



PatOrg 6.2 Innovations

General


64 bit

PatOrg is now a 64-bit application. This increases the amount of RAM that can be addressed, which makes the software faster.

New controls

Everything visible is new. Menus, option, check and selection fields as well as text fields and buttons are

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based on an improved GUI technology. New multi-value fields simplify the display. A button that pops up when needed expands the field info symbol, making it easier to use. The colour design of the user interface can be selected individually. There are over 20 different themes to choose from including a dark one to be easy on the eyes.

Import of web pages screenshots

The web view is equipped with a new function that makes a screenshot of the displayed web page and imports it into the document management in the form of a PDF document. This functionality is especially useful for renewals management, to efficiently generate documents proving that a deposit has been made.

Flexible, constrained filtering

PatOrg 6.2 makes the restricted filtering more flexible. Constrained filters can now be extended by users as needed. To do this, PatOrg AND-links the filter criteria entered with those of the constraint filter, which further ensures that the filtering remains basically constrained. To indicate that a constraint filter is in use, the filter set is marked with a lock icon.

Multiselection in filtering

It is now possible to select multiple values for a filter criterion via field info function. Accordingly, PatOrg inserts an additional filter for each additional value.

TeamViewer Integration

A TeamViewer button is now integrated on the right side of the menu ribbon of each view in PatOrg to enable a quick start of the software if required.

Plausibility check of dates

As of version 6.2, PatOrg basically checks the plausibility of dates. If the date is far in the past or future, this is now noted by a warning symbol.

Integrated web service for remote control



The technique on which the "PatOrg Links" were previously based is now realized by means of a web service. The previously required plugin is thus no longer necessary. Instead of using the patorg:// protocol, control can alternatively take place via http. Furthermore, the new technology makes it possible to initiate workflows "from outside".

Docx- / xlsx-Export

The data from listings can now be exported to the new office formats docx and xlsx, which also allows more data to be exported at the same time.

Subordinate / Embedded listings

Hierarchical listings now make it possible to subordinate listings to other listings, for example, to display the case records with dependent due date records embedded.

Unser Zeichen	1. Bea H...	Taxbetrag	VgArt	Lnd	Flag...
-00001-		0,00	PT	US	
-00010-US		0,00	PT	US	
A 006	99	0,00			

Dokumente		
Dok-Id.	Kategorie	Bezeichnung
2004002276	KTX	Testformbrief

Main Menu

Preview for case and person records in the access history

Previews for case and person records based on list field definitions can now also be displayed in the history. As of version 6.2, the online IP register view can now also be integrated in the main menu, as can any other configurable HTML-based preview that displays data for the respective records and associated records.

Copying favourites for other users

A favourite in the dashboard, i.e. a configured menu entry that refers to a predefined filtering, can now easily be given to several other users.

Context menu for accessing linked records

For case and person records that are listed in the main menu as search hits or in the access history, there is now a context menu which makes it possible to get directly to linked records. For example, so, the deadlines for a case record can be obtained directly from the main menu, without having to go through the case record management.

Adding feeds in the RSS feed reader

RSS feeds can now be set directly in the RSS feed reader in a dialog box that appears when the button titled "Settings" is pressed.

Case Management

Listing of documents for persons denoted in field group C02

The field group C02 "Persons" of the case management is now equipped with a context menu that provides to access directly the documents linked to person without the need to get to the person record first.



Person-Id	Kurzname	Funktion
SIE001	Sig	G

Dokumentenverwaltung

Person / Contact Management

User-specific filtering and listing of contacts

How to filter and list the contact persons for a main person can now be configured individually. As of version 6.2, PatOrg also takes into account user-specific filter compilations of the AS variant, i.e. filter whose IDs correspond to those of users IDs.

Optimized extraction and assignment of address components

It is a challenge to automatically extract the individual information elements such as street, house number, postal code and city from addresses worldwide. Until now, PatOrg only had special algorithms for this for a few countries. As of PatOrg 6.2, PatOrg can use the free Bing Maps Web Service from Microsoft for this purpose.

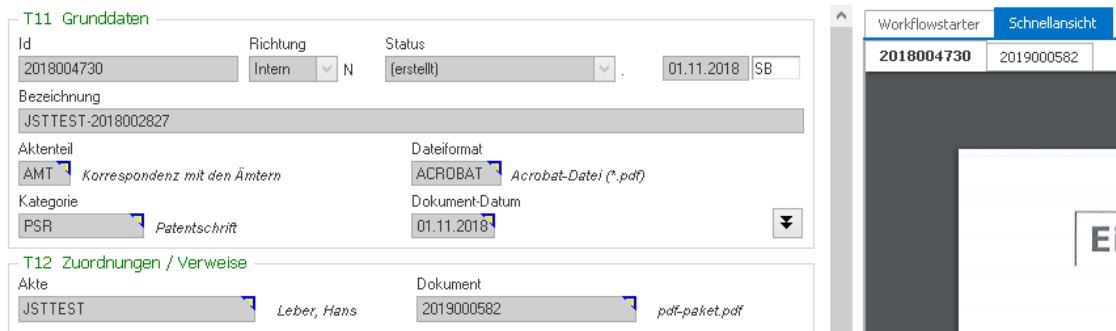
Document Management

New PDF Viewer Component

There is a new component for displaying managed and dynamically generated PDF documents. Functions for underlining, strikethrough and colouring of text passages can be executed via the context menu. In addition, annotations for markups are supported. All markups and annotations are listed in a side window that can be displayed on request.

Additional document view for referred documents

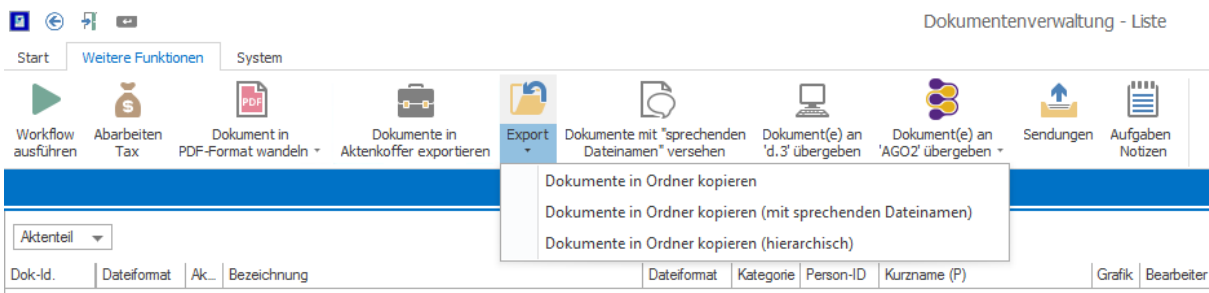
If a document management record contains references to other documents, these are displayed in additional tabs alongside.



The screenshot shows a document management interface. On the left, there are two main sections: 'T11 Grunddaten' and 'T12 Zuordnungen / Verweise'. The 'T11 Grunddaten' section contains fields for 'Id' (2018004730), 'Richtung' (Intern), 'Status' (erstellt), 'Dokument-Datum' (01.11.2018), 'Bezeichnung' (JSTTEST-2018002827), 'Aktenteil' (AMT), 'Dateiformat' (ACROBAT), and 'Kategorie' (PSR). The 'T12 Zuordnungen / Verweise' section shows a list of documents, including 'JSTTEST' by 'Leber, Hans' with document ID '2019000582' and file name 'pdf-paket.pdf'. On the right, there is a sidebar with tabs for 'Workflowstarter' and 'Schnellansicht', and a large dark area with a small 'Ei' icon.

Hierarchical document export to file system

From the listing of the document management either the selected or all listed documents can be exported hierarchically, i.e. if the listing is grouped, e.g. in first level by case part and in second level by category, PatOrg creates a file folder for each group and stores the documents in it. In the main directory, PatOrg further creates an HTML file that maps the listing and links each file, so that the files can in principle also be accessed from the listing as in PatOrg. This functionality is especially useful for lawyers to "take along" the documents stored for a file (sometimes also called "electronic file"), for example for a hearing in court.



The screenshot shows the 'Dokumentenverwaltung - Liste' interface. At the top, there are tabs for 'Start', 'Weitere Funktionen', and 'System'. Below the tabs, there is a row of icons for various functions: 'Workflow ausführen', 'Abarbeiten Tax', 'Dokument in PDF-Format wandeln', 'Dokumente in Aktenkoffer exportieren', 'Export', 'Dokumente mit "sprechenden Dateinamen" versehen', 'Dokument(e) an "d.3" übergeben', 'Dokument(e) an "AGOZ" übergeben', 'Sendungen', and 'Aufgaben Notizen'. The 'Export' menu is open, showing three options: 'Dokumente in Ordner kopieren', 'Dokumente in Ordner kopieren (mit sprechenden Dateinamen)', and 'Dokumente in Ordner kopieren (hierarchisch)'. Below the menu, there is a table with columns for 'Dok.-Id.', 'Dateiformat', 'Ak...', 'Bezeichnung', 'Dateiformat', 'Kategorie', 'Person-ID', 'Kurzname (P)', 'Grafik', and 'Bearbeiter'.

Hide the field group T15

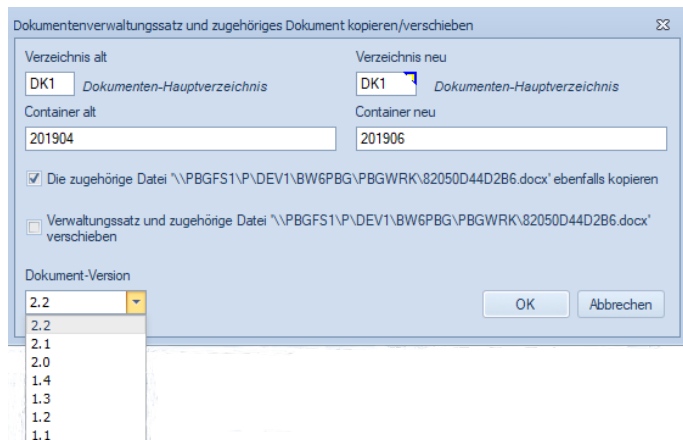
With a new option of the user settings, the field group T15 - Storage/call information can be hidden for individual users. This makes it possible to actually not show users where the file linked to a document management record is actually located and thus also avoid modification bypassing PatOrg.

Importing Excel files

The new @W20xS instruction can be used to import data from Excel files. The XML import interface must be licensed before it can be used.

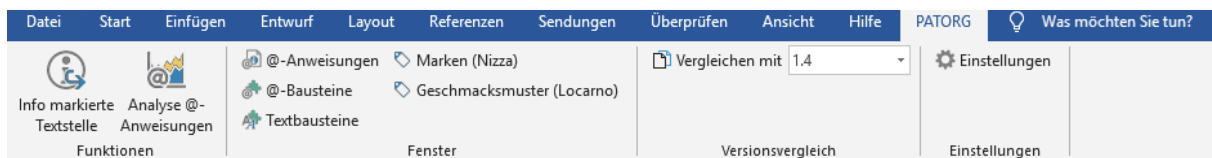
Version-specific cloning with CMIS

For versioned documents managed in a DMS, it is now possible to copy not only the latest version of a document, but any version. The version to be copied can be selected in the dialog, as the following screenshot shows as an example:



Version comparison

The Word addin now makes it possible to compare different versions using Microsoft Word's compare function. To compare one version with another, there is a new selection field in the ribbon that lists all versions. On selection of a version Word compares the current version of the document with the selected one.



Form letters & @-blocks

Suggestion of form letter templates based on criteria

As of version 6.2, PatOrg can, if accordingly

06 Auswahlkriterien

Vg.-Arten	Länder	Herkunft
EIN	CH	WO/EA

configured, suggest more specifically the templates in question for form letters. This is realized by a now filtered field info function in the dialog for processing, which is based on criteria potentially entered in the new field group 06 – “Selection criteria” of the form letter management. Up to four different matter types and countries as well as two origins can be specified in the field group. The field info function of the letter processing then lists all those form letters for which either no selection criteria are specified or the selection criteria match those determined for the processing.

Move generated emails to the Drafts folder

In the field “Action after processing” of the field group 04 – “Options for processing” there is a new option labeled Dialog Outlook. If it is set, PatOrg will load the generated email into a certain configurable Exchange mail folder, such as its own Drafts folder or that of another colleague.

Listing of documents created on the basis of a template

From a form letter management record, all documents generated on the basis of the form letter can now be listed. This should make it possible to find out with little effort how often the template was used, when it was last used, and how a generated document is formulated and designed.

Programming Editor for @-blocks

The text field in the data management of the @-blocks for editing them is now a programming editor field equipped with a line numbering as well as a simple syntax analysis, which colours comments green for a better overview. Furthermore, the block is displayed in a font commonly used for programming. In addition, a larger line spacing (1.3) is set to improve readability.

```
17 ## Dialog = Ja, Dokumente sollen angehängt werden:
18 @>W11aQMSG==06@
19 @T10mCDOK@
```

Due Date Management

Listing of documents assigned to a deadline

It is possible now to directly access the documents related to a deadline. Deadline records can be linked furthermore to document management records by means of data fields in the T12 assignments/references field group of document management.

Dynamic assignment for the person in charge for a due date

By means of a new option named "logged in user" of the due date events PatOrg

Bearbeiterzuordnung			
Fristenbearbeiter -1-	Fristenbearbeiter -2-	Fristenbearbeiter -3-	Fristenbearbeiter -4-
eingeloggter Benutzer	2. Bea / Akte	3. Bea / Akte	4. Bea / Akte

can now be instructed to dynamically assign the 1st, 2nd, 3rd or 4th person in charge for a case as responsible user for a due date.

Another new option called W12=BEA, let PatOrg automatically set the 1st,

Bearbeiterzuordnung			
Fristenbearbeiter -1-	Fristenbearbeiter -2-	Fristenbearbeiter -3-	Fristenbearbeiter -4-
W12 = BEA	2. Bea / Akte	3. Bea / Akte	4. Bea / Akte

2nd, 3rd or 4th person in charge of a case by means of the W12 workflow variable BEA. The position (the rank of the processor) results in this respect from the row index of the W12 variable.

Due Date Priorities

Due dates can now optionally be assigned to priorities "1" and "2" by data fields in the data managements of the due dates and deadline rules.

ICS/ICAL-Generation

A new @-command allows to generate calendar files in the standardized ICS/ICAL format. For example, deadlines can now be exported from PatOrg and read into systems such as Outlook or GMail. Furthermore, the new feature provides to generate ICS files based on due dates and attach them to emails as part of a workflow.

Task Management

Document View

The task management now also integrates a document preview. All (displayable) documents to which a task record refers are displayed.

Template / Sample Records

Data records can now be marked as samples and thus used as templates for new task data records. If records are accordingly marked in the field group 99, PatOrg offers these for selection when a new record is to be created.

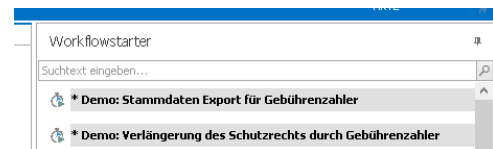
New fieldgroup for user-defined fields

In order to add custom data to tasks field groups for text fields, checkboxes and comboboxes has been introduced.

Workflows

Workflow-Starter Search

A search function has been added to the view of workflow starters to make it easy to find the one you are looking for even if there are many workflow starters.



Workflow-Starter for specific users

Workflow starters can now be offered to specific users only.

Other

Storage of invoices in DMS

With 6.2, invoices can also be stored in a DMS via CMIS after they have been generated.

Document preview for documents referenced in communication records

Communication records now also offer a document preview. All (displayable) documents to which a record refers are displayed.

Document preview for costs

The data management for cost recording is now also equipped with a document view. The configured default preview shows the document that references the cost record.

Change history

Changes to data records can now be tracked, i.e. it is possible to trace which editor entered, modified or removed a value in a field at what time. The change tracking is configurable on field level.

Seamless integration of annuity provider web services

As of version 6.2, PatOrg integrates the PAVIS and CPA/IPAN web service interfaces. Thanks to the integration, data on case and payment orders can be transferred more efficiently, conveniently and securely. As a result, the compilation and sending of files by email for the transmission of case and order data is now a thing of the past.

The web services respond to each data transmission promptly. So, it is immediately apparent, for example, whether the transmission of new case data was successful. If the transmission should fail, the new technology explains this with a description of the problem. This way, typical errors resulting from inadequate data, for example, can now usually be solved quickly and potentially even without assistance.

Extended by appropriate renewal actions, the new functionality enables to commission the renewal provider on short notice. The processing via PAVIS and CPA/IPAN is embedded now directly into renewal workflow processes. PatOrg tracks every communication via the web services, so that it is always possible to trace which case data and payment orders were transferred to the provider at what time and with what result. Besides, PatOrg's case view can also be extended for specialists entrusted with IP renewals by PAVIS and CPA/IPAN data. Thus, when opening the file, it is obvious at any time which data are registered with the annuity provider and what the status of the renewal is.