MAILBOX and MyFILES

User Day – The Hague
Agenda

• Online services
• Mailbox creation
• Administrator
• Mailbox Access
• Electronic Mail
• Mailbox features
• Clean up of data
• MyFiles
ONLINE SERVICES ACCESS

Online services

These services have been designed to allow applicants, attorneys and other users to conduct their EPO business electronically in a secure state-of-the-art environment.

Improving online services
We have initiated a major programme to improve IT support for the filing and processing of patent applications.

Online filing
Use the online filing software to file EP, Euro-PCT and PCT applications, submissions in EP opposition, appeal, invention and revocation proceedings, and subsequently filed documents for all EP proceedings.

Online fee payment
Online fee payment is a convenient and user-friendly online service designed for holders of EPO deposit accounts.

Find a professional representative
If you need to consult or appoint a professional representative, you can find one on our regularly updated database.

Oral proceedings calendar
Check dates, times and other details of public EPO oral proceedings on oppositions or appeals.

Administration
The Administration facility allows you to specify which members of your staff can access the online fee payment and mailbox services.

Updates
EPO offices closed from 22.12.2012 to 2.1.2013
Temporary unavailability of some parts of EPO website
17.12.2012
Online Filing software - V5.05 full package for installation and new EP and PCT Update now available

My files
My files allows you to compile a portfolio of folders containing your favourite published files.

Mailbox
The Mailbox service allows professional representatives to receive communications from the EPO online.

Security
We take your online security and confidentiality very seriously. Security features are implemented using SSL, smart cards, and PKI technology.
Mailbox Creation I

Personal details

Title: [Select a title]  
First name:*  
If you have more than one first name, please enter one only (exception: hyphenated first names).  
Last name:*  
Do not use BLOCK CAPITALS.  
Preferred language: [Select a language]  
EPO representative:  
- Yes  
- No  
Representative whose name appears on the list of professional representatives before the EPO.  
Authentication question:* [Select a question]  
Authentication answer:*  
Choose one of the security questions and enter the appropriate answer. Please enter an answer that you can easily remember. We will ask you this question to confirm your identity if:  
- you lose your PIN code  
- you block your smart card and need the AdminPIN  
- you require a new card

Company details

Company name:*  
Your company name will appear on your smart card.
## Mailbox Creation II

<table>
<thead>
<tr>
<th>Company Name</th>
<th>City</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPO</td>
<td>Den Haag</td>
<td>Netherlands</td>
</tr>
<tr>
<td>EPO, Den Haag &amp; Bijld</td>
<td>Rijswijk</td>
<td>Netherlands</td>
</tr>
<tr>
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<td>Berlin</td>
<td>Germany</td>
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<td>-----------</td>
<td>------------</td>
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<tr>
<td>Mr. Adu</td>
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<td>Martin</td>
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<tr>
<td>Ms. Andreata</td>
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<td>Roberta</td>
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<td>Ms. Cunningham</td>
<td></td>
<td>Julie</td>
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<tr>
<td>Mr. De Zwart</td>
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<td>Jaap</td>
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<tr>
<td>Mr. Garvey</td>
<td></td>
<td>Richard</td>
</tr>
<tr>
<td>Mr. Hjørland</td>
<td></td>
<td>Johannes</td>
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<tr>
<td>Mr. Ivanov</td>
<td></td>
<td>Stanimir</td>
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<tr>
<td>Mr. Nesciobelli</td>
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<td>Claudio</td>
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<tr>
<td>Ms. Polenzani</td>
<td></td>
<td>Sandrine</td>
</tr>
<tr>
<td>Ms. Robert Hamilton</td>
<td></td>
<td>Rivka</td>
</tr>
</tbody>
</table>
Administrator

• Before your company can use the Mailbox, a company administrator has to be appointed. Any smart card holder from your company can log in and sign up as the first administrator.

• Having installed your smart card reader, all you have to do is insert your smart card, click on “Login” under “Smart card access” on www.epoline.org, and follow the prompts.

• The following message will appear on the right of the screen: Invitation to register as company administrator

• Click “Register” to verify your company information and accept the terms and conditions of use. Log out and log in again.
### Administrator Tasks I

<table>
<thead>
<tr>
<th>Fee Payment</th>
<th>My Files</th>
<th>Mailbox</th>
<th>Administration</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Mailbox

**Mailbox status**

The mailbox for **Einstein Ltd** is **on**.

The mailbox was started by 12572/Roberta Andreatta on 06.06.2012

[Turn off…]

**Trash settings**

Mail items located in the trash are permanently erased after **twelve weeks**

[Change…]
Administrator Tasks II

Enter the name of the new associate.
Only professional representatives should be entered.
Fields marked * are compulsory

Title:* Mr.
First Name:* Richard
Last Name:* Garvey

The information you have entered will be processed by EPO User Support
Administrator Tasks III

Enter the name of the new associate.

Only professional representatives should be entered.
Fields marked * are compulsory

Title:* Mr.
First Name:* Garvey IP
Last Name:* Association 123321

The information you have entered will be processed by EPO User Support
## Administrator Tasks IV

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<th>Role Code</th>
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<tr>
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<td>Herr</td>
<td>assoc 123</td>
<td>✔</td>
<td>Richard</td>
<td>10093884</td>
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<tr>
<td>✔</td>
<td>Mr.</td>
<td>Garvey</td>
<td>✔</td>
<td>Richard</td>
<td>1921490</td>
</tr>
<tr>
<td>✔</td>
<td>Mr.</td>
<td>Ivanov</td>
<td>✔</td>
<td>Stanimir</td>
<td>10073060</td>
</tr>
<tr>
<td>✔</td>
<td>Mr.</td>
<td>van Bat</td>
<td>✔</td>
<td>Arne</td>
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</table>
Administrator Tasks V

Feed Payment | My Files | Mailbox | Administration

Mailbox | Associates | Users

Refresh | Add | Edit | Delete

Find in current view: Last Name

Status | Title | Last Name

☑️ Mr. Garvey
Administrator Tasks VI

- Edit the settings of Richard Garvey
  - Send electronic mail to company mailbox

Title: Mr.
First Name: Richard
Last Name: Garvey
Role Code: 09211490

Terms and conditions of use for the Online Services Mailbox:
I have read the notice referred to below and confirm that the representation data for the files for which the associate is now responsible is up to date.
(Notice from the European Patent Office dated 13 December 2011 concerning EPO online services)

*To optimise these services for all users, professional representatives should make sure that all data relating to them and their clients is up to date at all times. Electronic notifications will be sent to the appointed professional representative according to our records.*

Accept | Decline
### Administrator Tasks VII

#### Find in current view

<table>
<thead>
<tr>
<th>Last Name</th>
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<th>Role Code</th>
<th>Deposit Account</th>
<th>Admin</th>
<th>Mailbox</th>
<th>View accounts</th>
<th>Pay fees</th>
<th>Payment plan</th>
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<td>Ms. Andreata</td>
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<td>00034140</td>
<td>28490100 2003021 1200346</td>
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Administrator tasks VIII
MAILBOX ACCESS

Mailbox

The Mailbox service allows professional representatives to receive communications from the EPO online.

**Direct access**

Smart card access

Access Mailbox with a secure smart card connection. Enter your smart card and press the login button.

- Smart card login
- Enrol for a smart card
- Register or renew your smart card

**Getting started**

- Mailbox quick reference guide (PDF)
- Features and benefits of Mailbox
- EPO smart cards
<table>
<thead>
<tr>
<th>Fee Payment</th>
<th>My Files</th>
<th>Mailbox</th>
<th>Administration</th>
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</thead>
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**Online Services - the way to do IP**

EPO Online Services have been designed to allow applicants, attorneys and other users to conduct their business with the European Patent Office electronically in a state-of-the-art secure environment, protected by smart card or username/password access.

With Online Services you can:

- use the **Online Filing** software to file the following applications and documents with the EPO
  - EP, Euro-PCT and PCT applications
  - submissions in opposition, appeal, limitation and revocation proceedings
  - subsequently filed documents for all EP proceedings
  - You can also use it to file the following with participating national offices:
    - EP and PCT applications
    - national applications and other documents in national procedures
- use the **Online Fee Payment** software: this is a user-friendly online service which allows you to pay fees, in single or batch payments (via batch files created using the MultiPay Tool), track fees paid via the Online Filing software, view, print in PDF or download in XML the details of your transactions (e.g. deposit account overviews, account statements, pending orders, the EPO’s schedule of fees, etc.)
- submit your applications using **PatentX**, which helps you draft your patent documents in Microsoft Word by creating a template with built-in EPO rules
- organise your files and receive communications from the EPO using My Files and Mailbox
  - My Files allows you to compile a portfolio of folders containing your favourite published files and to view these files in the Online Secure File Inspection section
  - The Mailbox service allows professional representatives to benefit from immediate and direct access to a defined list of communications from the EPO online

We invite you to login and navigate through our services. More detailed information is available for each of them. We trust you will find all the information and instructions you need.
ELECTRONIC MAIL I
Communication, amended entries representative

Representative: Warren, Caroline Elisabeth
Postal address: Einaten Ltd
Rijswijk
Netherlands
Date: 21 March 2013

<table>
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<td>AnthroCare Corporation</td>
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<td>P285564EPCT-RMG</td>
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</table>

The European Patent Office hereby acknowledges receipt of your request for amending entries concerning the representative (R. 140(1)(h) EPC) for the above application(s), as detailed below.

Submitted by: Warren, Caroline Elisabeth
Date and time requested: 21 March 2013, 11:26:26 (CEST)

The EPO is hereby requested to register the following representation changes for the above application(s):

Kazi, Ilya
Mathys & Squire LLP
120 Holborn
London EC1N 2SQ
GB

Once your request has been validated and processed, this amendment will be recorded in the European Patent Register.

/European Patent Office/
**ELECTRONIC MAIL III**

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ELECTRONIC MAIL IV
# ELECTRONIC MAIL VI

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<th>Fee Payment</th>
<th>My Files</th>
<th><strong>Mailbox</strong></th>
<th>Administration</th>
</tr>
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</table>

**Mailbox - Einstein Ltd**

- **New Folder**
- **Rename**
- **Delete**

**Inbox**
- Not opened
- Follow up
- electronic mail
- garv1
- john
- March 2015

## Download

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## ELECTRONIC MAIL VII

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<td>15%</td>
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Why use The Mailbox

• You retain the 10 day rule

• You receive documents in electronic format (communicating internally and with clients)

• Search reports, including cited documents and NPL

• Legal certainty
MAILBOX ISSUES: File - Representative relationship

- Representative leaves / retires.
- No request for transfer of representation.
- Delay in change of address by EPO.
Kazi, Ilya
Mathys & Squire LLP
120 Holborn
London EC1N 2SQ
ROYAUME UNI

European Patent Office
Postbus 5018
2280 HV RIJSWIJK
NETHERLANDS
Tel. +31 (0)70 340-2040
Fax +31 (0)70 340-3016

For any questions about this communication:
Tel.: +31 (0)70 340 45 00

Date 15-11-2011
Electronic Address

- FREP Number

- INDIVIDUAL not COMPANY
MyFiles

• MyFiles allows representatives to view a list of all of their files for which they are, according to EPO data, the appointed representative.

• It provides access to the content of the file.

• Access to MyFiles is with Smart Card.
  – Contact the EPO if you do not have access

New functionality / Data Clean up

• Edit file reference
• Change representation
• Withdraw representation
Related Pro-active Clean up

• Company provides EPO with a list of those representatives still at the company

• EPO provide company with list of files for attorneys who have left their company.

• Short term solution is to transfer all files to one attorney

• Medium term solution

• Long term: manage using Myfiles
### MyFiles I

#### My Files - 09211490

- **Warren, Carolin...**
- **Matthys & Squire...**

#### My Files Table

<table>
<thead>
<tr>
<th>EP Number</th>
<th>PCT Number</th>
<th>Applicant</th>
<th>Reference</th>
<th>IPC Code</th>
<th>Date of Filing</th>
<th>EP Publ. Date</th>
</tr>
</thead>
</table>

#### Search Options
- **Search**
- **Reset**
- **Show search options**
Change representation for the following application

You are about to change the representation for the application indicated below. Please note: once you change the representation, you will not be able to access this application from MyFiles. Nor will EPO communications relating to this application be sent to you.

If you reallocate representation to a representative in your company, you can create a new user reference. In all other cases your existing user reference will be deleted.

<table>
<thead>
<tr>
<th>EP Number</th>
<th>Reference</th>
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</table>

Find representative
Find association
## MyFiles - Change of Representation III

<table>
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<tr>
<th>Fee Payment</th>
<th>My Files</th>
<th>Mailbox</th>
<th>Administration</th>
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</thead>
</table>

**My Files - 09211490**

<table>
<thead>
<tr>
<th>Name</th>
<th>City</th>
<th>Country</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Kazi</td>
<td>London</td>
<td>United Kingdom</td>
<td></td>
</tr>
</tbody>
</table>

**Search**

- Name: Kazi
- City: London
- Country: United Kingdom

### Select representative

Search for a representative. Select a representative address from the list and click the Select button or just click one of the address rows.

Please enter a representative address only if there is no appropriate representative/association in our system. Please note that making a manual entry will delay the reassignment process.

**Address**

Enter address manually
MyFiles - Select representative IV

Name: Kazi
City: London
Country: 

Select representative

Search for a representative. Select a representative address from the list and click the Select button or just click one of the address rows.

Please enter a representative address only if there is no appropriate representative/association in our system. Please note that making a manual entry will delay the reassignment process.

Address:

Kazi, Ilya
Mathys & Squire LLP
120 Holborn
London EC1N 2SQ
GB

Enter address manually
MyFiles – Review V

Change representation for the following application

You are about to change the representation for the application indicated below. Please note: once you change the representation, you will not be able to access this application from MyFiles. Nor will EPO communications relating to this application be sent to you.

If you reassign representation to a representative in your company, you can create a new user reference. In all other cases your existing user reference will be deleted.

Find representative: Kazli, Ilya
Find association: Mathys & Squire LLP
120 Holborn
London EC1N 2SQ
GB

The address selected above does not appear to belong to a representative in your company.

<table>
<thead>
<tr>
<th>EP Number</th>
<th>Reference</th>
<th>New Reference (max. 15 characters)</th>
</tr>
</thead>
</table>

Help | Change | Don’t Change
MyFiles - Next actions

- EPO database is **immediately** updated
- A confirmation is sent to the company Mailbox
- The confirmation is stored in the electronic dossier
- The representative no longer has access to the file via MyFiles
- Client Data Registration team is informed about the change.
BENEFITS

• SECURITY

• QUALITY & TRANSPARENCY

• ACCESS TO UNPUBLISHED FILES

• ELECTRONIC MAIL

• SELF SERVICE FEATURES
CONTACT

- SUPPORT@epo.org
- 00 800 80 20 20 20

(Monday to Friday,
08.00-18.00 hrs CET)

- THANK YOU...........ANY QUESTIONS