



NEW CMS Training

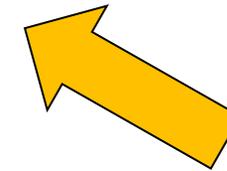
How to create an organisation or a legal team

July 2025

How to create an organisation or a legal team

When logging into your **e-filing** (Front Office) CMS account, you will have the following overview page:

The screenshot shows the 'CASE MANAGEMENT' overview page. At the top, there is a navigation bar with the court's name in three languages and a 'CASE MANAGEMENT' label. On the right, there are icons for a notification bell, a globe with 'EN' (English), and a user profile icon with 'NG'. Below the navigation bar, the main content area is titled 'Welcome Your Name' and includes the text 'This is your e-filing portal. Here you can manage all your filings.' There are three tabs: 'Case Proceedings' (selected), 'Opt Outs', and 'Protective letters'. The 'Case Proceedings' tab is divided into four sections: 'Infringement', 'Revocation', 'Counterclaim for infringement', and 'Counterclaim for revocation'. Each section displays a donut chart and a list of items with their status. The 'Infringement' section shows 1 Draft, 0 Ready to sign, and 1 Ready to send. The 'Revocation' section shows 0 Draft, 0 Ready to sign, and 0 Ready to send. The 'Counterclaim for infringement' and 'Counterclaim for revocation' sections both show 'No data' and 0 items in each status category. Each section has a 'Create new' button at the bottom.



Click on the symbol with your initials and expand it.

How to create an organisation

The screenshot shows the user interface of the Unified Patent Court. At the top, there is a navigation bar with a notification bell, a globe icon, the language 'EN', and a circular profile icon labeled 'NG'. Below this, a user profile card is displayed, featuring a circular 'NG' icon, a redacted name, and a 'View profile >' link. Underneath the profile card, the text 'Individual' is shown. A section titled 'Your roles' contains five colored buttons: 'Signer' (light blue), 'Drafter' (orange), 'Admin' (black), 'Payer' (green), and 'Sender' (light green). At the bottom of the page, there is a menu with three options: 'Switch account' (with a person icon), 'Create Organisation' (with a group of people icon), and 'Sign out' (with a sign-out icon). A large yellow arrow points from the right towards the 'Create Organisation' option.

At first, you are logged in as an individual. You can now create your organisation so you will be able to work on cases together with your colleagues. To start, click on “Create organisation”.

How to create an organisation

The screenshot shows the 'New organisation' page in the Unified Patent Court Case Management system. The page is titled 'New organisation' and includes a breadcrumb trail 'Dashboard > User profile'. Below the title, there is a brief instruction: 'On this page you can create a new organisation. You can later edit this information in the organisation page.' The form is divided into two main sections: 'Organisation information' and 'Choose accent colour'. The 'Organisation information' section contains two text input fields: 'Organisation information' and 'Description'. The 'Choose accent colour' section includes a note: 'This colour will be used to display your organisation name on the navigation bar.' and a row of six color selection circles: blue, pink, green, orange, yellow, and grey. The blue circle is currently selected.

Under “Organisation information”, you can add the name you wish to give to your organisation. Then, add a short description.

As an option, you can choose an accent colour to appear in your navigation bar.

When finished, click “Create Organisation” in the bottom right corner.

Now you can add members to your organisation.

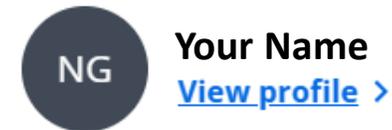
To do so, click on the symbol in the top right corner of your screen.



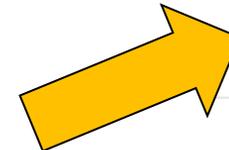
Then click on the name of your organisation as pictured on the right.

How to create an organisation

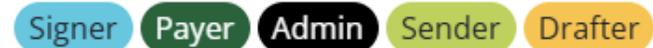
Manage your organisation



Organisation
[Smart Law Firm >](#)



Your roles



 Switch account

 Create Organisation

 Sign out

How to create an organisation

Manage your organisation

You will now see an overview of your organisation with you as the only member so far.

The first step should be, if needed, to edit your own information. To do this, click on the pencil symbol.

My organisation
Smart Law Firm

Admin
NG Your Name

Collaboration on Cases

Members Manage invitations

Invite Members

Filters

Name	Email	Roles	Edit	Remove	View
[Redacted]	[Redacted]	Sender Signer Payer Admin Drafter	[Pencil icon]	[X icon]	[Eye icon]

Rows per page 10 Showing 1-1 of 1 results

Edit Organisation

How to create an organisation

Edit your user profile

You will now see your user profile.

If you are eligible to be a representative before the Court, make sure to **first** file your registration request.

If you are already registered, you will see the "Representative" role, in your list of roles.

Representative

The screenshot shows the 'User profile' page in the Unified Patent Court system. The page is titled 'User profile' and includes a breadcrumb trail 'Dashboard > User profile'. Below the title, there is a description: 'On this page you can view and edit all the details regarding personal profile.' The page is divided into two main sections: 'User details' and 'Account verification for eligibility to file with the UPC'. The 'User details' section contains 'Personal information' with fields for 'First name' and 'Last name', both of which are redacted with black boxes. The 'Account verification' section includes a heading 'Select type of justification' and a list of five radio button options for different professional qualifications.

Unified Patent Court
Einheitliches Patentgericht
Jurisdiction unifiée du brevet

CASE MANAGEMENT

Dashboard > User profile

User profile

On this page you can view and edit all the details regarding personal profile.

User details

Personal information

First name [REDACTED] Last name [REDACTED]

Account verification for eligibility to file with the UPC

Verify your account for eligibility to file with the UPC

Select type of justification

- Article 48(1), Lawyer authorized to practice in contracting Member States
- Article 48(2), Patent Attorney with EPLC-EPLC Decision Rule 1
- Article 48(2), Patent Attorney with Law Diploma-EPLC Decision Rule 11
- Article 48(2), Patent Attorney with other qualifications-EPLC Decision Rule 12.1 (a)
- Article 48(2), Patent Attorney who satisfies the requirement of EPLC Decision Rule 12.1 (b)

How to create an organisation

Edit your user profile

When scrolling further down, you see your organisation and all the roles that have been automatically assigned to you when you created the organisation.

To edit your roles, click on the pencil on the righthand side.

Organisation

Organisation
[Smart Law Firm >](#)

Roles

Sender Signer Payer Admin Drafter

Remove user from organisation

Removing this user from your organisation, will make him lose access to all the information linked to this organisation.



How to create an organisation

Edit your user profile

Now you can remove the roles that you do not need and click “Save changes” once finished.

Organisation

 Save changes

Organisation

[Smart Law Firm](#) >

Roles

- Drafter
- Signer
- Sender
- Payer
- Admin

Remove user from organisation

Removing this user from your organisation, will make him lose access to all the information linked to this organisation.

Now you can invite colleagues to your team. You can assign roles to them when issuing the invitation. Please note: If you invite multiple people at once, they will all have the same roles. If this is not desired, you can either invite them individually or edit their roles later in the same way that you were able to edit yours in the previous step.

Please note you **cannot assign the "Representative's role"** as this can only be done via a formal registration procedure, as foreseen in the Agreement and relevant Rules.

How to create an organisation Invite Members

Invite members

To invite members to join your organization in Front Office, please enter their email address and click enter. Please note that when adding multiple users, they will have the same roles.

Roles

- Drafter
- Signer
- Sender
- Payer
- Admin

Cancel

Confirm

After you have invited team members, you will find them under “Manage invitations”. As long as their invitation is still pending, you can resend or remove the invitation. Once they have accepted, you can edit their information under “Members”, provided you have admin rights.

My organisation

Smart Law Firm

Admin
 Natalie Gnass

Collaboration on Cases

[Members](#) [Manage invitations](#)

[Invite Members](#)

Filters

<input type="checkbox"/> Email ↕	Name ↕	Roles	Status ↕	Resend	Remove
<input type="checkbox"/> eurico.igreja@unifiedpatentcourt.org	eurico.igreja@unifiedpatentcourt.org		Pending		
<input type="checkbox"/> frontoffice-test-1@test.epo.org	frontoffice-test-1		Pending		

Rows per page: 10 Showing 1-2 of 2 results

[Edit Organisation](#)

How to create an organisation

After creating your organisation(s), you can select the desired account you wish to start your filing from.

If you are planning to file sensitive information which should not be accessible to every member of your organisation, you are advised to use your individual account.

[Dashboard](#) > Switch account

Select an account to sign in

0 06b3f75e-14f2-4a7f-ad04-064321ac30f8 >

Individual account

Sender Signer Payer Admin Drafter

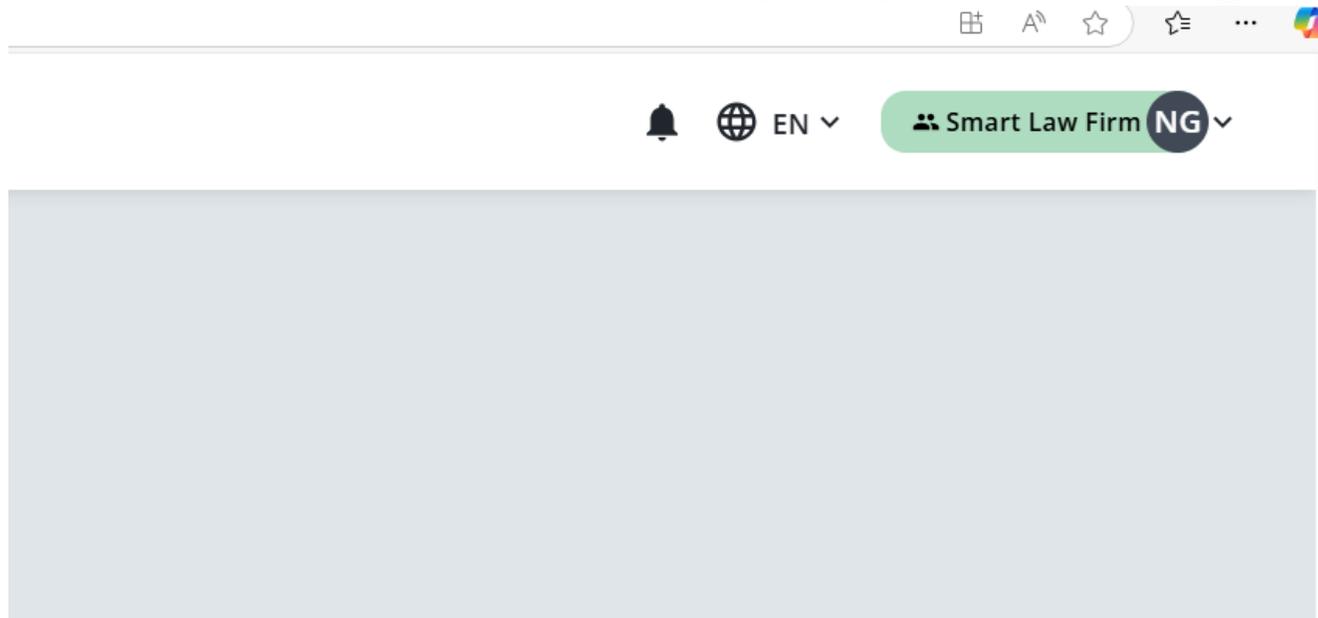
S Smart Law Firm >

Organisation account

Sender Signer Payer Admin Drafter

How to create an organisation

After having chosen an account to log in with, you are redirected to your e-filing portal. You can see in the top right corner of the page which account you are currently using. **When navigating to your "Portfolio" view, you will view all cases managed by this chosen organisation/account.**



How to create an organisation Invite External Members

If you are collaborating on a case with representatives from other companies or law firms, you can invite them to your organisation too.

In this case it is very important that you make sure you are using the right account when you are creating a new or working on an existing case. **Whichever action you perform while using an organisation's account, will be visible to all members of that organisation**, no matter if they usually work with you or for another law firm. An exception to this rule are documents filed by the opposing party and which have been classified as "restricted" (i.e. subject to a so-called "confidentiality club"). These documents are visible only to those members of an organisation **which are registered representatives**.

***Please note that more information will be provided on confidentiality codes at a later stage, in view of the full roll out of the new CMS.**

How to create an organisation

Create multiple organisations

Starting from your individual account, you can create multiple organisations as outlined above. Please take care at all times that you are using the desired one for a given filing . **Please note we strongly advise not to create more than 5 organisations.**

[Dashboard](#) > [Switch account](#)

Select an account to sign in

0 06b3f75e-14f2-4a7f-ad04-064321ac30f8 >

Individual account

Sender Signer Payer Admin Drafter

C Case 12345 Infringement Action >

Organisation account

Sender Signer Payer Admin Drafter

S Smart Law Firm >

Organisation account

Sender Signer Payer Admin Drafter

General remarks:

- Please think about refreshing your page should you not find the same option to move forward with your applications as shown in this presentation.
 - UPC Website : [New CMS | Unified Patent Court](#)
 - New CMS Filing platform : Coming Soon
 - New CMS Portfolio : Coming Soon
-



Unified Patent Court
Einheitliches Patentgericht
Jurisdiction unifiée du brevet

Thank you for your attention!
