MyEPO Portfolio

Feature guide: accessing your portfolios and documents

Content

1. Introduction

With MyEPO Portfolio users can view public information about any published EP or Euro-PCT application, view and work on their portfolios of EP patent applications, including direct access to the digital files associated with each EP application. You can do this as a representative, or as a company member provided you have access to MyEPO Portfolio and been granted permission to access portfolios by the company administrator.

The **Applications and patents** area of MyEPO Portfolio makes it easy for you, and in this feature guide we provide an overview of how it works.

The Applications and patents area of MyEPO Portfolio replaces the **legacy My Files tool**, which will be decommissioned in June 2024.

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're still not sure about something.

2. Working with your portfolios and documents

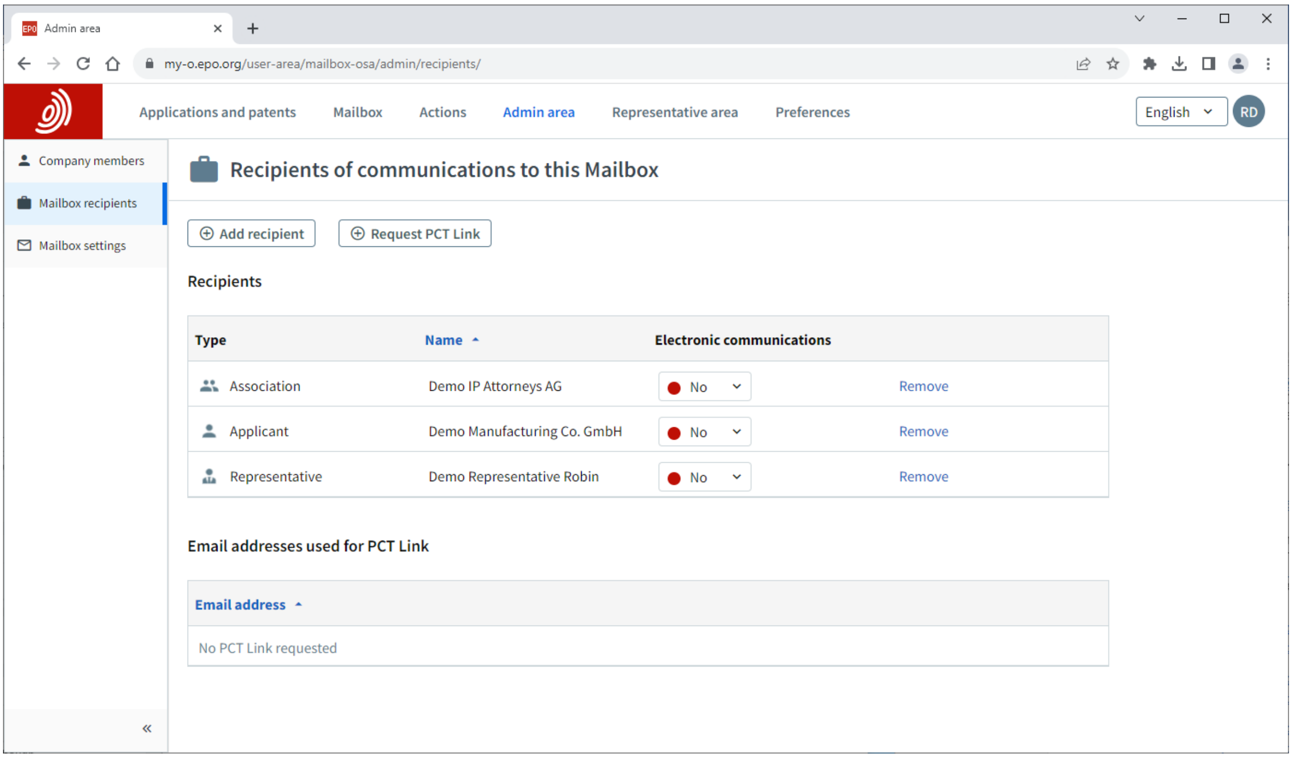
2.1 Get access to your portfolios of applications

All users of MyEPO Portfolio have access to the **Applications and patents** area and you can view public information about <u>any</u> published EP or Euro-PCT application, including applications that aren't part of your portfolios. You can also request certified copies, transfer of rights and register licences.

In addition, you can view both public and non-public information about the applications in your company's portfolios, but first your company administrator must set up recipients and grant permissions as follows:

As a company administrator, you first go the **Admin area** and use the **Mailbox recipients** tab to request to add "recipients" for whom electronic communications can be sent to the company mailbox and whose portfolios can be accessed in MyEPO Portfolio.

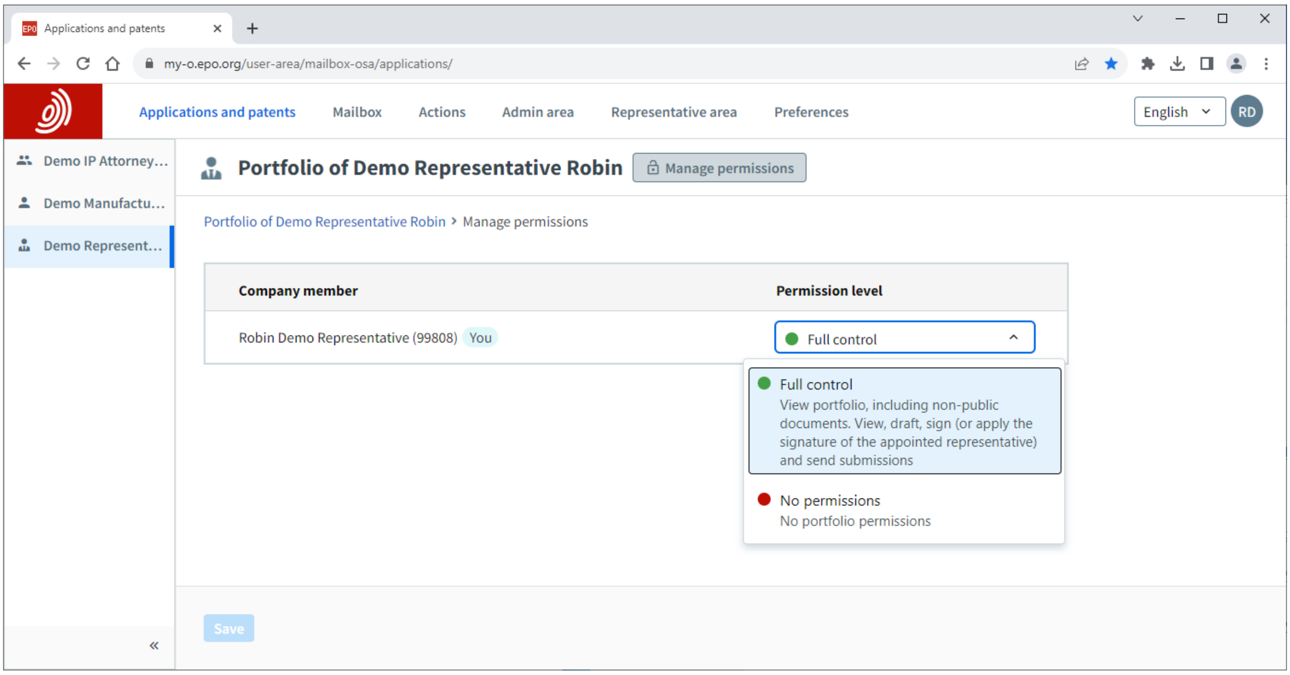
A "recipient" can be a European representative, an association of European representatives, a lawyer or a self-representing party (applicant, proprietor, opponent/intervener or appellant).



The EPO will check each request to add a recipient, which may take several working days.

Once your request has been validated, all recipient portfolios will appear in the **Application and patents** area.

As company administrator you can select a recipient's portfolio and use the **Manage permissions** option to identify which users within your company can access the portfolio.



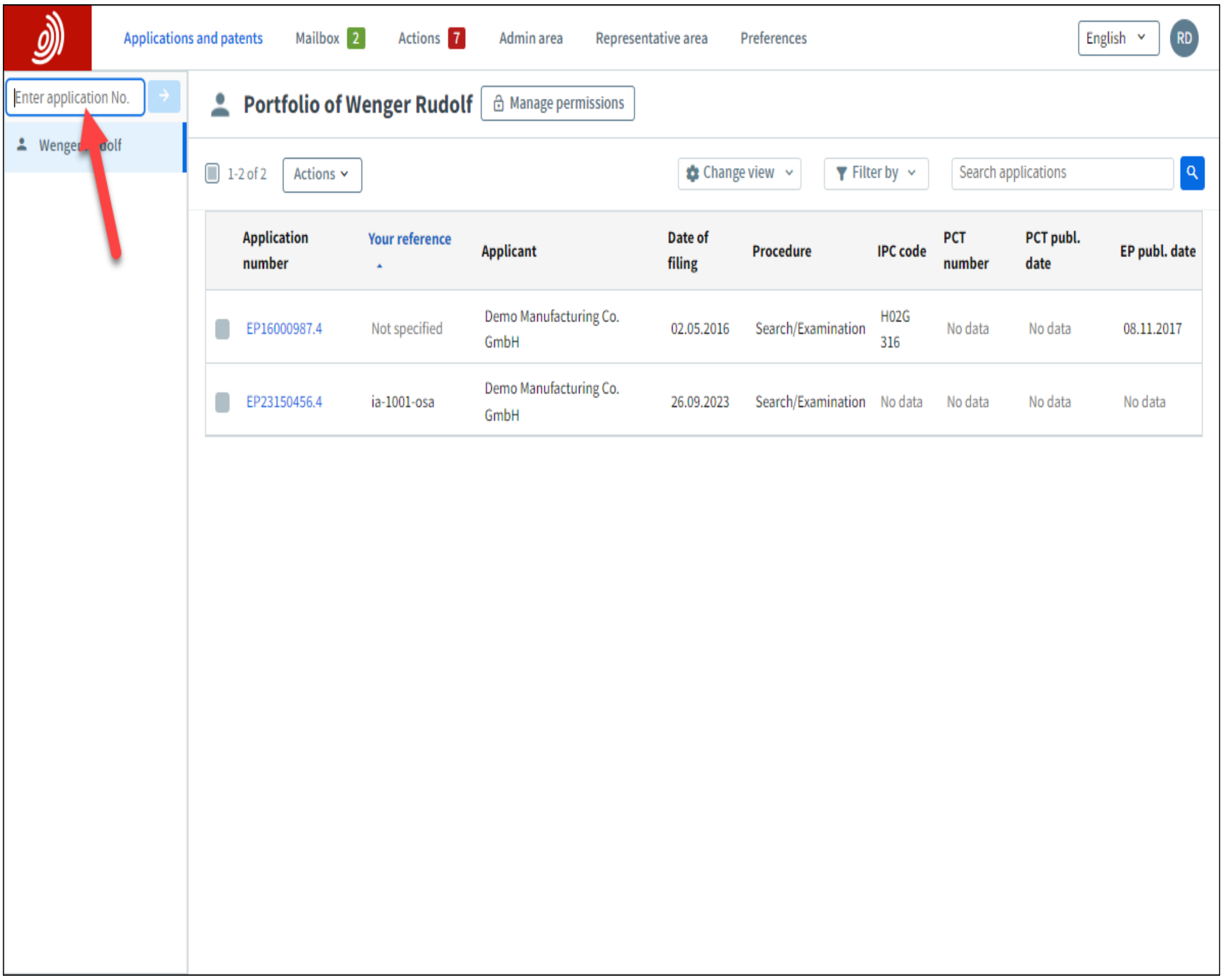
When you grant “Full control” to a user, they will be able to

- See applications for the representative or association, including unpublished applications.
- See documents for those applications, including non-public documents.
- Perform procedural actions and submit requests for the applications: draft submissions and fee payments, sign and send to the EPO. *Please note that some actions and requests are not currently available to self-representing applicants.*

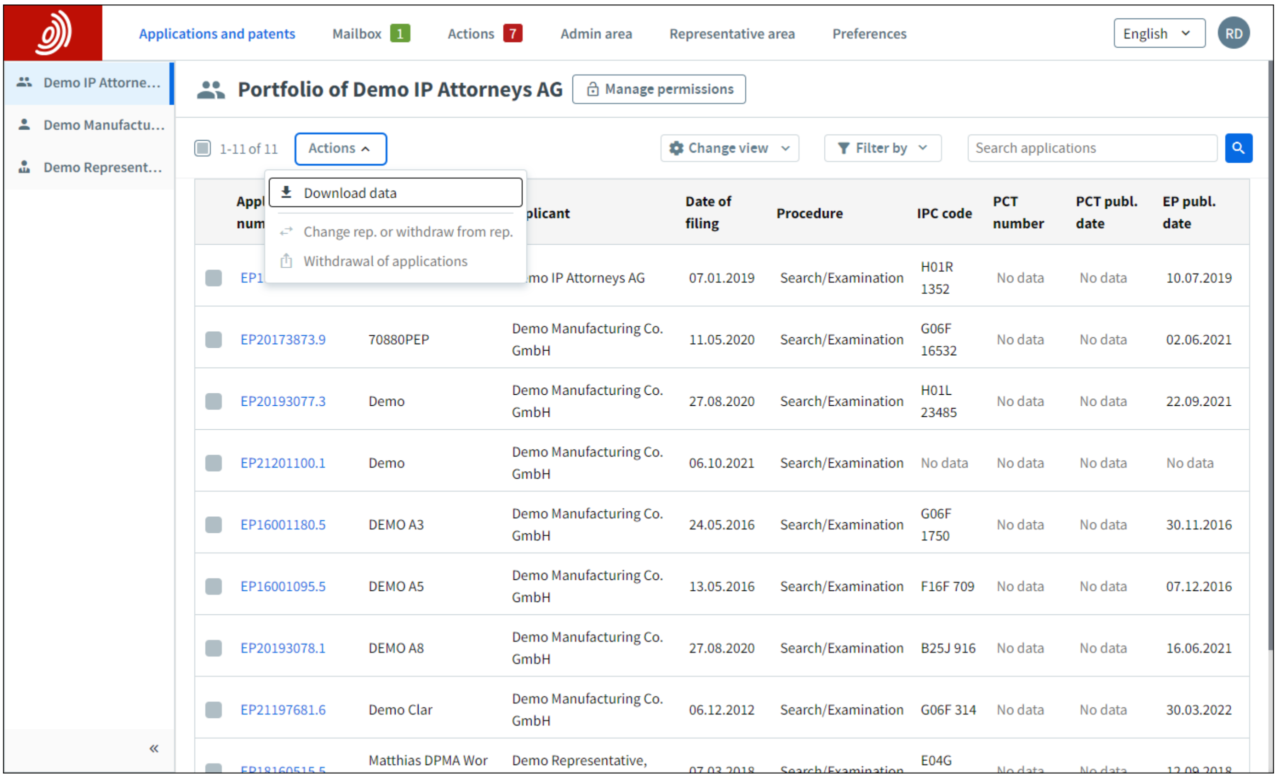
For more information on MyEPO Portfolio companies and users, please see the feature guide on managing user access in MyEPO Portfolio.

2.2 Work with your portfolios

In the **Applications and patents** area of MyEPO Portfolio, you can enter the number of any EP or Euro-PCT application on the left-hand side to access public information about that application, request certified copies, transfer of rights and register licences.



On the left-hand side you can also see the list of your company’s application portfolios for which you have been granted access by your company administrator (see section 2.1). When you select a portfolio, you can view the list of applications in that portfolio.



There are smart filters that prevent unauthorised users from seeing non-public applications.

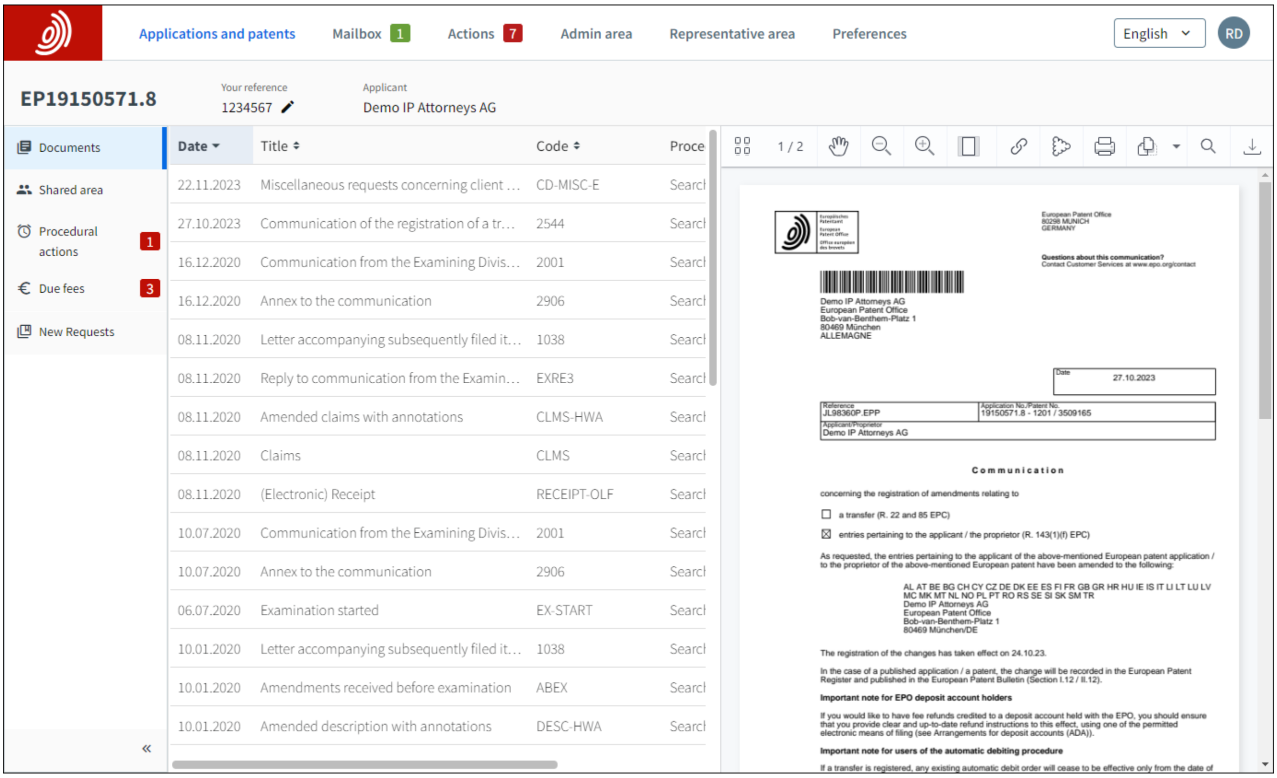
You can search and filter applications, and perform actions on one or more of the applications:

- Download information about the applications to a CSV file that you can open in Excel or upload to your IP management systems.
- Submit procedural requests about the applications, such as change of representation. *Please note that these actions are not currently available to self-representing applicants.*

For more information on submitting procedural requests about applications, please see the feature guide on submitting procedural requests.

2.3 Work on an application

When you click on an application number in the **Applications and patents** area, you will be taken to a screen with information and options to work on the application.



The **Documents** tab on the left-hand side gives you access to the digital files associated with the application. There are smart filters that prevent unauthorised users from seeing non-public documents. You can select, view, print, and download each document.

The **Shared area** tab only appears if the application is part of your company's portfolio. It gives you access to a space where you can initiate live online interaction with EPO examiners on substantive content related to your application. For more information, please see the feature guide on the shared area.

The **Procedural actions** tab only appears if the application is part of your company's portfolio. It allows you to perform pending procedural actions, such as replying to communications from the EPO. For more information, please see the feature guide on replying to communications with deadlines. *Please note that these actions are not currently available to self-representing applicants.*

The **Due fees** tab only appears if the application is part of your company's portfolio. It is where you can view pending fees (EP pre-grant) for the application and use Central Fee Payments to process them.

The **New requests** tab allows you to submit procedural requests about the application, such as requests to change bibliographic data. If the application isn't in your company's portfolio, only limited types of request are possible. For more information, please see the feature guide on submitting procedural requests.