



PatOrg 6.3 Innovations

General

4K Optimization

The graphical user interface is now improved to work with 4K resolution.

Generation of Excel documents

In addition to Word documents and emails, PatOrg now provides the ability to generate Excel documents based on templates as well.

Administrative super login

Users can be authorized to log in on behalf of other users by activating a special option in the user settings. This allows administrators to easily check configurations and settings for other users, in particular permission restrictions and the composition of filter favourites in the main menu.

WAN mode

PatOrg can now be operated in so-called WAN mode. In this mode, the PatOrg client communicates exclusively with the PatOrg server and not directly with the Oracle DB in parallel. Using WAN mode, PatOrg can also be used remotely via VPN.

Case management

User Roles

A larger number of users including roles, can now be assigned to a record.

Bearbeiter			
Bea.-ID	Name	Rollen-ID	Rollenbezeichnung
FLE	Fleck Michael	AKBEA 1	Aktenbearbeiter 1
JAK	Jan Kochan	FRI	1. Fristenverantwortlicher

Relations between persons

In the field group C02 for the administration of persons, there is now a subordinate field group with which relationships including dates can optionally be defined between the persons entered in the field group. In particular, this now makes it possible to manage conveniently records by noting the respective relationship between the previous and the new holder and a date specification as to when the rewrite (has) taken place. The field group is also useful for dispute cases with many participants, to note which party is represented by which law firm.

C02 Personen				
Person-Id	Kurzname	Funktion	Ansp	Briefart
10014	BMW / Bayerische Motoren Werke AG	AN		
10064	SLEIPNER MOTOR AS	GG		
10051	GETRAG Getriebe- und Zahnradfabrik	GG		
00000	Patentanwälte Mustermann & Partner	GV		
30001	Beier & Meyer Patentanwälte, Musterstadt	GV		

Beziehungen			
Person-Id 1	Beziehung	Person-Id 2	Datum
00000	vertritt	10064	
30001	vertritt	10051	

Deactivation of user-defined fields

The definable fields in the form of checkboxes (C11), checkboxes with date (C16) and combo boxes (C12) can now be deactivated. This makes it possible to preserve existing fields in case records, but at the same time prevent their further use, so that the configuration can be changed over easily.

DAS code

There is now an additional field for managing the DAS code in the priority field group.

Undocking of document views

Document views can now be undocked and displayed in a separate window via drag & drop.

Direct editing

6.3 abolishes the multi-document mode and introduces the direct editing of documents instead. This means that several documents can be opened simultaneously with one action without PatOrg waiting for the documents to be closed.

Import of data from Excel files

By means of a new @-instruction, data can be read in from Excel files, which makes it possible, among other things, to automatically import file and personal data.

Alternative display component for Word documents

There is now an editor for Word documents that can be activated in the user settings as an alternative to the document preview. However, editing is not yet possible, but could be implemented if the view component proves itself in practice.

Form letter generation

Generation of form letters directly from template

A processing can now be initiated directly from the form letter management. A button to initiate the processing has been added to the ribbon. This makes it easier to test form letters.

Invoice management

Generation of electronic invoices (ZUGFeRD-Invoices)

PatOrg now makes it possible to generate electronic invoices according to the 'Zugferd' and 'X-Rechnung' standard.

Swiss QR-Code / EPC-QR-Code

As of PatOrg 6.3, the @V00qCSWI()@ and @V00qCEPC() instructions can be used to include Swiss QR codes and Swiss EPC QR codes in invoices. The codes encode the essential data of an invoice and thus make it possible to pay invoices in a simple way using an appropriate reader (such as a cell phone).

Invoices including invoice items integrated in one list

In the invoice management, listings can now be configured where the invoice items are displayed as a sub-list.

Import of invoices based on the LEDES format

Incoming invoices can now be imported in the form of open items in LEDES format (LEDES98BI). The menu item for calling up the new function is called "OP export/import". The import function only considers the total invoice amounts, not individual item amounts. As a result, the imported open item records only have one line with the total invoice amount in the "O03 Account assignment data" field group.

Workflows

Workflow-Starter for cases dependent of data of linked persons

Workflow starters for case records can now also be displayed specifically only for those cases for which a person record linked via field group C02 in field group P15 has a certain value.

Batch Workflows

Optionally workflow starters can be set so that the configured workflow rule is executed only once. In this mode PatOrg writes the Ids of the selected records into a named workflow table. For processing, the marked records can be taken from the workflow variable. The new function thus largely replaces the one where the workflow rule is specified in the filtering.

Team Workflows

Introduction of a new workflow technique extending the established one for the automation of longer-term processes, as well as for processes involving several users.

Client agreements

New data management for specific pricing

Law firms can now manage client agreements to set specific hourly rates, payment terms and fees.

Outlook-Addin

Transfer of data assignments to attachments

The Outlook Addin now has a function to transfer the date, status, file part and category as well as the assignments to the attachments. In addition, it is symbolically displayed whether these data are actually the same for e-mail and attachments. After the function has been executed, the Outlook add-in locks the relevant data fields for the attachments. The lock can be removed by clicking on the corresponding button.

Import of read confirmations

As of PatOrg 6.3, read confirmations from Outlook can also be imported into the document management.

Separate remember import setting for incoming and outgoing emails

The Outlook plugin now remembers separately for incoming and outgoing e-mails which category, which part of the file and which status was last selected and thus present for the next import.

Comments

It is now also possible to specify a comment for a document to be imported, which is transferred to the T16 field group of the document management record.