



WorkPortal Module

As prosecution-related correspondence arrives via email, fax, postal service, or from an IP receiving office, consistent document intake automation ensures uniform profiling standards and efficient capture of documents within the document management system. As aforementioned, customizable document workflows can notify appropriate matter personnel, initiate the docketing process, flow into client portals, or notify the client of newly received correspondence with increased transparency and consistent document handling through automation. Furthermore, a centralized, single source location for client and matter data, documents and dockets facilitates more rapid access to information contained in individual source systems. Efficient business process automation such as docket generation and docket clearing events triggered by document arrival or task assignment completion provides improvements to overall organizational efficiency, and mitigation of risk.

Operating as the core of the PracticeLink® Suite, our WorkPortal module provides not only a customizable but also centralized user interface for all or selected members of your firm to work within. All pertinent information sourced from existing systems, is keyed with appropriate references for search, report and review of information related to one of four main subjects; Client, Matter, Docket or Document.

WorkPortal UI Feature Summary

Matter View

- Aggregation of information from disconnected source systems; Financial, Docketing or Document Management Systems
- Matter Personnel
- Patent Inventors
- Trademark Mark Images as well as Goods and Services Information
- Matter Notes
- Client Special Instructions Display
- Customizable Matter Bibliographic Display by Matter Type

Docket Interaction

- 'My' Docket Perspective for Matters assigned to logged in user or team member of logged in user
- Matter Docket Presentation of Dockets related to Matter
- Docket Clearing Request generation for timekeepers with ability to associate file attachments
- List of Docket Clearing Requests for Docketers to take action on
- Enables tracking and management of docket clearing requests with related notes and histories

Client View

- General Client information address
- Matter list for client
- Dockets related to Matters for Client
- Client Special Instructions

Document Intake & Capture

- USPTO Private PAIR outgoing correspondence automated document download
- TSDR Trademark document download automation
- Email Box monitoring with email and attachment capture and PDF Conversion for web based screen review
- eFax Account with fax document capture

- Scanned Document capture and conversion
- Directory Monitoring capabilities for capture and conversion of network documents

Document Profiling Center

- View Documents and execute Client Matter Search and Assignment within a single screen
- Setup Profiles for Multiple Matters in relation to a Single incoming document and specify at an email attachment or page level where the document elements should be saved
- Split and Merge functionality for incoming Email Documents
- Document Classification profiling to identify document types/document naming
- Document Storage Location in DMS specification

Incoming Document Notification

- Leveraging Document Profile information generation of notifications to the Matter Personnel of the arrival of new documents
- Configuration of Rules for determining notification specification based on Client, Matter, Document Class and Document information

Task Generation & Assignment

- Automated task generation initiated from events or actions within the system related to Matters, Dockets, Documents or configurable criteria
- Group based Task List assignment
- Individual Task Assignment
- Contextualized information presentation related to task assignment which can be presented as data from other integrated systems or document attachments

WorkPortal Visualization

Time Keeper (Atty) home page shows recently visited matters, recently visited documents and the logged in Timekeeper's upcoming docket.

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Home My Inbox ▾ Docket Center Docketing Inbox Profilers Inbox Matter Center Client Email Rules Report and Searches ▾ Admin Center
Matters ▾

Recent Matters Export All Records

Title	Docket Number
Reducing flicker noise in two-stage amplifiers	100001.00-US
Case Type F: Dedicated to the Public. Expiration and Tax information will not be generated as an unlimited term applies and the patent is not subject to the payment of yearly fees.	100020.0002JP-JP
System and method for providing unique and immediately redeemable incentive vouchers to a customer to encourage transactions with a business entity	100024.75128-US
Reducing flicker noise in two-stage amplifiers	100019.73239-US
Isolated nucleic acid molecules encoding the Br2 P-glycoprotein of maize and methods of modifying growth in plants transformed therewith	100001.75290-JP

Recent Documents Export All Records

Title	Docket Number
73239-US.100019--Web Upload - SKIPSS UX.docx.DOCX	100019.73239-US
Template: P:237_OUT--ISR_and_Written_Opinion_Received7/31/2015--[APPNUM].PDF	100019.73239-US

Docket Search:

Timekeeper Client

Timekeeper:
 Working Attorney (Lake, Sheehan)
 Backup Attorney (Lake, Sheehan)

Additional Timekeepers:
 Select All

Custom
 Today
 7-Days
 14-Days
 30-Days

 All
 Due
 Final
 Reminder

[Search](#)

Export All Records

Due Date	Client Name	Docket Number	Action	Title	Attorney	App. Number	Country	Matter Type	
01/25/2017	Fitzpatrick Wholesalers	100022.10004-DE	Corrected Application Papers - mail date	Glutathione based delivery system	DCH-1	99/000,337	GERM	Patent	+ Docket Task Clear
01/25/2017	Fitzpatrick Wholesalers	100022.10004-GB	Notice of missing parts - fina	Glutathione based delivery system	DCH-1	99/000,342	GBRI	Patent	+ Docket Task Clear
01/25/2017	Real Technologies	100001.76408-JP	Notice of missing parts - fina	Variable lamination of vascular graft	DCH-1	99/000,271	JAPA	Patent	+ Docket Task Clear
			Response to	Modification of Hesion					

Matter Details Screen shows matter bibliographic data in a summary on top half bottom half outlines sub tabs with more detailed information. This screenshot shows both completed and recently cleared Matters Dockets, as well as upcoming docket actions.

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Matters

[Add Docketing Date](#)
[Request Correction](#)
[Add Matter Task](#)
[Web Upload](#)





100001.00-US (US - United States)

Reducing flicker noise in two-stage amplifiers

Client: Real Technologies
Case Type: Regular
Application Number: 99/000,049 (Filed)
Publication Number: US 2011 2490999 A2
Patent Number: 1854799549
Important Matter Notes:

Application Status: Filed
Filing Date: 03/30/2010
Publication Date: 08/22/2011
Confirmation Num: 3007
Important Client Special Instructions:
Special Billing instructions for client. Please send invoices 2wks prior to final bill.

[Docket](#)
[Docket History](#)
[Inventors](#)
[Notes](#)
[Personnel](#)
[Related Matters](#)
[Trifold](#)
[Open Tasks](#)
[Completed Tasks](#)
[Received Documents](#)

Export All Records    

Due Date	Action Desc	Notes	Completed Date
<input type="checkbox"/> 10/12/2010	Reminder issue fee due	Please review the case	+ Docket Task Clear
<input type="checkbox"/> 05/28/2011	Info Discl. Statement		+ Docket Task Clear
<input type="checkbox"/> 07/30/2011	Priority Doc. To Be Filed		+ Docket Task Clear
<input type="checkbox"/> 07/30/2011	Redacted Publication Deadline		+ Docket Task Clear
<input type="checkbox"/> 09/13/2015	Appeal brief - final deadline		+ Docket Task Clear
<input type="checkbox"/> 09/26/2015	Annual Tax Due		+ Docket Task Clear
<input type="checkbox"/> 10/21/2015	Continuing prosecution applica		+ Docket Task Clear
<input type="checkbox"/> 11/06/2015	Decision on reconsideration		+ Docket Task Clear
<input type="checkbox"/> 12/06/2015	File By Due Date		+ Docket Task Clear
<input type="checkbox"/> 12/26/2015	Info Discl. Statement		+ Docket Task Clear
<input type="checkbox"/> 01/04/2016	Issue Fee Due		+ Docket Task Clear

Matter Details Summary is a Trifold tab which displays links to the Matter Documents available in the Document Management System.

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Matters

Add Docketing Date Request Correction Add Matter Task Web Upload

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Application Status: Filed
 Filing Date: 03/30/2010
 Publication Date: 08/22/2011
 Confirmation Num: 3007

Important Client Special Instructions:
 Special Billing instructions for client. Please send invoices 2wks prior to final bill.

Docket Docket History Inventors Notes Personnel Related Matters **Trifold** Open Tasks Completed Tasks Received Documents

Description Search: Include Exclude Search Download: DeskSite NRL Requires DMS Client

Correspondence		PTO		Other	
Last Edit / Received	Description	Last Edit / Received	Description	Last Edit / Received	Description
01/23/2017	100001.71456-VN--Checking the Intake Document/Workitem name of an intake exception.	01/24/2017	892--892 - List of references cited by examiner9/28/2016	01/20/2017	100019.10006-US--File Uploaded From Web Upload: Example Attachment 3.docx
01/23/2017	Interoffice: automation@auroranorthsoftware.com N/A ()	01/24/2017	PET.DEC AUTO--PET.DEC AUTO - Petition Auto Grant letter9/6/2016	01/20/2017	100019.10006-US--File Uploaded From Web Upload: Example Attachment 2.docx
01/22/2017	Interoffice: automation@auroranorthsoftware.com N/A ()	01/24/2017	QPIDS.REQ--QPIDS.REQ - Quick Path Information Disclosure Statement 9/6/2016	01/20/2017	100019.10006-US--File Uploaded From Web Upload: Example Attachment 1.docx
01/22/2017	Interoffice: automation@auroranorthsoftware.com N/A ()	01/20/2017	100019.73444-EP--eml to pdf	01/20/2017	100001.71448-FR--Web Upload - Excel.xlsx
01/22/2017	Interoffice: automation@auroranorthsoftware.com N/A ()	01/20/2017	100021.75009-CA--jpg png text	01/20/2017	100001.71448-FR--Web Upload - Excel.xlsx
01/22/2017	Interoffice: automation@auroranorthsoftware.com N/A ()	01/20/2017	100001.0011INDI-IN--Emi and word	01/20/2017	100001.71448-FR--Web Upload - Excel.xlsx
01/22/2017	Interoffice: automation@auroranorthsoftware.com N/A ()	01/20/2017	100001.75326-CN--nothing	01/20/2017	100001.71448-FR--Web Upload - Excel.xlsx
		01/20/2017	100001.71448-FR--Web Upload - 2774.pdf	01/20/2017	100001.71448-FR--Web Upload - Excel.xlsx

Client Search using generic search term.

PracticeLink Client Search Sheehan Lake Edit Page Security

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Matters

Clients Documents Matters Dockets Saved Searches

Column Expression Value
 Name Contains Acme + Save Search

Search

Export All Records

Name	Email	Address	Phone	Fax	Docketing Client #	Assigned File #	Billing Client #	Date Joined
Acme Propellants	test_acme@masterdatacenter.com	365 Acme Road Burlington, VT 05401	(802) 555-1212	(802) 555-1112	ACME-1	72664-0129	100023	2/15/2001

Page size: 50 1 Items in 1 pages

Matter Search with generic search term, searched from the header.

PracticeLink Matter Search Sheehan Lake Edit Page Security

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Matters

Clients Documents **Matters** Dockets Saved Searches

Column Expression Value
 Broad Search Contains 100001

Save Search

Search

Export All Records

Client Matter	Matter Type	Title	Client	Attorney	Application Number	Country	Status
100001.0011INDI-IN	Patent	IP Rules: Provisional filings are obtainable in India and are valid for 1 year. The Expiration Date will be calculated on a pending provisional application to indicate the one year date.	Real Technologies	Douglas Spencer	99/000,306	India	Filed
100001.00-US	Patent	Reducing flicker noise in two-stage amplifiers	Real Technologies	Todd Metcalf	99/000,049	United States	Filed
100001.10001-JP	Patent	The shoes fixing device for bicycles	Real Technologies	Todd Metcalf	99/000,317	Japan	Filed
100001.10002-AU	Patent	Method and apparatus for integrated supply chain management	Real Technologies	Blake Ingram	99/000,319	Australia	Granted
100001.10002-CN	Patent	Method and apparatus for management, financing and supply in an integrated supply chain system	Real Technologies	Blake Ingram	99/000,323	China P.R.	Filed
100001.10002-EP	Patent	Method and apparatus for management, financing and supply in an integrated supply chain system	Real Technologies	Blake Ingram	99/000,320	European Patent Convention	Filed
100001.10002-JP	Patent	Method and apparatus for management, financing and supply in an integrated supply chain system	Real Technologies	Blake Ingram	99/000,321	Japan	Filed
100001.10002-US	Patent	Method and apparatus for management, financing and supply in an integrated supply chain system	Real Technologies	Blake Ingram	99/000,324	United States	Filed
100001.10002-WO	Patent	Method and apparatus for management, financing and supply in an integrated supply chain system	Real Technologies	Blake Ingram	99/000,318	Patent Cooperation Treaty	Filed
100001.10003-TW	Patent	Fixing device for computer fittings	Real Technologies	Todd Metcalf	99/000,326	Taiwan	Filed
100001.10003-US	Patent	Fixing device for computer fittings	Real Technologies	Todd Metcalf	99/000,325	United States	Granted
100001.71448-BR	Trademark	FRESH SQUEEZE	Real Technologies	Douglas Spencer	934443	Brazil	Filed

Matter Search Plus with generic search term and refined additional drill down secondary search filter.

PracticeLink Matter Search Sheehan Lake Edit Page Security

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Matters

Clients Documents **Matters** Dockets Saved Searches

Column Expression Value
 Broad Search Contains 100001

AND Matter Type Equals Patent

Save Search

Search

Export All Records

Client Matter	Matter Type	Title	Client	Attorney	Application Number	Country	Status
100001.0011INDI-IN	Patent	IP Rules: Provisional filings are obtainable in India and are valid for 1 year. The Expiration Date will be calculated on a pending provisional application to indicate the one year date.	Real Technologies	Douglas Spencer	99/000,306	India	Filed
100001.00-US	Patent	Reducing flicker noise in two-stage amplifiers	Real Technologies	Todd Metcalf	99/000,049	United States	Filed
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100001.10002-AU	Patent	Method and apparatus for integrated supply chain management	Real Technologies	Blake Ingram	99/000,319	Australia	Granted
100001.10002-CN	Patent	Method and apparatus for management, financing and supply in an integrated supply chain system	Real Technologies	Blake Ingram	99/000,323	China P.R.	Filed
100001.10002-EP	Patent	Method and apparatus for management, financing and supply in an integrated supply chain system	Real Technologies	Blake Ingram	99/000,320	European Patent Convention	Filed
100001.10002-JP	Patent	Method and apparatus for management, financing and supply in an integrated supply chain system	Real Technologies	Blake Ingram	99/000,321	Japan	Filed
100001.10002-US	Patent	Method and apparatus for management, financing and supply in an integrated supply chain system	Real Technologies	Blake Ingram	99/000,324	United States	Filed
100001.10002-WO	Patent	Method and apparatus for management, financing and supply in an integrated supply chain system	Real Technologies	Blake Ingram	99/000,318	Patent Cooperation Treaty	Filed
100001.10003-TW	Patent	Fixing device for computer fittings	Real Technologies	Todd Metcalf	99/000,326	Taiwan	Filed
100001.10003-US	Patent	Fixing device for computer fittings	Real Technologies	Todd Metcalf	99/000,325	United States	Granted
100001.73239-			Real			Patent Cooperation	





Matters Assigned to logged in timekeeper for quick access.

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Matters ▾

My Matters:
Timekeeper: ▾ Check All
Exclude Inactive Matters

Export All Records    

Docket Number	Matter Type	Client	Description	Docketing Status	Application Date	Application Number
100022.10004-JP	Patent	Fitzpatrick Wholesalers	Glutathione based delivery system	Filed	12/27/2005	99/000,329
999999.999999	Patent	Engineering Client	Glutathione based delivery system	Filed	01/19/2006	99/000,330
100022.10004-EP	Patent	Fitzpatrick Wholesalers	Glutathione based delivery system	Filed	12/29/2005	99/000,331
100022.10004-AT	Patent	Fitzpatrick Wholesalers	Glutathione based delivery system	Filed	12/29/2005	99/000,332
100022.10005-US	Patent	Fitzpatrick Wholesalers	Glutathione based delivery system	Granted	12/19/2005	99/000,327
100022.10004-US	Patent	Fitzpatrick Wholesalers	Glutathione-based delivery system	Granted	12/11/2007	99/000,328
100022.10004-BE	Patent	Fitzpatrick Wholesalers	Glutathione based delivery system	Filed	12/29/2005	99/000,333
100022.10004-BG	Patent	Fitzpatrick Wholesalers	Glutathione based delivery system	Filed	12/29/2005	99/000,334
100022.10004-CH	Patent	Fitzpatrick Wholesalers	Glutathione based delivery system	Filed	12/29/2005	99/000,335
100022.10004-CY	Patent	Fitzpatrick Wholesalers	Glutathione based delivery system	Filed	12/29/2005	99/000,336

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