CPA GLOBAL

Inprotech
Client WorkBench Module

SERVICE YOUR CLIENTS ONLINE

Inprotech is a complete IP and practice management solution. The Client WorkBench Module takes advantage of web technology to give you a completely new way of working with your clients while you manage their IP matters.

With the Client WorkBench Module you can offer your clients a means of collaborating with the staff members responsible for managing their cases as well as secure, on-line access to their IP portfolio. This brings benefits to both parties. Clients appreciate the system's functionality and flexibility — they can unobtrusively monitor IP events, submit instructions, respond to queries and view financial information. Your firm benefits from improved efficiency, productivity and client relationships. Both attorneys and clients can run queries and portfolio reports at their convenience.

Your clients will appreciate the flexibility and functionality available to them. The system automatically notifies them about What's New, plus you can add reminders to their To Do List and broadcast messages to them.

KEY FEATURES

PORTFOLIO ACCESS

Clients can easily track the progress of their cases, submit electronic instructions, or send an e-mail response to a query in the Client WorkBench.

The module can be configured so that clients only have access to cases where they are acting as the Instructor or Agent. They can also be limited to seeing only certain types of cases, such as Properties. Access to details about other parties associated with the case, for example, basic name address and contact details, can be allowed or restricted. They may also be given access to events that you consider relevant to your clients.

Within the Client WorkBench there is an option to do a Google Key Words search (which finds matches for words in the case title) and to view a world map showing countries where a case is pending or registered.

Files or documents that have been linked to a case in the firm's database can be made available to clients. Any files that the client is permitted to access will be displayed and can be downloaded.

DUE DATES AND REMINDERS

The Client WorkBench Module shows clients a list of the events due for their case portfolio. This is the What's Due list which can be restricted to include only those events and critical dates that are relevant to your clients.

Clients can check due dates and respond to reminders. Both system-generated and ad-hoc reminders can be displayed in the Client WorkBench Module. Clients receiving ad-hoc reminders are able to indicate that they have been read, and have been completed (no further reminders necessary). Reminders that are no longer required are easily deleted.

CLIENT REQUESTS

Client requests streamline communication and help prevent misunderstandings. Clients using the WorkBench can send instructions to their attorney, ask questions about an IP matter, or advise the firm of changes in case details. These requests are saved in the system for future reference.

SEARCHES AND REPORTS

With the quick search capability, your clients have all their cases and IP contacts at their fingertips. When they want to send an e-mail to the attorney managing a case, they can use the quick search — typing the case reference in the field and clicking GO; his details are there. When they want to find out the status of an important case, they can use the quick search — typing part of the case title in the field and clicking GO; the case status is listed for them.

The available reporting options cater well for your clients' requirements. Case and To Do Lists, information about what's due, and case details retrieved through a search can be opened in a Microsoft® Excel worksheet, exported in XML format (for data exchange) or printed as a PDF report.

FINANCIAL INFORMATION

The Client WorkBench Module includes tools for budgeting and managing the cost of official fees. The Fee Report can be used to forecast renewal fees due on selected cases. All charges (e.g. Renewal, Affidavit) are included and the report can be run for a specific period or as a forecast of the anticipated cost for the life of the patent or design.

Where Inprotech Billing and Accounts Receivable modules are used, clients can be given access to financial information about their cases. The level of detail can be tailored individually for each client. Depending on access levels, the following can be viewed:

- Billing history
- Prepayments
- Accounts Receivable items
- Work In Progress items
- Billing Instructions

EASE OF USE

The Client WorkBench Module is based on the familiar browser interface: information is presented on tabs and logically arranged to let clients locate information and perform tasks quickly. They can drill down to view detailed information as required.

The module looks and works the same for all your clients. However, the level of detail you allow specific clients to view is left to your discretion and can be easily managed. Simply determine what functions can be performed and what information can be viewed, then configure your client's access accordingly.

ACCESS AND SECURITY CONTROL

Each client has an Access Account that identifies which names in the firm's database can be accessed. Only individuals who are registered to use the account and have a valid USER ID and password can access this information. Within the system, access to information is based on an individual's relationship to a case.

System Administration tasks, such as maintaining existing user detail and setting up new ones, can be performed centrally or at the client's site.

INTEGRATION

The Client WorkBench Module is seamlessly integrated with other Inprotech modules. Your clients will benefit from your use of other CPA Global products and services such as the Electronic Interface and Law Update Service.

ABOUT CPA GLOBAL

CPA Global is one of the leading legal outsourcing companies in the world, offering a full range of general legal and intellectual property (IP) support services.

With offices across the United States, Europe, Asia and the Pacific, CPA Global is well placed to support attorney firms and corporate clients with a diverse set of legal and IP specific needs.

We provide services such as document review, contract management and litigation support right through to top end intellectual property software, renewals and data management, research and consulting — assisting busy law firms and corporate legal departments throughout the litigation and IP life cycle.

For further information contact your regional office.

Asia Pacific Tel +61 (0) 2 9993 3000 | **Europe** Tel +44 (0) 20 7549 0666 | **North America** Tel: +1 (703) 739 2234