

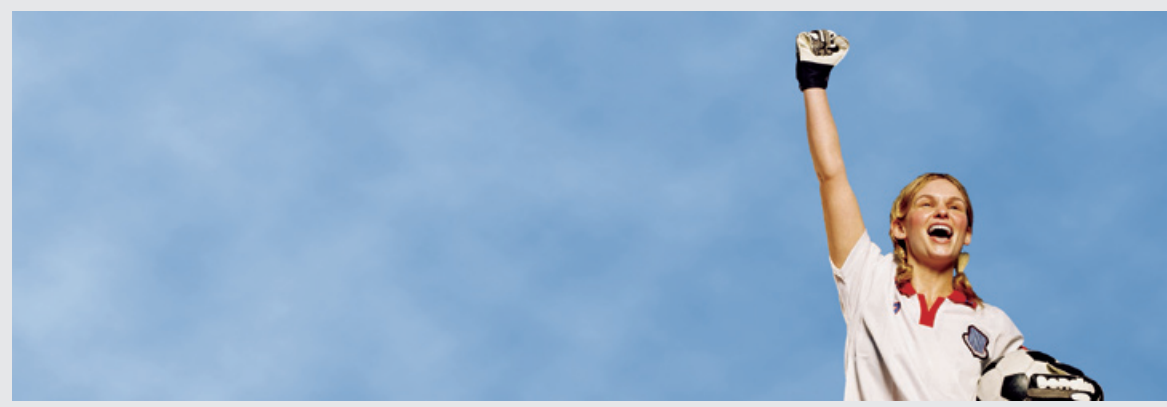
Patricia®

World Class IP Management
Software



PATRIX
IP HELPWARE

PATRICIA® - DESIGNED FOR EFFICIENCY



Patricia is the name of our fully customizable IP Management Software, available both as a Client/Server and as a Web product – or as a combination thereof. Patricia was created by IP professionals for IP professionals. The software is flexible and can handle all case matters within an IP organization, including litigation. Patricia is an enterprise wide solution that provides point-and-click access to case data and automatic tracking of relevant IP, i.e., laws/regulations, standard forms, time and cost registration, invoicing, document management including mail merge activities and batch processing. Patricia is designed to handle your unique Work Flow process for all IP cases.

Within Patricia we have combined the best of two worlds, the traditional client server environment and the web environment. Patricia will connect both to the same database, making it possible for you to choose: Client/Server, Web or a combination of both. Depending on the needs of the end user, choose Client/Server for heavy internal administration, or Web for all travelling attorneys or external users such as clients or marketing departments, inventors etc. The choice is yours!

THE POSSIBILITY TO COMBINE THE CLIENT/SERVER AND WEB IS UNIQUE FOR PATRICIA AND FOR PATRIX, NOT FOUND ANYWHERE ELSE IN THE INDUSTRY.

“Business today requires more flexibility from our customers. Patrix’ range of Client/Server and Web-based solutions enables our customers to choose the appropriate technology at any time without the need of data migration or having to worry about future technology changes, thus allowing them to maximize return of investments on current technology and to stay competitive in their business”

Mehrdad Assadi, CTO, Patrix

BENEFITS OF WORKING WITH PATRICIA®

THESE ARE SOME OF THE BENEFITS YOU WILL ENJOY WHEN IMPLEMENTING PATRICIA IN YOUR ORGANIZATION:

- Direct access to case data with a flexible work-flow based tool
- The ability to share information and assign tasks to staff
- Extensive automatic Country & Law File, including updates
- Fast, efficient and accurate invoicing based on time and cost registration as well as service charges
- Document creation, storing, tracking and viewing
- Flexible report tool to meet individual needs
- Cost Estimation; reporting and predicting costs for new or existing cases and case families
- Increasing client satisfaction and demands with tools to improve communication
- Direct data exchanges to and from Patricia and other systems
- E-filing functionality

WE KNOW THAT TODAY'S IP PROFESSIONALS NEED:

- Improved profitability and docketing quality
- Increased client retention and growth with existing staff
- Increased efficiency by automating repetitive daily tasks
- Improved communication & task management within the organization
- Open architecture for the future

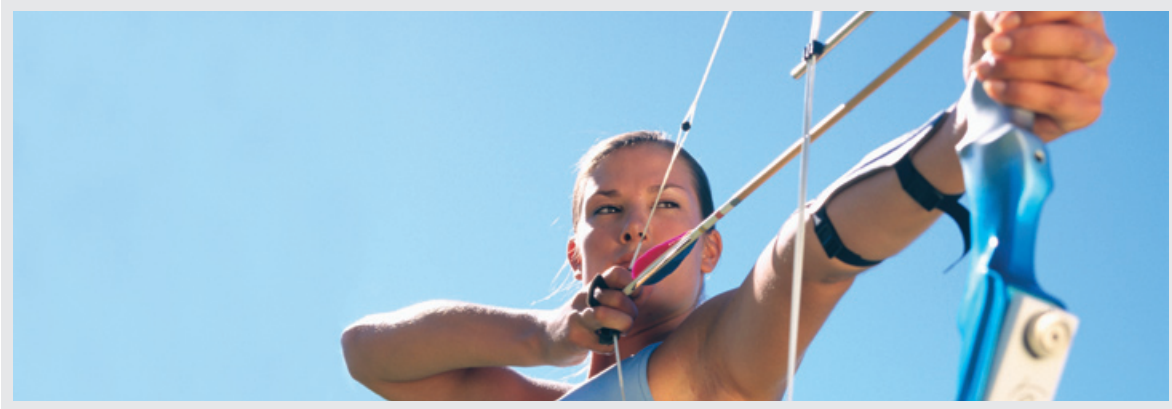
PATRICIA WILL HELP YOUR ORGANIZATION REACH ITS DESIRED GOALS

Patricia is so much more than a docketing system – it is a fully equipped enterprise system built to manage all parts of your IP business. Patricia is ready to be used – a standard set up is included, making the implementation easy, economical and time efficient. This makes Patricia stand out from our competitors in the enterprise IP software area.

"Patricx communicated very effectively with us from Day One. Their energy and drive gave us real confidence that they would lead the implementation project and that our new system would be installed successfully and on time. Their product met our requirements and seemed rather more user friendly and accessible than any of the other systems we looked at"

Lesley Evans, Chief Executive, Haseltine Lake

PATRICIA® MAIN FUNCTIONS



BASIC CASE INFORMATION

The Basic Case Information contains data vital for identification of the case and how it shall be treated within the organization and within the program. The Basic Information tab provides a quick overview of the entire case. All vital changes made by users are logged and can be verified through reports.

DIARY

The Diary stores information that occurs during the process of handling the case. Diary date fields can be linked to terms or other Diary fields, which will provide the user with suggested due dates. Diary fields can be linked to letters and forms as well as reminders, providing a flexible docketing, diarizing and document generation solution.

NAME INFORMATION

The Name Information is the name and address module where each record can be linked to the cases and to the Financial module (see definition below). This provides a quick overview of all the names relevant to your cases. Throw out the rolodex or old contact management software; within Patricia you will find everything you need to know quickly and efficiently.

FAMILY OVERVIEW

Lists the different members of an IP family including the status of each record. It also gives a graphic overview of the entire family.

FAMILY COUNTRY COVERAGE

Cases grouped in a family can be presented on a world map, highlighting the countries where the applications are filed. A Family Tree can be automatically created, showing status and filing strategy.

FINANCIAL

The Financial module enables the user to register disbursements, time, translation charges and fees. It has the ability to create invoices, using preset matrixes with different price lists, providing precise and quick invoicing to clients. The module has a powerful and sophisticated mechanism to handle discounting and invoicing in different currencies on a customized client-by-client basis.

TERM LIST INTO OUTLOOK

Patricia offers a number of different layouts for your daily to-do list. The Term List can also incorporate case related tasks into your Outlook calendar, with an easy-to-use export. Patricia also offers an internal planner directly from the Term List.

WORK FLOWS

Work Flows connected with Diary provide a collaborative, advanced docketing and office management tool designed to keep track of all steps in managing a case or matter, for example, an internal term that needs to be dealt with in order to meet an external term or deadline. The Work Flows are created to delegate the different tasks to a predefined person within the organization. Once the task is completed, the next step in the Work Flow is automatically handed off to the appropriate person to handle that task. The optimal time for each task can be suggested and monitored in an automatic process.

CLASSIFICATION/CLASSIFICATION HELP

This area contains the International Trademark Classification, and a search facility on goods and services, allowing you to create dynamic classifications based on WIPO definitions in various languages. You can also create and store customized lists of specifications for particular clients or divisions, thus making it simple to quickly add the list to new applications.

CITED MATERIAL HANDLING

This feature makes it easier to administrate and report references to official offices around the world. The system also makes it possible to automatically print the required IDS Form for the USPTO, and it contains a feature to keep track of what has already been cited to the PTO.

DOCUMENT STORAGE

Patricia contains the ability to automatically store any type of document, form or email, in digital format, on each case. Furthermore, documents can be shared across an entire family, if relevant. There is no limit to the number of images and documents that can be associated with any case. Patricia now comes with full Microsoft Outlook and Lotus Notes integration, allowing the user to add emails to cases with the click of a button.

DESIGNATED COUNTRIES

Patricia provides the ability to keep track of national total/partial refusals and subsequent applications in the international trademark record. Regarding PCT and EPO records, Patricia can also create national/grant phase records at the press of a button.

COST ESTIMATION

Patricia offers the ability to calculate future costs for both new and existing cases and case families. Clear and comprehensive reports can be provided as well. For existing applications/registrations, cost estimation can be set up with deadlines for when fees need to be paid.

ELECTRONIC FILING

Patricia has an electronic filing functionality that files electronic applications with the EPO, PCT and Benelux in XML-format using the case information from the specific case in Patricia. These data transfers will be recorded in the case document log for future reference.

BATCH PROCESSING

Often times it is more efficient to process information using a batch function. A batch function can be used to input information or process multiple cases in one single operation. Patricia is the only case management system that offers the following batch processing tools:

Batch Run

The Batch Run provides the ability to generate letters, invoices and reporting lists, based on set criteria, to a large number of different mailing addresses. It can also update a Work Flow in one single automated process. This function is particularly useful when sending annuity or renewal notifications or instructions, but it is applicable to all kinds of letters.

Batch Update

This part of the program makes it possible to batch update certain cases only, with certain data, i.e., incoming renewal instructions, instructions to lapse/close cases, incoming official actions, etc. The system easily handles digital information (no manual input required) and updating from a pre-defined list (some manual input required). In addition to these, the user always has the option to manually update information case-by-case.

Batch Parties Update

This function assists the user in keeping track of changes such as assignment and change of name in a large number of cases.

“Thanks to the efficiency provided by Patricia, it has been possible for us to grow as a company with a minimum of support staff in a very short time”

Morten Balle, Protector A/S Norway

TIME REGISTRATION

Depending on the type of task or working method, there are four different ways of entering time and/or production in Patricia. This makes Patricia the most flexible case management tool on the market.

DOCUMENT MANAGEMENT/CREATION

One of the most powerful and easy-to-use features of Patricia is the Document Creation. Documents can be created in Microsoft Word, Patricia Editor or PDF. Any type of documents - letters, invoices or forms - can be generated in an automatic or semi-automatic process by attaching them to a term in a Work Flow or Diary field. Repetitive outgoing correspondence can be created as template documents and sent either to the printer, by fax or by e-mail. All letters and documents are automatically stored within the record.

THE VERY POWERFUL, YET EASY TO USE, QUERYING ENGINE ALLOWS YOU TO GENERATE LETTER/DOCUMENT TEMPLATES; WITHOUT ANY DATABASE KNOWLEDGE.

MAINTENANCE

Patricia is a very powerful, flexible and intuitive Case Management System. The cornerstone of its flexibility lies in the Maintenance tool that is built into the system. Maintenance provides the user with the ability to customize the standard Patricia set-up in almost all areas to suit the individual organization. What could be better? A system that learns how YOUR operation works!

COUNTRY & LAW FILE

Patricia has an extensive Country & Law file that is updated four times per year. Patricia will automatically calculate most of the IP law dependent due dates such as Annuities/ Renewals, Duration, Examination, Opposition Periods, Chapter I & II, etc., saving you valuable time and effort. The system also provides easy-to-read information regarding when filings, assignments and renewal applications are due and supplies the user with the required forms such as assignment documents, powers of attorney, etc.

REPORTS

Patricia has a selection of Standard Reports with predefined layout, such as Term List, Client List, Portfolio Lists, Reciprocity Statistics, Filing Statistics, Case Summary, Work in Progress, Financial Overview, Project Card, and Renewal Budget List. In addition to the Standard Reports, the powerful and easy-to-use Report Generator allows the user to create and design their own reports based on their specific needs without using any third party software. This is made possible by our drag-and-drop functionality. Simply click on the query definition and drag it onto your layout, this performed within minutes by you.

"I think Patricia is a great asset to our company and I wouldn't swop her for the world! I've been using Patricia since Version 2. something (December 1999) and I can't think of another program that I've ever used that has improved as much as Patricia has, year by year! Keep up the good work!!"

Theresa Welgemoed, DM Kisch

IMPLEMENTATION CONCEPT



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Patrix' implementation concept is to assist the client in taking control of their own system. Therefore the client will undergo training to fully understand the structure of the program and how to keep it updated in accordance with their internal routines and client requirements. A professional implementation project management team will be assigned to each new Patricia client to plan and execute the implementation according to a project plan jointly worked out between the parties, taking into consideration specific requirements, needs and goals for each individual project including installation, customization and conversion of data and links to other systems. For this purpose, Patrix makes use of its extensive experience in guiding its clients through the implementation process, beginning with the business review, training and workshop, conversion of data, connection to other systems, roll out and the subsequent vital support.

TRAINING & CUSTOMIZATION

Each project starts up with 1-3 weeks of training in combination with a workshop including a business review in order for the Patrix project manager to get a good understanding of the requirements specific for each project. The training can take place in any of Patrix' training centers in Washington DC, Munich or Göteborg or at the client's site. The purpose of the training and workshop period is to enable the client's project team to take full control of its program and thereby be able to update the processes, templates and reports to meet the ever changing requirements internally, and ensuring the client is able to make Patricia keep up with their demands far into the future.

WE HAVE THE FASTEST IMPLEMENTATION TIME ON THE MARKET. THAT MEANS LOWERED COSTS, FEWER DISRUPTIONS, INCREASED PROFITS AND IMPROVED OPERATIONS.

CONVERSION

Patrix has extensive experience with data conversions from standard systems in the market from providers such as CPI, CPA, Dennemeyer, Master Data, Questel Orbit, Patrafee, and a large variety of custom built systems. Patrix has developed clear conversion routines which are well documented to secure a 100% complete and accurate transfer.

DATA AUDIT

Patrix provides data audit services. This means comparing in-house data with official data to remove any inconsistencies and provide the client with a more accurate database than they started with. This can be done any time, also in connection with the conversion of data.

PROJECT MANAGEMENT

The skills and methods of Patrix' group of project leaders are your guarantee of a successful and timely implementation. Each project leader has first hand IP experience, and with the backing and support of expert technical specialists at the home offices to cover any technical issues, we believe that we have the best implementation teams in the business. Time and time again our project teams have proven that we can get our clients up and running with the new system on time within the agreed offer!

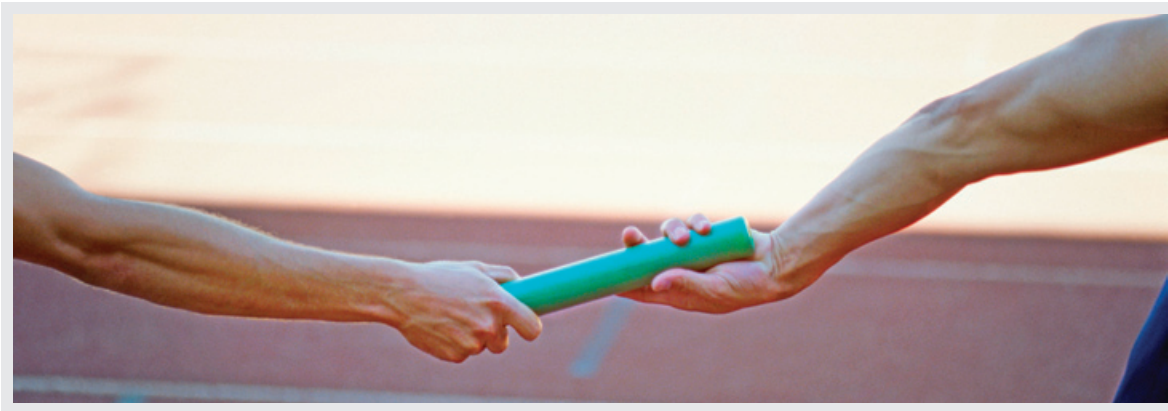
INTERFACE WITH OTHER SYSTEMS

Patricia operates on a variety of platforms, and is open in its structure. This means that integration is often done with other systems such as bookkeeping systems, document management systems, renewal systems, or any other software used within the organization. Patrix strongly believes that each piece of data should only be entered once, and thereafter distributed to any other related programs automatically, thus reducing the risk of human error and mismatching data.

"The project leaders at Patrix all have IP background as well as the required IT knowledge thereby providing our clients with the highest level of implementation support and project management"

Karin Hermansson, Head of Implementation, Patrix

PATRICIA® COLLABORATION PLATFORM



Patrix offers uniquely designed plug-ins that allows integration with your direct clients, foreign associates, outside counsel, inventors and subsidiaries. They cut down response times, limit double entries, and tighten cooperation, by giving quick direct access to case information through the web.

PLUG-INS:

PARTNER PRESENTER MODULE (PPM)

Will give your clients access to their IP portfolio as well as documents, and the possibility to print reports and summaries, as needed.

PARTNER UPDATE MODULE (PUM)

Allows partners and agents the possibility to directly update your records via the Internet.

INVENTORS DISCLOSURE MODULE (IDM)

Gives the inventors the possibility to post their ideas directly into the IP system, keeping all data in one place. Automatic reminders will alert of the posting.

ORDER RECEIPT MODULE (ORM)

Allow your clients to place their filing orders directly into your IP system.

All plug-ins offer a high level of security, allowing you to define different access levels for various clients.

"We pride ourselves in having a 99% Client Retention Rate"

Carina Schramm, CEO, Patrix

TECHNICAL REQUIREMENTS

DBMS PLATFORMS

DBMS	SUPPORTED VERSION	SUPPLIER
Sybase Adaptive Server Enterprise (ASE)	15.x	Sybase Inc.
Sybase SQL Anywhere (ASA)	10.x	Sybase Inc.
Oracle	10 g	Oracle Corp.
Microsoft SQL server	2005	Microsoft Corp.
Microsoft SBS	2003	Microsoft Corp.

CLIENT/SERVER PLATFORMS

PLATFORM NAME	SUPPORTED VERSION	SUPPLIER
Windows 2000	Professional	Microsoft Corp.
Windows XP	Professional	Microsoft Corp.
Citrix Access Suite	4.0	Citrix Systems Inc.
Windows 2003 Server	2003	Microsoft Corp.
Microsoft SBS	2003	Microsoft Corp.

PATRICIA WEB SPECIFIC

CLIENT OS	CLIENT SOFTWARE	SERVER OS	SERVER SOFTWARE
Any OS capable of running mentioned client software.	Internet Explorer 6.x Netscape 8.0.x Camino 0.8.x Safari 2.x Firefox 1.5.x Java version JRE 5.x SVG Viewer	Any operating system that supports mentioned server software and optionally a listed DBMS	Java version J2SE 5 Any J2EE EJB3 compatible application server. Shipped with JBOSS 4.0.x All server software is supplied by Patrix. (Java runtime, JBOSS 4.0.x).

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