Online Filing SE, Module 2
Creating and managing your organisation
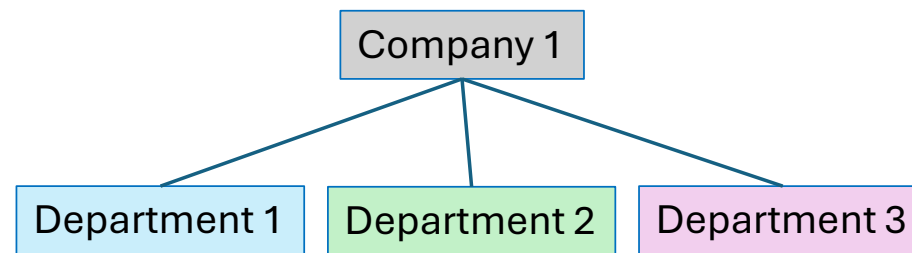
Elina Staaf

Patent Engineer and Submission systems support staff

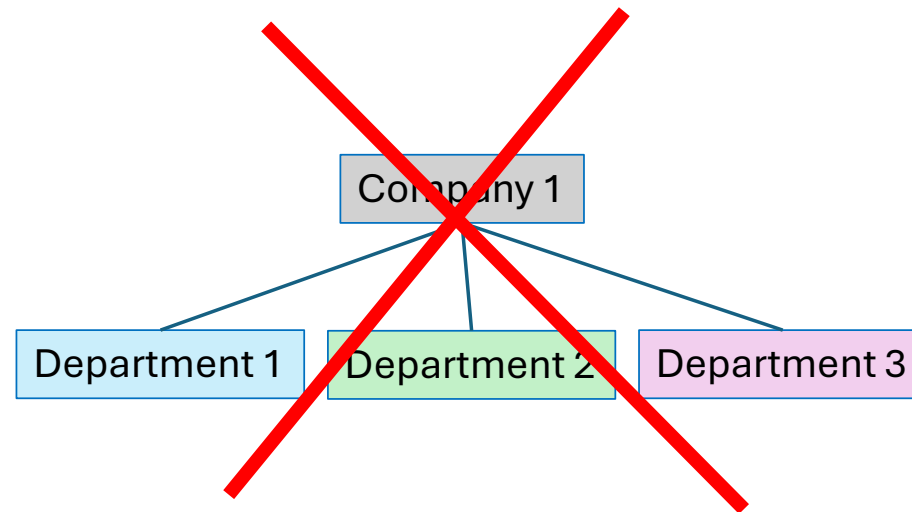Member of the Online Filing SE implementation team, PRV

PRV

Creating Organisation(s)

Online Filing SE does *not* support hierarchical organizations.

```
                    ┌──────────────┐
                    │  Company 1   │
                    └──────────────┘
              ┌───────────┼───────────┐
      ┌──────────────┐ ┌──────────────┐ ┌──────────────┐
      │ Department 1 │ │ Department 2 │ │ Department 3 │
      └──────────────┘ └──────────────┘ └──────────────┘
```

Creating Organisation(s)

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Creating Organisation(s)

Each **department/function** within a company that is to be kept separate must therefore be created as a **separate organization**.

Company1_Dep1	Company2_Dep2	Company1_Dep3

Creating Organisation(s)

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Company1_Dep1	Company2_Dep2	Company1_Dep3

Each organization is **created and owned** by an **individual user**. It is therefore important that your company has decided ahead of time **who** shall create and handle the organization(s) for your company.

Roles

Online Filing SE has the following roles for users in an organization:

Roles

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Only the **_Main user_** can invite persons to the organization, but a Main user can add more main users to the organizations.

Roles

Online Filing SE has the following roles for users in an organization:

Main user **Payer** **Drafter** **Signer** **Sender**

Only the *Main user* can invite persons to the organization, but a Main user can add more main users to the organizations.

Note: The *creator* of an organization **cannot currently be removed** from that organization.

It is therefore important for the company to select a trusted individual for creating the company organization(s).
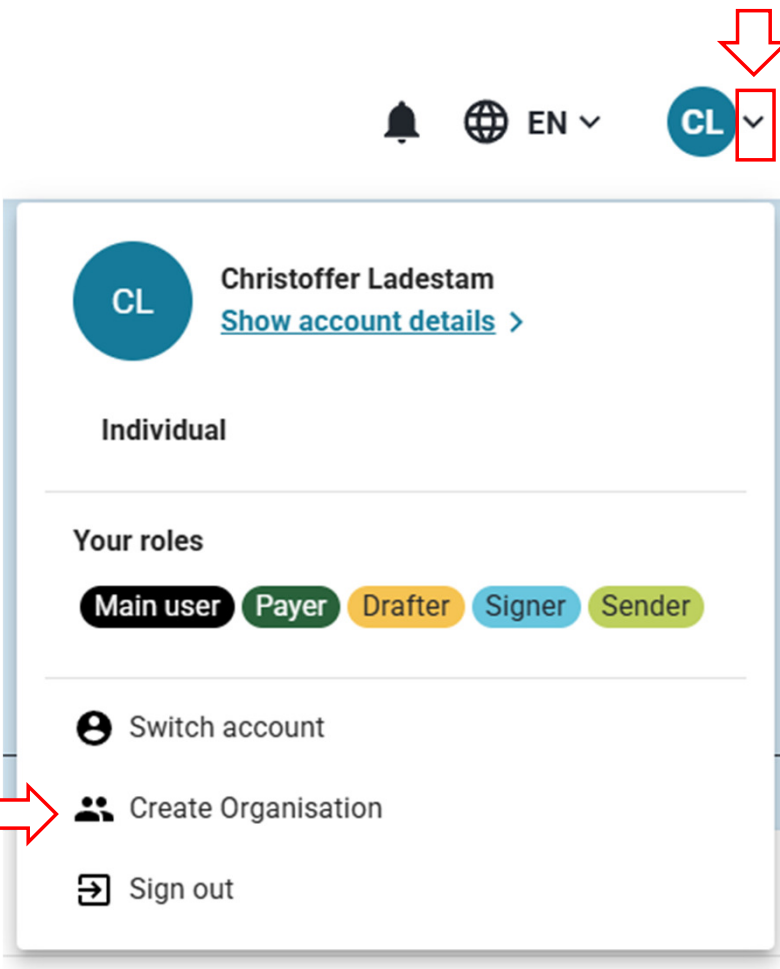
PRV recommends to only invite new members to an organisation *after* they have created their personal accounts.

PRV

Example: Creating an organisation

Press the little arrow next to your initials to see your account settings, and create organisations

PATENT OCH REGISTRERINGS VERKET **PRV** | PATENT SERVICE

EN

CL

Welcome Christoffer Ladestam

This is your national patent e-filing portal. Here you can manage all your submissions.

National submissions   **International submissions**   **European patent applications**

PRV

Example: Creating an organisation

Press **Create Organisation**

Example: Creating an organisation

- Information (Name)
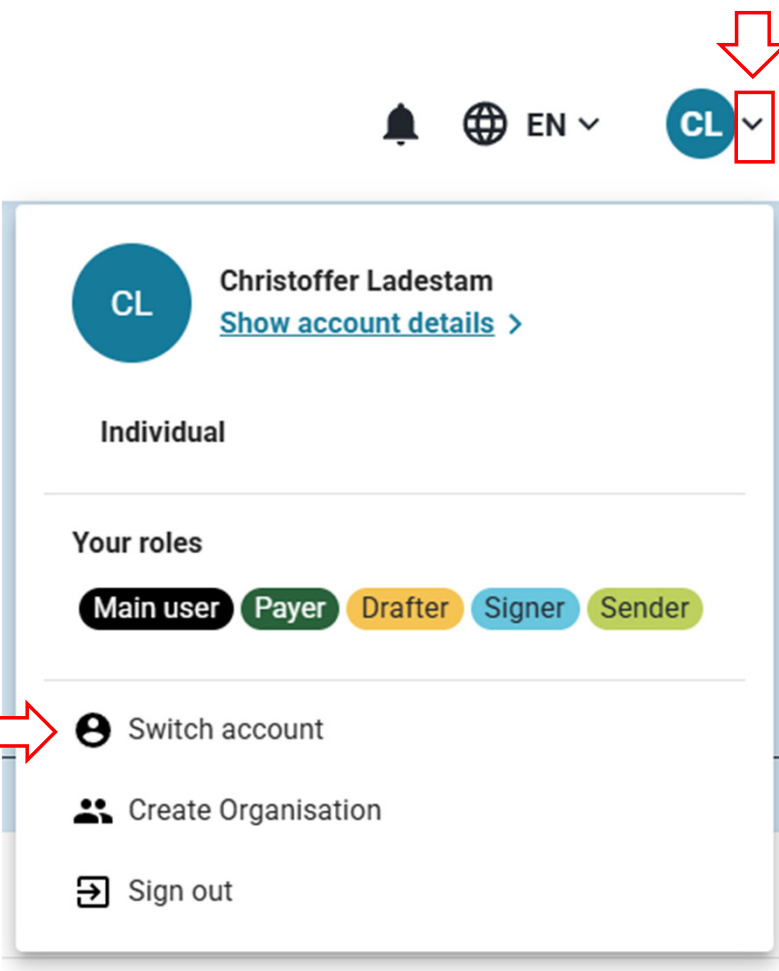
- Description

- Choose accent colour

Example: Switch to your new organisation

Press **Switch account**

Example: Switch to your new organisation

Example: Switch to your new organisation

Select the account

Settings for the organisation account

Example: Managing the account

Example: Inviting members

Invite members

To invite members to join your organisation in Front Office please search for them or enter their email address and hit enter.\n\nPlease note that when adding multiple users they will have the same roles.

> elina.staaf@prv.se; kristin.wiklund@prv.se

Roles

Add one or more users to invite. Press *Enter* after each e-mail address to activate the e-mail invitation.

☐ Drafter
☐ Signer
☐ Sender
☐ Payer
☐ Main user

Select one or more roles.
If multiple users are added, they will have the same roles.

Each user can be a part of multiple organisations, at different Roles.

Cancel   Confirm

PRV

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To invite members to join your organisation in Front Office please search for them or enter their email address and hit enter.\n\nPlease note that when adding multiple users they will have the same roles.

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Select one or more roles. If multiple users are added, they will have the same roles.

Each user can be a part of multiple organisations, at different Roles.

Press *Confirm* to send the invitation

Cancel   Confirm

PRV

Example: Moving drafts/submissions

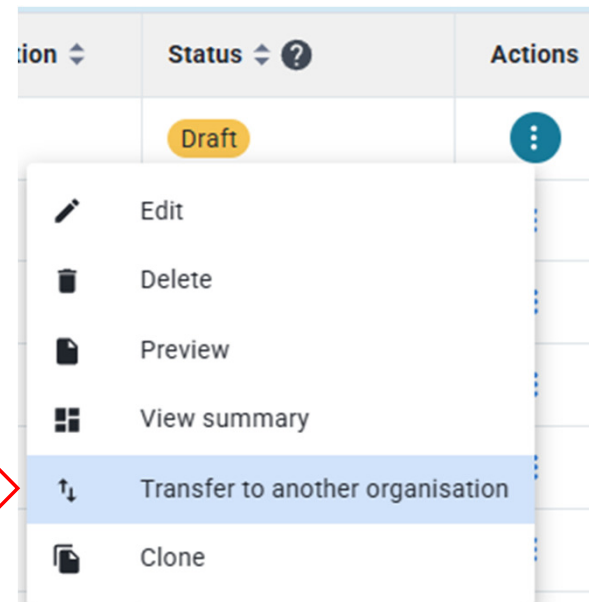Note: Can only be done by a user with Role: Main User

Find the draft or submission you want to move, press the three buttons in the Actions column

PRV

Example: Moving drafts/submissions

Note: Can only be done by a user with Role: Main User

Select **transfer** to another organisation

Example: Moving drafts/submissions

Note: Can only be done by a user with Role: Main User

Select organisation

Press Transfer

Merge accounts

If the company has accidentally created two or more organizations with the same name, contact PRV and EPO to merge the accounts.

- End of Module 2 -