PatOrg IP Management

PatOrg is a modular, versatile software solution for intelligent IPR management that provides support to all kinds of IPR matters and processes. In leveraging its potential, organizations can develop their business in a wide range of activities while simultaneously saving time and cost.
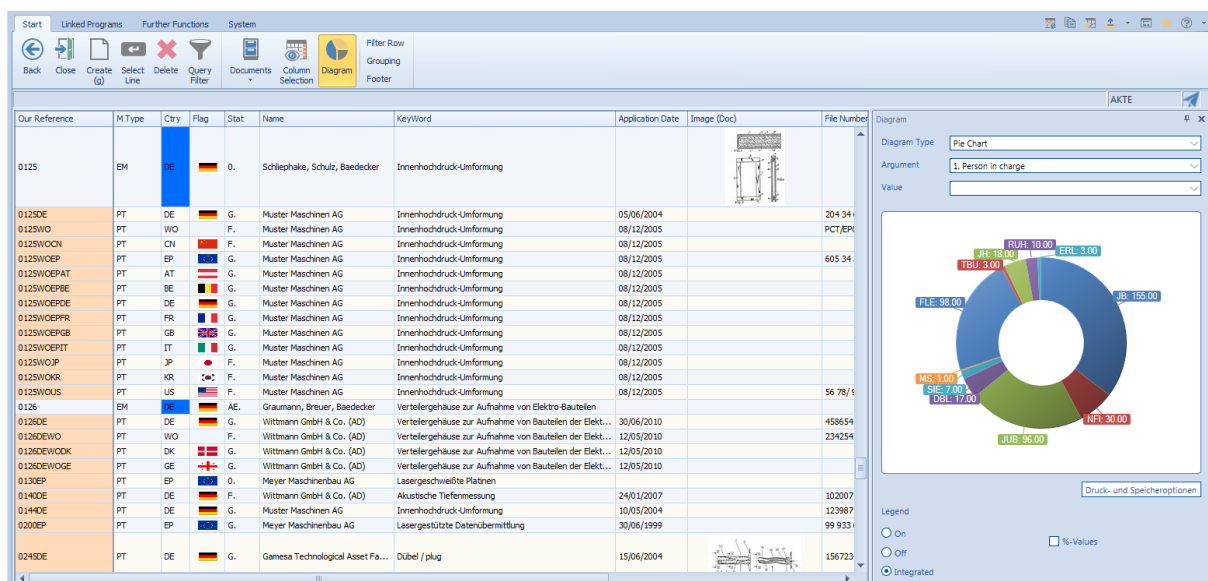
Great Flexibility

What makes PatOrg particularly special is its flexibility and adaptability to changing requirements. Thanks to PatOrg's IP application-oriented design you can easily tailor PatOrg to your needs without prior skills in general-purpose programming languages such as Visual Basic or SQL. Your configuration implementing the individuality of your organization and uniqueness of your services is completely in your hands and separated from the platform. So, PatOrg is a scalable and well-proven IP Management Standard Software which facilitates development, updates and training.

Great flexibility is also offered for managing data. Configurable data fields are provided for case management, persons, activities, costs, documents, and more according to your needs. Easy adaptability within a short-time based on configuration by the user, is PatOrg's most important quality characteristic. Complex updates as well as costly individual programming requiring significant lead and planning time jeopardizing software maintenance in the long run are a thing of the past with PatOrg. Although our software is widely used by law firms, companies as well as research facilities there are no software variants. There is only one PatOrg for all which facilitates development, updates and training.

Long-standing and Widely Used in Practice

PatOrg is the market-leading software solution for IP Management in Germany. More than **400 organizations** all across Europe rely on PatOrg – many of them for more than 10 years.

Easy to Learn

PatOrg is based on consistent concepts with data managed according to coherent principles that have proven their worth in practice, time and again. When handling of cases is learned, the management of other matters is basically understood as well.

Quick Setup

Out-of-the-box sample configurations tailored to law firms, companies and research organizations, along with best-practices with respect to typical requirements, facilitate quick implementation, accelerate time-to-value and offer continuous optimization.

Low Maintenance Cost

Once PatOrg's basic principles are understood, configuration can quickly be done in-house with ease. The software allows for enhancements and adaptions to new requirements as well as legal changes, with a minimal investment of your time. Since PatOrg's commands do not directly access the database, configuration is not sensitive to structural database changes. Updates have a minimal effect on individual configuration which makes simplifies system maintenance.

Advanced Technology

PatOrg is based on Microsoft.NET and Oracle database technology. Due to this solid foundation, PatOrg is highly performant, very stable, and scalable.

Multilingual

PatOrg is available in German and English. To adapt translations or to localize PatOrg to another language, PatOrg offers easy-to-use translation means supported by Bing translation web service. Using UTF-8 encoding, PatOrg can process data in many other languages incl. Arab, Chinese and Cyrillic.

Full-featured Report Generator

PatOrg is equipped with an efficient report generator which allows for the creation of reports in several formats including Microsoft Word, Excel and PDF. By means of PatOrg's report generator all types of managed data can be accessed and freely compiled, textually as well as graphically, using different types of charts.

Fine-grained Authorization System

Customizable user/role-based access control system guarantees that only authorized people will be able to see and manipulate data.

Comprehensive Workflows

Leveraging PatOrg Workflows a variety of IPR processes can be modelled and automated by means of PatOrg's commands. There are more than 1000 commands available including usage examples and a multitude of events which enables the automation of basically any system action (e.g., calculation of due dates, dialog queries, data modification, document generation, etc.**)**.

Impressive Performance

PatOrg works fast! Even complex queries are quickly processed. Simple letters, invoices and reports can be produced in seconds.

In particular, this is achieved by:

- **Optimization in the Oracle database**
  All kinds of data are stored in the Oracle Database. Access routines are fully optimized in the Oracle database for maximal performance.
- **Document generation without controlling Microsoft Word or Outlook**
  No OLE! No ActiveX! PatOrg generates documents on its own without using Word, Outlook and PDF-Files (e.g., without using Microsoft Word, Outlook or Adobe Acrobat). Only after the document is generated is it passed and opened in the respective software (if requested by the user) and may be further modified manually.

Variable List Layouts

Layout of result lists can be easily and widely customized. Importantly, by means of Drag&Drop list fields can be intuitively compiled. Moreover, it is possible to configure the ordering of columns, column size, sorting, and colorization for lines, and cells dependent of data, grouping and fixed columns. PatOrg saves multiple list layouts and can easily switch between them so that data can always be presented according to respective information needs and depending on search query. Lists are equipped with several export options to save data in Microsoft Word, Excel, HTML, CSV and more, so creating files containing specific data in a predefined format is easily done with PatOrg.

620.000,00	↘	-170.320,00
640.300,00	↓	-310.200,00
200.000,00	↑	100.000,00

Powerful Search

Nothing remains hidden with PatOrg's comprehensive possibilities for searching. Any field is searchable including custom fields. Boolean functions are supported for combining search criteria to also enable more complex searches. Since case and person management in particular comprise many data fields, PatOrg tailors search screens per Drag&Drop containing only the most relevant search fields (even with predefined search criteria) for the respective matter and/or user. If necessary, additional search fields can be added at any time. With just one click PatOrg can switch to another search screen.

One of PatOrg's most powerful features is integrated search, which combines search criteria from several dependent entities such as case data and due dates. Intertwined inquiries such as the following can easily be made:

- Find documents which exist for patents whose application date lies between 04/23/2003 and 05/01/2003
- Find cases which exist for fixed dates that have to be completed next week
- Find persons data that is only linked with closed cases

PatOrg is also equipped with broad search options for searching data in all kinds of fields. A proximity search option is available so that PatOrg can find data records even if the search criteria does not completely match with managed data, which is particularly helpful when searching for patent numbers.

Let PatOrg drive your IP organization and intelligently manage all kinds of IP rights including related general matters over the entire lifecycle with one integrated solution.

Cases

Free from rigid structures! IP Matters are characterized by a multiplicity of aspects and may be very specific in nature. For efficient handling of inventions, patents, trademarks, contracts, oppositions and other, PatOrg offers one flexible case management featuring custom fields facilitating the management of all kind of cases in a uniformed manner, while simultaneously showing most relevant case data in one view. PatOrg's case view seamlessly integrates with online Patent Registers in more than 150 jurisdictions worldwide so that internal data and official data is presented at a glance.

Docketing

Due dates calculation is based on customizable rules. Relative to official due dates, reminder deadlines can be defined according to your own or individual clients' needs. PatOrg provides the ability to create, postpone or cancel terms in accordance with the four-eyes-principle. Due dates can be filtered according to any criteria. By means of user-defined filters, it is possible to define specific alert lists which can be added to the dashboard. PatOrg's sample configuration includes statutory calculation rules for due dates for a variety of countries. All kinds of actions with respect to docketing are stored and are thus fully traceable.
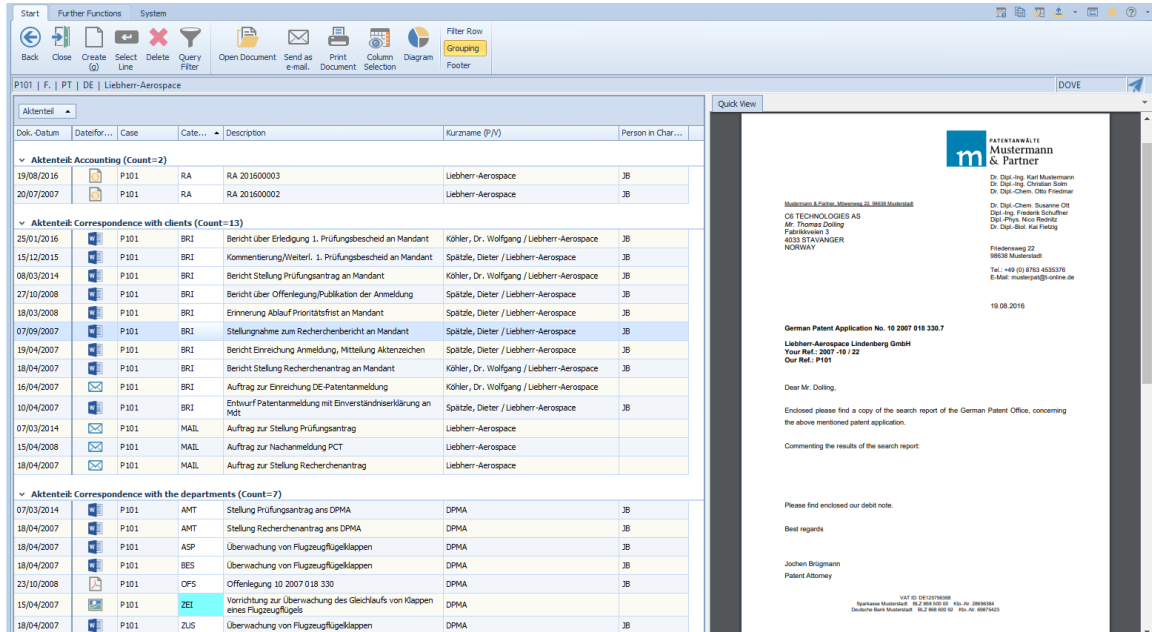
Contacts

Person management shares sophisticated concepts with case management enabling all kinds of persons and organizations such as clients, inventors, law firms and others to be managed individually and detailed at the same time. Person management, moreover, allows the establishment of user-defined relationships between records and the ability to use them for intelligent data processing.

Document Management

PatOrg's integrated document management system (DMS) provides the ability to store and index all kinds of documents. Alternatively or additionally, files can be easily stored in any third-party CMIS-compliant DMS such as Alfresco, exo or Agorum extending PatOrg's capabilities to preserve previous document versions and archive documents in an audit-compliant manner.

For many file formats PatOrg offers a quick document preview (e.g., for Microsoft Office files). Annotation of PDFs is also supported. Each document can be allocated to several contacts, cases, and due date records. Import of files is easily done by Drag&Drop. To efficiently handle scanned incoming mail, PatOrg features a mass interface facilitating quick categorization and assignments to case and person records.
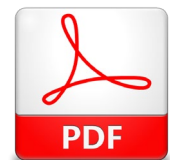

Document / Email Generation

Maximize your productivity of document output! PatOrg is very strong in automatic document as well as invoice generation. Instead of simple RTF files, PatOrg offers to create nicely designed Word/docx and Outlook/msg files or even e-mails including attachments in one step.

Complex templates for Microsoft Word, Outlook and PDF documents can be defined with ease only using Word or Outlook and leveraging PatOrg Commands. There is no need to have any previous knowledge of SQL or VBA in this respect. PatOrg is also capable to fill-out Word and PDF forms as e.g. for reporting IDS.
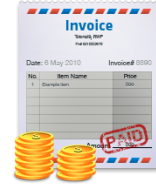
Continuous Electronic Processes with PDF Forms

PatOrg's outstanding technology for document generation can also automatically create PDF forms based on Microsoft Word templates. You can use checkboxes, combo boxes, text fields and other elements to make your client-specific letters even more interactive. Leveraging PatOrg Workflows it is possible to import and process data entered by the addressee with just one click.

Activity and Service Recording

PatOrg provides, records and manages all kinds of activities including assignments to case(s), person(s), projects and more. It is designed to predefine forms, descriptions, fees and hourly rates for typical activities. (Billable) activities can be processed into invoice items with full flexibility (e.g., combined where necessary). PatOrg's report generator conveniently analyses managed activities.

Invoicing

PatOrg provides single as well as collective (periodical) invoicing. Specific invoice layouts enable law firms to conveniently create invoices for clients' specific needs. Recorded activities and incoming invoices can be processed into invoice items for passing on costs. For the compilation of invoices there is also a wide range of options and aids available which can be combined with each other when needed, ranging from simple manual compilation to fully automatic composition. PatOrg's invoicing capabilities benefit from the system's advanced technology for document generation as well since invoice templates can be simply defined based on Microsoft Word templates.

Annuities

Annuities can be efficiently managed from PatOrgs' database of worldwide IPR annuity rules. PatOrg supports both in-house renewing and renewing via annuity service providers (e.g., Dennemeyer, IPAN or Pavis). The mode of procedure can be set individually for each case and country.

Detailed Cost Forecasting

Based on renewal data either produced by PatOrg or imported from an annuity provider, future costs for any period of time can be calculated and analyzed using PatOrg's report generator.

Convenient IDS Management

State-of-the-art literature can be stored, indexed and managed including bibliographic (meta) data, case assignments and others. For search and examination reports from the European Patent Office a workflow is offered to load cited patent documents from Espacenet. PatOrg's technology for form-filling facilitates the population of official IDS forms automatically. It is also possible to generate letters or emails covering IDS matters for foreign lawyers.

Ad Hoc Visualizations

Data included in result lists can be visualized instantly on demand. You can easily create pi and bar charts showing distribution of values in selected columns. PatOrg also provides advanced map visualization which enables the ability to create maps, for example, graphically showing the legal status of patent families over the world. It also offers the option of visualizing the number of active IPs per country. On request PatOrg can color-code all countries in a selected color to show accession to a certain treaty.