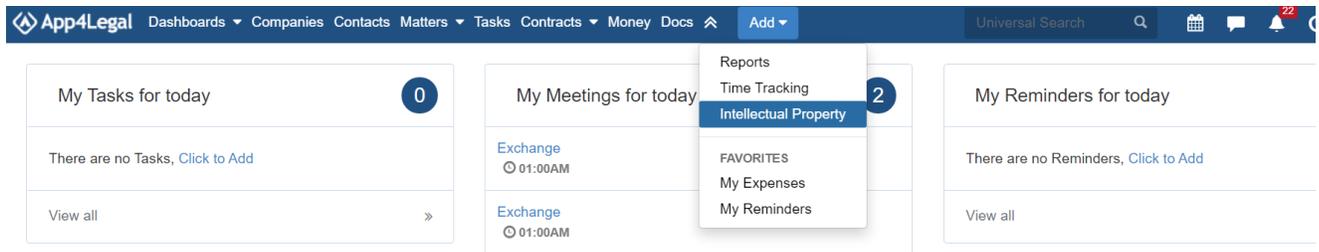


# Manage Intellectual Property

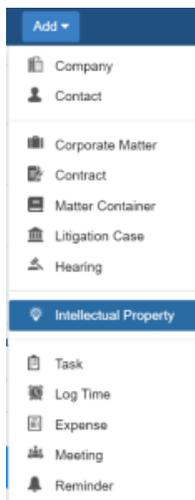
## How to access it

From the main menu "Intellectual Property"

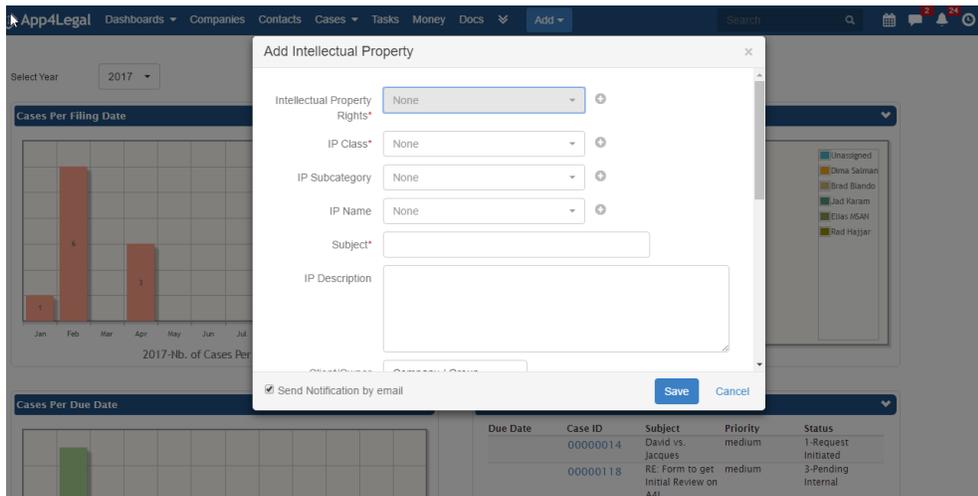


## Add/Edit an IP Case

Adding an IP Case is done from the Quick Add, choose Intellectual Property.



The Add form has many important fields. The mandatory fields are the ones with a red star next to them:



- Intellectual Property Rights
- IP Class
- IP Subcategory
- Registration Status: Active or Inactive
- IP Title

- IP Description
- Assigned Team: Medium to Large teams may wish to divide the Legal teams based on their specialty. Teams are managed through the Settings Teams Assigned Teams.
- Assignee: The App4Legal user who is assigned on this Case who compulsorily has to belong to the above chosen Assigned Team. This is managed through the Settings-> Users & Permissions section-> Manage Users. Within the User form, go to Personal information and choose the **Member of** field to be the appropriate Assigned Team so that the name of the user appears in the drop-down list.
- Client: A Client could be either a Company or a Contact.
- Registration Ref: It is the internal numbering of a Case that is different than that of the Court. This is the firm's reference of file number of the Case.
- Registration Date

After adding a Intellectual Property Case, it will be designated by a **Case ID** that is automatically generated by the system. Once the user clicks on the Case ID from the grid, the Intellectual Property Case form opens where the user can be view/edit the IP Case data. Also, through the action wheel, you can choose View/Edit.

In the Edit form, the user has the possibility to **Manage Renewals**.

In the Renewal form, the user can add the country where the IP is to be renewed, Comments, Registration Date, Renewal Date and who handles this Renewal. Once a newer Renewal date is added for the same country, the obsolete one for the same country disappears from the table.

[Back to Top](#)

#### Add configurations on the fly

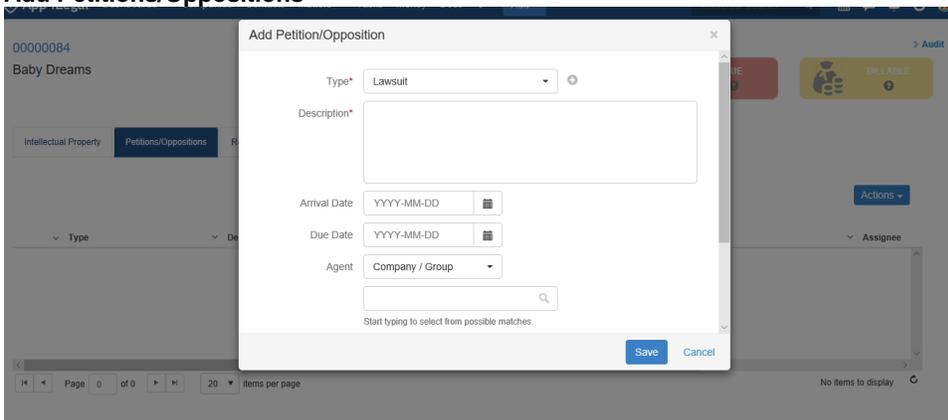
All drop-down lists in App4Legal are configurable through the Settings however some configurations can be configured on the fly. For instance, in the IP Case form, a user is adding data and wants to have a new Intellectual Property Rights (IPR) swiftly. There is a blue plus sign that can assist the user to add a new value to the IPR new value drop-down list on the fly.

Values that can be similarly added on the fly in an IP Case form are:

- Intellectual Property Rights (IPR)
- IP class
- IP Subcategory
- IP name

[Back to Top](#)

## □ Add Petitions/Oppositions



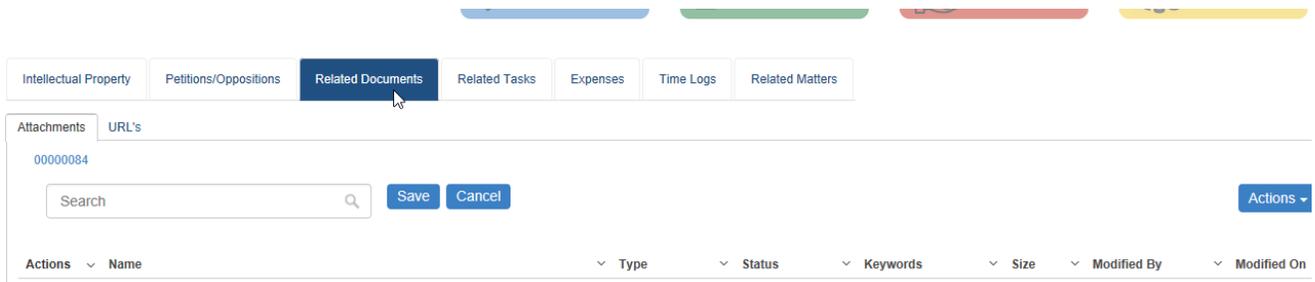
You can add the petitions and oppositions related to this specific IP matters.

## □ Relate Documents

The user can relate Documents to an IP Case such as IP Rights, Registration Documents, Renewal, etc.. Documents can be arranged in folders. Privacy can also be applied on a folder and the privileged user can control with whom to share the file.

Files and Folders can be categorized by Type, Status and optional comments. Document Type and Statuses are managed via the Settings.

Documents can be related by either physically applying Documents can be added by 2 ways. Either by the drag-and-drop procedure



C0000022

My IP Case

»Archived Hard Copies



or by uploading the files.

Note that if a File/Folder is added/uploaded with spaces in its name, the system will automatically replace the spaces with underscore for technical reasons. After the File/Folder is added, they can be managed using the action wheel on the grid.

Actions	Name	Type	Status	Comments	Size	Location	Modified By	Modified On
	MOMs						Dima Salman	2016-04-18 09:04:38
Rename							Dima Salman	2016-04-18 09:04:47
Delete							Dima Salman	2016-04-18 09:04:37
Share With					78.09 (KB)		Dima Salman	2016-04-18 09:04:13
Copy Path					77.87 (KB)		Dima Salman	2016-04-18 09:04:00

Page 1 of 1 | 20 items per page | 1 - 5 of 5 items

File/Folders can be

- Renamed
- Deleted
- Shared With: Folder can be set as Private that means only the creator can see it and with chosen App4Legal Users if needed. Folders that are locked are designated with a lock sign. Users who are set to Override Privacy can see all Private objects on App4Legal.
- Copy Path: Folder/Files paths can be copied in order to be shared with colleagues for fast access.

As an alternative to manually adding Files/Folders, and if there's an already implemented Document Management System, you may map a URL to the IP Case Documents to any Network Drive or Web link.

[Back to Top](#)

## Relate Tasks

From the top of the IP edit form, the user can choose [Add a Task](#) hyperlink to automatically add a Task related to this IP Case. The IP Case is directly inserted in the Related Case field in the Task form.

Related Tasks can then be tracked under the Related Tasks tab in an IP Case.

[Back to Top](#)

### Add Expenses

Intellectual Property | Petitions/Oppositions | Related Documents | Related Tasks | **Expenses** | Time Logs | Related Matters

Related Expenses

Paid On | Expense ID | Reference # | Expense Category | Expense Amount | Currency | Paid Through | Billing Status

Actions

- Record Expense
- Statement of Expenses
- Export to Excel

Page 0 of 0 | 20 items per page | No items to display

Add an expense, view the statement of expenses , or export the data to Excel of this IP case.

[Back to Top](#)

### Add Time Logs

Intellectual Property | Petitions/Oppositions | Related Documents | Related Tasks | Expenses | **Time Logs** | Related Matters

Time tracking related to this matter is billable by default

Logged Time | Specific User Rates

Time Tracking

Date	User	Client	Eff. Effort (H)	Comments	Status	Time spent
------	------	--------	-----------------	----------	--------	------------

Actions

- Log Time
- Export to Excel

Log time on this specific case.

### Relate Matters

In the Related Matter within an IP matter, relation can be created between an IP Matter and another Legal Matter or Litigation Case. In the Relate to Matter field you can look up for the Matter to be added, choose it, choose Add Relation and in the Comment field you can double click and add the business need behind the relation.

Intellectual Property | Petitions/Oppositions | Related Documents | Related Tasks | Expenses | Time Logs | **Related Matters**

Relate to Matter: Matter Subject | Add Relation

Save | Cancel

Matter ID | Comment | Companies | Referred By | Assignee | Area of Practice | Matter Prio... | Matter Status | Actions

[Back to Top](#)

### Manage Filters on the grid

App4Legal offers the ability to save predefined filters. For instance, a user uses the Advanced Search to apply a certain filter on IP Cases in App4Legal database. The user wishes to apply this filter every time the grid was accessed. Managing filters is easy and is done via the IP Cases grid.

Intellectual Property | All | Save as | Export | Tools

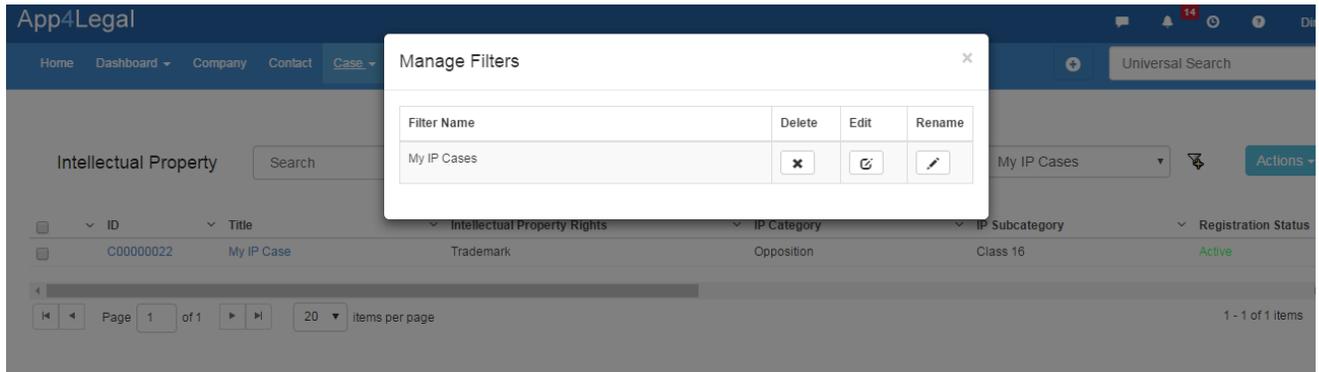
16 of 16 items

Search | Advanced | Manage Filter

ID	Subject	Intellectual Property Rights	IP Class	IP Subcategory	IP Status	Description
00000084	Baby Dreams	Trademark	16	1-Open	1-Open	

Once any filter in the Advanced Search is applied, all what the user has to do is Add Filter. Then later on, whenever the Filter is chosen from the list of Filters, the Advanced Search filters automatically apply and the grid is filtered automatically.

If there is a need to edit or delete any Filter, click on Manage Filters.



If a Filter is chosen and you wish to update the filters applied in the Advanced Search, it is possible. Go to the Advanced Search, apply your new filters and choose, Submit and Update Filter.

If you do not wish to impact the filter, you can just click on the regular Submit. It will not take any action over the Filters.

[Back to Top](#)

#### Search for an existing IP Case

There are 3 methods to search for an existing IP Case: Quick Search, Advanced Search and Universal Search:

- In **Quick Search**, from within the Cases grid, you can type any string from the Subject of the Case and hit Enter from your keyboard to generate your search results.
- Using **Advanced Search**, you can run your search on a specific field from the Case form. You'll have the possibility also to modify the operator of search for each field (i.e. equal, begins with, contains, >, <, and more). The Advanced Search menu is hidden by default; you need to click on the link Advanced Search from the Companies grid to view it.
- With **Universal Search**, you can type any string from the Subject of the Case and hit Enter from your keyboard to generate your search results. The Universal Search looks into all the App4Legal database.

[Back to Top](#)

#### Choose columns

**Choose the columns you want to see on your grid and save it.**

#### Export to Excel

The IP Cases grid can be exported to an excel sheet at any moment via the export button on the grid-> Export to Excel. Also, search results can be exported to an excel sheet separately.

[Back to Top](#)