

Solution Brief

Patent iNSIGHT Pro Enterprise

Organizing Enterprise Intellectual Property
Knowledge Management (IPKM)

Current State of Enterprise IP Research and Analysis

Management of ongoing IP Research is becoming an important objective of the head of corporate research or licensing departments.

Most organizations have IP Asset Management (IAM) and Docketing solutions that track their idea to IP portfolios and manage their annuities. How they manage their IP research that comprising Prior-Art Searching, FTOs, Infringement Analyses, Technology and Competitor Intelligence Analysis, Own-portfolio mining and categorizing, is another thing. Such research largely lies unorganized in the form of Word/Excel reports in shared folders or scattered across computers of researchers. The problem is compounded by the myriad of people interested and involved in either the research process or the output. For any mid-sized organization and above these would include IP & Legal, R&D, Marketing, Licensing, External Counsels, Search service providers and external R&D team.

What organizations need is an IP Knowledge Management (**IPKM**) solution that both manages and accelerates the research process while allowing for collaboration and effective communication of IP and analyzed-IP information across the different teams.

How is this different from IAM solutions and generic KM systems?

IAM solutions are mostly docketing solutions that manage the lifecycle of applications, patents, trademarks and copyrights. They focus more on the annuities and legalities associated with managements of large invention families. You would never have your competitor or a technology portfolio (with patent of many companies) in such systems.

Generic Knowledge Management systems suffer the same issue as generic text mining solution when it comes to IP and that is – they don't understand IP data well enough. Trying to train or customize such systems is prohibitively expensive and includes the risk of failed implementations due to the customization aspect.

An IPKM solution includes tools to quickly integrate IP information from the variety of sources that an organization gets its information from and provides a wide range of management and analysis capabilities with different access points for different type of users. So an IP Manager would have access to the Patent Data Creation and Management tools while Management would only require access to the Dashboard or key Analytics.

Needs of Enterprise IP Research professionals

Corporate IP practitioners, both managers and analysts have IP needs that are different from external consultants, law firms and IP service providers. Chances are if you are a corporate IP practitioner, when you initiate IP research for a new product/technology area, mapping intellectual-property is just one aspect of analyzing IP and a lot of your day to day IP research work besides patent searching would involve:

- Creating different kind of Excel or Word summary reports that help communicate patent and journal information between the you, R&D and management
- Coordinating processes and material (Summarized Content, PDFs, Front Page drawings) for rapid screening by R&D team or a inventor

- Analyzing and manipulating related content such as US Assignments information, Sequence Listings, patent families, legal status.
- Grouping and filtering patent and journal data based on different criterion and assigning a rating that can represent its importance from technology, legal or commercial standpoint
- Categorizing patent data according to technology or product groups defined within the organization and maintaining updated patents sets for each group. (Critical insights are usually revealed when you analyze patent data in context of technology and business categories that are relevant to your company)
- Managing patent images and patent PDFs effectively along with patent data

So, one of the key aspects that you should consider when considering an IP solution is your need for flexibility with the data within the solution. Our experience with corporate users has been that most IP professionals cannot have enough flexibility when it comes to *molding* patent data and usually work on the bleeding edge of what one can do with patents. So, managing the IP reporting, screening, and analyzing requires a lot of flexibility in manipulating, categorizing, grouping and reporting patent data and this can significantly burden corporate IP managers.

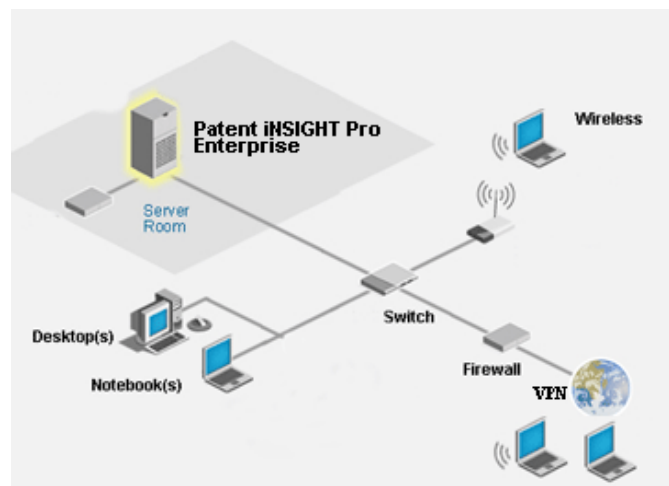
Transparency in analysis is also very important. *"I could get thrown out of my management meeting if I don't have the exact logic to back the output"* says one user. Its important for your analysis solution to provide transparency at each stage of the process. Most advanced users for Patent iNSIGHT Pro have questioned our charts and visualizations or even algorithmically calculated fields and we have helped them understand the full logic behind each. While there isn't any exact statistic I could locate, based on what most researchers say it appears that very few people base decisions on patent maps that aren't backed by a full understanding of the logic (and in many cases screening of patent content) behind the map.

Finally time to deployment, time to learn and cost are important considerations. Traditional enterprise solutions talk about implementation schedules and "hand-holding" and handoff periods. However that's a thing of the past. Ready to fit solutions today can be setup in a day or two and users can start work on the system in day 3. Further when trying to optimize your IP expenditure the question that arises is: Which solution meets most of your needs and is cost effective enough to achieve ROI in a few months instead of years.

Patent iNSIGHT Pro Enterprise – Your solution for Corporate Intellectual Property KM

Patent iNSIGHT Pro Enterprise is a "behind the firewall" hosted server edition that provides simultaneous multi-user access to a central repository with Patent iNSIGHT Pro as the front end.

Organizations can now host the software on a secure server within their data center without the need for any installation or



management at the end user computer. The user can log in to Patent iNSIGHT Pro from any computer on the intranet having access to the server via a web-browser. VPN based users too can access the software from remote sites and offices.

Enterprise Solution Features

The Enterprise solution includes all the reporting, analytics and visualization capabilities* of [Patent iNSIGHT Pro](#) with the following additions:

Centralized Hosting, Data Storage and Management

The application is installed centrally on a server and all Intellectual Property data is also stored centrally. Each user has her own workspace within which the information is organized around Catalogues and Reports. A Catalogue usually represent a company, technology, drug pipeline etc under which research or monitoring is ongoing. Each catalogue can have multiple reports or portfolios that have different sets of patents. Patents, applications or even journal records imported into the software are managed in the form of different catalogues and reports and one can manage all the information as simple managing files and folders.

IT Administrators have access to tools for centralized data administration and backup. These can be scheduled to run daily or weekly with email based notification of the status.

Collaboration and Sharing

The Enterprise solution includes enterprise collaboration, security, privacy and data sharing capabilities. Each Enterprise user has private catalogues and access to shared catalogues. Users can login into the system using their existing Domain logins (already implemented in Active Directory or LDAP servers).

In many organizations select few persons are tasked with the responsibility of creating and maintaining a technology or company portfolio so that other users who only want insights and quick answers from a portfolio need not have to worry about creating or maintaining the data. Here two types of portfolio sharing scenarios are possible and have been taken care of in Patent iNSIGHT Pro Enterprise:

- **Many users sharing a single portfolio with varying access privileges:** The user who maintains the portfolio can give others read only access to the portfolio. Other users can read/filter/sort/run analysis/run reports on the data but not modify it.
- **One user setting up his/her portfolio for replication to a selected set of users:** The user who maintains the portfolio can set his/her catalogue to be periodically replicated across other designated users. Since in replication the portfolio data is copied into each user's private folders, each recipient can modify the information as per their own needs. This is usually needed by analysts in the company. For instance if an analyst is give a project to re-categorize the portfolio according to a new set of categories, rate the records accordingly and preparing reports on that, then the original data needs to be modified.

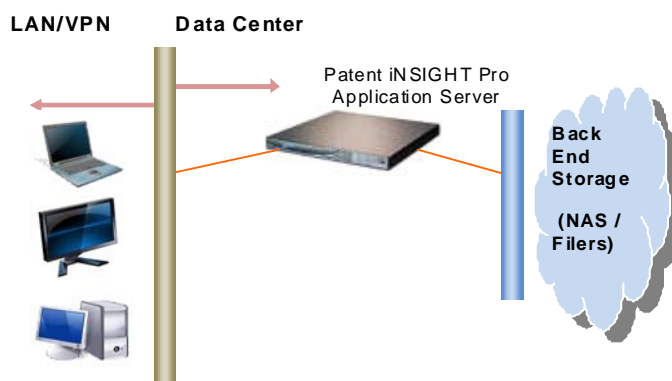
*For detailed features of Patent iNSIGHT Pro please visit www.patentinsightpro.com/features.html

Deployment Configuration

Once the hardware is in place the time taken to deploy and configure the solution is usually 2 days. The Enterprise solution leverages Windows Server 2008 Terminal Services technology to deliver access to multiple secure instances of Patent iNSIGHT Pro application over a corporate intranet or to external users over a VPN. Users can access the solution over a browser or over a Terminal Services session (similar to Citrix sessions). The solution further includes security authentication for restriction of browser based access to select users only (Active Directory/LDAP based authentication is supported).

For 1-10 users, a single server is sufficient to run the application. A backend database needed by the application can also be running on the same server. A

physical server is not necessary and a virtual server (VM host) can also be used. A scalable solution (for 15 or more users) requires the Database server to be separate from the Application Server.



The hardware & OS requirements for the server are:

<i>Operating System</i>	<i>Windows Server 2008 (with multiple user CALs)</i>
<i>Server Processor</i>	<i>Dual-Xeon or Quad-Core Xeon 64 bit</i>
<i>Memory</i>	<i>8GB</i>
<i>Other software needed</i>	<i>MS Office 2003/2007, JRE (latest)</i>
<i>Database</i>	<i>MS SQL/ MySQL/Oracle</i>
<i>Storage</i>	<i>100 GB with capability to expand to 500 GB.</i>

About Patent iNSIGHT Pro

Patent iNSIGHT Pro™ is a comprehensive patent analysis platform that allows you to accelerate your time-to-decision from patent analysis activities. Designed from inputs by experienced patent researchers, Patent iNSIGHT Pro easily blends into your existing Research workflow. Patent iNSIGHT Pro is used by leading legal services, Pharmaceutical & biotech, electronics companies and research organization across US, Europe, South America and India with more than 150 end users. Patent iNSIGHT Pro is product of Gridlogics, a research driven IT Company specializing in providing intellectual property analysis and visualization solutions to aid R&D and corporate strategy. Gridlogics is headquartered in Pune, India and has a sales presence in Delhi, Mumbai and USA.

For more information:

Visit us at: www.patentinsightpro.com

Or call us at: 1-408-786-5524

Or mail us at: contact@patentinsightpro.com