

# THE HISTORY OF DOCKETING SOFTWARE

No one really knows how the word "docket" got its meaning and no one really cares.

But we all know what it means to us as docketing professionals. It is the word that identifies us, sets us apart from our colleagues, confuses those that are not aware of its meaning, and brings us together as a cohesive group of like minded professionals. It also belongs to the naming scheme of the software we use.

Over the years, as technology advanced, docketing software became very sophisticated. Vendors are always looking for ways to improve their software and support and make their products more valuable to law firms and better than their competitors. The market is getting saturated by the products but that is a good thing for law firms.

There are multiple vendors for litigation related software as well as patent and trademark software. Some of these vendors are new in the market and others have been around for many years.

Just because the vendor has been around longer does not mean they are more reliable. It is true that the vendor will be more experienced in some ways and may have a wider existing client base. However, many older companies can lag behind the newer, smaller companies in product development. Newer companies often have a fresh perspective on client and market demands. Smaller companies are often more able to adapt to changes and accommodate clients in personalizing software. The risk with new, smaller companies is their ability to survive in the market. Because software needs to be updated and supported for long periods of time, it is important to select a vendor that will have future longevity.

This article will concentrate on both litigation and intellectual property software. Every vendor received the same questions and was asked to provide their history, expertise, and current product features. Not all vendors participated. The following list of software is sorted alphabetically.

## LITIGATION DOCKETING SOFTWARE

### BEC DOCKET ENTERPRISE®

BEC Legal Systems was established in 1943 as Business Equipment Company. Over the years, the company transitioned itself to address changing requirements in the markets served. In 1988, BEC made a strategic decision to focus exclusively on serving the needs of law firms and changed their name to BEC Legal Systems.

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The original owner was Michael Brearton, a former executive of the Remington Typewriter Company. BEC Legal, coming up on its 75<sup>th</sup> anniversary, is still controlled by the same family within a strong corporate shareholder structure.

Originally, through World War II, BEC sold refurbished adding machines and typewriters. During the 1950's and 60's the company prospered in the emerging market of professional dictation equipment sales to law firms. This was complemented in the 1970's and early 80's by also providing law firms with word processing systems. The result was a strong presence in the local legal community.

In 1988 BEC Legal Systems was formed. The early 1990's brought additional services to their legal clients including document management software and a commitment to training law firms in the use of Microsoft Office with an emphasis on Microsoft Word and Outlook. In 2002, BEC Legal developed a custom docket/calendar solution designed to enhance the legal functionality of Microsoft Outlook calendars.

The initial docketing solution was Docket Administrator™. It was developed to improve the legal functionality and reporting of Microsoft Outlook calendars. Docket Administrator was replaced by **BEC Docket Enterprise®** in 2004 providing an enterprise **SQL based solution**. A complete suite of BEC Legal software solutions continued to evolve with the subsequent release of **BEC MatterLink®** and **BEC Assemble-It®**.

Docket Enterprise provides an **enterprise solution** for both litigation and transactional work groups, which includes **court rules, custom calendar/task templates, automatic workflow and reminders, recurring dates, integration with Microsoft Meeting Organizer, auditing** and an **optional matter management module** (MatterLink®). Hot fixes are performed every two weeks, with minor software enhancements every 6 months, and major release every two years.

BEC Docket Enterprise/Schedule Express was designed specifically for the Microsoft Exchange platform, providing a firm wide enterprise solution addressing the needs of both transactional and litigation practice groups. The product is a member of the BEC CoreRelate® Suite, a modular solution allowing a firm/practice group to implement the appropriate module to address their practice management needs.

According to the company, BEC Legal Systems has extensive experience working with law firms. They currently work with over 300 law firms and their experience includes legal calendaring, docketing, case management, word processing, document assembly and document management.

“Docket Enterprise is a one of a kind calendar solution capable of managing both personal and client/matter activities.” - Mike Brookbank, Vice President.

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“MatterLink provides a unique legal platform delivering matter centric information directly to Microsoft Word and Outlook while integrating with leading Billing and Document Management systems.” - Laurie Danford, Director of Product Development.

## COMPULAW VISION

CompuLaw was established in 1978 under the ownership of David and Lois Kalmick. In 1986, the company expanded from a regional to a national presence with its flagship product, CompuLaw Vision. In 2011, CompuLaw was acquired by Aderant, a global company providing comprehensive business management software for law and other professional services firms.

Originally, CompuLaw offered time and billing software to small law firms and the product ran on the Apple II computer. With the development of CompuLaw Vision, the company focused on rules-based calendaring software and quickly garnered the reputation as the industry leader. Today Aderant offers a feature-rich solution including robust MS Exchange synchronization and an advanced browser-based front-end interface. The product has been in constant evolution driven by client needs and by technology changes.

Aderant offers the following products and features:

- **CompuLaw Vision** - a comprehensive calendaring and matter management system with an intuitive user interface, multiple workflow tools and a robust rules database.
- **CompuLaw MyView** - an intuitive browser-based application for attorneys and front-office staff to view their deadlines and more.
- **CompuLaw DocketMonitor** - automatically track court appearances and notifications to further protect against missed deadlines.
- **CompuLaw Electronic Filing** - automated downloading of federal court receipts and documents.
- **CompuLaw Rules** - comprehensive and accurate court and agency rules integrated into CompuLaw Vision and written by licensed attorneys employed by Aderant.
- **CompuLaw Exchange Sync** - transfers dates and tasks from CompuLaw Vision directly into users' Microsoft Exchange accounts. Users can personalize and filter their calendar settings.
- **CompuLaw DMS Integrations** - integrates with leading Document Management Systems (DMS) to provide easy access to needed documents.
- **Deadlines.com** - web-based solution that protects small law firms and solo practitioners from the leading case of malpractice claims. Uses CompuLaw's date calculation engine and extensive court rules library.

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According to the company, CompuLaw Vision has the largest and most accurate electronic rules library available, a feature-rich back-end application, simple rules and event updating process, customizable and reliable MS Exchange synchronization, ability for users to create their own user rule sets, multiple integrations with PACER, IL Courts, OpenText, iManage, NetDocuments, and a built-in report writer.

CompuLaw Vision is updated about 2 to 3 times per year. The rules are updated as they are amended by the courts.

According to Alex Manners, Director of CompuLaw, Aderant CompuLaw differentiates itself from the competitors by focusing on what matters most to their clients - not missing important deadlines. They spend a large amount of time and resources focused on that goal. Their rules attorneys are recognized as the most experienced and knowledgeable in the industry and this is reflected in their product as well as in the high satisfaction scores for their rules support. They are very involved with the courts and rules-setting bodies and are asked by courts to review their proposed rule amendments prior to publication.

The long tenure of CompuLaw's staff, which includes 20 attorneys and research specialists, are one of the keys to the quality of their solutions. The CompuLaw team has a combined 300+ years of legal experience. They only hire experienced attorneys who have practiced law for many years, and the team includes attorneys with a broad range of practice experience.

"Law firms look to us to be the authority on rules and calendaring issues," said Manners. "Aderant's emphasis on thorough and accurate rules is what differentiates us from our competitors."

## COURTALERT®

CourtAlert was established in 1999. Izzy Schiller, the current owner and president of CourtAlert, was the original founder.

CourtAlert started with a simple, yet revolutionary idea. It pushed email alerts to attorneys concerning the status of their cases using data from the Courts. In New York, CourtAlert invented push notifications with detailed alerts related to case filings and appearances. The information was historically available only in the local legal newspapers. According to Yaniv Schiller, the company's Chief Operating Officer, through their relationship with the courts and other industry experts, CourtAlert has continued to develop many products that allow them to remain the market leader in case monitoring.

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The company released CourtAlert in 2005. It was only after the advent of e-filing that their clients reached out to them to develop a solution that could handle the increasing demands of docketing support. This led them to develop the first version of the docketing product to their New York and East Coast clients. By 2010, CourtAlert began offering automated rules and support for West Coast law firms.

Over the years, the product evolved with many features developed for law firms and legal departments. The product continues to expand with client-driven suggestions and changes to the legal and technology environment. It is designed to support centralized and decentralized docketing teams and offers quick and **accurate rules calculations, Outlook integration, email and print reporting, knowledge management inquiry** and many more features. According to the company, it also offers best-in class enterprise integration with Document Management Systems, Microsoft Exchange, Ethical Wall Builders, Accounting and Human Resource Systems.

CourtAlert offers major upgrades annually with new features and other updates. The upgrade process was recently improved to make it even easier for their clients.

The company differentiates itself with the level of support it provides to their clients. Clients often compliment the company for its support. "Our clients and support always come first," said Yaniv.

CourtAlert works closely with the courts to keep up with the latest changes to rules and procedures, as well as availability of case information. Their team of attorneys opine on specific workflow, but most of their innovation comes from their clients.

"CourtAlert is not only an effective docketing and calendaring platform, but also a repository of knowledge with robust reporting and research capabilities," said Izzy Schiller. "CourtAlert is a client driven approach to development and support is the key to our growth and success."

## EDOCKETS™

American LegalNet (ALN) was founded in 1996 by Erez Bustan, the company's current President & CEO. Bustan, an investor and entrepreneur, started the company as American Runner servicing Law Firms.

One of the original products ALN offered was **Forms WorkFlow** in 1999 (a/k/a US Court Forms). From 1996-2003, ALN provided a primary law research service and what they found from the data, as well as interactions with their clients, was a need for a better way to manage forms. Twenty years ago, forms were not electronically fillable, they were not current on court websites, there were inconsistent versions of forms, and the workflow associated with forms was extremely inefficient. The legal community was

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looking for an easy to use, up to date, consistent version forms product for the entire country that was both easy to use and easy to find. This was the birth of Forms WorkFlow providing 100,000 up-to-date forms with consistent versions that were available in PDF and MS Word formats for all 50 states as well as federal.

In 2009, ALN launched **eDockets Critical Dates**, a rules-based docketing platform that has become the flagship product for the company. The objective was to create the most technologically advanced, powerful docketing system that would provide attorneys an easy way to get data from the courts. According to the company, it provides the only national court rules calendaring platform that integrates with a national court and agency forms database and court data feeds in the NY, IL, and Delaware Chancery jurisdictions.

ALN's objective is to connect the attorney to the courthouse. Its vision is to be a leader in litigation workflow solutions and develop products to address the key litigation lifecycle components while integrating with one another. Within the litigation lifecycle there are key components related to the courts: daily pleading notifications, court rules and calendaring of critical dates, official forms to file with the court or agency, filing of documents electronically or manually, and electronic case filing (ECF) receipts.

ALN's current products and features include:

- **eDockets Critical Dates** - national court rules based calendaring platform with automatic scheduled reports, an attorney database for court admissions, official court forms integration, document management systems integration, automated court feeds, an advanced search feature that gives firms the capability to research and retrieve court documents, and an attorney case change utility.
- **Forms WorkFlow** - national court and agency forms database fillable in PDF and MS Word.
- **eFiling Portal** - eFiling engine for Southern California.
- **AutoDocket Module** - assisted calendaring from Federal ECF receipts with a PACER downloader.
- **Docket Direct** - court data feeds from key jurisdictions including NY Supreme & Federal Courts, IL State and Federal Courts, and Delaware Chancery Court.
- **Docket Alerts** - case monitoring and docket-verification service that delivers the reliable alerts to the legal community.
- **Smart Dockets** - a free, rules-based, deadline calculator available on the Web and a mobile app.

ALN's products develop and evolve with recommendations from their clients, including from their user group. They release updates approximately four times per year.

According to the company, it differentiates itself from the competition by listening closely to their clients, creating a business partnership with their clients, building upon

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the latest technologies available, and providing an exceptional customer service experience. Their support response time averages two hours or less.

ALN's leadership has a cumulative 175 years of experience working in the legal industry. From legal research to docket/calendaring to filing, "ALN understands how to effectively and efficiently provide the legal industry with state-of-the-art products."

"A fundamental component in reducing the risk of legal malpractice suits is an empowered, trained docketing team. Part of empowering a docketing team is providing them with adequate tools to perform their functions. Implementing a robust, rules-based docketing software platform is an imperative," said Erez Bustan. "Law firms today are more than ever exposed to risk. In our vision to become the #1 in litigation workflow solutions, ALN created eDockets – the next generation platform that increases efficiency, reduces risk exposure and dramatically lowers costs."

## JURALAW

Recognizing the need to assemble the schedule of the courts which sat six-days a week, commercial reporter Edwin Bean set up an office at 45 Clark Street in Chicago in 1854. Before the opening of the November 1854 Term of the Circuit Court, Bean published the first issue, a single 8 x 12-inch sheet titled *Daily Report of Suits, Judgments and Chattel Mortgages, etc.* on October 27<sup>th</sup>, 1854. It was the first daily court newspaper to be published in America and it was the beginning of what would become the Law Bulletin Publishing Company.

At the end of 1879, Henry James Macfarland, Sr., a successful businessman and president of M.D. Wells & Company and a leather and shoe wholesaler, bought the Law Bulletin Publishing Company. This was the beginning of over 137 years of unbroken Macfarland family private ownership and leadership that remains in place today.\*

The Company's first product was the **Chicago Daily Law Bulletin** for the legal community. It was a central publication for court calls and public notices. In 1974, Law Bulletin developed the Case Watch System, the technology to support the Law Clerk business. The System was the foundation for what would eventually become Docket Management 2000 (DM2000). Introduced in 1984, DM2000 was the first product of its kind in the United States. Within three years of its release, there were more than 200 subscribing firms. By 2000, the number of subscribers included 96 of Chicago's top 100 firms.\*

The product was developed by docketing professionals for docketing professionals. In March 2012 at the ABA Tech Show in Chicago, Law Bulletin introduced the successor to DM2000, JuraLaw, the first completely web-based case, calendar and docket management product. In 2013, access to a document management system, Net

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Documents, was integrated into JuraLaw. In 2014, New York court data became available in JuraLaw. In 2015, JuraLaw was the first Law Bulletin product migrated to the Amazon Web Services Cloud. In 2016, Law Bulletin introduced JuraLawyer, a JuraLaw mobile app that makes it easy for lawyers to view their case information and communicate outcomes and future dates via JuraLaw to docket professionals.

The features that comprise JuraLaw include the following:

- **National Product**—NY & IL Court Data & Nationwide Rules - court rules from across the nation as well as state and federal data directly from the Illinois and New York courts.
- **Comprehensive Illinois Court Call Information Available** - court docket information, including future court dates, historical data (orders, motions, pleadings, continuances, and summons) and more can be automatically loaded.
- **Real-Time Rules™** - automatic rule updates make the most current rules available to the end user in real time without user intervention.
- **Completely Web-Based Solution & Office 365 Compatible** - can be accessed 24/7, does not require the installation of a database (i.e. MS SQL server), benefits from new updates, and features and functions without the time-consuming process of new software installation.
- **Intuitive Interface** - court events can be automatically populated with court calls, court dockets and court rules to further increase efficiency and reduce human error. The type-ahead feature increases efficiency, accuracy and consistency of input.
- **Scheduled Reports** - over 100 reports available, including but not limited to caseload reports, daily and weekly calendars, conflict of interest reports, case lists by office and more. Reports can be customized and scheduled to be automatically distributed via email each day. This feature is especially important when there are unexpected docketing personnel absences.
- **Flexible Calendaring Options** - attorneys can populate email reminders and MS Outlook calendars so that they can have their personal court call information easily accessible on their desktops and mobile devices.
- **Integration with NetDocuments** - associate documents with cases, dockets and diary events via links without ever leaving JuraLaw, saving users time and simplifying the technology used to get work done.
- **JuraLawyer Mobile Application** - attorneys are able to view their list of cases and upcoming events, with all the details on the JuraLawyer mobile application and communicate with JuraLaw directly.

Since it launched JuraLaw in 2012, the company had 15 releases. They average 3-4 releases per year.

The company has decades of experience integrating state and federal court data into docketing products. JuraLaw is the only completely Web-based docket product on the

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market. Most, if not all, of JuraLaw's competitors' products require some type of PC software or database installation; JuraLaw does not. All the database maintenance and upgrades required by other products are not required for JuraLaw. JuraLaw upgrades are immediately available to the firm via accessing the product over the web browser.

According to the company, most frequent releases of new product features and functionality are requested by customers. It is much easier to use and therefore requires less training than competitors' products. JuraLaw's customer service and support surpasses the competition in response time and docketing experience and knowledge.

Unlimited training is included. In addition, local account representatives are located in the CA, IL and NY regions. LBPC has been providing Illinois court dates and dockets much longer than any other vendor and continues to offer the most county coverage, accuracy and completeness. The Illinois coverage includes court data from the Circuit Courts of Cook, DuPage, Kane, Lake, McHenry, Madison, Will and Winnebago Counties, the Illinois Appellate Court, the Illinois Workers' Compensation Commission as well as the U.S. District Court of the Northern District of Illinois, Eastern Division, and the U.S. Bankruptcy Court of the Northern District of Illinois, Eastern Division. The product also offers a case monitoring service for many New York Courts.

JuraLawyer is the first docketing mobile app. With the app, attorneys are now able to view only the cases and events that s/he is assigned to in JuraLaw. With JuraLawyer, they also have the ability to send notes about the outcome of their events directly to the JuraLaw case, calendar and docket management system where docket managers/professionals can manage and monitor the attorney updates.

The company has worked with and in the legal industry for over 160 years. They are supported by experienced professionals. According to Rosemary Milew, Vice President and General Manager of JuraLaw, "Our court call manager has been at Law Bulletin for over 35 years. Our senior product analyst has worked at Law Bulletin for over 30 years. Our court call specialist and two of our sales team members have each worked at Law Bulletin for over 20 years. Our JuraLaw team lead/senior architect, our Quality Assurance Manager and our Customer Support Manager have each worked at Law Bulletin for over 12 years."

\* Sources: Macauley, Irene, [This I'll Defend: Law Bulletin Macfarlands, 1718-1994](#), Law Bulletin Publishing Company (1994). Macauley, Irene, [The Law Bulletin Publishing Company, 1854-2004](#), Law Bulletin Publishing Company (2004).

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## INTELLECTUAL PROPERTY SOFTWARE

### ALT LEGAL

ALT Legal was formed in 2013. Nehal Madhani, the company's current CEO, was the original founder.

Although the company began as a platform to help attorneys better work with clients by combining a marketplace with productivity software, they quickly turned their focus on providing productivity software for intellectual property professionals. The company began offering its automated IP docketing software in 2014.

ALT Legal started with IP document assembly tools that would collect IP information from clients or employees and instantly generate draft filings. Shortly thereafter, they saw an opportunity to use IP office data to automatically identify and docket filings and key deadlines without manual input. According to Nehal Madhani, Am Law firms, boutiques, and public companies rely on their software to handle hundreds of thousands of filings and deadlines daily.

Their product offers the following features:

- **Automatic docketing:** The software connects to IP office databases to automatically identify new filings, update statuses, and calculate filing deadlines. The docketing tools create client-ready reports with one click and send daily email alerts of key filing changes and upcoming deadlines. It integrates with Microsoft Office 365 and Clio Practice Management to make deadline management seamless.
- **IP intake and assembly:** In addition to automated docketing, the tools collect IP information through a secure online site and instantly create new trademark applications through the USPTO integration.

ALT Legal regularly releases improvements and upgrades their software to provide more value for their customers. As a customer-centric company, they engage with their customers to ensure that the docketing software is tailored to their needs. In addition to their regular updates, they also release new versions that offer more workflow automation and integration with additional global IP office databases.

According to Madhani, unlike their competitors, they focus on integrating with IP offices to automate repetitive and administrative tasks. Their automated docketing detects new filings, updates existing filings, and identifies filing deadlines without manual data entry. In addition, they provide unique tools that collect IP information and instantly create new trademark applications. They do not charge clients extra for data

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migration/setup, support, or training. The company even offers live chat support to customers and monthly subscription plans.

Their team has a unique combination of experience working in the legal industry. Before starting Alt Legal, their CEO, Nehal Madhani, practiced law at Kirkland & Ellis for several years. In addition, the CTO, Charles Amoako, previously worked at Kirkland & Ellis as an IP paralegal. They also have other team members with JD's and experience in intellectual property law.

"We've built a different type of an IP docketing company," said Madhani. "One that automates repetitive tasks using IP office data, streamlines complicated tasks with simple design, and places customers first with unlimited support."

## ANAQUA

Anaqua was formed in 2004 as a commercial spinoff of an in-house system jointly developed by Ford Global Technologies and British American Tobacco. It began to offer its docketing system in the same year.

Anaqua provides Intellectual Property Asset Management software and services for mid to large size corporations and law firms. In 2015, it began a string of high profile strategic acquisitions including ideaPoint (September 2015), focused on the innovation management and business development and licensing pipeline; AcclaimIP (March 2016), including their Free Patents Online product to significantly enhance their patent analytics and search capabilities; and, Patent River (June 2016), adding significant citation and prosecution data to the AcclaimIP analytics products.

Anaqua offers the following features:

- **IP Search & Analytics**
- **Homepage, Calendar & Dashboards**
- **Portfolio Classification & Management**
- **Invention & Awards Management**
- **Patent & Trademark Management**
- **Docketing Management**
- **Global & Workflow Law Engine**
- **Automatic Document Processing**
- **Design & Product Management**
- **Patent Family Visualizations**
- **IP Reviews**
- **Annuities & Renewals Management**
- **General Matters Management**
- **Agreements & Conflicts Management**

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- **Royalty Management**
- **Invoicing & Cost Tracking**
- **Patent Drafting Software & Services**
- **Document & Email Management**
- **Consulting Services**
- **Patent Drafting Software & Services**
- **Filing Services Data Validation**

There are numerous docketing software solutions available today, and they're all good. According to the company, Anaqua is the only solution flexible enough to start with world-class docketing and expand to with the growth and sophistication of the client to include portfolio management capabilities, attorney enablement, and big IP data analytics that provide insight into your portfolio and the market at large.

Having worked with hundreds of executives, partners, attorneys, IP professionals, and administrators, Anaqua continuously iterates its proven implementation methodology to fit the growing needs of its client base. The company provides bi-annual major releases with a three year rolling priority roadmap.

Anaqua was named a Market Leader in Hyperion Global Partners' 2016 MarketView™ Report for IP Management Systems, including special recognition for innovation lifecycle management, decision support analytics and uniquely integrated patent drafting.

ANAQUA is the product of a joint software development program sponsored by two large corporate IP teams for the specific purpose of managing an IP portfolio more efficiently and effectively. According to the company, "Anaqua continues to innovate and enhance its core products with IP decision support analytics and additional value-add packages and services. With hundreds of clients and tens of thousands of users, Anaqua specs, develops, and produces products through the mind and skills of experienced corporate and law firm IP attorneys, executives, and professionals."

## PATRICIA®

For over 20 years, Patrix has been developing software for the IP professional. In 1996 Patrix "Intellectual Property Helpware" was formed. The original owner was Carina Roth-Schramm. Today, Patrix is a provider of enterprise wide case management software that adapts to unique internal processes. The headquarters is based in Göteborg, Sweden and they also have offices in Amsterdam, London, Munich, Paris, Pretoria and Washington, D.C.

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Patrix developed Patricia® by carefully listening to their clients' ideas and incorporating their dynamic needs into the software. The end result is software that met their clients' needs today.

By helping their customers retain their clients and improve their operations, they further understand those evolving requirements and improve their software. Their business culture is entrepreneurial, open, and based on a foundation of common sense. As the industry evolves, so does their product, which is why they have annual upgrades to consistently stay current with the demands of the IP industry.

Some of the features included with Patricia are:

- Downloadable App for use on the go.
- Data Comparison for OPS, a real-time tool that allows the Patricia® user to input a few key elements and access over 92 PTO offices worldwide and instantly see data comparison results.
- Document Docketing allows the Patricia® user to use their USPTO login credentials and set-up a schedule.
- Dashboard feature for visual analysis.
- Direct Access to Case Data with a flexible workflow based tool.
- Effective solutions for securely sharing information and assigning tasks to staff.
- Fast, efficient, and accurate invoicing.
- Document creation, storing, tracking and viewing.
- Direct data exchanges to and from Patricia and other systems.
- Flexible report tool.
- Cost estimation; reporting and predicting cost for new or existing cases and case families.
- Extensive automatic country & law file, including updates.
- E-filing, E-billing, and much more.

At Patrix, they view their staff as their most valuable asset. They are very proud to provide their clients with the highest level of knowledge and professionalism in their market space. Coupling their extensive IP background with a highly trained and professional IT staff has fueled their growth and provided unmatched results to their clients. Their IP and IT personnel collaborate with their clients to create a dynamic consulting group. This ensures the best decisions are taken during the implementation process.

The net result: satisfied clients. According to the company, when you decide to purchase Patricia, you are buying much more than software; you are buying knowledge, professionalism, teamwork, and a commitment to their success.

Patrix IP Services was formed in 2004, following requests from Patricia clients who wanted a reliable partner that could easily interact with their existing software. Patrix IP

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Services remains a subsidiary of Patrix with all the benefits of a professional IT supplier close at hand. They provide digital and customized solutions for all global annuity and renewal payments.

Patrix IP Services include:

- **Direct Payments to Patent Offices**  
They make direct payments to those patent authorities which allow it. This saves unnecessary third party agent fees and is a safe and easy way to make sure that fees are paid. Where local agents are required, they utilize their global network of Patricia clients wherever possible. They are constantly evaluating agents.
- **Digital Communication**  
They run a paperless office as far as possible. This includes digital instructions to agents, digital invoices from agents, digital invoices to clients, and digital import of the cost per case.
- **Transparency**  
Their fees are all-inclusive, and based on three factors: non-negotiable official fees, agent fees and their service fee – they charge no extra for maintaining their data in their database.
- **Additional Benefits**  
Quality checks, invoicing in one single currency, budget lists, cost estimates, and document handling. They can also assist with assignments, change of name, change of address, providing information on proof of use requirements, and reclassification of trademarks.

They recently launched a YouTube channel for clients to use as a training reference on an unlimited basis. You can view it at <https://www.youtube.com/channel/UCJVXcCiCsGAyE1DZGPixA8g>.

According to Felicia Kelly, Marketing & Sales Coordinator, "Our IP support personnel are experts in the field. Having the experience of working in large and small IP offices they can easily understand the client's current situation and apply their learned experiences to provide a smooth and seamless integration of the software into your organization."

WEBTMS®

The company started in 1998. The original owners were Louis Stevenson, Brid Madeley, and Rita O'Kyere. It rebranded its product from IPPO in 2013 to WebTMS. It is still known as IPPO in the industry.

The company originally offered Client/Server Trademark Management Software to law firms and corporations. In the same year the company started, 1998, it made its first

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software offering. The biggest leap was being the first to offer truly web based Trademark Management Software and hosted systems.

Regarding functionality of the system, they constantly update the system based on actual end user feedback. The updates are usually performed quarterly.

Some of their features include:

- **Cloud or client hosted solutions**
- **Trademark Management and Record Keeping** - Trademark records include integrated images for trademark logos, multiple class listings, a full specification of goods, intra-office memos and personal notes. It also performs critical date calculations, extensive docketing for case tracking and personal reminders.
- **Other Party Trademarks Module** - A separate database to store the details of other party trademark applications and registrations, for reference, validation and cross indexing.
- **Companies & Contacts** - A database of names, addresses, contact information and company profiles for all entities related to trademark records. This module is capable of multiple address handling, classification systems and agent management.
- **Disputes** - Offers the ability to document and store information about oppositions, infringements, unfair competition and policing activities. This module also has document attachment capability for record storage and immediate access to pictures of infringing products, packaging and related files.
- **Contracts** - Storage of terms of use, agreements, consents, licenses, registered user agreements, prior rights declarations and settlement agreements. The contracts module has document attachment capability with direct links for quick viewing of the full text of agreement and other documents. You can store and use Microsoft Word® merge templates and email templates or for your frequently used correspondence.
- **Assignments** - Stores records of assignments, transfers of title, mergers and name changes. It has Microsoft Word® merge capability which allows use of Microsoft Word® templates for rapid creation of assignment documents.
- **Domain Names** - Stores full text records of internet domain name registrations. This data module is cross indexed with trademark records and contains links to Registrar's sites.
- **Registered Designs** - Full text records with integrated images for national, RCD and International (Hague) registered designs and renewal due date calculation engine. This module allows the creation of reports and uses email templates, and Microsoft Word® merge features with and the ability to attach documents.
- **Cost Tracking** - A ledger system to record all invoices and other expenses relating to any case in the system.

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- **Case Management Module** - This holds a summary of information for all types of IP related and other general files.
- **Trademark Profile Module** - A master list of trademark templates used to create, organize and validate logos and design.

According to Nick March, IP Business Development Manager, "the company is highly focused on one area, the development and support of the software which creates a very supportive and responsive team. User friendliness and client support are paramount to our success." A number of their staff have previous experience working as paralegals, trademark administrators, formalities managers, and trademark assistants at global law firms, corporations and boutique IP firms.

*Chris Gierymski is a demonstrated leader with over 25 years of experience supporting attorneys and law firms with a focus on risk management and leveraging technology to meet their docketing needs and goals. He served as founding member and past president of the National Docketing Association (NDA). Chris published several articles and white papers related to docketing topics and was a speaker at Aderant Momentum, NALS...the association for legal professionals, and the NDA.*