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1 Introduction

1.1 What is IP4?

IP4 is a workgroup software application for electronically managing files or matters and the data that comprises them, namely dates, contacts, correspondence, reference numbers, notes, and documents. It is designed primarily to handle the complex requirements of intellectual property practices, but is easily adaptable to manage any types of office matters with similar informational requirements.

For intellectual property practices, it streamlines the input and maintenance of application filing details, due dates and reminders. It automatically performs critical date calculations and form letter generation, significantly reducing both the risk of error and the time spent on data entry.

IP4 combines case management, client and contact management, due date docketing and document generation into a single efficient, accurate and secure system.

1.2 What you can do with IP4

IP4 is ready from the outset to improve the efficiency of an intellectual property practice. With IP4 you can...

- organize client and matter records for quick access through a simple, efficient central database
- efficiently manage information pertaining to matters including reference numbers, dates, actions, contacts and related documents
- cross-reference matters by various search fields, including the file or matter no., title, trademark, application no., issue no., client reference or other custom reference number
- securely automate the input and maintenance of due dates and reminders
- automatically generate correspondence to clients and intellectual property offices
- output reminder reports to advise of upcoming due dates on a timely basis
- produce visually appealing status reports, file sheets and other documents which can be exported to Word or Excel
- easily design and save search criteria and report layouts with a simple point-and-click interface
- use the included set of action rules for calculating due dates or create your own customized system with the built-in rule management interface

While user-friendly enough for casual users to learn easily, IP4 also includes advanced tools for power users to...

- search, sort and export data to other applications
- develop routines to automatically filter and format tables
- create and modify report layouts
- manage users and credentials

- control the appearance and logic of the system through custom fields, codes and rules

1.3 Features and Specifications

1.3.1 Matter, Client and Contact Management

- comes with pre-designed matter specifications for patents, trademarks and general matters
- firms can easily create new matter types and design data entry windows without program modification (e.g. litigation matters, domain names, etc.)
- supports various numbering schemes for client and matter files
- all types of matters are stored in a common table to enable searching of all matters in one operation
- finding matters and companies is easy with powerful, yet simple, "Find" windows
- records can be viewed in either detail (full-screen) or table (chart) window formats
- matter structure accommodates one primary contact per matter and unlimited other contacts in user-defined categories
- contacts are organized and retrievable by both individual and company names
- supports multiple addresses for each company or person without duplication of person or company name
- ample user-definable fields provide multiple ways to categorize companies and contacts for setting up mailing lists and reports
- contents of each matter is virtually unlimited as multiple records of the following types can be attached or linked: actions (events, reminders and due dates – see below), contacts, letters (program-generated documents), and references (reference numbers, text, related files, images and other external documents).
- attached files can be conveniently opened for viewing in their native application (.doc, .xls, .pdf and graphics files are currently supported).

1.3.2 Event and Due Date Management

- information about both past events and future deadlines and reminder dates are recorded in the Actions window of the each matter
- base actions (events upon which reminders or deadlines are based) are listed chronologically to present a concise history of the matter
- non-base actions are designed to track one or more dates pertaining to the action, including due dates, extensions, bring-forwards and other reminder dates
- actions are quickly entered through predefined action codes and descriptions and automatically calculated dates
- further details for each action can be entered in the action's Comments field
- when due date actions are completed, the date done is recorded and subsequent actions are automatically added to the matter
- date entries may trigger new actions and letters, update the status of the matter, or delete previously entered actions
- dates are reported in master list format or separately to each person in charge of the matter through the customizable due date reports module

- all due date calculations and items generated can be reviewed in a comprehensive Action Rule Report and modified within the application
- IP4 supports various numeric formats for entering dates including mm/dd/yyyy, dd/mm/yyyy and yyyy-mm-dd.
- Dates are confirmed on-screen and in printed reports using words for the month (e.g. Jan 01, 2004) to avoid error-causing misinterpretations of dates.

1.3.3 Form Letter and Document Generation

- integrates with Microsoft Word to produce documents automatically
- history of document generation is recorded on each matter
- documents can be produced individually by matter or in batches based on matter or due date criteria
- supports multiple versions of documents depending on type of client or matter through user-defined rules
- generated document content is highly flexible through the use of program snippets or calculated fields within document text
- documents can be automatically generated upon entry of action dates

1.3.4 Data Security

- system log records date and time of any user signing on to IP4
- records date, time and user name for all modifications to database records
- data verification report confirms database integrity; automatically detects and reports data corruption or modifications made outside of IP4
- user access can be restricted by an administrator to selected parts of the database
- all input windows provide an "out" to cancel any changes made to a record before saving

1.3.5 Database Engine

- compiled with Microsoft Visual FoxPro 6.0
- easily scalable from single-user to multi-user
- supports up to 100 million records in each table
- requires no third party software license, only IP4 and MS Windows
- runs on any Windows version
- fully ODBC compliant database
- FoxPro database (DBF) files can be opened with other applications such as Excel, Access and Visual Basic
- includes the Visual FoxPro Report Designer for modifying report formats
- IP4 is easy to install, update and administer

1.4 Customization

IP4 is highly flexible and configurable. It is designed to be customized to each firm's unique requirements with respect to country, size and scope of practice, and individual preferences.

IP4 is a "data-driven" application - the variable elements of the software (data fields, menu options, screen displays, calculations and reports) are generated from records in data tables. This design enables the software to be easily customized to better meet the unique requirements of your firm's business.

The following are some of the components of IP4 that are easily customized without requiring any modification to the application software:

- client number size and format
- matter number size and format
- automatic numbering of new matters
- selection lists for coded matter components (types, subtypes, status, countries, actions, etc.)
- matter detail items (fields customized for specific matter types)
- matter detail print items (list of fields printed when in matter detail)
- table columns (columns viewed or printed in tabular format)
- action rules (how due dates are generated and calculated)
- letter rules (how form letters are generated, addressed and formatted)
- log item rules (fields tracked in audit trail)
- client, matter, and due date report formats
- user groups and access privileges