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 a specific "company" will be set up for you in MyEPO Portfolio, and you will have administration rights for your "company".

Access to an application in MyEPO Portfolio is available to the representative if they have been added as recipient. If the applicant is self-representing they can have access to applications and communications, but not to pending actions. Professional representatives can access communications, applications and procedural actions. The company administrator manages access and can grant permissions to other company members, depending on what options are available to the recipients.

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
- adding and/or removing "recipients" (representatives, associations or self-representing parties and PCT Links) whose EPO communications will be sent to the company mailbox and whose portfolios can be accessed using MyEPO Portfolio, and activating or deactivating them

In the case of the "**Representative area**" of MyEPO Portfolio, which allows professionals to manage their personal entry in <u>the list of European representatives before the EPO</u>, each named representative owns their personal area and can grant other users from their company access to work on their behalf in their area. The company administrator is not able to do this.

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 you can set up new MyEPO Portfolio companies.

Section 2.2 of this guide explains what to do to join a MyEPO Portfolio company and how a company administrator can remove users from their company.

Section 2.3 of this guide explains how company administrators can manage general user rights and recipients in the **Admin area** of MyEPO Portfolio.

Section 2.4 explains how they can manage permissions to view portfolios of applications in the **Applications and patents** area of MyEPO Portfolio.

Section 2.5 explains how registered European professional representatives before the EPO can manage permissions for other users to work on their behalf in their personal **Representative area** of MyEPO Portfolio.

To guide you further, we have also published some "frequently asked questions" (FAQs), and you can always contact us at epo.org/support or your key account manager if you still aren't sure about something.

2. How to manage user access in MyEPO Portfolio

2.1 Setting up a new company in MyEPO Portfolio

A "**company**" in MyEPO Portfolio is a group of users that share a mailbox and can work together on portfolios of applications.

If you wish to use MyEPO services, your EPO account must first be linked to a MyEPO Portfolio "company", and a company administrator of that company must also give you access in MyEPO Portfolio.

MyEPO Portfolio allows you to set up companies that reflect your ways of working and grouping users. Some large companies choose to set up multiple MyEPO Portfolio "companies" that reflect organisational structures. Others keep it simple and just use one company in MyEPO Portfolio.

When setting up a new MyEPO Portfolio company, you can name the company as you wish. For example, the name of the company (on its own or including the team, business area or location) or the name of an association.
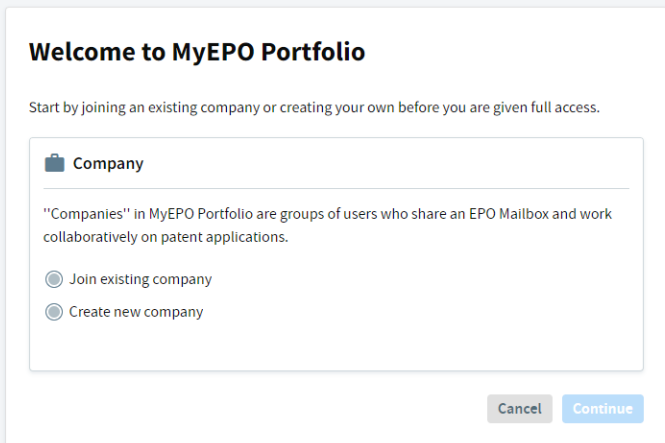
If you are applying for a patent as a private person, and not on behalf of a company or through a professional representative, you still need to set up a specific MyEPO Portfolio company for yourself, and you will be the company administrator for your "company". You can use your first and last name as the name of your company.

Your personal EPO account can only be linked to one MyEPO Portfolio company at any time.

How to set up a new MyEPO Portfolio company

To set up a new company, you should first sign in to MyEPO Portfolio using an EPO account that isn't linked to a company.

You will be offered the choice to join an existing company or to create a new one. When you select "Create a new company", you will be asked to enter the name and address of the company.

The new company will be immediately active, and a new Mailbox will be created.

You will have administration rights as company administrator and can use the **Admin** area to accept requests from other users to join your company, as described in section 2.2.

You should also add and activate your "recipients" (i.e. representatives, associations or self-representing applicants or opponents, or PCT Links) whose communications may be sent electronically to your **Mailbox** and whose portfolios will appear in the **Applications and patents** area.

2.2 Joining and leaving a MyEPO Portfolio company as a user
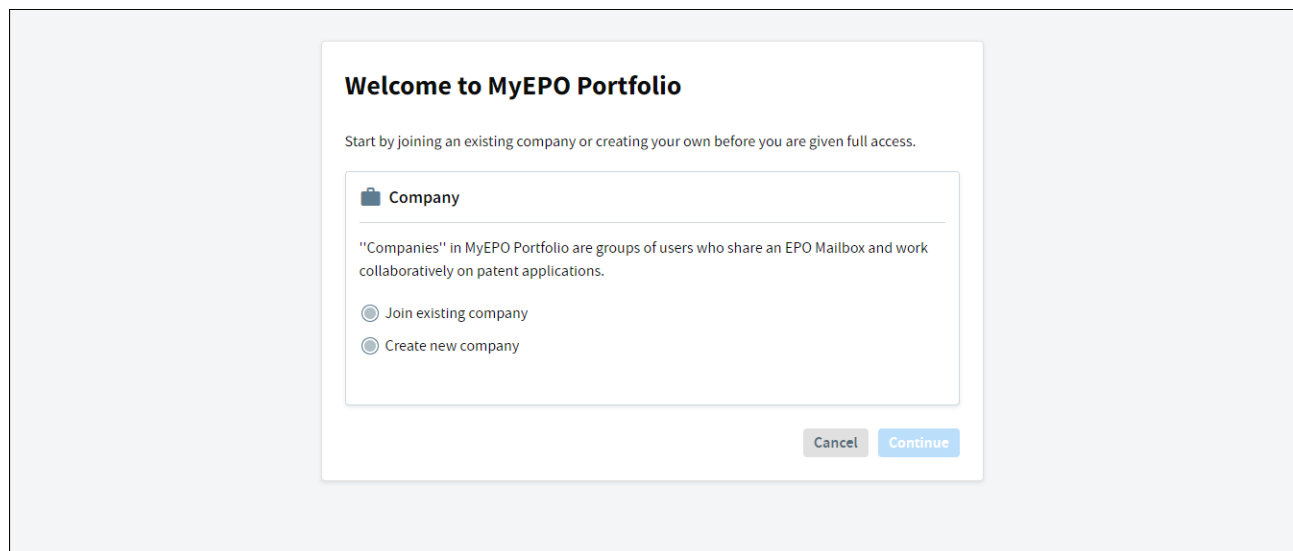
As a user of MyEPO services, your EPO account must be linked to a MyEPO Portfolio company. The company administrator must also give you access to the Mailbox or to specific portfolios as needed.

Your EPO account can only be linked to one MyEPO Portfolio company at any time.

If you are changing companies, be aware that it is important that you have access to the email address associated with your EPO account, especially if you are using it for two-factor authentication. So, if you change companies make sure to update the email address associated with your EPO account. You should also make sure you have at least two methods of two-factor authentication in case you lose access to your old email account.

What you should do as a new user for a company

When you sign in to MyEPO Portfolio, if you are not yet linked to a company, you will be offered the choice to create a new company (see section 2.1) or join an existing company.

To join an existing company, you will be asked to search for the company name. Please check with your company administrator which company name you should select.

After selecting a company, you can select which deposit accounts your user will need access to and will then see a message confirming that your request is pending approval by your company administrator.

What your company administrator needs to do

The company administrator should go to the "Company members" option in the **Admin area**, and accept your request to become a member of the company.

Your user will immediately appear in the list of company members, and the company administrator can assign you further access rights as described in sections 2.3 and 2.4 of this guide.

What should you and your company administrator do if you change company

The company administrator should go to the "Company members" option in the **Admin area**, and remove you as a member of the company by clicking on the user name and selecting the option to remove the user from the company.

Your EPO account isn't deleted as such, but your user will no longer be linked with a MyEPO Portfolio company.

To continue using MyEPO services, you should either create a new company (see section 2.1) or join an existing company (section 2.2). You should also update the email address associated with your EPO account by signing in to the **Account settings** page.

2.3 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, administration rights, and rights to sign and send submissions. 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 European representative, an association of European representatives, a lawyer or a self-representing party (applicant, proprietor, opponent/intervener or appellant).

When a request is made to add a new mailbox recipient, the EPO checks to make sure that the recipient is linked to the company. If this is not the case the recipient will be contacted.

A recipient can only be entered in MyEPO Portfolio once, and only for one company. Once a recipient has been added to your company, access to their portfolio of applications will be available in MyEPO Portfolio for users with portfolio viewing permissions.

If you are an international applicant or agent with international PCT applications for which the EPO is acting as ISA or IPEA, you can also request "PCT Links" in the Mailbox recipients tab. These allow communications from the EPO to be delivered to your Mailbox.

When you request a PCT Link, you enter the email address that was either indicated in Form PCT/RO/101 or has since been provided to the International Bureau of WIPO.

An email will then be sent from noreply@epo.org to that email address, asking the recipient to sign in to MyEPO Portfolio and agree to link the email address to this Mailbox.

You can then have all communications from the EPO for PCT applications associated with this address routed to your Mailbox by selecting "Yes" in the Electronic communications column.

You can choose to stop receiving electronic communications at any time or remove the PCT Link from your Mailbox.

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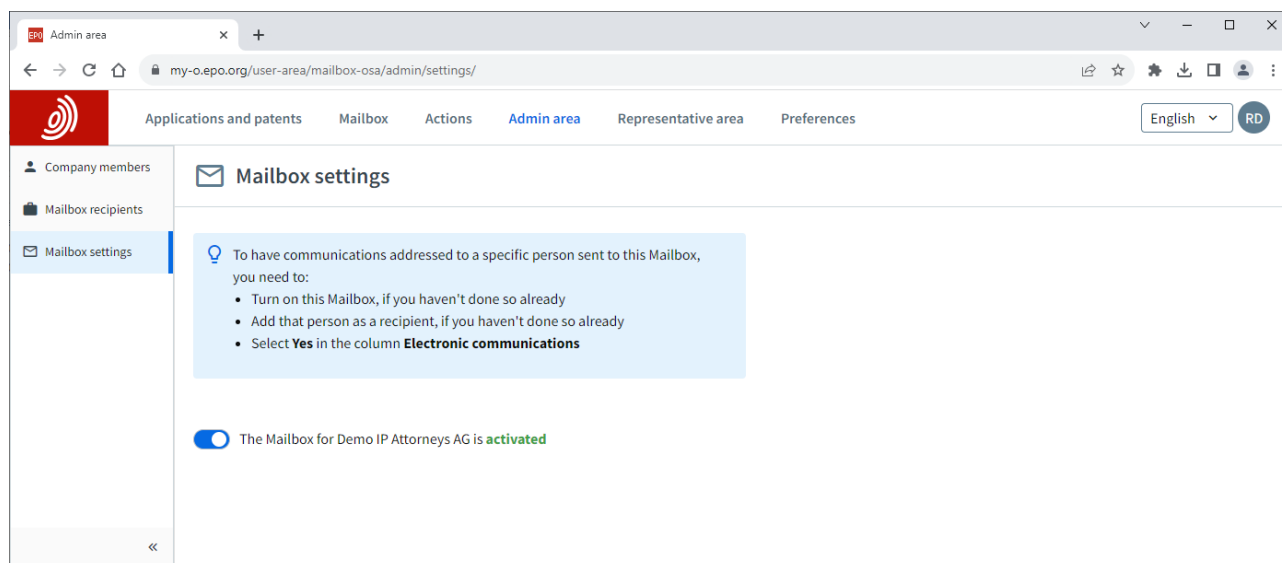
Note:

A "recipient" can be a European representative, an association of European representatives, a lawyer or a self-representing party (applicant, proprietor, opponent/intervener or appellant). Once a recipient has been added to your company, access to their portfolio of applications will be available in MyEPO Portfolio for users with portfolio viewing permissions (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.

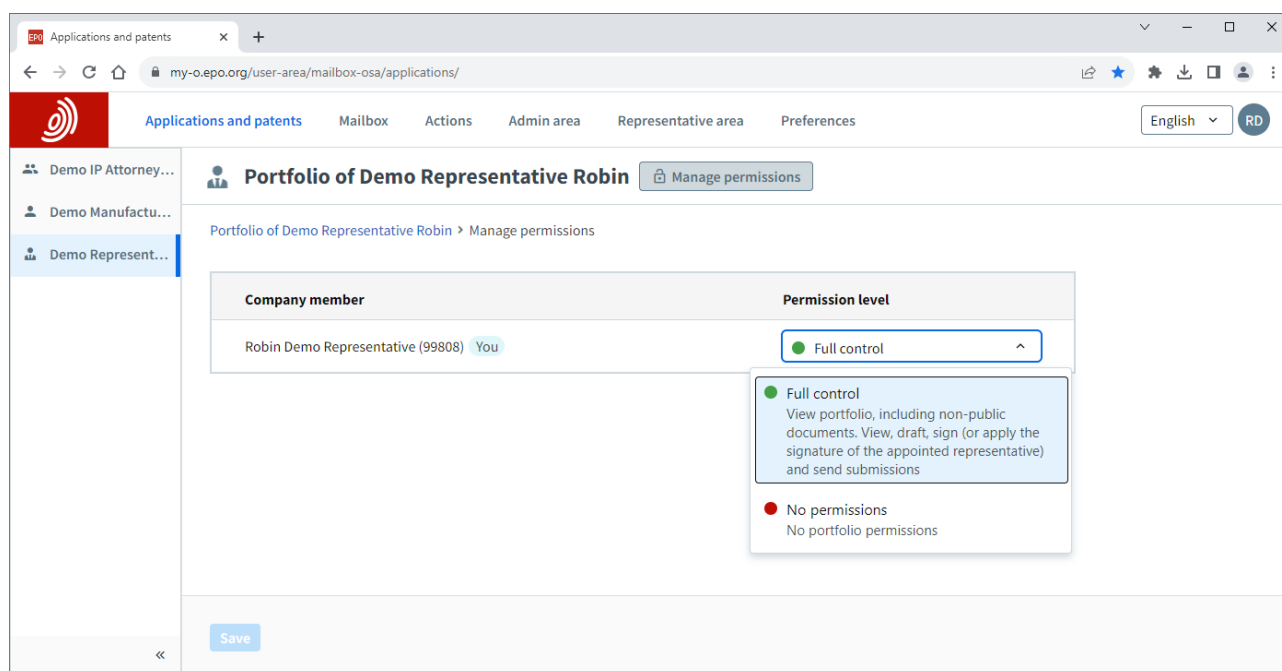## 2.4   Managing permission to view portfolios of applications

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

2.5 Managing permission to work in the Representative area

The "**Representative area**" of MyEPO Portfolio allows professionals to manage their personal entry in the list of European representatives before the EPO.

Each named representative owns their personal representative area and can grant other users from their company access to work on their behalf in their area.

The company administrator is not able to do this for the representative.

If you are the representative, sign in to MyEPO Portfolio and go to your **Representative area**. Select the "Manage permissions" option and specify which company members are allowed to work on your behalf in your area.

As a user with access, when you go to the Representative area, you will see the list of representatives who have granted you access to work on their behalf.