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Administration Systems for Patents  
and Trademarks

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**IP Master**  
Administration System for Patents and Trademarks

## Intelligent Intellectual Property Management

IP Master represents an intellectual property management system that derived from traditional software development based upon the wishes of the customers. This resulted in a product suited for law firms as well as corporations worldwide. This is documented impressively by more than 600 installations worldwide.

IP Master is based upon Microsoft<sup>®</sup> SQL Server, an industry standard relational database management system. The multi-tier data access architecture provides new and enormously flexible control over the data stored. New customisation capabilities allow previously unknown flexibility in the design of the user interface. Different license packages are tailored to the different user's needs. From single user installations for a small, specialised practice up to the world's largest intellectual property portfolios, IP Master provides the license package which meets the needs.

With a rules database constantly updated by us, the most important due dates are calculated automatically. If needed, this rules database can be modified and amended by the client. Especially for distributed filing centres of large world wide active corporations, the rules can be modified in such a way that all actions based upon the country laws suit the needs of different filing philosophies.

## License Models

According to the needs of different user groups, three license models are available.

### IP Master - Personal Edition

Designed and priced to meet the needs of a small department or specialised practice, the Personal Edition is available for one user with many of the same advantages of the larger systems. An upgrade to the larger systems is available at any time.

### IP Master - Professional Edition

This package for small-to-mid size networks ideally suits the needs of law firms or companies handling up to 20.000 records. With up to 25 concurrent users, this license model provides an ideal solution for the mid size user group.

### IP Master - Enterprise Edition

This package is designed to help clients manage the world's largest intellectual property portfolios. With a variety of options, IP Master Enterprise Edition allows to manage economically, quickly and easily an unlimited number of cases. For all types of actions, functions are available at your finger tips. Overviews, statistics and forms are at hand quickly and at any time.

## Functional Capabilities

Based upon the range of performance in PC Master, new functionality has been developed according to the wishes of the user community. All relevant data of an intellectual property can be entered into a data input screen which is simple and easy to use. Browsers can be created for user groups, functions or specific users. Reports and form letters can be used at any time. Tax dates can be calculated according to the user's needs for past and future dates. Budgets can be created easily. For trademarks, the renewal history can be calculated based upon the rules database back to the first application. Using a simple and easy menu, all functions can be accessed.

## Security

Controlled access for clients, inventors, subsidiaries and other interested third parties are necessary in today's business environment. The IP Master architecture supports all security mechanisms of SQL<sup>®</sup> Server:

1. Windows NT authentication
2. SQL Server authentication
3. Access rights to selected database tables

Based upon these security functions, different levels of access can be defined to the database server, the database or specific database objects.

## Searching, Queries and Data Analysis

IP Master provides totally new capabilities for searching, querying and analysing the data. All sorts of queries can be defined, stored and executed. Different types of queries are available to each individual user. Data analysis queries represent a new type of information processing and are integrated into the standard queries. IP Master queries use standard SQL statements.

Each user has access to his own queries or can utilise additional queries from his user group. The access rights are controlled by the system administrator.

IP Master offers the following queries in a standard installation:

1. Shared Queries are stored views of the SQL Server database. Columns or fields are defined in the view. The content of the view depends on the access rights that the database administrator has assigned to the user account or the group. All network users of IP Master may run Shared Queries.
2. User specific Queries can be built by a user by writing own SQL statements or using one of a number of query building tools, including IP Master's Create New Record Selection Wizard. With access right to do so, custom-built queries may be «published», so that other users can run it. It then becomes a Shared Query.

Queries run against data fields such as Docket Number, Country, Attorney, Status, etc. and are grouped in a Windows Explorer-like hierarchical tree by module (Patents, Trademarks, Docket Lists, Portfolio Analysis, Parties, Codes, etc.).

IP Master provides users with an unlimited variety of queries. Examples of queries which are shipped with IP Master are:

- Docket list queries with different criteria
- Listings of applicants, owners, inventors, etc.
- Lists of applications in specific countries, based on specific conventions, etc.
- Portfolio analysis queries by applicants, countries, key words, inventors, etc.
- Statistics using different criteria
- Yearly and monthly statistics
- etc.

Additionally, each user may limit the number of records by applying filters and search for specific cases or groups of cases by adding search criteria.

### **Reporting and Graphical Visualisation**

Because of the wide spread of the Microsoft<sup>®</sup> Office suite of programs, IP Master utilises applications such as Microsoft<sup>®</sup> Word and Microsoft<sup>®</sup> Access for reporting of database information. These products are easy to attach to Microsoft<sup>®</sup> SQL Server and thus are easy to use. They produce results in presentation quality.

#### **Possible representations:**

1. Presentation of cases or families
2. Various listings in defined order
3. Data sheets or specific information from one case
4. Display of information in a list, a letter or a form
5. Graphical analysis in various representations
6. Print of hard copies in black and white or colour

During the installation of IP Master many predefined reports ready to be used will be implemented. These reports may be modified, extended or serve as templates for new reports.

### **Form Letters**

Utilising Microsoft<sup>®</sup> Word, Form Letters can be created and used to print either series of letters for a selected list of cases or just print a form filled with data from an open case. Any existing company form can be customised and turned into a usable form and filled with IP Master data.

IP Master will be installed with patent and trademark form letter templates. These templates can be amended and modified with database information. These forms are then available to any authorised user. With the aid of Microsoft<sup>®</sup> Query and Microsoft<sup>®</sup> Access Form Letters can be created from any source (internal, from patent and trademark offices, from agents, etc).

### **Docketing**

Recording the critical information and events surrounding intellectual property is the principal function of IP Master. Using IP Master, you can easily record internal as well as legally required events about an intellectual property and track its progress through all its life stages, from filing to expiration.

Due to the differences in tasks, the needs for informations differ between a patent department and a law firm. IP Master therefore can be customised to store only those data, required for the environment in which it is utilised with no additional overhead.

As your company's intellectual assets grow in number and value, IP Master's docketing functions can help you quantify and manipulate those assets. Never before has it been so easy to accurately and comprehensively manage your IP portfolio.

### **Country Rules**

The Country Rules table contains critical date calculations for the various countries and treaty organisations around the world. The Country Rules table contains worldwide country laws and other information governing the calculation of expiration dates, renewal dates, foreign filing deadlines, priority dates and many other critical action dates. The Country Rules table is part of every standard installation of IP Master.

IP Master comes pre-loaded with the most current Country Rules table, which Master Data Center updates on a quarterly basis. The Country Rules table may be augmented by the client with own automatically calculated actions, deadline dates and reminders representing the internal workflow. With Global Rules world-wide active companies can customise the Country Rules table to the needs of their local representations in different countries.

## Additional Modules

Optional modules are available for users requiring needs over and above the base IP Master system. The following extensions which cover additional functionality are available:

### Web Access Module (WAM)

The IP Master Web Access client brings the advantage of Intranet and Internet technology to the PCs of users connected worldwide. External users and inventors may access IP Master data through your company network while you generate their views and tailor their access to selected cases.

The IP Master Web Access Module provides law firms with an easy and cost-effective method for clients to query their own portfolios. The restrictive security functions will allow clients read access to their records and their records only.

### IP Forms Module

The IP Forms module opens up completely new capabilities for the generation, completion and administration of office and in-house forms. All forms are based upon the industry standard «Portable Document Format» (PDF) from Adobe. A library of forms of different origin can be created and turned into templates linked to IP Master information. These form templates fill in themselves, if a user opens such a template on top of an IP Master case. The user only needs to select the form template after he opened the case for which he wants to fill in the form. Additional data required and not stored in IP Master can be added manually.

These forms are administrated easily, because they are actively linked to the IP Master cases, automatically sorted by docket number. A navigation tool similar to the Windows Explorer facilitates this task.

With IP Forms the filing process can be simplified and accelerated by filling out multiple forms while entering data only once. Case folders hold filled in forms for a quick overview. IP Forms provides the tools to optimise work flow processes.

### Invention Disclosure

This extension to the patent module is used to track inventions from the idea to an application ready to be filed, to keep track of review decisions, priority changes and other relevant information collected. Statistics are available on which inventions are carried on or have been dropped before filing. Up to six different «clocks» allow, if you wish, to report how much time has been spent for the different processes between receipt of the invention and filing an application.

## Annuity Budgeting

This strategic tool is designed to generate reports based on projected maintenance fees. It allows to generate maintenance fee forecasts for specific timeframes and for any combination of specific criteria in the IP Master system.

Corporations can produce reports by divisions, product lines, etc. Law Firms may create reports by client or applicant or any other combination with additional fields.

### General IP Matters (Conflicts, Licenses, Agreements, etc.)

The user interface of this module is especially flexible and can be customised to the wishes and needs of a client. This allows to create a module to track conflicts like infringements or oppositions with direct links to the patent or trademark information. Another customisation could be a module which supports licenses and agreements related to patents or trademarks. Each module is dynamically added to the IP Master administration system and supports the Related Id concept of linking records across modules.

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## Technical Information

Working together with the Microsoft<sup>®</sup> SQL Server relational database management system, IP Master gives you new and enormously flexible control over your intellectual property portfolio. IP Master's design uses a multi-tier data access architecture.

It supports three tiers of objects:

### Client Data Objects:

Format and present information to users and provide an interface for data entry.

### Business Logic Objects:

Implement business rules by, for example, checking limits, validating data and providing calculated or summarized data.

### Data Access Objects:

Provide storage, retrieval, security, and integrity for the data.

## Minimum System Requirements:

Client Workstation	Server
300 MHz Pentium	300 MHz Pentium
50 MB disk space	200 MB disk space (in addition to database)
64 MB RAM	64 MB RAM

## Recommended System Requirements (1-5 Users):

Client Workstation	Server
500 MHz Pentium	500 MHz Pentium
200 MB disk space	1 GB disk space (in addition to database)
256 MB RAM	512 MB RAM

## Recommended System Requirements (5 - 20 Users):

Client Workstation	Server
500 MHz Pentium	700 MHz Pentium
200 MB disk space	1 GB disk space (in addition to database)
256 MB RAM	1 - 2 GB RAM

Note: SQL Server 7.0 or 2000 required for Enterprise edition.