Iolite – Trademark Management Software (TMSv2) Data Sheet

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Product Overview

Iolite – Trademark Management Software transforms the office of In-House Trademark Counsels paperless. Iolite is a powerful administrative integrative tool to manage the complete business process of trademark department for the trademarks owned by the company right from the submission of the allocation of task, correspondence, case document docketing reminder alerts for renewals, hearing due dates, due filing submissions to eliminate errors 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, Business Units, and Legal team, whilst maintaining agreed levels of restricted access to the external attorney firms on a single platform.

Iolite helps in managing the Trademark Applications for the different jurisdictions:

1) Domestic	2) International	3) EUTM
4) Madrid	5) ARIPO	6) OAPI

Product Highlights

- Centralized repository for Trademark applications and Trademark 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 Brand Request forms
- Complete workflow management as per national and international Trademark rules
- Single Screen Case Dashboard
- Manage trademark application details, documents and allocate work from anywhere
- Role restricted access to the In-House Counsel, Business Unit 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
- Complete workflow processing for the Trademark application & Trademark Opposition along with automated reminders for during the complete life cycle from application to examination, registration & renewals.
- Restriction of Trademark application as per Business Units.

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
    a. View upcoming trademark prosecution deadlines i.e. Renewal, Examination.
    b. Personal internal work deadlines allocated by other team members
    c. Notification alerts of update carried by other users in dockets.
    d. Calendars to view upcoming deadlines of Examination, Hearings, Form filing, Follow ups & Renewal
    e. Shortcut menu to create and manage trademark dockets
    f. Diary to keep track of upcoming appointments and events
    g. Task Alert Email services to send emails of upcoming deadline on daily basis
    h. Facility to view current pending / completed task counts of each staff
    i. and category wise Task allocation details along with graphs.
2. Trademark Dashboard
    a. View Trademark filed across all jurisdictions with GEO chart, pie chart country wise and bar chart month wise to view current projection of application.
    b. List of Pending examination report and ones that are responded along with bar graph of monthly counts.
    c. List of registered & renewed trademarks along with bar graph of monthly counts.
    d. List of trademarks due for renewal with bar graph of monthly counts.
    e. List of Hearing dates and pending forms submission with bar graph of monthly counts.

- Idea Management:

Work process of trademark pre-filing request submitted by Marketing Team, receiving and storing search report from Attorney or Legal Team. Facility to convert pre-filing search to application, creating a link between stored search report to trademark case docket.

- Company & Department Management:

A list of companies, its departments, sub-departments & filing department with complete information and working in the software Masters 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 trademark 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 / Trademark 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:

Manage the filed application, track their reply, due dates & manage their hearing & orders. Facility to store Registration 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 upcoming deadlines.

- Renewal Management:

Track and view upcoming renewal / renewal history / due submission with renewal calculator to calculate the renewal amounts as per trademark types & create preformatted renewal applications for trademarks as per all countries. Renewal structure storage for budgeting of the amount to be paid on renewal of a trademark application. 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, trademarks registered, hearings, forms deadlines, publications received, renewed trademarks, 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 Iolite Trademark 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 Trademark management software available in the industry.

- **Centralized Resilient Storage on Cloud:**

Iolite offers Trademark 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:**

Iolite offers a fully managed solution hosted on Iolite 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 Iolite PMS.

- **Visible reduction in man-power time and cost as Iolite 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 Iolite offers a fully managed software solution.

- **Major reduction in the overall cost of managing the Trademark Portfolio:**

Elimination of manual status update in the Trademark 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 Trademark Management Software is a multi-user software and it provides the logins to all users involved in the various activities relating to Trademark 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 – Trademark 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 (trademark) 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 Trademark Management Software offers a structured family of IP assets linked to each other giving a holistic view to the users i.e., Trademarks 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

- Iolite 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 Iolite, which would prevent Iolite from entering into Software Sale Agreement.
- Warrants that the Software substantially confirms to its published specifications. In no event does the Iolite warrant that the Software is free from errors or that the Licensee will be able to operate the Software without problems or interruptions. Further, Iolite 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 Iolite, (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 Iolite 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 Iolite 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