

# Manage Intellectual Property

- [How to access it](#)
- [Add/Edit an IP Case](#)
- [Add configurations on the fly](#)
- [Relate Documents](#)
- [Relate Tasks](#)
- [Add Reminders](#)
- [Relate Cases](#)
- [Manage Filters on the grid](#)
- [Search for an existing IP Case](#)
- [Export to Excel](#)

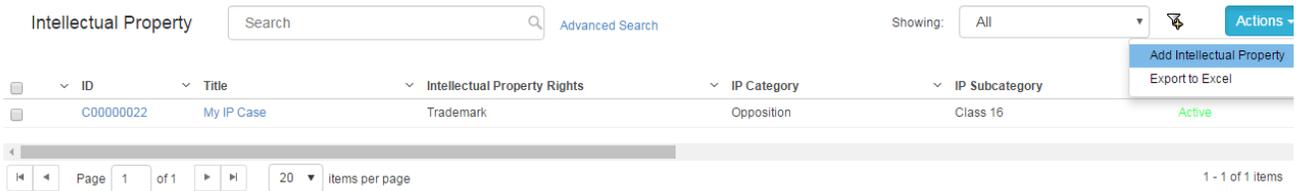
## How to access it

From the main menu "Case ->Intellectual Property".

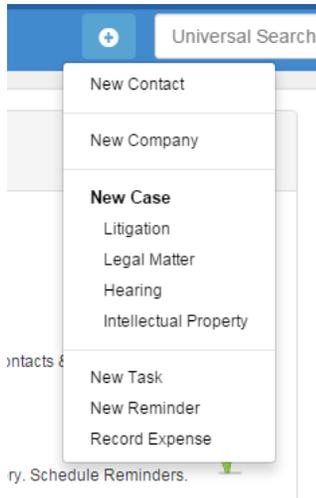
## Add/Edit an IP Case

Adding an IP Case is done via 2 ways:

1- From the Intellectual Property Cases grid, go to the Actions button and Choose Add Intellectual Property.



2- From the Quick Add, choose Intellectual Property.



The Add form has many important fields. The mandatory fields are the ones in red only:

**Add Intellectual Property**

Intellectual Property Rights (IPR)\*  + IP Category\*  +

IP Subcategory  + Registration Status\*

IP Title\*

IP Description

Received by team\*  Client Name\*  Start Typing

Assign To  Registration Date

Registration Ref

Send notification by email

- Intellectual Property Rights
- IP Category
- IP Subcategory
- Registration Status: Active or Inactive
- IP Title
- IP Description
- Received by Team: Medium to Large teams may wish to divide the Legal teams based on their specialty. Teams are managed through the Admin & Setup-> Received by Teams.
- Assignee: The App4Legal user who is assigned on this Case who compulsorily has to belong to the above chosen Received by Team. This is managed through the Admin & Setup-> Users & Permissions section-> Manage Users. Within the User form, go to Personal information and choose the **Member of** field to be the appropriate Received by Team so that the name of the user appears in the drop-down list.
- Client: A Client could be either a Company or a Contact.
- Registration Ref: It is the internal numbering of a Case that is different than that of the Court. This is the firm's reference of file number of the Case.
- Registration Date

After adding a Intellectual Property Case, it will be designated by a **Case ID** that is automatically generated by the system. Once the user clicks on the Case ID from the grid, the Intellectual Property Case form opens where the user can be view/edit the IP Case data. Also, through the action wheel, you can choose View/Edit.

In the Edit form, the user has the possibility to **Manage Renewals**.

C292 > Audi

My IP Case

**Add Country Renewal** ✕

Country\*

Comments

Registration Date

Renewal Date\*

Handled by

▼ Countries Renewal

In the Renewal form, the user can add the Country where the IP is to be renewed, Comments, Registration Date, Renewal Date and who handles this Renewal. Once a newer Renewal date is added for the same country, the obsolete one for the same Country disappears from the table.

[Back to Top](#)

## □ Add configurations on the fly

All drop-down lists in App4Legal are configurable through the Admin & Setup. Luckily, some configurations can be configured on the fly. For instance, in the IP Case form, a user is adding data and wants to have a new Intellectual Property Rights (IPR) swiftly. There is a blue plus sign that can assist the user to add a new value to the IPR new value drop-down list on the fly.

Intellectual Property Rights (IPR)\* Select IPR + IP Category\* Select Category +

IP Subcategory Select Subcategory + Registration Status\* Select Status

IP Title\* [Text Field]

IP Description [Text Area]

Received by team\* [Dropdown] Client Name\* Company/ Coi Start Typing

Assign To Choose Users Registration Date YYYY-MM-DD

Registration Ref [Text Field]

Send notification by email

Save Cancel

Values that can be similarly added on the fly in an IP Case form are:

- Intellectual Property Rights (IPR)
- IP Category
- IP Subcategory

[Back to Top](#)

## □ Relate Documents

The user can relate Documents to an IP Case such as IP Rights, Registration Documents, Renewal, etc.. Documents can be arranged in folders. Privacy can also be applied on a folder and the privileged user can control with whom to share the file.

Files and Folders can be Categorized by Type, Status and optional Comments. Document Type and Statuses are managed via the Admin & Setup.

Documents can be related by either physically applying Documents can be added by 2 ways. Either by the drag-and-drop procedure

C00000022

My IP Case

»Archived Hard Copies

Attachments URL's

C00000022

Search

Save

Cancel

Drop file here



ID.pdf

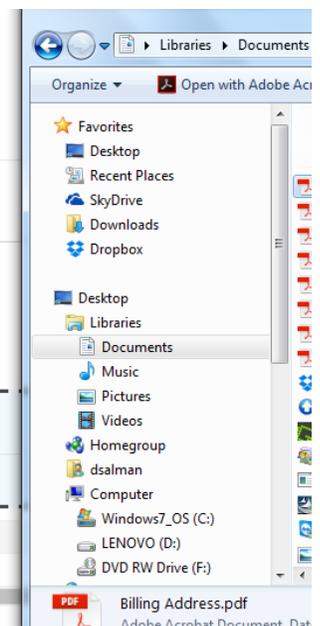
Move

78.09 (KB)

Billing\_Address.pdf

77.87 (KB)

Page 1 of 1 20 items per page



or by uploading the files.

Case **Related Documents** Related Tasks Related Cases

»Archived Hard Copies

Attachments **URL's**

C00000022

Search  Save Cancel Actions ▾

Actions	Name	Type	Status	Comments	Size	Location	Modified By	Modified On
	ID.pdf				78.09 (KB)		Dima Salman	2016-04-18 09:04:13

Page 1 of 1 20 items per page 1 - 1 of 1 items

Note that if a File/Folder is added/uploaded with spaces in its name, the system will automatically replace the spaces with underscore for technical reasons. After the File/Folder is added, they can be managed using the action wheel on the grid.

Actions	Name	Type	Status	Comments	Size	Location	Modified By	Modified On
	MOMs						Dima Salman	2016-04-18 09:04:38
	...						Dima Salman	2016-04-18 09:04:47
	...						Dima Salman	2016-04-18 09:04:37
	...				78.09 (KB)		Dima Salman	2016-04-18 09:04:13
	...				77.87 (KB)		Dima Salman	2016-04-18 09:04:00

Page 1 of 1 20 items per page 1 - 5 of 5 items

File/Folders can be

- Renamed
- Deleted
- Shared With: Folder can be set as Private that means only the creator can see it and with chosen App4Legal Users if needed. Folders that are locked are designated with a lock sign. Users who are set to Override Privacy can see all Private objects on App4Legal.
- Copy Path: Folder/Files paths can be copied in order to be shared with colleagues for fast access.

As an alternative to manually adding Files/Folders, and if there's an already implemented Document Management System, you may map a URL to the IP Case Documents to any Network Drive or Web link.

**Add New URL**

Document Type\*

Document Status\*

Document Name

URL Type\*

URL\*

Comments

Save Cancel

[Back to Top](#)

**Relate Tasks**

From the top of the IP edit form, the user can choose Add a Task hyperlink to automatically add a Task related to this IP Case. The IP Case is directly inserted in the Related Case field in the Task form.

C292

My IP Case

Case | Related Documents | Related Tasks | Related Cases

Add a Task | Add Reminder

Send notification by email

IP Dashboard

Intellectual Property Rights (IPR)\* Copyright

IP Category\* Cat 3

Related Tasks can then be tracked under the Related Tasks tab in an IP Case.

[Back to Top](#)

**Add Reminders**

From the top of the IP edit form, the user can choose Add a Reminder hyperlink to automatically add a Reminder related to this IP Case. The IP Case is directly inserted in the Related Case field in the Reminder form.

C292

My IP Case

Case | Related Documents | Related Tasks | Related Cases

Add a Task | Add Reminder

Send notification by email

IP Dashboard

Intellectual Property Rights (IPR)\* Copyright

IP Category\* Cat 3

[Back to Top](#)

**Relate Cases**

In the Related Cases within an IP Case, relation can be created between an IP Case and another Legal Matter or Litigation Case. In the Relate to Case field you can look up for the Case to be added, choose it, choose Add Relation and in the Comment field you can double click and add the business need behind the relation.

C00000022

My IP Case

[> At](#)

Case | Related Documents | Related Tasks | **Related Cases**

Relate to Case Case Subject  Add Relation

Save Cancel

Case ID	Comment	Companies	Referred By	Assign To	Case Type	Case Prio...	Case Status	Actions
C00000023	My business need			Dima Salman	Other	critical	جاري العمل-2	

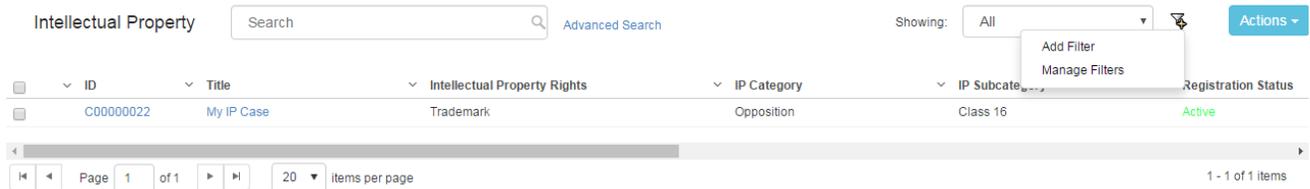
Page 1 of 1 5 items per page

1 - 1 of 1 items

[Back to Top](#)

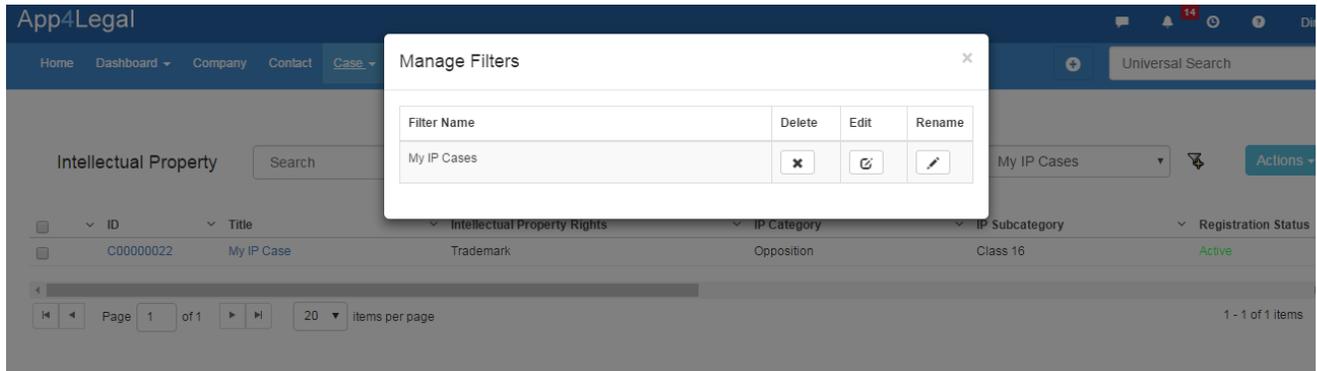
**Manage Filters on the grid**

App4Legal offers the ability to save predefined filters. For instance, a user uses the Advanced Search to apply a certain filter on IP Cases in App4Legal database. The user wishes to apply this filter every time the grid was accessed. Managing filters is easy and is done via the IP Cases grid.



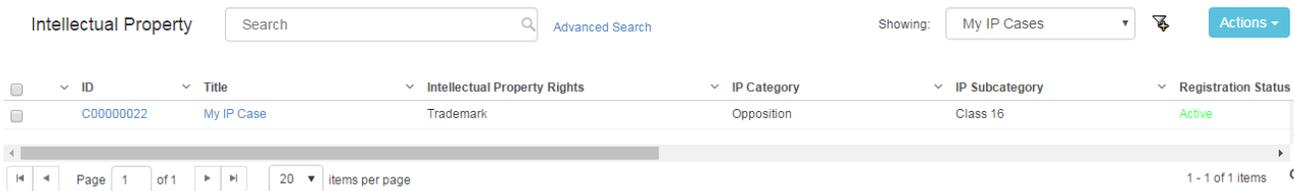
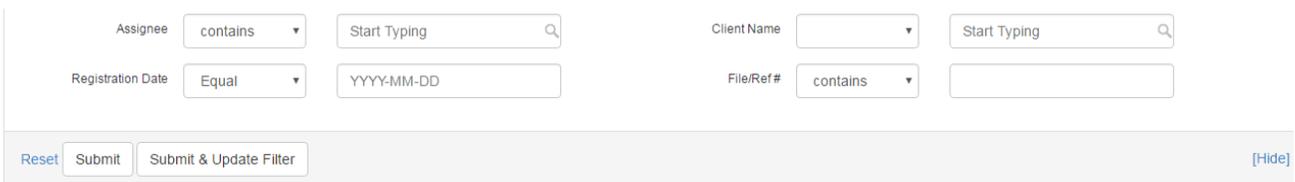
Once any filter in the Advanced Search is applied, all what the user has to do is Add Filter. Then later on, whenever the Filter is chosen from the list of Filters, the Advanced Search filters automatically apply and the grid is filtered automatically.

If there is a need to edit or delete any Filter, click on Manage Filters.



If a Filter is chosen and you wish to update the filters applied in the Advanced Search, it is possible. Go to the Advanced Search, apply your new filters and choose, Submit and Update Filter.

If you do not wish to impact the filter, you can just click on the regular Submit. It will not take any action over the Filters.



The filters applied above are local ones unlike a **Global Filter**. A Global filter functions the same way as a regular Filter except that one it's configured it will appear to all App4Legal users on their grids. Only Authorized users are allowed to add a Global Filter. They are managed from the Admin & Setup-> Setup & Configuration-> Default Values->Filters Grid Admin User Groups. This is where the Administrator can add the User Group that has the authority to add a Global Filter.

[Back to Top](#)

**Delete a Case**

From the action wheel, there is an option to delete a Case. A Case if not related to any Money object such as Expense, Bill or Invoice, may be deleted from the system along with all the related metadata.

[Back to Top](#)

**Search for an existing IP Case**

There are 3 methods to search for an existing IP Case: Quick Search, Advanced Search and Universal Search:

- In **Quick Search**, from within the Cases grid, you can type any string from the Subject of the Case and hit Enter from your keyboard to generate your search results.
- Using **Advanced Search**, you can run your search on a specific field from the Case form. You'll have the possibility also to modify the operator of search for each field (i.e. equal, begins with, contains, >, <, and more). The Advanced Search menu is hidden by default; you need to click on the link Advanced Search from the Companies grid to view it.
- With **Universal Search**, you can type any string from the Subject of the Case and hit Enter from your keyboard to generate your search results. The Universal Search looks into all the App4Legal database.

[Back to Top](#)

#### **Export to Excel**

The IP Cases grid can be exported to an excel sheet at any moment via the Actions button on the grid-> Export to Excel. Also, search results can be exported to an excel sheet separately.

[Back to Top](#)