

Inprotech Professional WorkBench Module

HELPING IP ATTORNEYS WORK SMARTER

Inprotech is a complete IP and practice management solution. The Professional WorkBench Module focuses on the specific needs of professional IP practitioners and offers a smarter way to work: increasing personal productivity and ultimately client satisfaction.

Entirely browser-based, the Professional WorkBench Module features a user-friendly interface that facilitates access to information from a single entry point. Wherever you are working, you can check due dates, act upon reminders, look up contact details, report on cases, review your personal productivity, and access financial information about your cases. When connected to your internal network, you can also create ad hoc documents based on your predefined Microsoft® Word templates.

Staying in touch with clients and your office is easy. You can remain productive while you are on the road by sending instructions to your staff and sending case updates to your clients. The module helps you co-ordinate work and encourages collaboration between clients and colleagues.

KEY FEATURES

WHAT'S NEW

The What's New tab provides a quick overview of events that have occurred recently across a person's area of responsibility. The default view can be changed to see what has happened in a range of time scales.

WHAT'S DUE

The future workload for a person, team, or client is displayed in a convenient calendar format. A quick glance then tells you what case related events are due, which ones require immediate attention, and what you need to plan. Your firm can use its own symbols and categories — basic, routine, or complex to indicate what can easily be delegated; simple or substantive to denote the amount of work involved. These visual cues help you plan your time, assign work, and concentrate on what has to be done.

PERSONAL PRODUCTIVITY

The My Statistics tab in the Professional WorkBench Module gives a quick financial overview of your work. It allows you to check:

- Effort and productivity
- WIP to be billed
- Periodic value of WIP compared with total billed
- Outstanding debtor totals

More financial details are directly linked to individual cases or clients.

WHAT'S TO BE DONE

To Do Lists for yourself or a work group help you keep track of all your on-going projects and monitor what is currently in progress. From here you have direct access to case information and other people associated with a case. General reminders can be added as a way of delegating tasks and sharing information with colleagues.

DAY TO DAY TASKS

The Professional WorkBench Module allows quick and in-context work. In a simple click, you are able to:

- Write a letter
- Create and maintain reminders
- Provide instructions
- Record notes against a case or name
- Record time
- Review work in progress
- Create a billing worksheet

FLEXIBLE REPORTING

The quick search puts all your cases, clients, staff, and contacts at your fingertips.

When you want to send an e-mail to a colleague, use the quick search — select Name, type part of the name in the field, and click GO, the e-mail address is there. When you've forgotten a new client's address, use the quick search — a few keystrokes and you have it. When you need to know the status of an important case, use the quick search — all the case details are readily available.

More complex queries and reports are set up and saved through the advanced search. Once a new query or report format is saved, it is available from the Search menu and can be used as readily as the quick search.

Reporting options in the Professional WorkBench Module cater for a range of requirements. Daily To Do Lists, information about What's New or What's Due, and case or name 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. Integration with Microsoft® Reporting Services is also available.

EASE OF USE

All the familiar features that make a browser easy to use have been incorporated into the Professional WorkBench Module. In addition, the interface can be adapted to suit each individual's needs, with the presentation of information tailored to suit the way people want to work.

The Professional WorkBench Module is also your direct link to the greater IP community. Staff members can save a personal list of reference sites in My Links and firm-wide Quick Links are available to everyone. Web links can also be established to let you move seamlessly; for example from the case to the public patent and trademark office information.

ACCESS AND SECURITY

WorkBench access and security are built around roles, not data. Roles, based on the work that is typically performed, provide a logical way of grouping and restricting access to virtually any information and task in the system. Professionals using the WorkBench modules can be assigned roles that give them access to only the specific information they need on a routine basis. This model puts the focus on the way individuals need to work, rather than having a database structure determine the security restrictions.

INTEGRATION

The Professional WorkBench Module is seamlessly integrated with other Inprotech modules. You have access to all the information you need through the browser interface without having to know anything about the back office programs and database behind the scenes. The module is also designed to work with other applications such as Microsoft® Outlook, document and practice management systems, and directory services.

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