



# Patricia® IP Management Software

Don't change an operation that works, change your case management system instead. Meet Patricia®; a fully customizable IP Management Software that can handle all case matters within an IP organization, including prosecution. Created for IP professionals – by IP professionals.

How about a case management system that is configurable to how your operation works, instead of forcing you to change your ways – or spend huge sums of money on software development? Patricia® is designed to handle your unique work process for all IP cases, with a setup customizable in nearly all areas to perfectly suit the individual organization. Right now and for the future.

## Take control

Patricia® provides easy access to case data and automatic tracking of due dates, laws/regulations, standard forms, time and cost registration, invoicing and document management including mail merge activities and batch processing. Workflows are created to delegate tasks to a person within the organization. Once the task is completed, the next step in the Workflow is automatically handed off to the appropriate person to handle. The optimal time for each task can be suggested and monitored in an automatic process.

## The best of both worlds

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. For example, choose Client/Server for heavy internal administration, or Web for traveling attorneys or external users such as clients, marketing departments, inventors etc. The possibility to combine Client/Server and Web is unique for Patricia®, not found anywhere else in the industry.

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

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» Discover an enterprise wide solution for efficient case and document management. Patricia® will help your entire organization achieve its desired goals. «

## Patricia® offers

- Direct access to case data with a flexible workflow based tool
- Effective solutions for securely sharing information and assigning tasks to staff
- Fast, efficient and accurate invoicing
- Document creation, storing, tracking and viewing
- Direct data exchanges to and from Patricia® and other systems
- Flexible report tool
- Cost Estimation; reporting and predicting costs for new or existing cases and case families
- Extensive automatic Country & Law File, including updates
- E-filing, E-billing – and much more

## Smooth implementation – and outstanding support

Choosing Patricia® means you get to have things your way – without involving any extra IT resources. With your designated project manager from Patrix IP Helpware and Patricia®'s excellent customizability you'll be up and running before you know it.

## Maintenance

What could be better? A system that learns how your operation works – not the firm down the street. Maintenance provides the ability to customize the standard Patricia® setup in almost all areas to suit the individual organization.

## Basic Case Information

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.

## Case Management

### Diary

Stores what happens 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.

### Workflows

Workflows 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. Workflows are created to delegate tasks to a person within the organization. Once the task is completed, the next step in the Workflow 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

Contains the International Trademark Classification and a search facility within these phrases, allowing you to create dynamic classification based on WIPO definitions in various languages.

### Family Country Coverage & Overview

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. 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.

### Cited Material Handling

This feature makes it easier to administer and report references to official offices around the world. You can populate the required IDS Form for the USPTO, and it contains a feature to keep track of what has already been cited to the PTO.

### Time Registration

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

### Electronic Filing

Patricia® has an electronic filing functionality that files electronic applications with the EPO and PCT 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.

## Case Management

### 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 e-mail, or by fax. All letters and documents are automatically stored within the record.

### Storage

Automatically store outgoing letters and forms in digital format in each case. Incoming correspondence, emails, scanned documents and all standard formats of images can be attached to the record. There is no limit to the number of images and documents that can be associated with each case.

## Financial management

Register disbursements, time, translation charges and fees. You can create invoices, using preset matrixes with different price lists, for precise and quick invoicing to clients. This module has a powerful and sophisticated mechanism to handle discounting and invoicing in different currencies on a customized client-by-client basis.

### Name Information

A 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.

## Reports

Patricia® has a wide 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 Creator allows you to create and design your own reports without using any third party software.

## Batch Processing

It is often more efficient to process information using a batch function. Patricia® can generate letters, invoices and reporting lists, based on set criteria, to a large number of different mailing addresses. It can also update a Workflow in one single automated process. You can also batch update certain cases only, with certain data, i.e., incoming renewal instructions, instructions to lapse/close cases, incoming official actions, etc. And, you can keep track of changes such as assignment and change of name in a large number of cases.

## Country & Law File Designated Countries

## Cost Estimation

## Term List into Outlook

– and more...

