible to everyone with access to the document, including EPO staff. The name of the commentator and a timestamp appears in the comment. Comments can be replied with other comments, edited, deleted, or noted as resolved, for example once an agreement for a certain action has been reached.

Comments can be added by right clicking, or from the Collaboration tab by selecting the Add comment option.

Users can navigate to the different comments via the comments menu and by clicking on the text of each comment.

## **Chat**

During the consultation, users can use the chat option to chat with each other while editing the document.