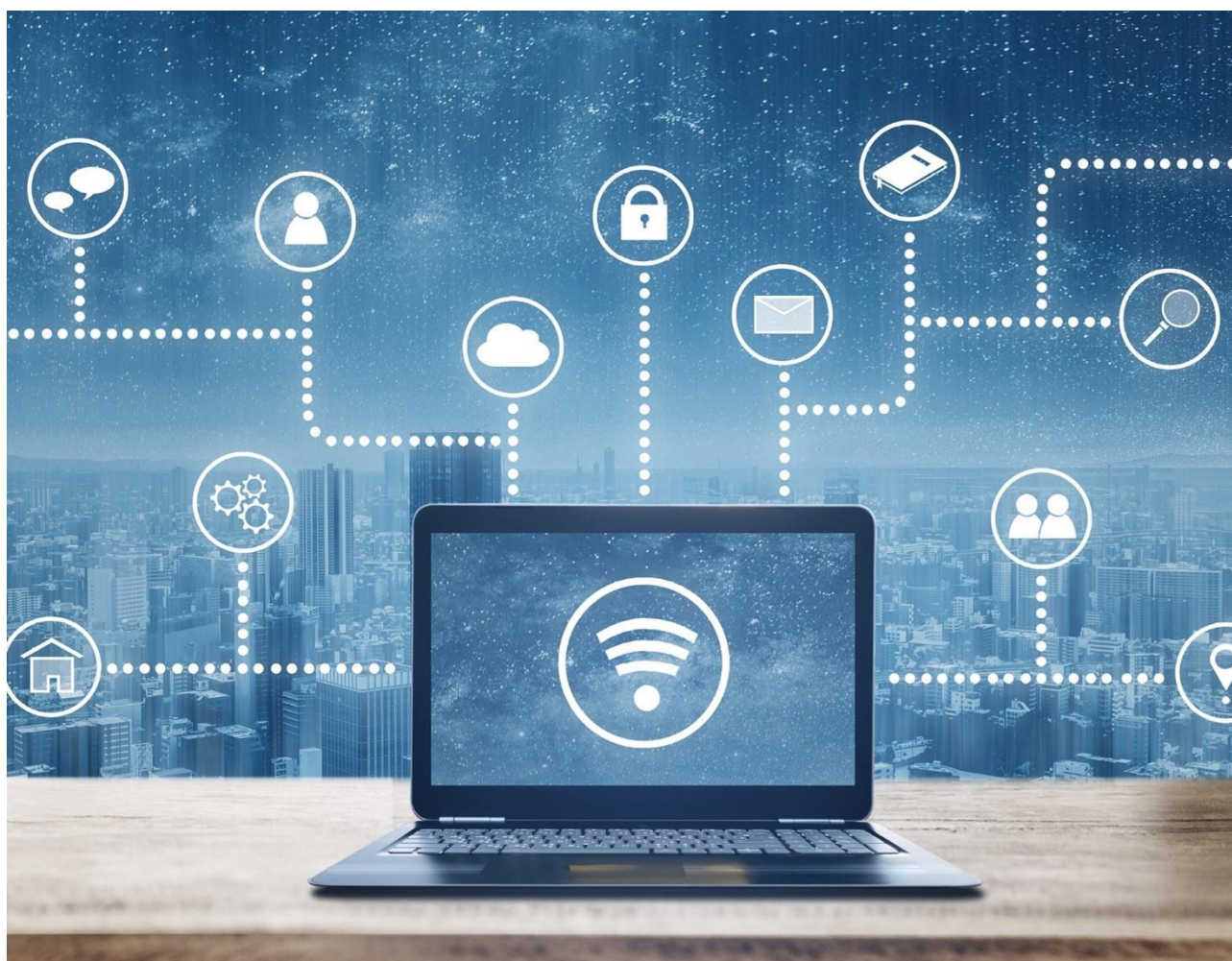


MyEPO services

Feature guide: managing user access in MyEPO Portfolio



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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”.

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 the case of the “**Representative area**” of MyEPO Portfolio, which allows professionals to manage their personal entry in the list of European representatives before the EPO, 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. *PLEASE NOTE: This feature is currently only available to users from pilot companies. Once pilot phase 4 successfully completes in 2024, it will be made available to all users.*

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 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 give the company any name you wish.

For example, it could be the actual name of your company as a legal entity, or the name of a specific geographical team or business area within your company.

The names of your MyEPO Portfolio companies don’t have a legal meaning under the European Patent Convention or PCT, nor are they shown on any official documents.


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 you, and you will be the company administrator for 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.



Welcome to MyEPO Portfolio

Start by joining an existing company or creating your own before you are given full access.

Company

“Companies” in MyEPO Portfolio are groups of users who share an EPO Mailbox and work collaboratively on patent applications.

☐ Join existing company

☐ Create new company

Cancel Continue

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 your first “recipients” (ie. representatives, associations or self-representing applicants or opponents) whose communications may be sent electronically to your **Mailbox** and whose portfolios will appear in the **Applications and patents** area.

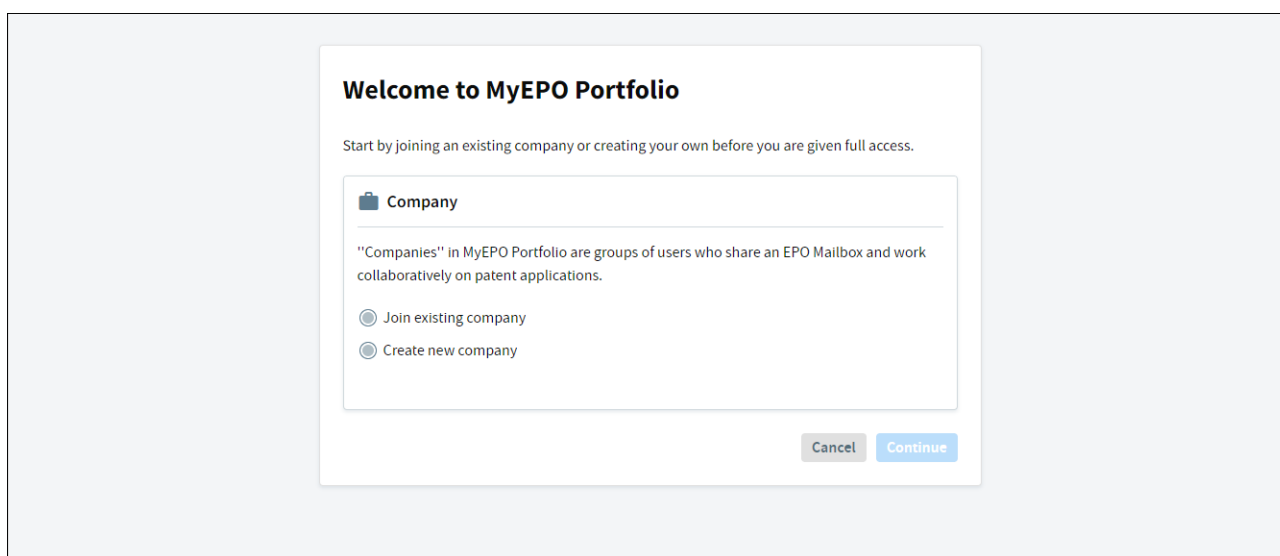
2.2 Joining and leaving a MyEPO Portfolio company as a user

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.

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.



The screenshot shows a 'Welcome to MyEPO Portfolio' dialog box. At the top, it says 'Welcome to MyEPO Portfolio'. Below that, a message states: 'Start by joining an existing company or creating your own before you are given full access.' The main section is titled 'Company' with a brief description: '"Companies" in MyEPO Portfolio are groups of users who share an EPO Mailbox and work collaboratively on patent applications.' There are two radio button options: 'Join existing company' and 'Create new company'. At the bottom right, there are 'Cancel' and 'Continue' buttons.

To join an existing company, you will be asked to search for the company name. If multiple companies appear in your search, you will see the company address for each one. If you still aren't sure which company to select, please get in touch with your company administrator(s) for MyEPO services.

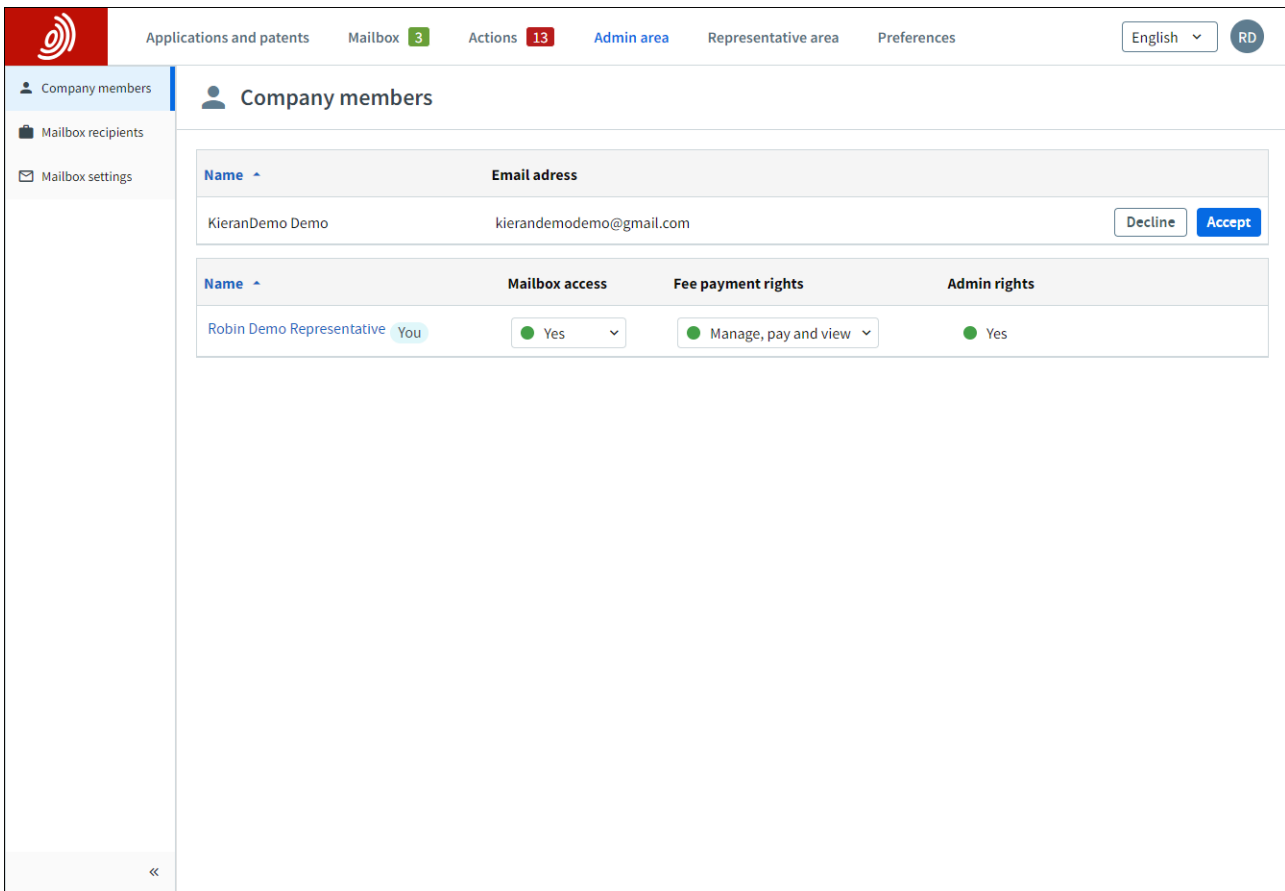
The screenshot shows a web interface titled "Welcome to MyEPO Portfolio". Below the title, it says "Start by joining an existing company or creating your own before you are given full access." There is a section titled "Company" with a brief explanation: "Companies in MyEPO Portfolio are groups of users who share an EPO Mailbox and work collaboratively on patent applications." Two radio buttons are present: "Join existing company" (selected) and "Create new company". Below this is a "Company name" search field. The search term "Demo" is entered, and a dropdown list of suggestions is shown, including "EPODemo8", "EPODemo1", "EPODemo2", "EPODemo6", "EPODemo9", "EPO TEST AND DEMO", and "Demo IP Attorneys AG". At the bottom right of the form are "Cancel" and "Continue" buttons.

After selecting a company, a message appears informing you that your request is pending approval by the company administrator.

The screenshot shows a confirmation message box. It starts with a green checkmark icon followed by the text "Your request to join a company is pending." Below this, it says "You will join the company once the administrator approves your request. If you haven't received a response in a reasonable time, you might want to contact the company." At the bottom left of the box is a button labeled "Cancel request".

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.



The screenshot shows the 'Company members' page in the MyEPO Portfolio. The top navigation bar includes 'Applications and patents', 'Mailbox 3', 'Actions 13', 'Admin area', 'Representative area', and 'Preferences'. The left sidebar has 'Company members', 'Mailbox recipients', and 'Mailbox settings'. The main content area is titled 'Company members' and contains a table of members.

Name	Email address	
KieranDemo Demo	kierandemodemo@gmail.com	<button>Decline</button> <button>Accept</button>

Name	Mailbox access	Fee payment rights	Admin rights
Robin Demo Representative	You	Yes	Manage, pay and view
	Yes	Manage, pay and view	Yes

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.

Removing a user from a MyEPO Portfolio 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.

The screenshot shows the 'Company members' page in the MyEPO Portfolio Admin area. The page has a sidebar with 'Company members', 'Mailbox recipients', and 'Mailbox settings'. The main content area displays a table of company members. A modal window is open for 'Robin Demo Representative', showing their details and a 'Delete member' button.

Name	Mailbox access	Fee payment rights	Admin rights
KieranDemo Demo You	Yes	View	Yes
Robin Demo Representative	Yes	Manage, pay and view	Yes

Robin Demo Representative

Smart card number: 99808
Company: Demo IP Attorneys AG
Email address: tcs@epo.org
Phone number:
EPO deposit account:
Representative ID number: 09264480

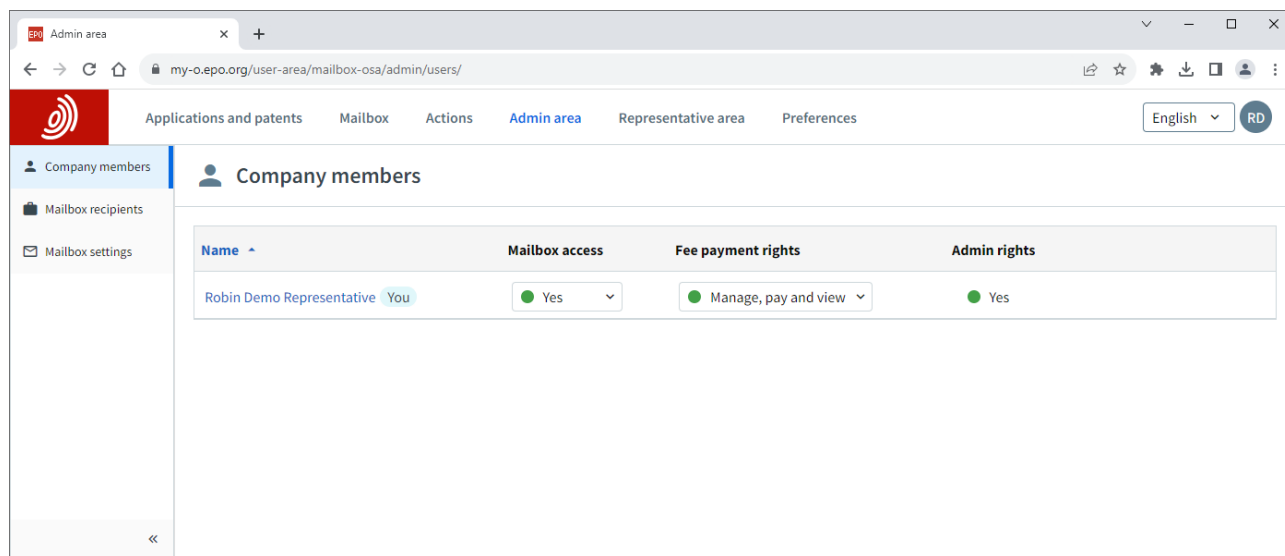
[Delete member](#)

The user's EPO account isn't deleted as such, but their user will no longer be linked with a MyEPO Portfolio company. In order to continue using MyEPO services, the user should either create a new company (see section 2.1) or join an existing company (section 2.2).

2.3 Managing general user rights and recipients

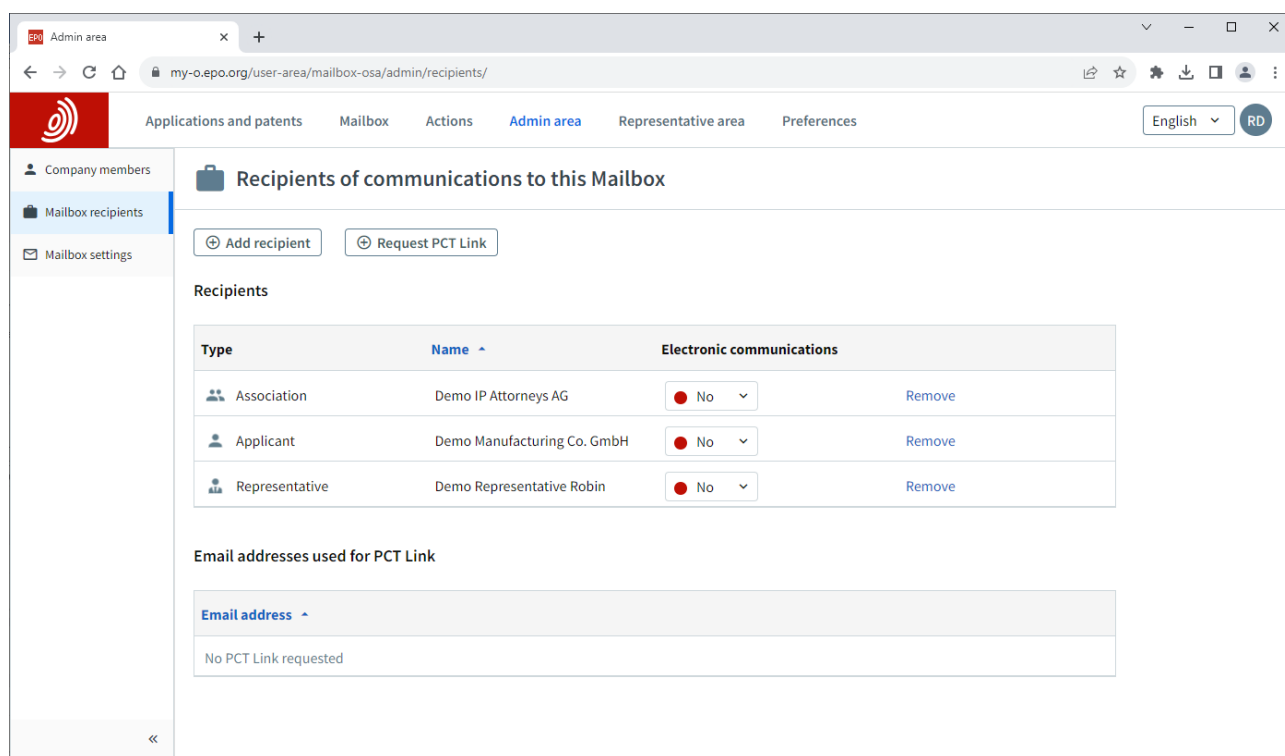
As a company administrator, you will see **Admin area** appear as one of the menu options in MyEPO Portfolio.

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 and administration rights. You can also check who else is a company administrator for your company.

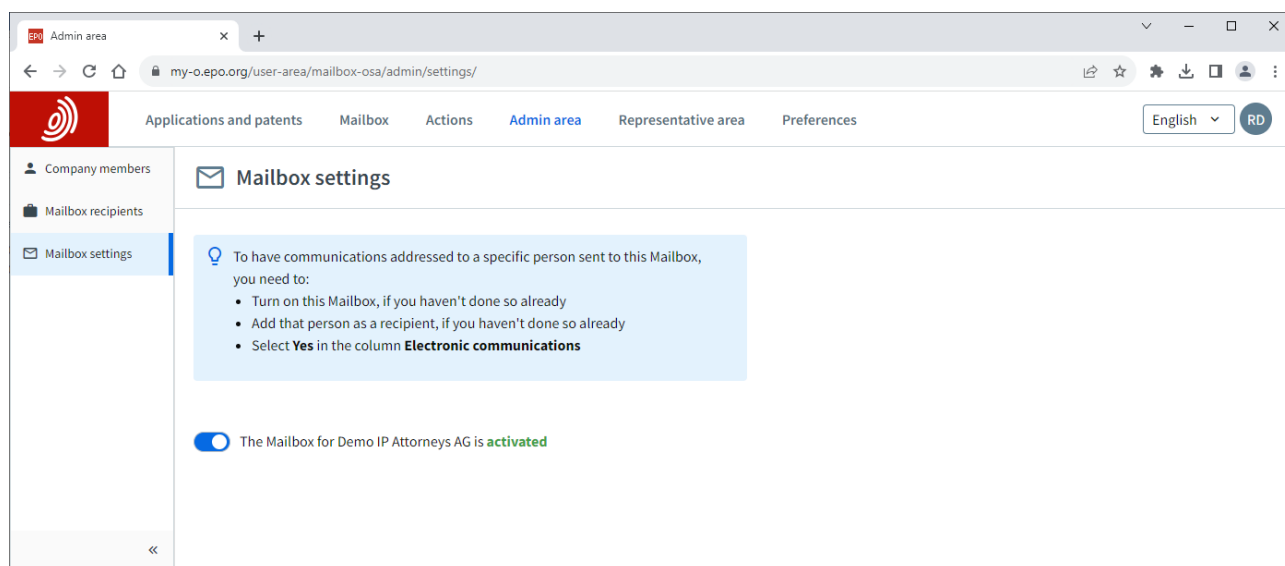


In the **Mailbox recipients** tab, you can request and manage “recipients” for whom electronic communications can be sent to the company mailbox and whose portfolios can be accessed in MyEPO Portfolio. A “recipient” can be a representative, an association, a self-representing applicant, or a self-representing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



Note:

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.

2.4 Managing permission to view portfolios of applications

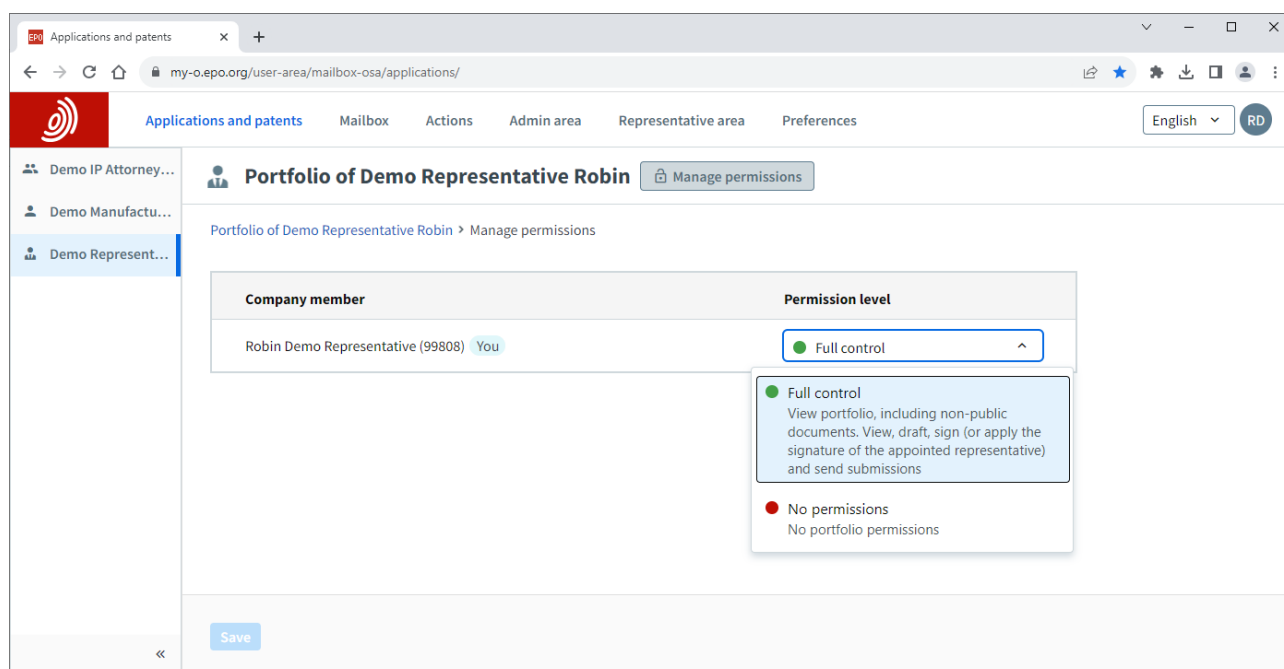
As a company administrator, you will see **Applications and patents** appear as one of the menu options in MyEPO Portfolio.

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 (PILOT FEATURE)

PLEASE NOTE: This feature is currently only available to users from pilot companies. Once pilot phase 4 successfully completes in 2024, it will be made available to all users.

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 access” 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.