IP management software – Patricia®

Dr Raphael Jung

Serviva GmbH

Software for working with industrial property rights is much more than mere administration. It is a tool for structurally improving processes – for smoother processes and more yield in the form of time or money. It is the main day-to-day starting point for all activities, for example, for

- Communication (e-mail, fax, scans, phone calls),
- document storage,
- structuring of one's own portfolio or a client's one,
- reports
- and many more tasks.

For good software, typical contradictions are not opposites. Normally, the user is forced to opt for one of the opposing sides. It is different with Patricia.

Flexibility and standardisation are realised, for example, by means of a uniform file and information architecture, which simultaneously leaves room for the realisation of all of one's own requirements for types of files.

Simplicity and functionality are made possible by the complete parameterisation of the system. All menu items, features, and dividing elements can be switched on and off, personal or group-specific, controlled by a unique security and rights management system.

The requirements of an industrial IP department and a law firm are almost identical in their maximum requirement definition, but they differ

significantly in the upstream requirement graduations. The way Patricia® has come to deal with this knowledge is to design and deliver a fully equipped system and scale it to meet the needs of the customer.

Another example of the proactive development of the product is its parallel usability as a client/server product and web product. Both "system worlds" have their advantages and disadvantages. Normally, you have to decide – but this is not the case with Patricia®.

Patricia® offers optimised settings for all user groups, from the international patent law firm to large and medium-sized companies to small businesses and single-user installations, which can grow with the needs of customers or change as they change internally.

Patricia®, the IP management solution of the Swedish manufacturer Patrix® AB, has been on the market for over 25 years. Thanks to consistent, continuous development, the software has made a name for itself as an innovative pioneer in the industry. Serviva GmbH has been a distribution and integration partner of Patrix® AB for the product Patricia® exclusively for Germany and Austria for many years, but also beyond.

Serviva provides world-class service in demand analysis, engineering, implementation, data migration, and training for your team members so you can work productively on the new system from day one.

Selected benefits of Patricia:

Files

- All registered types of intellectual property rights (e.g. patents, trademarks, utility models, designs, domains, etc.) are included in the standard scope of delivery.
- Other types of files (e.g. contracts, dispute files, search files, expertise files) are supplied as a template for your own versions.
- All types of files are fully amenable and modifiable.
- There is no limit on the number of types of files.
- Several variants of the same types of files can exist side by side (e.g. cooperation agreements, licence agreements, confidentiality agreements, and much more).
- Files can have any relation to each other (e.g. inventions => resulting in property rights => for which contracts are to be concluded => from which licence payments result => to be paid for the inventor's fee)> > > >
- Files can contain any meta-information (e.g. own classifications, relevant products, relevant technologies).
- File content can be synchronised with many public data sources (e.g. patents with the EPO (OPS)).

Information on names

- People can be placed in any constellations to each other or to companies.
- Hierarchies, for example, for passing on information to subordinate elements (persons and/or companies) are easily possible.

Documents

- Documents can be added to files via "drag and drop" or via dialogue.
- All documents are automatically indexed and searchable in full text (with *ADMS).
- Automatic document preview (with *ADMS).
- Auditable watermarks for official correspondence (with *ADMS).
- All documents are automatically versioned (with *ADMS).
- Automatic assignment of e-mails to files based on recognised file numbers (with *ADMS).

*ADMS – advanced document management system

Finances

- Separately secured container for financial information
- Billing account for cost centres
- Full financial reporting and billing
- Datev interface
- Time recording and invoicing
- WiseTime integration (ext. plug-in, fee-based)
- Calculation of employee invention compensation according to guidelines, flat-rate or company-specific.

Partner collaboration portal – PCP

- Web portal for cooperation with internal and external partners, e.g. inventors, (patent) lawyers, affiliated companies and much more.
- Online invention reports
- Online procurement
- Highest security standard through demilitarised zone (DMZ)
- Individual reading and editing rights

Summary

Patricia® manages to fulfil the most important boundary conditions outstandingly like no other product:

- Fully parameterised, no programming needed for adjustment, update-fixed
- Client/server and web application can be used in parallel
- 12 languages for frontend and database available on a user-specific basis, all translation files fully modifiable, update-fixed
- Own Patricia app, for iOS and Android tablets
- Seamless integration into standard IT environments with Microsoft® SQL Server and Microsoft® Exchange Server
- Web services for Windows and Linux environments
- Internal, available as virtual hosting or as device hosting
- Two product updates per year
- Four legal rule updates per year