

# Iolite – Patent Management Software (PMSv2) Data Sheet

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# Iolite – Patent Management Software (PMSv2) Data Sheet

## Product Overview

Iolite – Patent Management Software transforms the office of In-House Patent Counsels paperless. Iolite is a powerful administrative integrative tool to manage the complete business process of patent department for the patents owned by the company right from the submission of the invention disclosure, allocation of work, correspondences, case document docketing and reminder alerts for renewals, hearing dates, due filing, and submissions so as to eliminate errors and never miss an important deadline. Further, the software offers a centralized repository for storage and retrieval of complete records of IPR assets.

Iolite is specially designed for in-house counsels and integrates the Inter-Departmental users, Inventors, and Legal team, whilst maintaining agreed levels of restricted access to the external attorney firms on a single platform.

The software allows to efficiently manage Patent Applications as follows:

### Patent Applications:

- |                                  |                                  |
|----------------------------------|----------------------------------|
| 1. Provisional / Non-Provisional | 2. Conventional                  |
| 3. National Phase                | 4. PCT Filing                    |
| 5. Patent of Addition            | 6. Divisional                    |
| 7. Continuation                  | 8. Continuation in part          |
| 9. EPO & EAPO Validated Patents  | 10. Utility model / Petty Patent |

Over and above these application types, the software also allows the users to store any Patent Opposition filed / received by them making this platform a single point access.

### Patent Opposition:

- |              |               |
|--------------|---------------|
| 1. Pre Grant | 2. Post Grant |
|--------------|---------------|

## Product Highlights

- Centralized repository for patent applications and patent oppositions docketing
- Graphical Dashboard for Task alerts, Daily Administration and Expense
- Comprehensive reports and graphs with export to excel facility
- Task Dashboard to manage allocated task, examination, renewal, hearing and form deadlines.
- Dashboard with pending task alerts with one click transfer to case dockets.
- Manage Invention Disclosure forms
- Complete workflow management as per national and international Patent rules
- Single Screen Case Dashboard
- Manage patent application details, documents and allocate work from anywhere any time
- Role restricted access to the inventor, In-House Counsel, R & D Teams, and attorneys
- Automated Reminders with configurable templates for upcoming deadlines
- Facility to store expense invoices and record receipts of payment
- Allocate Task for managing deadlines to Staff
- Add & manage ad hoc follow-ups for reminding the staff
- Store PCT filing details i.e. ISR & its compliance, Demand Filing, IPER/ IPEA & its compliance, Due Dates etc.
- Drawing & Abstract Management to store all the drawing & abstract for the filing
- Complete workflow processing for the Patent application along with automated reminders for the complete life cycle from application to examination up till registration & renewals.
- Auto generation of Deadlines of Complete / Non-provisional filing on filing a provisional filing
- Form 27 reminders to inform IP team for filing it before 30<sup>th</sup> September
- Form 1, 3, 5, 26 filing deadlines generated on creation of docket automatically
- Restriction of Patent application as per divisions.

## Features of the Software

- Dashboard:

Informative Dashboard for due work, pending tasks, submissions, renewals and upcoming deadlines calendars for examination, hearing, follow up and form deadlines increasing productivity of staff by providing calendar view of deadlines. Dashboard with notification / work alerts - One click transfer to case dockets, allocate work, manage case & docket documents.

1. Task Dashboard
2. Patent Dashboard

- Idea Management:

Full work process of patent pre-filing with storage of Invention Disclosure Forms (IDF) submitted by inventors, submission of documents related to invention and prior art search and workflow of storing search report and complete workflow processing. Facility to convert pre-filing idea of invention to application, creating a link between IDF to patent case docket.

- Inventor Management:

A list of inventors with complete information and working in the software master's for central storage.

- Staff & Attorney Login Management:

Staff logins with defined restricted staff role based on department, sub department & country of filing. External Attorney Login with role restriction. For security, IP based protection and OTP based two-factor authentication while allowing users for external access of application i.e., outside the office premises.

- Pending Work Alert:

Alerts for pending works, pending documents and due submissions. Reminders for deadlines on pre-scheduled dates. Daily deadline report forecasting all deadlines in upcoming 30 days. Hearing alerts on daily basis for reminding upcoming hearings. Automated calculation of deadlines as per the patent act rules of the filing country. Renewal, Hearings & Due works alerts & reminders. Manage examination / office action deadlines.

- Centralize Case Docketing:

Iolite provides a centralized case docketing facility to docket all documents in the centralized repository.

- Single Screen Case Docket:

Single screen to access complete case information. It displays comprehensive case information, full case history and deadlines on a single page

- Expense Management:

Facility to store expenses incurred with regards to professional and government fees and record the payments of Invoices. Link to new idea / Patent registration title wise expenses, professional fees and official fees for approval and expense control. Management of tariff structure of all professional and official charges charged by the attorney. Storage of all expenses incurred and mapping them to cases and search dockets. Finding out duplicate titles and over charged amounts based on the auto mapping of tariff and official fees charges. Payment storage for advance and normal payment paid to the attorney. Conversion of all expenses to single currency INR to give an edge of understanding the net expense done.

- Case Management:

Store, process and retrieve complete patent application information, deadlines, and documents right from the day of filing the patent application to publication, examination, hearing, opposition, grant, and renewal of the patent in the centralized patent repository making the workflow of in-house legal department highly simplified, productive, and smooth. Facility to store Grant Certificate or Rejection / Abandon details. Store historical communications among employees and attorneys in history module. Examination Reply deadline generated automatically on receiving of examination report. Draft facility for generating all Indian forms. Facility to docket all forms, drafts, and store email communications. Auto generation of reminders for filing PCT and Conventional application based on the application dates and priority dates. Auto generation of deadlines for National phase applications on creation of PCT applications. Auto generation of validation and prosecution deadlines in EPO. Workflow for extension of examination on filing form 4 auto generation of reminders. Patent classification as per jurisdiction (i.e. utility model, inventions, etc.) setup for ease of operation. Manage pre-grant & post grant opposition against the filed application, track their reply, due dates & manage their hearing & orders.

- Renewal Management:

Track and view upcoming renewal / renewal history / due submission with renewal calculator to calculate the renewal amounts as per patent types & create preformatted renewal applications for patents as per all countries. Renewal structure storage for budgeting of the amount to be paid on annuity of a patent. Renewal Intimation on periodical basis before the expiry.

- Analytical Reports:

Graphical reports with desired field selections, date range and other parameters for providing information of all application filed in different jurisdictions, inventor wise, month wise filing, patent granted, hearings, forms deadlines, publications received, renewed patent, examination pending and replied. Customized reports with basic and advanced search parameters and facility to export reports to file.

## Benefits of the Software

- Efficient and Accurate Advice:

Advice for all deadline's management i.e. renewals, examination reports, hearings, written submissions, form filing deadlines of IP assets without the help of external parties. Financial loss can be mitigated by meeting important deadlines with great accuracy i.e. Examination, Opposition, Hearings, Due submissions, and Renewals.

- Feature-rich software at industry best price:

Product pricing of Lolite Patent Management Software is industry best i.e. perpetual license with unlimited users. The Software offers features which are much more and unmatched compared to any other patent management software available in the industry.

- Centralized Resilient Storage on Cloud:

Lolite offers Patent Management Software structured & designed with centralized storage using which you can record & store the data and documents at a single location, view in a single screen, and keep the data up to date.

- Reduced cost of IT infrastructure and IT manpower:

Lolite offers a fully managed solution hosted on Lolite secured server keeping the requirement of IT infrastructure minimal which further eliminates the expert IT man-power requirement, capital investment in IT infrastructure, and lowers the energy consumption costs which saves a lot of time and money.

- Collaboration Efficiency:

Collaboration in a cloud environment gives your business the ability to communicate and share more easily. If there are multiple staff members working on a project across different locations, they can easily work parallelly and seamlessly. Capturing the relevant data for drafting an email or document is with just a few clicks.

- Accessible from anywhere, anytime in the most secure manner:

Whether you are working from office or meeting location or working from home under some unavoidable circumstances, all the required data and documents are easily accessible and handy using Lolite PMS.

- Visible reduction in man-power time and cost as Lolite offers a fully managed software:

You no longer need to recruit staff and manage a team of in-house IT specialists to install and update software, manage email and file servers, or run backups as Lolite offers a fully managed software solution.

- Major reduction in the overall cost of managing the Patent Portfolio:

Elimination of manual status update in the Patent application which saves the time of your team members which in turn can be utilized for the more productive tasks

- Reduction in Chances of Errors:

When all the data and documents are available online and are managed by an Artificial Intelligence (AI), the chances of duplicacy of data and errors are eliminated. This also helps in timely submission to the clients, which in turn can have a favorable impact on the client which positively enhances & strengthen your relationship with your clients.

- Time Management and Fast Processing of Information:

Undoubtedly, if the technology used correctly it can be a great assistance to the organization. A high level of data retrieval is a matter of minutes as the data and documents are centralized eliminating the tedious clerical tasks. Another tangible benefit of using the software is the timing of the information received.

- Aids in Growing your Business:

Iolite works with the motto "Grow your Business unlimited". The software helps you in managing and maintaining client records at a single location and share important information in a timely manner. Hence it helps in managing with ease a high growth of cases which in-turn can directly increase the business profit.

- Multi-User Software:

Iolite Patent Management Software is a multi-user software and it provides the logins to all users involved in the various activities relating to Patent Portfolio, each department and its users will be provided with pre-defined role restrictions such as Business Unit Users, Head of Department, Administrative Staff, Legal Managers, Para-Legal Staff, IT Managers, Associates, and External Attorneys.

- Secured Access

Iolite – Patent Management Software comes with role-restrictions so that only person who have necessary authorization can access the various modules. The software is designed with security standards to safeguard the interests of the users with auto-password expiry and password change notifications.

- Other Intangible Benefits:

Periodic and reliable MIS, from one source for reviews. Close working between all team members and departments. Possibility to dovetail the expense management data and system, in future by dovetailing the business procedures. Process oriented approach for sustainable working in future. Generate reports for renewal due during a financial year to budget the cost. Flow process across the organization becomes systematic, structured, swift, accurate, simplified and independent of Human Resources. Iolite ensures efficient management of a large volume of data with minimum resources. The complete workflow process and life cycle of intellectual property (patent) applications are managed. Automated reminders from the stage of the invention disclosure, application filing to examination, registration till renewals & opposition. Informative and graphical dashboard with notification alerts, quick search & various reports. The Patent Management Software offers a structured family of IP assets linked to each other giving a holistic view to the users i.e. Patents filed in several jurisdictions along with opposition filed for them.

## Licensing

Iolite offers simplified licensing option for its customers.

- Iolite grants to the Licensee a non-exclusive, non-transferable, and perpetual license (“**License**”) to use the Software in object code form solely on a single central server unit owned or managed by the Licensee in form of an Electronic License Key.
- The Software will be installed on the Licensee’s Test and Production Servers and the Software will be accessed by the Licensee using any Web browser with the feature of multi-user login on the Internet or Intranet.
- The Licensee shall not copy, in whole or in part, Software or Documentation; flow charts or flow process of Software; screen shots; user manuals of Software; design of Software; modify the Software; reverse compile or reverse assemble all or any portion of the Software; or rent, lease, distribute, sell, or create derivative works of the Software, except for back up purposes and to comply with the provisions of law.



## Warranty

- Lolite offers warranty for a period of 365 days from the date of installation and will furnish free of cost, full support in rectification & modification of defects in the software required under the normal use.
- Shall ensure that appropriate technical and organizational measures are taken against unauthorized or unlawful processing of the data shared by the Licensee and against accidental loss or destruction of, or damage to the data provided.
- Shall comply with all applicable laws for performing services and will obtain and maintain all required licenses, permits etc., for performing its obligations
- Represents that no claim or litigation is pending or threatened against Lolite, which would prevent Lolite from entering into Software Sale Agreement.
- Warrants that the Software substantially conforms to its published specifications. In no event does the Lolite warrant that the Software is free from errors or that the Licensee will be able to operate the Software without problems or interruptions. Further, Lolite will furnish full support in rectification of errors or any defects and workmanship required under the normal use.
- This warranty does not apply if the Software (a) has been altered, except by Lolite, (b) has not been installed, operated, repaired, or maintained in accordance with instructions supplied by the Supplier, (c) has been subjected to abnormal physical or electrical stress, misuse, negligence, or accident, or (d) is used in hazardous conditions or activities.
- In no event will Lolite be liable for any loss of revenue, profit, or data, or for special, indirect, consequential, incidental, or punitive damages however caused and regardless of the theory of liability arising out of the use of or inability to use the Software even if the Lolite has been advised of the possibility of such damages.

## Hardware & Software Requirement

### Hardware Requirement for Windows Server

1. Intel® 2x6-Core Xeon® Processor E5 Family 2.40GHz w/HT
2. Memory: 32 GB RAM
3. Hard Drive: 480GB SSD Primary Drive
4. Hard Drive: 1TB SATA3 HDD Backup Drive

### Software Requirements for Windows Server

1. Operating System: Windows Server 2012 or 2019
2. Microsoft SQL Server 2012 or higher
3. MS SQL Management Studio
4. IIS 7.0 or higher
5. .net framework 4.0
6. IIS Rewrite URL 2.0
7. MS Office 2019
8. One SMTP Email configuration
9. Antivirus Software