



2010 CONFERENCE

Gaylord National Resort & Convention Center | **National Harbor, MD** | October 17-20



2010

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2010 Conference Board Members

We would like to thank the 2010 Conference Board Members for their help and contribution in developing this year's conference program.

Kathleen Andree-Cuneo

Patent Administrator
H. Lundbeck A/S

Emilie Benschoter

Sr. Docketing Specialist/Patent Paralegal
Wagner Blecher LLP

Cathy Broder-Raymond

Manager IP
Gowling Lafleur Henderson LLP

Laura Caponi

Associate Director - Patent Operations
Bristol-Myers Squibb Company

John Collins

Patent Attorney
Marks & Clerk

Jim Dwyer

Patent Prosecution Administrator
Osler, Hoskin & Harcourt LLP

Cheryl Franke

IP Paralegal
Geron Corporation

Wendy Furlano

Manager IP Business
Torys LLP

Robert Houle

National General Manager, IP Services
Ogilvy Renault

Konnie Love

IP Prosecution Manager
Dorsey & Whitney LLP

Miriam Moore

Patent Administrator
H. Lundbeck A/S

Susan O'Kash

IP Supervisor
Gardere Wynne Sewell LLP

Jana Ottmar

Manager of Legal Operations
Schwegman, Lundberg, Woessner, P.A.

Andrea Ryan

Director Patent Operations
sanofi-aventis U.S.

Laurie Schutze

IP Operations Manager
Agilent Technologies

Sherri Sitzmann

IP Systems Coordinator
Schlumberger

Eden Stright

Sr. Specialist - Head of Patent Administration
Accenture

YOU'RE INVITED

to the CPA Global Conference
in Washington, DC this
October 17-20, 2010.

Join hundreds of fellow IP professionals and CPA Global experts this fall, to share industry best practices and learn how to maximize your IP software. The CPA Global Conference is three days of unparalleled professional development, including cutting-edge industry thought leadership sessions, opportunities to benchmark your work against other IP professionals and in-depth software training from our expert consultants and developers.

Developed in conjunction with an advisory board of senior IP professionals and CPA Global software users, this year's Conference program is designed to provide you with a wealth of information to help you improve the way you manage your IP portfolio.

WHAT'S NEW THIS YEAR?

More Hands-on Training - An expanded program of 17 in-depth software training sessions will be available at this year's Conference. No matter how much experience you have with the CPA Global system you use, you're bound to find a range of tailored sessions that will suit your requirements.

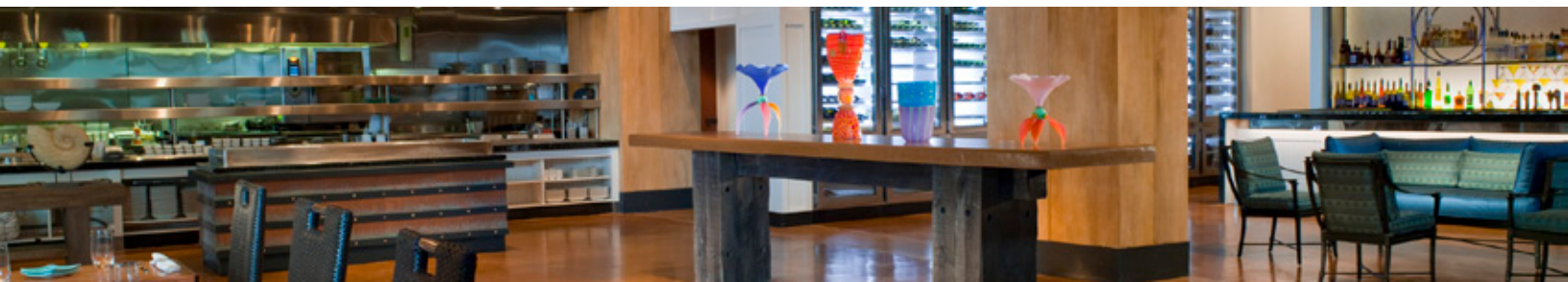
New Conference Delegate Orientation - Conference first-timers are invited to a special welcome reception during which they have the chance to meet CPA Global representatives and ask questions about the three days ahead.

New User Boot Camp - New users of CPA Global's software are invited to attend an intensive training program worth more than \$5,000. Delegates will receive expert advice on how to use their IP systems more effectively back at the office.

Best Practices - Benchmark your IP strategies and workflows against those of other organizations through a choice of 18 Best Practice sessions and roundtables.

Greater Focus on Trademarks - This year we have incorporated more trademark specific sessions into the overall conference agenda than ever before.

Meet the Experts - Why not schedule a meeting with one of CPA Global's software experts for one-on-one advice on how to make your software work best for you?



Who should attend?

Any user of CPA Global's Memotech, Inprotech or FoundationIP software will gain considerable value from attending this Conference. Delegates are able to take advantage of tailored software training and excellent networking opportunities for an exceptional price.

Back by popular demand...

Software Lab

Stop by the Software Lab to have your IP software related questions answered personally by a CPA Global expert. You can also book a more in-depth one-on-one training appointment in the Lab when registering online.

Independent User Group Meeting

The Independent User Group meeting offers you the opportunity to directly shape the future of the software product that you use. These meetings are run entirely by you, the software users, and allow you to make suggestions on the future development of our IP solutions. For more information about the meetings, please contact the chair of your product board:

Memotech Chair:
Andrea Ryan at Andrea.Ryan@sanofi-aventis.com

Inprotech Chair:
Cathy Broder-Raymond at
Catherine.BroderRaymond@gowlings.com

FoundationIP Co-Chairs:
Kathy Broecker at Kathy.Broecker@oracle.com
Laurie Schutze at Laurie_Schutze@agilent.com

CPA Global Business Update

Join members of CPA Global's senior management team for an update on the company's rapid growth within the IP and legal services outsourcing markets and an introduction to some exciting new IP management solutions that are currently in development.

REGISTER NOW AT
www.cpaglobal.com/dc2010

New User Boot Camp

This three day crash course in Memotech, Inprotech or FoundationIP is aimed at new users who are looking to bulk up their product knowledge and whip their software skills into shape.

Throughout these interactive sessions, each topic will be further developed and built upon as new areas of functionality are covered. At the end of the conference users will walk away with a comprehensive understanding of the software product and the necessary skills to use the system.

Which topics will be covered?

Memotech

- Directory Management & Basic Administration
- Basic Template & Workflow Management
- Document Management
- Case Management & Docketing
- Basic Searching & Reporting

Inprotech

- Case Management & Docketing
- Workflow Management
- Advanced Searching & Reporting
- Basic Administration
- Letter & Form Generation

FoundationIP

- Creating Contacts & Understanding the Organizational Structure
- Docketing
- Understanding Activity Structure
- Recording Documents, Communication, & Notes against an Activity
- Creating Custom Fields & Matter Status
- Basic Template Creation
- Basic Reporting

What is the value?

The New User Boot Camp provides a great opportunity to receive intensive training from CPA Global experts at a large discount. The Boot Camp is offered at the standard conference price, but the overall value of three days of training is over \$5,000+.

Who should attend the New User Boot Camp?

New software users and those who feel that they need more specific training to master the basics of Memotech, Inprotech or FoundationIP.



A GUIDE TO UNDERSTANDING THE CONFERENCE SESSIONS

SESSION TITLE & TYPE

WHO SHOULD ATTEND?

SESSION DESCRIPTION

TAKE AWAYS

Advanced Reporting for Law Firms

Prerequisite: Experience creating basic tabular reports.

Learn how to create advanced customized reports within FoundationIP in this hands-on session geared towards law firms. Join CPA Global experts and other FoundationIP users as they share best practices in report creation and configuration. During the online registration process, you will also be able to suggest reports to be presented in this session.

- Learn how to build sophisticated reports that can be exported in various formats including Microsoft Word, Excel, and HTML
- Learn creative ways of utilizing multiple data sets, subreports, and aggregation functionality to obtain complex data and structure efficient reports
- Obtain tips on report schedules and user access



CPA GLOBAL LED



GUEST SPEAKER



HANDS ON TRAINING



EVERYONE



NEW USERS



INTERMEDIATE USERS



ADVANCED USERS

2010 CONFERENCE

MEMOTECH SESSIONS

CPA GLOBAL LED GUEST SPEAKER HANDS ON TRAINING EVERYONE NEW USERS INTERMEDIATE USERS ADVANCED USERS

Product Update Part I

Prerequisite: All Memotech users

Learn about Memotech Release 6 and future roadmap plans. Preview the exciting new release built on a brand new technology platform and learn about the enhanced user interface, improved portfolio management, enhanced workflow and reporting capabilities and much more.

- Overview on development of Memotech 6
- Release schedule
- Learn about new general system enhancements

Product Update Part II:

Patent & Invention Submission

Prerequisite: Memotech users working with Patents

This session focuses on the patent related areas of the new release including invention submission, review committee and patent modules. See the new invention submission and review committee modules in action including a newly designed user interface.

- Sneak peek into the new invention submission and review committee modules
- See new enhancements specific to the patent module
- See new user interface and navigation changes in action

Product Update Part II: Trademark and Licensing

Prerequisite: Memotech users working with Trademarks and/or Contracts

Learn more about the trademarks and licensing (contracts) areas of the new release. See trademark and licensing specific improvements along with the newly designed review committee module that can support the decision making process of any IP types including trademarks and contracts.

- See new enhancements specific to trademarks and licensing modules
- Preview review committee module
- See the new user interface and navigation changes in action

Roundtable: Docketing for Corporations

Prerequisite: IP and Memotech knowledge

How do you minimize risks and ensure timely and accurate docketing? How do you manage multi-site and external docketing? Do workflows and custom rules simplify the docketing process? Find out what best practices other organizations have implemented to achieve docketing efficiency.

- Learn how other companies are docketing in Memotech
- Docketing best practices

Conversion Boot Camp

Prerequisite: Everyone in the process or planning to migrate to newer Memotech versions in the future

Are you planning to migrate to a newer version of Memotech and have questions about the data conversion process? In this session, **Schlumberger** shares their migration approach and techniques for data mapping and cleanup to help ensure a successful migration.

- Steps for a successful migration
- Conversion approaches
- Data validation techniques

Patent Workflow Management Training

Prerequisite: Advanced user knowledgeable in docketing

Customized workflows provide a simplified docketing for users and can automatically generate a form, letter or email. In this hands-on training session, learn how to setup a workflow which corresponds to the way your company works.

- How to set up custom workflows for patents
- Using workflows to streamline docketing
- Setting up automatic emails and form/letter generation

Best Practices:

Invention Submission & Patent Committee

Prerequisite: Users interested in invention submission and review process

How do you capture and manage ideas in your organization? Are you planning to implement an online invention submission and review process? Find out how other organizations have implemented tools and processes to handle the entire workflow.

- Get first hand experiences from other organizations
- Effectively capturing ideas from R&D and other parts of your company
- Promoting collaboration through patent committee meetings

Trademark Workflow Management Training

Prerequisite: Advanced user knowledgeable in docketing

Customized workflows provide simplified docketing for users and can automatically generate a form, letter or email. In this hands-on training session, learn how to setup a workflow which corresponds to the way your company works.

- How to set up custom workflows for trademarks
- Tips for streamlining your trademark docketing
- Setting up automatic emails and form/letter generation

Prior Art Training

Prerequisite: Basic knowledge of Memotech patent module

This is a hands-on training session that will cover the Prior Art feature to manage patent and non-patent documents in the project, family, and application levels. Users can review and link prior art of related patents through cross-references.

- Learn how to manage Prior Art
- Add, copy and cite patent and non-patent literatures
- Setting up cross-reference between patent families
- Information Disclosure Statement (IDS) requirements

Roundtable: Trademark Brand Management

Prerequisite: Basic knowledge of Memotech trademark module

How do you develop strategies to manage and protect your organization's brands? How do you manage your worldwide trademark portfolio? Find out from **Kellogg Company** and other organizations who have implemented tools and processes to maintain business critical IP assets.

- Tips on effectively managing your trademark portfolio
- Learn how other organizations are managing their trademarks

Best Practices: Prior Art ◀◀ E

Prerequisite: Prior Art Training

After attending the hands-on session on the Memotech Prior Art feature, this session will provide you insight on how **Owens Corning** is utilizing various tools and practices to manage prior art and comply with IDS requirements.

- Hear how other organizations are managing prior art (with and without the 3rd Party Prior Art Tool)
- Hear how to get your organization and data ready to use the Prior Art feature
- IDS procedure with USPTO

Understanding the Renewals Process ● E

Prerequisite: Current Memotech users involved in sending case information to CPA Global for renewals handling, performing such tasks as producing electronic batches or handling CPA Global responses. Memotech users considering CPA Global's renewals system.

Using the electronic interface to deliver case information to CPA Global for annuity/renewal payments reduces risk to your business and increases your efficiency. Find out how the electronic extraction process determines whether a case will be included for sending to CPA Global for processing. Learn how to review the history of case data exchange. A better understanding of how this seamless process works will bring increased confidence and a greater sense of control.

- Improved understanding of when/why a case is sent to CPA Global
- Greater visibility of data sent to/received from CPA Global
- Enhance your productivity by leveraging the automated features of the Interface

Roundtable: Reducing Costs ◀◀ E

Prerequisite: IP and Memotech knowledge

How do you develop cost reduction strategies through effective IP asset valuation and audit? How can IP tools and streamlined processes contribute to cost reduction? Are you interested in legal process outsourcing? Find out how **Novartis** and other organizations are responding to the current financial challenges.

- Get tips to reduce your legal costs
- Strategies to streamline your processes

Free Query Report ● A

Prerequisite: Knowledge of structured query language (SQL)

This hands-on training session will introduce the user to the Free Query feature which provides a powerful SQL query tool to create complex queries that will complement the standard Search and Custom Reports. Basic Memotech database structure will be covered and participants are expected to have SQL coding experience.

- Master the free query tool
- Learn how to create complex queries

Best Practices: Multi-Site Implementation ◀◀ E

Prerequisite: IP and Memotech knowledge

In a global organization, collaboration in project planning and execution is essential to help ensure a successful multi-site implementation and IP asset management strategy. Find out how **Novartis**, with IP groups in over 20 regional locations worldwide, and other organizations are working together to meet the global challenge.

- Hear how others have structured Memotech in global settings
- Learn the steps to a successful roll-out

Behind the Scenes: Law Update Service ● E

Prerequisite: Basic IP and Memotech knowledge

Are you wondering how CPA Global receives and manages the critical information contained in the Law Update Service? Looking for advice on how best to manage your law updates? Join us to learn more about how the Software Laws and Legal Research Teams work to bring you timely, relevant, and continually expanding laws information. We will also give you our best tips and tricks on working with the Law Update Tool and will seek your feedback on how we can continue to improve this vitally important service to help support your business.

- Who makes up the Software Laws and Legal Research Teams and how these groups work together
- What deadlines to expect in the Law Update Service
- Law Update Tool top tips and tricks
- How best to work with support to resolve your law questions
- Upcoming initiatives of the Software Laws and Legal Research Teams

Administrators Corner ◀◀ E

Prerequisite: Memotech users involved in administration

Memotech is a highly configurable IP management system to suit your specific business requirements and workflows. Find out how **Dow Chemical** and other organizations implemented various features and functionality to meet a wide range of business needs and simplify the IP process for greater efficiency.

- Learn about common & custom configurations used by administrators
- Administrators best practices

Advanced Custom Reports ● A

Prerequisite: Advanced Memotech user

In this hands-on session, learn how you can create custom reports based on various criteria and export the result to a variety of formats including Microsoft Excel & Word, HTML, XSD, XML and Crystal Reports. Custom reports can be shared with various user profiles.

- Create sophisticated custom reports
- Memotech and Crystal Reports

Best Practices: System Integration Strategies ◀◀ E

Prerequisite: IP and Memotech knowledge

Are you planning to integrate Memotech with 3rd party applications such as document management systems, financial systems or other company specific systems? Find out from **Dow Chemical** and other organizations who have successfully implemented system integrations with Memotech.

- Hear real life examples of Memotech and 3rd party application integration
- Alternate authentication methods

Test Your Memotech Knowledge ● E

Prerequisite: IP and Memotech knowledge

In this session, Memotech users compete to test their knowledge of all aspects of the product. This is a great opportunity for new and advanced users to learn valuable tips and tricks about the product in an interactive setting.

- Memotech tips & tricks
- General IP practice and law tips

INPROTECH SESSIONS

CPA GLOBAL LED GUEST SPEAKER HANDS ON TRAINING EVERYONE NEW USERS INTERMEDIATE USERS ADVANCED USERS

Product Update

Prerequisite: All Inprotech Users

Learn about Inprotech Release 6 and future roadmap plans. Release 6 focuses on moving all the core functionality in client server over to the web platform, which will result in efficiency gains, enhanced user interface, flexible delivery of information, and easier upgrades for clients. We'll also review release schedule and future roadmap plans.

- Sneak peek into Inprotech in the web environment
- Hear about the product roadmap

Roundtable: Managing Risks

Prerequisite: Basic IP and Inprotech knowledge

In this roundtable discussion, **Reddie and Grose** and **Torys LLP** share their experiences and solutions for minimizing risk within their practices. Come hear how they are using Inprotech and other processes to manage their data.

- Strategies for good data management
- Making use of date logic
- Learn how to compare the data with what is held publicly where possible
- Configure double docketing
- Learn methods of other experienced Inprotech users and their configuration

Demystifying the Electronic Interface

Prerequisite: IP or IT persons involved in sending case information to CPA Global for renewals handling, performing such tasks as producing electronic batches or handling CPA Global responses

Using the electronic interface to deliver case information to CPA Global for annuity/renewal payments reduces risk to your business and increases your efficiency. Find out how the electronic extraction process determines whether a case will be included for sending to CPA Global for processing. Learn how to review the history of case data exchange for a client or a case. A better understanding of how this seamless process works will bring increased confidence and a greater sense of control.

- Improved understanding of when/why a case is sent to CPA Global
- Greater visibility of data sent to/received from CPA Global

WorkBench Set up & Configuration Training

Prerequisite: Basic understanding of WorkBenches and Inprotech

Learn how to set up users both internally and externally to use the WorkBenches. In this session, we will focus on the screen settings and portal configurations.

- How to set up access groups and users
- How to set up roles and portal configurations
- What the web parts in the portal configuration do and mean

WorkBench Advanced Training

Prerequisite: Mastering the clerical and professional basic course of WorkBench set up

In this advanced hands-on training session, discover how to set up users internally with tasks and actions and learn how to customize the searches for the user.

- What do the tasks and subjects mean within the portal configuration
- Set up links for use within cases and in the quick links area
- Set up default searches for the users
- Applying role based security to see how the tasks and subjects affect the WorkBenches themselves.

Basic Database Structure

Prerequisite: SQL Server knowledge

Learn the basic database structure for the major tables and the relationship between these tables.

- Names of the basic Inprotech tables
- Names of the primary keys
- Names and the uses of the import columns within these tables

Behind the Scenes: Law Update Service

Prerequisite: Basic IP and Inprotech knowledge

Are you wondering how CPA Global receives and manages the critical information contained in the Law Update Service? Join us to learn more about how the Software Laws and Legal Research Teams work to bring you timely, relevant, and continually expanding laws information. We will also seek your feedback on how we can continue to improve this vitally important service to help support your business.

- Who makes up the Software Laws and Legal Research Teams and how these groups work together
- How laws are implemented in Inprotech
- What deadlines to expect in the Law Update Service
- How best to work with support to resolve your law questions
- Upcoming initiatives of the Software Laws and Legal Research Teams

Advanced Database Structure

Prerequisite: SQL Server knowledge and understanding of the basic Inprotech database structure

Have you ever wondered why certain fields are displayed or not? Or where the information on screen comes from? This session will provide a more detailed dive into the Inprotech database structure.

- For more commonly used screens, where does the field information come from in the database
- How knowing the database structure assists in setting up client server reports

Roundtable: Managing Change ◀ E

Prerequisite: Basic IP and Inprotech knowledge

How do you implement new procedures? What is the best approach for implementing new releases? Representatives from **Marger Johnson & McCollom PC** and **The Nath Law Group** share how they manage change within their organization and get buy in from the stakeholders.

- Examples of what firms do when receiving a new release
- Suggested best practices of what to do when receiving a new release
- Methods of testing, accepting and implementing new procedural and workflow changes.

Best Practices: System Integration Strategies ◀ E

Prerequisite: IP business knowledge and good Inprotech knowledge

Have you ever wanted to enter information into one system and have it pushed to others? **Fitzpatrick Cello Harper & Scinto** and another leading firm share their strategies for integration with other systems including document management and accounting systems.

- What system integration means and does it vary from client to client
- What systems can be considered for integration
- Learn what other firms have integrated with Inprotech

Prior Art Functionality • I

Prerequisite: Basic IP & Inprotech knowledge

Have you noticed the new Prior Art icon on the launch pad? Has it not been added? Find out why you want to use this application during this hands on training session.

- Enter citations and record them against a case and a family
- How do you find out what citations have been cited against the cases in a family
- Produce the IDS form

Advanced Reporting • A

Prerequisite: Advance Inprotech knowledge. For the Microsoft™(MS) Reporting Services component, basic SQL knowledge would be useful

During this hands-on training session, find out what reports can be produced out of the standard reporting capabilities within the WorkBenches and how MS Reporting Services can be used in conjunction with these.

- Complex reporting out of the WorkBenches
- Save existing reports for users
- Integration capabilities between the WorkBenches and MS Reporting Services
- Samples of reports that can be produced out of MS Reporting Services

Is Your Firm Using this Functionality? • I

Prerequisite: Basic Inprotech knowledge

What is a checklist? How do we stop users from entering poorly formatted official numbers? Discover functionality that exists within the Inprotech product which is underused and how this can solve some business issues.

- Discover functionality that exists within the system
- Solve real life business problems with existing functionality
- What functionality do customers use outside of North America that is not typically in use here

Docketor's Corner ◀ E

Prerequisite: IP and Inprotech knowledge

Meet with other docketing users to discuss specific docketing problems and then work with a consultant to see whether configuring the product can solve this problem. During registration, there will be an opportunity for you to submit issues to be included during the session.

- Solutions for existing docketing problems
- Learn how to docket things that you previously thought could not be done

Electronic Data Exchange • A

Prerequisite: Advanced Inprotech knowledge. Some IT knowledge would be an advantage

What does Electronic Data Exchange (EDE) mean and how is it used in Inprotech?

- What information can be imported into Inprotech
- Learn how to use the Import Server
- What format is required for EDE into Inprotech

WorkBench Practices ◀ E

Prerequisite: Basic Inprotech knowledge

Discover how other firms have set up the WorkBenches for both their internal and external users.

- Real life examples of how the WorkBenches are being used
- Come up with a strategy to implement the WorkBenches if you have not already implemented them

Basic Tips & Tricks • N

Prerequisite: Basic knowledge of activities, tasks, matters and reports

This interactive session is designed to demonstrate functionality that will allow new users to save time as well as provide valuable tips for everyday use.

- Learn basic tips in Inprotech
- Test your Inprotech knowledge

Advanced Tips & Tricks • A

Prerequisite: Advance Inprotech knowledge

Get more out of Inprotech by finding out tips and tricks that other firms have used to solve those tricky problems. Come prepared with existing issues or submit them when registering online.

- Learn new tips in Inprotech
- Test your Inprotech knowledge

FOUNDATIONIP SESSIONS

CPA GLOBAL LED GUEST SPEAKER HANDS ON TRAINING EVERYONE NEW USERS INTERMEDIATE USERS ADVANCED USERS

Product Update ● E

Prerequisite: All FoundationIP Users

Learn about Release 4.2 of FoundationIP and future roadmap plans. Release 4.2 focuses on the core IP functions including matter creation, improved interfaces with trademark offices, simpler management of activities, and ability to view additional audit information for contacts and templates. We'll also review release schedule and roadmap plans for Release 4.3 and beyond.

- Sneak peek into new functional developments of the latest release
- Hear about the product roadmap

Behind the Scenes: Law Update Service ● E

Prerequisite: Basic IP and FoundationIP knowledge

Are you wondering how CPA Global receives and manages the critical information contained in the Law Update Service? Join us to learn more about how the Software Laws and Legal Research Teams work to bring you timely, relevant, and continually expanding laws information. We will also update you on our progress toward providing smaller, more frequent updates and will seek your feedback on how we can continue to improve this vitally important service to help support your business.

- Who makes up the Software Laws and Legal Research Teams and how these groups work together
- What deadlines to expect in the Law Update Service
- Progress report on size and timing of law updates
- How best to work with support to resolve your law questions

Basic Roles, Access, Security ● I

Prerequisite: Administrator access to your FoundationIP system; Basic familiarity with FoundationIP and inviting new users to the system

Explore the fundamentals of system security to ensure you've granted users access to information they need to see... and nothing more.

- Become comfortable with creating new roles and applying permission
- Learn the difference between matter roles and organization roles
- Understand external personnel and external organizations
- Learn how to create new groups

Reporting Fundamentals ● N I

Prerequisite: Basic system experience/knowledge: matters, contacts, activities/tasks

Have you struggled with understanding how to effectively utilize the FoundationIP reporting engine? Perhaps you are relatively new to the system? Take the confusion out of it and get control of your data through this refresher on reporting fundamentals.

- Learn the basics – creating tabular reports in FoundationIP
- Understand how to utilize filters to get the data that's important to you
- Learn how you can effectively schedule or share reports within your organization
- Collaborate with other users through practical real-life reporting examples (bring your own!)

Activity Template Creation ● A

Prerequisite: Experience creating and modifying activity templates, understand what attributes and tasks are in relation to activity templates. Java code will be used in the creation of rules, but understanding Java code is not required

Do you want to get more out of your activity templates? Have you ever wondered if you could create more than just a simple reminder? Take this hands-on course, get your feet wet and understand the advanced aspects of activity template and complex rules creation!

- Understand how to fully manipulate the template creation process to achieve your goals
- Learn how to launch activities based on matters details, completion of other activities and more
- Understand the ins and outs of creating automatic e-mail reminders
- Make Java work for you to achieve your more unique needs

Advanced Roles, Access, Security ● A

Prerequisite: Administrator access to your FoundationIP system; Good understanding of the topics covered in Basic Roles and Security Training

Can I gain anything by using sub-organizations or assigning explicit roles to groups? If you have asked yourself these questions, this is the course for you.

- Build new sub-organizations
- Understand Group Types and why they are useful
- Using explicit roles with personnel groups and why they can save you time

Behind the Scenes: Annuities Interface ● E

Prerequisite: FoundationIP users currently not using or who would like to know more about the interface

Learn how your organization can leverage the power of the FoundationIP Annuities interface to more effectively manage your patent renewals portfolio. Whether new to the Annuities Interface or an experienced user this session provides an opportunity to meet with the FoundationIP Interface team, ask questions, and discuss effective utilization of the tool.

- Collaborate in a panel discussion with the Interface team and other users
- Learn and discuss Annuity Interface best practices

Reporting Structure & Theory ● I A

Prerequisite: Familiarity with FoundationIP matter screens, field names, and terminology are assumed. Recommended refresher session: Reporting Fundamentals

Take the guess work and frustration out of building reports by following a pragmatic approach to requirements definition, design and testing.

- Learn how you can use core blocks and related blocks more effectively
- Develop a mastery of grouping and/or conditions
- Learn and how to build a more efficient report, and save time

Advanced Reporting for Law Firms

Prerequisite: Experience creating basic tabular reports

Learn how to create advanced customized reports within FoundationIP in this hands-on session geared toward law firms. Join **Ropes & Gray LLP** and CPA Global as they share best practices in report creation and configuration. During the online registration process, you will also be able to suggest reports to be presented in this session.

- Learn how to build sophisticated reports that can be exported in various formats including Microsoft Word, Excel, and HTML
- Learn creative ways of utilizing multiple data sets, subreports, and aggregation functionality to obtain complex data and structure efficient reports
- Obtain tips on report schedules and user access

Advanced Reporting for Corporations

Prerequisite: Experience creating basic tabular reports

Learn how to create advanced customized reports within FoundationIP in this hands-on session geared toward corporations. Join CPA Global experts and other FoundationIP users as they share best practices in report creation and configuration. During the online registration process, you will also be able to suggest reports to be presented in this session.

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- Learn creative ways of utilizing multiple data sets, subreports, and aggregation functionality to obtain complex data and structure efficient reports
- Obtain tips on report schedules and user access

Best Practices: Billing Modules

Prerequisite: Knowledge of billing module setup, creation of billing items in matters and billing management through Billing Tab

FoundationIP provides the ability to track costs against activities through the billing module which can be transferred into third-party billing management systems. Join **Accenture** and **HID Global** as they demonstrate unique ways of utilizing the billing module.

- See real life examples of FoundationIP and billing management system integration
- Learn and discuss methods of improving billing item entry and workflow

IDS Basics & Implementation

Prerequisite: Familiarity with US patent prosecution and the ability to navigate FoundationIP matters are assumed. Recommended follow-up session: Best Practices & Discussion: IDS

It's back to the basics in this hands-on session where you will learn how the IDS manager can be used to build a library of references for your portfolio.

- Learn how to capture publication and patent documents and than associate these to matters
- Understand how to manage citations and pass references between related matters
- See how pre-existing FoundationIP rules can help you stay on top of IDS submissions

Best Practices & Discussion: IDS

Prerequisite: Familiarity with US patent prosecution and FoundationIP IDS Manager are assumed. Recommended refresher session: IDS Basics & Implementation

Managing relevant art is an art in itself—how can one IP team take these submissions in stride, while another considers each new piece of information a hot potato? Hear how **Dorsey &**

Whitney LLP and **Schwegman, Lundberg, Woessner, PA** use FoundationIP to collect references, track citations, manage their attorneys and make their IDS submissions on time.

- Participate in a moderated discussion with other interested users
- Collect tips and techniques to apply within your organization

Trademark Tips & Tricks

Prerequisite: Familiarity with trademark prosecution and basic FoundationIP knowledge

FoundationIP provides functionality specific to managing your trademark portfolio. In this session, common questions and nuances will be covered in a step-by-step process.

- Review matter creation process such as WIPO matter docketing
- Learn of necessary data entry for auto-launching trademark activities and review available trademark activities
- Learn how to utilize the Trademark Search page, create and modify class codes, and work with trademark images

Trademark Docketing & Workflow

Prerequisite: FoundationIP users working with Trademarks

In this session, hear how organizations are using FoundationIP to manage their trademark docketing and in turn streamline their workflow. Learn about their internal processes for tracking and monitoring all trademark prosecutions and maintenance deadlines.

- Learn of methods to improve monitoring trademark deadlines in FoundationIP
- Watch organizations demonstrate how they are using the FoundationIP functionality to increase workflow

Patent Docketing & Workflow

Prerequisite: FoundationIP users working with patents

In this session, hear how **Avago Technologies Limited** and other organizations are using FoundationIP to manage their patent docketing and in turn streamline their workflow. Learn about their internal processes for tracking and monitoring all patent prosecutions and annuity deadlines.

- Learn of methods to improve monitoring patent deadlines in FoundationIP
- Watch organizations demonstrate how they are using the FoundationIP functionality to increase workflow

Basic Tips & Tricks

Prerequisite: Basic knowledge of activities, matters and reports

This interactive session is designed to demonstrate functionality that will allow new users to save time as well as provide valuable tips for everyday use. Topics will range from bulk matter operations to using the Tasks tab.

- Obtain recommendations for efficient ways to create and update matters, tasks and contacts through source matters and bulk operations
- See how to setup easy access to reports and how to generate merge documents for multiple matters

Advanced Tips & Tricks

Prerequisite: Advance FoundationIP knowledge

Description: Get more out of FoundationIP by finding out tips and tricks that other organizations have used to solve those tricky problems. Come prepared with existing issues or submit them when registering online.

- Learn new tips in FoundationIP
- Test your FoundationIP knowledge

2010 CONFERENCE AGENDA

SUNDAY, OCTOBER 17	
2:00 PM - 8:00 PM	Conference Registration
2:00 PM - 6:00 PM	Software Lab
6:30 PM - 7:00 PM	New Conference Attendee Orientation
7:00 PM - 8:00 PM	Welcome Reception

MONDAY, OCTOBER 18									
8:00 AM - 5:00 PM	Registration and Information Desk								
8:00 AM - 6:00 PM	Software Lab								
9:00 AM - 9:15 AM	CPA Global Welcome								
9:15 AM - 9:45 AM	Keynote Speaker								
9:45 AM - 10:30 AM	CPA Global Business Address								
10:30 AM - 10:45 AM	Break								
	Memotech			Inprotech			FoundationIP		
10:45 AM - 11:00 AM	Conference Mixer			Conference Mixer			Conference Mixer		
11:00 AM - 12:00 PM	Product Update Part I			Product Update Part I			Product Update		
12:00 PM - 1:00 PM	Lunch								
1:00 PM - 2:15 PM	New User Boot Camp	Best Practices & Roundtable: Docketing for Corporations		Roundtable: Managing Risks			Product Update		
2:15 PM - 2:30 PM	Break								
2:30 PM - 3:45 PM	New User Boot Camp	Conversion Boot Camp	Patent Workflow Management Training	New User Boot Camp	Demystifying the Electronic Interface	Workbench Set up & Configuration Training	New User Boot Camp	Behind the Scenes: Law Update Service	
3:50 PM - 5:15 PM		Best Practices: Invention Submission & Patent Committee	Trademark Workflow Management Training		Workbench Advanced Training	Basic Database Structure		Basic Roles, Access, Security	Reporting Fundamentals
7:30 PM - 9:30 PM	Evening Event								

Follow CPA Global on Twitter to get the latest speaker announcements!

TUESDAY, OCTOBER 19									
8:00 AM - 6:00 PM	Software Lab								
8:30 AM - 5:00 PM	Information Desk								
	Memotech			Inprotech			FoundationIP		
9:00 AM - 10:15 AM	Product Update Part II: Patent & Invention Submission	Product Update: Trademark & Licensing		Product Update Part II			New User Boot Camp	Activity Template Creation	
10:15 AM - 10:30 AM	Break								
10:30 AM - 12:00 PM	Independent User Group			New User Boot Camp	Behind the Scenes: Law Update Service	Advanced Database Structure	New User Boot Camp	Advanced Roles, Access, Security	Behind the Scenes: Annuities Interface
12:00 PM - 1:00 PM	Lunch								
1:00 PM - 2:15 PM	New User Boot Camp	Prior Art Training	Roundtable: Trademark Brand Management	Independent User Group			New User Boot Camp	Reporting Structure and Theory	
2:15 PM - 2:30 PM	Break								
2:30 PM - 3:45 PM	New User Boot Camp	Best Practices: Prior Art	Understanding the Renewals Process	New User Boot Camp	Roundtable: Managing Change	Best Practices: System Integration Strategies	New User Boot Camp	Advanced Reporting for Law Firms	Advanced Reporting for Corporations
3:50 PM - 5:00 PM		Roundtable: Reducing Costs	Free Query Report		Prior Art Functionality	Advanced Reporting	Independent User Group		
7:30 PM - 11:00 PM	Evening Event								

WEDNESDAY, OCTOBER 20									
8:00 AM - 5:00 PM	Software Lab								
8:30 AM - 5:00 PM	Information Desk								
	Memotech			Inprotech			FoundationIP		
9:00 AM - 10:15 AM	New User Boot Camp	Best Practices: Multi-site Implementation	Behind the Scenes: Law Update Service	New User Boot Camp	Is your Firm using this functionality?		New User Boot Camp	Best Practices: Billing Modules	IDS Basics & Implementation
10:15 AM - 10:30 AM	Break								
10:30 AM - 12:00 PM	New User Boot Camp	Administrators Corner	Advanced Custom Report	New User Boot Camp	Docketor's Corner	Electronic Data Exchange	New User Boot Camp	Best Practices & Discussion: IDS	Trademark Tips & Tricks
12:00 PM - 1:00 PM	Closing Lunch - Moon Bay								
1:00 PM - 2:15 PM	New User Boot Camp Review	Best Practice: System Integration Strategies		New User Boot Camp Review	Workbench Practices		New User Boot Camp Review	Trademark Docketing & Workflow	Patent Docketing & Workflow
2:15 PM - 2:30 PM	Break								
2:30 PM - 4:00 PM	Test Your Memotech Knowledge			Basic Tips & Tricks	Advanced Tips & Tricks		Basic Tips & Tricks	Advanced Tips & Tricks	
4:00 PM	End of Conference								

Registration

One Affordable All Inclusive Price

Your Conference Package includes:

- Three Days of Conference Sessions
- A pass to all Conference tracks and sessions (over 50)
- One-on-one complimentary training in the Software Lab
- A pass to training workshops (valued at over \$5,000+)
- A pass to all evening events
- Continental breakfast and lunch each day of the Conference
- Delegate Conference materials
- A discounted rate at the Gaylord National Resort
- A pass to the Solution Showcase
- Access to CPA Global experts throughout the Conference

Conference Package	Before June 25	June 26-September 10
1 Attendee	\$899 each	\$1199 each
2 or More Attendees from same organization	\$799 each	\$1099 each

Hotel is not included in the above prices.

Discount Policy for two or more representatives

Please contact Lisa Kertsos at lkertsos@cpaglobal.com for a special rate code on group discounts.

REGISTER NOW AT
www.cpaglobal.com/dc2010

Register Now!

Register for the 2010 CPA Global Conference at www.cpaglobal.com/dc2010. The registration website requires that you set up a unique account to register. This will enable you to log in anytime and:

- Register for the 2010 CPA Global Conference
- Invite other users to register
- Pay online by credit card
- Print your invoice immediately
- Print your schedule (changes may be made up until September 10)
- Schedule an appointment at the Software Lab & request meetings with other CPA Global experts
- Download maps and directions to the venue
- Download the event to your calendar
- Start networking with other users
- Download a letter requesting your attendance to give to your management for approval.

Registration Deadlines

Early Registration Deadline: June 25, 2010

Final Registration Deadline: September 10, 2010

Payment Details

All payments must be received by September 17, 2010 for guaranteed admittance into the 2010 CPA Global Conference. To make payment easier, you have the option to pay online by credit card. If you prefer to pay by check, please print out a copy of your invoice from the website and mail it with your check to:

CPA Global
P.O. Box 602010
Charlotte, NC 28260-2010

Please reference "2010 CPA Global Conference" on your check.

Cancellation Policy

After September 10, 2010, no refunds will be available for cancellations. Cancellations must be made through the registration website on or before this date.

For more information about the conference, please contact Lisa Kertsos at +1-571-227-7034 or lkertsos@cpaglobal.com.

Hotel & Transportation

Staying at the Gaylord National Resort & Convention Center just makes sense – for only \$195!

Reserve your room now directly with the Gaylord at www.cpaglobal.com/dc2010

CPA Global Conference attendees will be extended the discounted room rates for the nights of Sunday, October 17 through Tuesday, October 19. The rates are \$195 for single occupancy and \$20 for each additional adult. Rates are subject to 16% tax and \$15 resort fee per day. If you wish to come early or stay after the conference, this rate will be offered based on hotel availability, so make sure to book early! If you have questions please contact the Gaylord National Resort & Convention Center at +1-301-965-4000.

The resort fee includes:

- Wired and wireless high speed-internet access (in-room and in public areas)
- Fitness center access
- Designated complimentary in-room beverages
- Daily newspaper
- Local and toll free 800 telephone calls (20 minutes per call)

Transportation & Parking:

Gaylord National is a 15-minute drive from Reagan National Airport and within a 45 minute drive from Dulles and Baltimore Washington International Airports. Shuttle service can be arranged from all airports, and from Union Station and the Old Post Office in Washington, DC. To arrange shuttle service, please call the Transportation Desk at +1-301-839-5261. In addition, the hotel can be accessed from Old Town Alexandria by water taxi.

If you wish to drive to the conference, CPA Global has arranged for a discounted price of \$13 per day for self-parking.

Why Stay at the Gaylord?

- Networking is priceless. Even more so after the daily events are over.
- Most attendees stay at the conference hotel.
- Meet fellow attendees everywhere you go in the hotel.
- Sleep in a little later and never be late because of traffic.
- Staying on-site allows you to run back to the room to drop off/pick up anything you need.
- Only those that stay on-site will have free internet throughout the hotel!
- Multiple restaurants and a night club are available on-site.



2010 CPA GLOBAL CONFERENCE

www.cpaglobal.com/dc2010