

Patricia®



World Class IP Management Software

Designed for Efficiency



“We needed to purchase software that could handle every type of matter in-house Legal Departments deal with daily. After seeing the demo of Patricia[®], we knew it was the one piece of software we needed to function. We use Patricia[®] as a Docketing system for all of our IP filings, Invention Disclosures and Contracts Database, as well as managing contractual obligations. Patrix has been instrumental in the success of Sapphire Energy’s Legal Department.”

Susan A. Mogavero, Sapphire Energy, Inc., USA

Patricia®

Patricia® is a fully customizable IP Management Software solution, created by IP professionals for IP professionals, allowing your organization to streamline procedures for all aspects of its IP work. Patricia® is delivered on a flexible, secure platform to provide excellence today while empowering you to meet future needs in a tough and an ever changing business environment where reducing procedural costs, increasing efficiency and improving service levels is the key to ongoing success. Patricia® can help you to reach and maintain your full business potential by offering you intuitive point-and-click access to your case data and automatic tracking of IP procedures, e.g., laws/regulations, standard forms, time and cost registration, invoicing, document management, mail merge activities and batch processing in a single, seamless and enterprise wide solution.

The possibility to combine the client/server and web applications is unique for Patricia® - not found anywhere else in the industry.

Combining 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 your end users, you may select the client/server for internal administrators and the web version for your traveling attorneys or external users such as inventors, clients, marketing departments, global locations etc.

The choice is yours!

Benefits of working with Patricia®



“Our system requirements are based upon risk management, the technical capabilities of the software and its user friendliness. In our view, Patricia® meets those requirements best. With Patricia®, there is a significant but somewhat ‘hidden’ ROI which is simply freeing time for fee earners to conduct more chargeable work.”

Laura Bandrowsky, Practice Support Director, Duane Morris LLP, USA

Whether you work in industry or practice we know what you need:

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

These are just some of the benefits you will enjoy when implementing Patricia® in your organization:

- Flexible work flow based engine, automating repetitive tasks
- Seamless ability to securely share information and assign tasks to staff
- Extensive automatic Country & Law file, with comprehensive update options
- Fast, efficient and accurate invoicing based on fix rate, time and cost entries
- Document Management for creation of standard correspondence, archiving, tracking and viewing
- Integrated intuitive and flexible report generation tool to be used by IP professionals
- Cost Estimation function enabling reporting and cost forecasting
- Fully customizable online access portal enabling fast, accurate communication with external parties
- Direct data exchanges to and from Patricia® and other systems
- E-filing, E-billing and much more!

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 competitors in the enterprise IP software area.

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 provide the user with suggested due dates. Date calculations can be conditional based upon any criteria in the Patricia® database. Diary fields can also be linked to letters and forms as well as reminders, providing a flexible docketing, diarizing and document generation solution. Innovative and unique new functionality in this area is now able to assist you greatly with risk management. Data validation ensures that the information entered by your users is logical. This can be set to calculate in numerous helpful ways against either dates or other already completed fields on the case. Data verification functionality can also be deployed against any diary fields in order to facilitate either double-entry by a single user, with Patricia® verifying that both entries match, or verification by a second user in which case the data is marked as 'pending confirmation' until the second user has verified the initial entry.

Online Data Comparison

This very powerful and innovative development delivers the capability to compare and, if required, update your case data in line with the official record of the relevant Intellectual Property Office.

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. 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 graphical 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, showing case status and filing strategy.

Financial

The Financial area enables you to register disbursements, time, translation charges and fees. It has the ability to create invoices, using preset matrices with different price lists, providing precise and quick invoicing. The Financial area has a powerful and sophisticated mechanism to handle customized discounting and invoicing in different currencies.

Term/Docket List into Outlook

Patricia® offers a number of predefined formats of your daily to-do list and you can easily create your own preferred layouts. The Term/Docket List can export your case related tasks directly into your Outlook calendar. Patricia® also offers a visual planner of your outstanding items.

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 your 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. Additional Work Flows may be connected or disconnected based upon any conditional criteria in the Patricia® database.

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.

Patricia® Main Functions (continued)

Document Storage

Patricia® contains the ability to automatically store any type of document, form or e-mail, in digital format, on each case. Furthermore, documents can be easily shared across an entire family. There is no limit to the number of images and documents that can be associated and linked with any case(s).

Microsoft Office Plug-In

Patricia® now comes with a powerful new Microsoft Office plug-in, in addition to Lotus Notes integration, allowing the user to add e-mail, Word, Excel and PowerPoint documents directly 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. For existing applications/registrations, estimates can include the relevant due dates of fees.

Batch Processing

It is often more efficient to process information using a batch function. The batch functions 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 update workflows and generate letters, invoices and reporting lists to a large number of different mailing addresses. This function is particularly useful when sending annuity/renewal notifications or instructions, but it is applicable to all communications.

Batch Update

This part of the program makes it possible to batch update specific cases only, with certain data, e.g., 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 predefined 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.

Electronic Filing

Patricia® has electronic filing functionality which files electronic applications with the receiving offices in XML format using information from the specific case in Patricia®. These data transfers are recorded in the case document log for future reference.

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 helps make 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 e-mail, directly from Patricia®. All letters and documents are automatically stored within the record.

The very powerful, yet easy to use, querying engine allows you to create letter/document templates without any database knowledge.

Power and Flexibility



“The availability of Patrix personnel worldwide made it possible for us to liaise with their help desk during local office hours. We have 390 users and more than 600,000 cases on the Patricia® system. We use Patricia® in the Patent, Trademark and Property departments.”

Patricia® Maintenance

Patricia® is a very powerful, flexible and intuitive case management system. The cornerstone of its flexibility lies in the in-built Patricia® Maintenance tool. This provides you with the ability to customize the standard Patricia® set-up in almost all areas to suit your organization - a system that learns how your operation works! What could be better?

Country & Law File

Patricia® has an extensive Country & Law file that is updated quarterly. Patricia® will automatically calculate most of the IP law dependent due dates such as Annuities/Renewals, Duration, Examination, Opposition Periods etc., saving you valuable time and effort. The system also provides easy-to-read information on application, assignment and maintenance rules and supplies the user with the required forms such as assignment documents, powers of attorney, etc.

Reports

Patricia® includes many standard reports with predefined layouts, 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 standard reports, the powerful and easy-to-use Report Generator allows you to create and design your own reports based on your specific needs without using any third party software.

No other IP management system is more customizable than Patricia®.

Implementation Concept



“While at Haseltine Lake, I was responsible for the implementation of Patricia® across four offices and 120 people. When setting up ElementOne IP, the first phone call I made was to Patrix as I knew this would play an important role in helping to guarantee success.”

Chris Vigers, Founder & Attorney, ElementOne IP, UK

Implementation Concept

Patrix' implementation concept is to assist you in taking control of your own system. A small number of your IP staff are trained as 'super users', in order to fully understand the configuration possibilities and learn how to optimize your use of Patricia® in accordance with your internal routines and requirements. A professional project management team is assigned to each new Patricia® client to execute the implementation according to a mutually agreed project plan, taking into consideration your specific requirements and goals, including installation, customization, data conversion and links to other systems. Patrix makes use of its extensive experience in guiding you through the implementation project, providing you with the very highest levels of support both during and after the process.

Training & Customization

Each project starts up with 1-3 weeks of 'super user' training in combination with a workshop, including a business review in order for the Patrix project manager to gain a good understanding of your specific requirements. The training can take place in any of Patrix' global training centers or at your site. The purpose of the training and workshop period is to enable your project team to take full control of the program and thereby be able to update the processes, templates and reports to meet the ever changing requirements. This approach means that you can avoid long term consultancy costs commonly encountered elsewhere in the IP software market.

We have the fastest implementation time on the market. That means lower costs, fewer disruptions, increased profits and improved operations.

Change Management



“IP is now the third largest and has been the most rapidly growing group within Duane Morris over the last 10 years. Patricia® is, without a doubt, one of the key reasons for our success in managing this growth. The successful integration of Patricia® with our billing system has enabled us to insure that every expenditure is recaptured. This alone is a huge achievement enabled by Patricia®.”

Lewis F. Gould, Jr. , Partner, Duane Morris LLP, USA

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

In addition to the system inherent capabilities, the optional data audit service offers you the opportunity of comparing your in-house data with official data to remove any inconsistencies. This service can be provided in connection with the data conversion or at any time thereafter.

Project Management

The skills and methods of the Patrix project teams are your guarantee of a successful and timely implementation. Each project leader has first hand IP experience and the backing and support of expert technical specialists at each of our headquarters. We believe that we have the best team in the business and we welcome the chance to prove this to you. Our project teams have repeatedly shown that we can have you to be up and running with Patricia® on time and within budget.

Interface With Other Systems

Patricia® operates on a variety of platforms, and is open in its structure. This means that integration with other software is often accommodated, including 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.

Our expert project leaders and technicians will guide you through the implementation process, insuring a smooth transition between systems.

Patricia® Collaboration Portal



“We knew from the beginning that we needed specialized IP software and that the investment in Patricia® and Patrix services would soon pay out.”

Optional Plug-in

The Patricia® Collaboration Portal ('PCP') is a powerful plug-in tool which delivers online interparty collaboration using the most advanced portlet technology available today.

Seamlessly integrating with your IP database the Patricia® Collaboration Portal will help you to increase service levels and reduce the paper trail, costs and reaction times by bringing your entire IP infrastructure, e.g., inventors, clients, outside counsel, foreign associates, external departments etc. closer together in a secure and intuitive web environment.

In an ever growing landscape of communication and collaboration with both internal and external partners, you need a flexible tool to facilitate global IP networking which is as easy to use as possible, keeping the implementation process simple and minimizing the related resource requirement. The PCP has been designed with all of your needs in mind, allowing your partners to be easily integrated into your flow of information while delivering all parties with exactly the right information, tools and access levels.

The Patricia® Collaboration Portal maintains the highest standards of usability, data integrity and security, offering the very latest in second generation web access via branded and personalized presentations for multiple target groups. Import your CSS (Cascading Style Sheet) and the PCP will take on your corporate image, giving instant recognition and familiarity to your users.

The Patricia® Collaboration Portal is available on an unlimited number of user license basis providing; case creation, case search, case view, case update, document view, document upload and dynamic report generation functionality. For those who wish to provide any number of clients/non-IP department users with online look-up type access only, we also offer a 'PCP Viewer' license with dynamic reports.

The Patricia® Collaboration Portal is truly ground-breaking both in terms of its functionality and licensing model. This offers you a real opportunity to make significant administrative and procedural cost-savings.

Schedule a Personal Presentation



“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 1999 and I can’t think of another program that I’ve ever used that has improved as much, year by year! Keep up the good work!!”

Theresa Welgemoed, DM Kisch, South Africa

Schedule a Personal Presentation

We welcome the opportunity to meet with you in order to discuss your specific business requirements and explore how Patricia® can assist your organization.

Meetings can be arranged either in person at your offices or via our web meeting facility - whichever is most convenient for you.

Contact us now and we will be delighted to arrange a personal presentation of the Patricia® software for you at your preferred date, time and location. You can call, e-mail or schedule a meeting via our website:

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We look forward to meeting you!

Technical Requirements

DBMS PLATFORMS

DBMS

Sybase Adaptive Server Enterprise (ASE)

Sybase SQL Anywhere (ASA)

Oracle

Microsoft SQL server

Microsoft SBS

SUPPLIER

Sybase Inc.

Sybase Inc.

Oracle Corp.

Microsoft Corp.

Microsoft Corp.

CLIENT/SERVER PLATFORMS

PLATFORM NAME

Microsoft Windows

Citrix Access Suite

Windows Server

Microsoft SBS

SUPPLIER

Microsoft Corp.

Citrix Systems Inc.

Microsoft Corp.

Microsoft Corp.

PATRICIA® WEB SPECIFIC

CLIENT OS

Any OS capable of running mentioned client software.

CLIENT SOFTWARE

Internet Explorer
Netscape
Camino
Safari
Firefox

Java version JRE 5.x

SVG Viewer

SERVER OS

Any operating system that supports mentioned server software and optionally a listed DBMS

SERVER SOFTWARE

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.x)

Please contact Patrix for the current supported versions of the above environments.



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