

Web TMS  
Web TMS



# WebTMS User Guide

## Part 2

Browser based trademark management software

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## Chapter 8: The Wizards

### The New Filing Wizard

#### Overview

The New Filing Wizard steps you through the process of preparing local application forms for the jurisdictions in which you practice directly before the Patent Office. The Wizard can also be used to instruct your foreign Agents for multiple country filing programs.

The Wizard prompts for all the information needed, and then automatically creates a set of records in the Trademark Records Module. Application forms or instruction letters can then be printed.

The left hand column displayed throughout the Wizard list the steps, and the top banner on screen records the Project status.

There is also a link to a page which lists a number of sites which provide online trademark searching in various jurisdictions, to allow you to make trademark searches before you proceed.

#### Before you start

Most of the information presented by the Wizard as you work through the various steps can be amended or updated on the fly. However, it makes sense to review some information before you start on a filing project.

**In the Companies module**, check the

- Name, address and corporate details of the Applicant (Owner)
- Name, address and contacts for the Client
- Name, address and contacts for each Agent to be instructed.

**For the trademark**, check to see if there is an existing trademark profile. If you find a suitable trademark profile, but need to amend it, remember that any amendments you make will be reflected against all trademark records which already use that profile.

**If the mark is a device mark**, prepare or acquire a scanned image of the device

**Review the instruction letter** in the Document Library

**For Madrid Agreement or Protocol applications**, review the base application or registration before starting the Wizard.

**Step 1**

|           |  |      |         |           |         |
|-----------|--|------|---------|-----------|---------|
| IP ONLINE |  | Back | Forward | Main Menu | Log out |
|-----------|--|------|---------|-----------|---------|

|                                      |                      |           |
|--------------------------------------|----------------------|-----------|
| Previous Step                        | <b>WIZARD STEP 1</b> | Next Step |
| PROJECT STATUS: No Project Selected! |                      |           |

|                                 |  |
|---------------------------------|--|
| <b>New Filing Wizard</b>        |  |
| Step 1                          | Create a New Project                                   |
| Step 2                          | Select Jurisdictions and Agents                        |
| Step 3                          | Select Trademark Profile and Claim Convention Priority |
| Step 4                          | Complete Trademark Profile                             |
| Step 5                          | Enter Owner and Client                                 |
| Step 6                          | Select Classes, Goods and Services                     |
| Step 7                          | Add Additional Information                             |
| Step 8                          | Create an Action Reminder                              |
| Step 9                          | Create Trademark Records                               |
| Step 10                         | Print Reports and Instruction Letters                  |
| <a href="#">Online Searches</a> |  |

|   |   |                      |  |
|---|---|----------------------|--|
| <b>Define a new project or continue with an incomplete one</b>  |   |                      |  |
| <input type="radio"/>   | Continue with an Incomplete Project           |                      |  |
| <input checked="" type="radio"/>                                | Enter a name or description for a new project | RAVEN device phase 1 |  |
| Select the responsible Supervisor                               |   | Louis Stevenson      |  |
| 2nd Supervisor  |   | 3rd Supervisor       |  |
| 4th Supervisor  |   | 5th Supervisor       |  |
| <b>Prepare individual application forms</b>                     |   |                      |  |
| <input type="checkbox"/>  | United Kingdom                                |                      |  |
| <input checked="" type="checkbox"/>                             | Hong Kong                                     |                      |  |
| <input checked="" type="checkbox"/>                             | CTM   |                      |  |
| <b>Prepare an application for an International Registration</b> |   |                      |  |
| <input type="checkbox"/>  | Madrid Agreement                              |                      |  |
| <input type="checkbox"/>  | Madrid Protocol                               |                      |  |
| <b>Instruct Agents in other jurisdictions</b>                   |   |                      |  |
| <input checked="" type="checkbox"/>                             | Foreign Filing Program                        |                      |  |

**Step 1 Section 1** If you wish to continue entering data into a Project, or if you wish to print reports or forms for a Project, select "Continue with an incomplete Project" and then pick the name of the Project from the drop down list.

If you are starting a new filing program, select "Enter a name or description for a new Project". Give the Project an obvious, descriptive name.

**Step 1 Section 2** Select the responsible attorneys or support personnel for the Project

**Step 1 Section 3** Select one or more individual jurisdictions, or select "Foreign Filing Program" if you wish to instruct filings in a number of countries.

To prepare local application forms (as opposed to instruction letters to Agents) select the required listed jurisdictions.

The list of available application forms shown on screen is determined by the Practice jurisdictions selected for the system User on the User Configuration screen. Different users can be presented with different lists of jurisdictions

Application forms can be added or amended through the Document Library

**Note:**

*If you wish to include jurisdictions in which you practice directly, and also other jurisdictions, be sure to select the individual jurisdictions and also "Foreign Filing Program" before proceeding to step 2.*

**Step 2**

Select the list of jurisdictions to be included in the filing program.

Previous Step    **WIZARD STEP 2**    Next Step

**PROJECT STATUS:** Select a Jurisdiction and Trademark Profile before continuing with Wizard

| Select the Jurisdictions |           |                                |               |            |             |           |         |            |
|--------------------------|-----------|--------------------------------|---------------|------------|-------------|-----------|---------|------------|
|                          | Country   | Agent                          | Agent Contact | Agent Ref. | Record Ref. | File Ref. | Status  | Sub Status |
|                          | CTM       | Silver, Gunn & Hawkins         | John Silver   |            |             |           | Pending |            |
|                          | Hong Kong | Arnberger, Kim, Buxbaum & Choy | David Buxbaum |            |             |           | Pending |            |

Add Foreign Jurisdictions

The Wizard will select and display the name of the preferred agent for each jurisdiction. Each selected agent can be changed, and other details added or amended by clicking on the Edit arrow. Jurisdictions can also be deleted from this dialog box.

**Adding foreign jurisdictions**

Click on the asterisk to the left of "Add Foreign Jurisdictions" and select the jurisdictions from the list by putting a check mark opposite each, then click on the "Save Jurisdictions" button

Select Jurisdictions - Microsoft Internet Explorer

**Select Jurisdictions**

| Select                               | Country           | CTM | Madrid Agreement | Madrid Protocol | WIPO code |
|--------------------------------------|-------------------|-----|------------------|-----------------|-----------|
| <b>CTM and any applicable Madrid</b> |                   |     |                  |                 |           |
| <input type="checkbox"/>             | Austria           | CTM | MA               | MP              | AT        |
| <input type="checkbox"/>             | Benelux           | CTM | MA               | MP              | BX        |
| <input type="checkbox"/>             | Denmark           | CTM |                  | MP              | DK        |
| <input type="checkbox"/>             | Finland           | CTM |                  | MP              | FI        |
| <input type="checkbox"/>             | France            | CTM | MA               | MP              | FR        |
| <input type="checkbox"/>             | Germany           | CTM | MA               | MP              | DE        |
| <input type="checkbox"/>             | Greece            | CTM |                  | MP              | GR        |
| <input type="checkbox"/>             | Ireland           | CTM |                  | MP              | IE        |
| <input type="checkbox"/>             | Italy             | CTM | MA               | MP              | IT        |
| <input type="checkbox"/>             | Jersey            | CTM |                  |                 |           |
| <input type="checkbox"/>             | Portugal          | CTM | MA               | MP              | PT        |
| <input type="checkbox"/>             | Spain             | CTM | MA               | MP              | ES        |
| <input type="checkbox"/>             | Sweden            | CTM |                  | MP              | SE        |
| <input type="checkbox"/>             | United Kingdom    | CTM |                  | MP              | GB        |
| <b>Madrid that are not also CTM</b>  |                   |     |                  |                 |           |
| <input type="checkbox"/>             | Albania           |     | MA               |                 | AL        |
| <input type="checkbox"/>             | Algeria           |     | MA               |                 | DZ        |
| <input type="checkbox"/>             | Antigua & Barbuda |     |                  | MP              | AG        |
| <input type="checkbox"/>             | Armenia           |     | MA               | MP              | AM        |
| <input type="checkbox"/>             | Australia         |     |                  | MP              | AU        |

### How the jurisdictions are listed

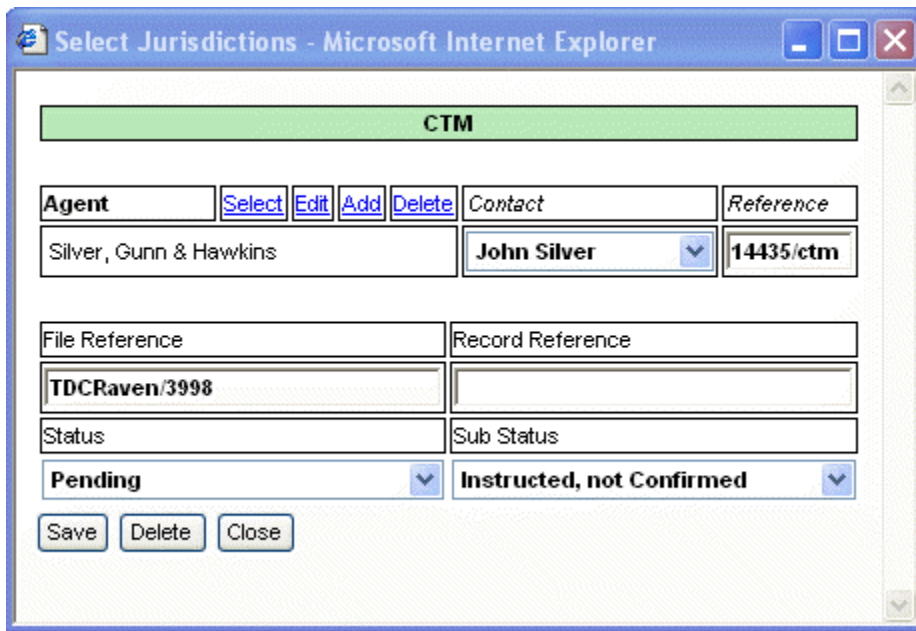
The jurisdictions are listed alphabetically within three sections:

1. CTM member countries
2. Madrid members not part of the CTM
3. Rest of the world, not part of CTM or Madrid

This arrangement draws attention to the member countries of the CTM and Madrid and helps to eliminate inadvertent duplications

### Amending Agent details

Click on the arrow to the left of the entry to be amended or completed. This will bring up a dialog box. Make the changes or additions and save, then close the dialog box.



To change Agents, click on "Select" and search for the new Agent

To view the names record for the Agent, click on "Edit"

**Step 3**

Enter or select the trademark.

|  |   |                           |                                |
|--|---|---------------------------|--------------------------------|
| Previous Step  | <b>WIZARD STEP 3</b>                            | Next Step                 |                                |
| <b>PROJECT STATUS:</b> Select a Jurisdiction and Trademark Profile before continuing with Wizard                               |   |                           |                                |
| <b>Select or add a new Trademark Profile; or select an existing Trademark application/registration to base the project on.</b> |   |                           |                                |
| <input checked="" type="radio"/>   | Add a new Trademark Profile                     | <input type="text"/>      |                                |
| <input type="radio"/>  | Select an existing Trademark Profile            |                           |                                |
| <input type="radio"/>  | Use Data from an existing Trademark application |                           |                                |
| <b>Prepare applications claiming Convention Priority: select base record</b>   |   |                           |                                |
|  | <i>Date</i>                                     | <i>Application Number</i> | <i>Country</i>                 |
| <a href="#">Select</a>   | <input type="text"/>                            | <input type="text"/>      | <input type="text" value="v"/> |

- You may enter a new trademark and create new trademark profile for it: or
- You can select and use an existing trademark profile: or
- You can select and use the data from an existing trademark record (Applicant's name and address, the trademark, and the classes and goods)
- If you have selected the Madrid Agreement or Protocol, you will be prompted for the base application or registration, and the trademark and other details will be taken from the base application or registration.

You can also enter details for a Convention Priority claim

**Step 4**

You can review, amend or add details listed in the trademark profile.

|  |                      |           |
|--|----------------------|-----------|
| Previous Step  | <b>WIZARD STEP 4</b> | Next Step |
| <b>PROJECT STATUS:</b> Minimum Project entries have been made to create Trademark records. |                      |           |

| Complete the core information for the trademark profile |                      |
|---|----------------------|
| <a href="#">Edit</a>                                    | CROW ROAD and device |
| Owner   |                      |
| Type Of Trademark                                       |                      |
| Trademark Group   |                      |
| Logo Name   |                      |
| Device Classification                                   |                      |
| Description   |                      |
| Generic Name  |                      |
| Generic Products  |                      |
| Colors Claimed  |                      |
| Translation   |                      |
| Transliteration   |                      |
| Adopted   |                      |
| Abandoned   |                      |
| Notes   |                      |

Click on the "Edit" link at the top left hand corner of the screen, to add or amend information in the Profile record.

The image file for device marks can also be uploaded to the system at this stage; the image file name is put in the field " Logo name"

Please bear in mind that if you have selected an existing trademark profile, any changes made to the profile information will affect all applications and registrations which refer to that profile.

**Step 5**

Select the name and address of the applicant and the client

|   |                      |           |
|---|----------------------|-----------|
| Previous Step   | <b>WIZARD STEP 5</b> | Next Step |
| <b>PROJECT STATUS:</b> To create Trademark records, you must select an Owner, at least one Trademark Jurisdiction and add at least one Goods entry. |                      |           |

|  |  |
|--|--|
| <b>Complete the Client and Owner details</b>                     |  |
| <b>Owner</b>   | <a href="#">Select</a> <a href="#">Edit</a> <a href="#">Add</a> <a href="#">Delete</a> |
| Ravenswood Ltd<br>1 High Street<br>Edinburgh EH1 2AA<br>Scotland |  |
| Incorporated In  | Scotland   |

|   |                     |
|---|---------------------|
| <b>Select if the Owner chosen is the same as the Client</b> | Same Owner & Client |
|---|---------------------|

| Client         | <a href="#">Select</a> <a href="#">Edit</a> <a href="#">Add</a> <a href="#">Delete</a> | Contact          | Reference |
|----------------|--|------------------|-----------|
| Ravenswood Ltd |  | William Paterson |           |

You can use the "Edit" link to amend or add information to the Companies record for the Owner or Client, but any changes you make will be reflected throughout the system in all records using these name records.

**Step 6**

Enter the International classes and goods or services to be covered by the applications

**Step 7**

A series of screens may be presented asking for additional information required to complete the application forms

|   |                                  |                                 |                                     |           |  |
|---|----------------------------------|---------------------------------|-------------------------------------|-----------|--|
| Previous Step   |                                  | <b>WIZARD STEP 7</b>            |                                     | Next Step |  |
| <b>PROJECT STATUS:</b> Minimum Project entries have been made to create Trademark records.        |                                  |                                 |                                     |           |  |
| <b>Hong Kong Registration details</b>   |                                  |                                 |                                     |           |  |
| Application for series  | <input type="text"/>             | Section 18(1)(b)                | <input type="checkbox"/>            |           |  |
| <b>Complete this section only if you wish to print the Hong Kong Application forms T2 and T2A</b> |                                  |                                 |                                     |           |  |
| Owner Code  | <input type="text"/>             | Number in Series                | <input type="text"/>                |           |  |
| Trademark if in Non Roman or Non Chinese characters   | <input type="text"/>             | Language                        | <input type="text"/>                |           |  |
| Transliteration   | <input type="text"/>             |                                 |                                     |           |  |
| Translation   | <input type="text"/>             |                                 |                                     |           |  |
| Total Number of Classes   | <b>1</b>                         | Use of Trademark                | <input checked="" type="checkbox"/> |           |  |
| Select the type of Trademarkmark  |                                  |                                 |                                     |           |  |
| <input type="radio"/> Certification   | <input type="radio"/> Collective | <input type="radio"/> Defensive |                                     |           |  |
| Select nature of Trademarkmark  |                                  |                                 |                                     |           |  |
| Shape   | <input type="checkbox"/>         | Colour                          | <input type="checkbox"/>            |           |  |
| Sound   | <input type="checkbox"/>         | Smell                           | <input type="checkbox"/>            |           |  |
| Limitations   | <input type="text"/>             |                                 |                                     |           |  |

**Step 8**

Enter one or more actions or reminders

**Step 9**

|   |                      |                   |
|---|----------------------|-------------------|
| Previous Step   | <b>WIZARD STEP 9</b> | Next Step         |
| <b>PROJECT STATUS:</b> Minimum Project entries have been made to create Trademark records.        |                      |                   |
| <b>Create Trademark Records</b>   |                      |                   |
| <b>Warning: Pressing this button will create Trademarks based on the entries in Steps 1 to 8.</b> |                      | Create TM Records |

Click the button to create records in the trademark Records module for each jurisdiction covered by the filing program.

When the records have been created, the information cannot be changed through the Wizard screens. However, each individual record created by the Wizard can be amended through the Trademark Records Module.

**Step 10**

Reports, application forms and instruction letters are printed from this step.

|   |                       |           |
|---|-----------------------|-----------|
| Previous Step   | <b>WIZARD STEP 10</b> | Next Step |
| <b>PROJECT STATUS:</b> Trademark Records Created  |                       |           |
| <b>Select a report to view or print</b>   |                       |           |
| <ul style="list-style-type: none"> <li>• <a href="#">Trademark Record Sheet</a></li> <li>• <a href="#">Trademark Records By Client</a></li> <li>• <a href="#">Trademark Records By Country</a></li> <li>• <a href="#">Trademark Records By Owner</a></li> <li>• <a href="#">Trademark Records By Trademark</a></li> </ul> |                       |           |
| Create Application Documents  |                       |           |
| To print a document, select it by clicking on its name, then transfer it to Word by clicking on the Word icon on the toolbar  |                       |           |
| <b>Please review each merged document after it has been loaded into Word, as you may need to add additional information by hand to complete the document before use.</b>  |                       |           |
| Country   | Document Title        |           |

You may then print various reports showing the records which have been created.

Click on the button "Create Application Documents" to prepare the Application forms and other associated documents

| Create Application Documents   |                                      |
|--|--------------------------------------|
| To print a document, select it by clicking on its name, then transfer it to Word by clicking on the Word icon on the toolbar   |                                      |
| <b>Please review each merged document after it has been loaded into Word, as you may need to add additional information by hand to complete the document before use.</b> |                                      |
| Country  | Document Title                       |
| CTM  | <a href="#">CTM Application Form</a> |
| Hong Kong  | <a href="#">T2</a>                   |
| Hong Kong  | <a href="#">T2A</a>                  |

When the documents have been created, click on the link and then load the document into Word for final review and amendment before printing.

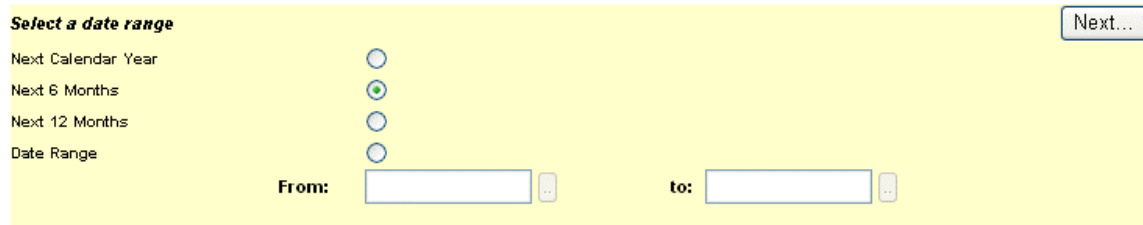
### The Renewals Wizard

The Renewals Wizard is used to manage the periodic renewal process for trademark registrations. The Wizard helps with the administration of the renewals process by preparing reports for in-house review, and by preparing requests for instructions from clients

There are two defaults: a date range set at the next six months, and a selection of records limited to renewals due. If you open the Wizard and click next, that is the list you will get.

#### Selecting a date range

##### Renewal Wizard



As most renewal projects are handled on an annual or six monthly basis, the Wizard allows the selection of these periods, plus an open-ended date range.

#### Limiting the search results

The second section of the Wizard screen allows the reported records to be limited by a variety of criteria, such as Client, Owner, Attorney etc. In this way you can limit the renewal list to the records of a selected client or owner.

In addition, if you have used the sub-status "Allow to lapse" in trademark records, you can exclude all such records from the search results by selecting that sub-status and clicking on the exclude button.

#### Selecting deadlines to report

The last part of the screen allows you to set the type of deadlines to be included in the search results. For example, for US records, you may need a report which reports Section 8 Affidavit due dates in addition to renewal due dates.

When the appropriate selections criteria have been selected, click "Next" to create the Renewals Hit List. The reported records can then be reviewed or selected for printing. A variety of reports are available.

**Renewal Wizard**

Select a date range Next...

Next Calendar Year

Next 6 Months

Next 12 Months

Date Range

From:  to:

**Sub Status** Exclude

Abandoned CTM

Advertised

Allow to Lapse

**Country**

Afghanistan

Albania

Algeria

**Client**

**Client (Local Language)**

**Owner**

**Owner (Local Language)**

**Agent**

**Agent (Local Language)**

**Trademark**

**Trademark (Local Language)**

**Attorney**

Audrey Whelan  
Eisworth Coutinho  
Glen May

**Business Group**

Complete  InComplete  Both

Active  Inactive  Both

Please choose which Statutory deadlines you wish to be reported.

Next Renewal Due

Affidavit Due

Sec 8 Affidavit Due

Annuities Due

DIU due

Quinquennial taxes due

Or Select from the list below

1st IJ Extension Due

2nd IJ Extension Due

3rd IJ Extension Due

4th IJ Extension Due

Clear Next...

**The Cross Module Wizard**

The Cross Module Wizard allows you to locate records in two or more modules and combine the results in one report.

For example, you can create a report showing all records in all modules for a particular owner or client, or agent. The default is to search across all modules, but the search can be limited to a selection of individual modules.

**Cross Module Search Screen**

Search

Search Records  Search TM's  Search OP TM's

English  Local Language

Search All Modules

Or select modules from the list below

- Assignments
- Case Management
- Contracts
- Disputes

**Owner** **Exclude**

save\*

Owner (Local language)

**Client**

Client (Local language)

**Client Reference**

**Country**

The Report menu is accessed by selecting one of the two print buttons below.

**Search Results**

10 records found

| Select   | Module          | File Reference | Owner                         | Owner Status | Country                  | Supervisor    | Client                        | Client Reference |
|--|-----------------|----------------|-------------------------------|--------------|--------------------------|---------------|-------------------------------|------------------|
| <a href="#">View</a> <a href="#">Edit</a> <input type="checkbox"/> | Case Management | STCC.CR.3221   | Save The Children (Sales) Ltd |              | United States of America | Audrey Whelan |                               |                  |
| <a href="#">View</a> <a href="#">Edit</a> <input type="checkbox"/> | Trademarks      |                | Save The Children (Sales) Ltd |              | United Kingdom           | Philip Behan  | Save The Children (Sales) Ltd |                  |
| <a href="#">View</a> <a href="#">Edit</a> <input type="checkbox"/> | Trademarks      |                | Save The Children (Sales) Ltd |              | United Kingdom           | Philip Behan  | Save The Children (Sales) Ltd |                  |
| <a href="#">View</a> <a href="#">Edit</a> <input type="checkbox"/> | Trademarks      |                | Save The Children (Sales) Ltd |              | United Kingdom           | Philip Behan  | Save The Children (Sales) Ltd |                  |
| <a href="#">View</a> <a href="#">Edit</a> <input type="checkbox"/> | Trademarks      |                | Save The Children (Sales) Ltd |              | United Kingdom           | Philip Behan  | Save The Children (Sales) Ltd |                  |
| <a href="#">View</a> <a href="#">Edit</a> <input type="checkbox"/> | Trademarks      |                | Save The Children (Sales) Ltd |              | United Kingdom           | Philip Behan  | Save The Children (Sales) Ltd |                  |

The reported records can be reviewed individually from the Search results hit list, and selected for printing in a variety of report formats.

## Chapter 9: The Utility Wizard

### The Utility Wizard

The Utility Wizard gives access to the many tables which are used to control information entered into the data records in the system. Many of the entries in these validation tables can be changed by the user to suit their specific practice; some are fixed and used by the system programs, and cannot be changed.

### Validation and Reference Tables

To access the validation tables, click on the **Utility Wizard** on the **Main Menu**

|  |  |
|--|--|
| <p style="text-align: center;"><b>Validation Tables</b></p> <p>Select Table<br/> <input type="text"/><br/> <input type="button" value="Select"/> <input type="button" value="Clear"/></p> <p><b>Attorneys</b><br/> <input type="button" value="Select"/></p> <p><b>Statutory Deadlines</b><br/> <input type="button" value="Select"/></p> <p><b>Countries</b><br/> <input type="button" value="Select"/></p> <p><b>Currencies</b><br/> <input type="button" value="Select"/></p> <p><b>Standard Charges</b><br/> <input type="button" value="Select"/></p> <p><b>Standard Goods</b><br/> <input type="button" value="Select"/></p> | <p><b>Validation tables</b><br/> Select a validation table to review or amend the entries, or add new entries</p> <p><b>Attorneys</b><br/> Maintain the list of attorneys, paralegals and others who are responsible for records in the system</p> <p><b>Statutory Deadlines</b><br/> Review or add to the list of statutory and other deadlines in the Actions file</p> <p><b>Countries</b><br/> Amend or update the country law information; add new countries or jurisdictions</p> <p><b>Currencies</b><br/> Maintain and update the list of currencies and exchange rates</p> <p><b>Standard Charges</b><br/> Maintain and update the list of standard charges</p> <p><b>Standard Goods</b><br/> Add standard specifications of goods and services for automatic entry into the goods field in trademark records</p> |
|--|--|

|   |  |
|---|--|
| <p><b>Deadline Reminder</b></p> <p>Select</p> <p><b>Deadline Rules, Record Type</b></p> <p>Trademarks</p> <p><b>Deadline Rules, Statutory Deadline</b></p> <p>1st Annuities Due (Patents)<br/>1st renewal due (Patents)<br/>2nd Annuities Due (Patents)</p> <p><b>Deadline Rules, Country</b></p> <p>Afghanistan<br/>Albania<br/>Algeria</p> <p><b>Deadline Rules, Agent</b></p> <p>Select Clear</p> <p style="text-align: center;"><b>Assignment Guide</b></p> <p><b>Amend Guide</b></p> <p>Select</p> | <p><b>Deadline Reminder:</b> Used to set a progression of reminders before or after another deadline</p> <p><b>Deadline Rules, Record Type:</b> Select the type of rule, i.e. for trademarks or patents</p> <p><b>Deadline Rules, Statutory Deadline:</b> Select the deadline for which the rule will be defined</p> <p><b>Deadline Rules, Country:</b> Select a country to create a new rule, or amend an existing rule.</p> <p>See "Entering Date Calculation Rules" for more details.</p> <p><b>The Assignment Guide</b></p> <p>The Assignment Guide provides a template for information relating to the handling and recording of Trademark Assignments. It is not supplied with any data.</p> |
|---|--|

|  |  |
|--|--|
| <p style="text-align: center;"><b>Office Setup</b></p> <p><b>Click to change office settings</b></p> <p><input type="button" value="Select"/></p> <p style="text-align: center;"><b>Import Wizard</b></p> <p><b>Click to change import field settings</b></p> <p><input type="button" value="Select"/></p> <p><b>Download Import Search Tool</b> <a href="#">Click Here...</a></p> <p><b>Download Marquesa Report<br/>(Copy to Templates folder of<br/>marquesa Application)</b> <a href="#">Click Here...</a></p> <p style="text-align: center;"><b>User Manual</b></p> <p><b>View WebTMS User Manual</b> <a href="#">Click Here...</a></p> | <p>Refer to the Technical Manual</p><br><br><p>Refer to the Technical Manual</p><br><br><p>Refer to the Technical Manual</p> |
|--|--|

**Validation Tables by Module**

| <b>Trademark Records</b>                  |   |   |
|---|---|---|
| Country                                   | The jurisdiction in which a mark is registered or pending | Principal entries provided; user may amend, delete or add |
| Status<br><i>Trademark status</i>         | The primary status of the trademark                       | Principal entries provided; no amendment allowed          |
| Sub status<br><i>Trademark sub status</i> | The secondary status of the mark                          | Sample entries provided; user may amend, delete or add    |
| Type of registration                      | E.g. Madrid, Madrid national                              | System generated  |
| Supervisor                                | The attorney or other responsible person                  | User entries  |
| Trademark Region                          |   | User determined   |
| Business Groups                           | Used in all modules                                       | User determined   |
| Basis of filing                           | For US marks  | Principal entries provided; no amendment allowed          |
| Type of Commerce                          | For US marks  | Sample entries provided; user may amend. Delete or add    |
| Manner of Use                             | For US marks  | Sample entries provided; user may amend. Delete or add    |
| Language                                  | For CTM marks   | Sample entries provided; user may amend. Delete or add    |
| Type of Payment                           | For CTM marks   | Principal entries provided; user may amend, delete or add |
| Type of Priority                          |   | Principal entries provided; user may amend, delete or add |

| <b>Trademark Profile</b> |  |  |
|--------------------------|--|--|
| Type of Trademark        |  | Sample entries provided; user may amend, delete or add |
| Trademark Group          |  | User determined  |

| <b>Companies &amp; Contacts</b>     |                                    |   |
|-------------------------------------|------------------------------------|---|
| Country                             | The country part of the address    | Principal entries provided; user may amend, delete or add |
| Type of Entity                      | E.g. plc, corporation, partnership | Sample entries provided; user may amend, delete or add    |
| Company Group                       |                                    | User determined   |
| Company Classification              | E.g. Owner, Agent                  | Principal entries provided; user may add classifications  |
| Type of Address                     | E.g. Previous, Billing             | Principal entries provided; user may add classifications  |
| Geographic region                   |                                    | User determined   |
| Position<br><i>Contact position</i> |                                    | Principal entries provided; user may add classifications  |

| <b>Contracts Module</b>                 |  |   |
|---|--|---|
| Type of Contract                        | E.g. Consent, License, Registered User   | Principal entries provided; user may amend, delete or add |
| Owner Status                            | E.g. Licensor, Plaintiff                 | Principal entries provided; user may amend, delete or add |
| Matter Status<br><i>Contract status</i> | E.g. in negotiation, signed, expired     | Principal entries provided; user may amend, delete or add |
| Supervisor                              | The attorney or other responsible person | User entries  |
| Business Groups                         | Used in all modules                      | User determined   |

| <b>Disputes</b>                        |  |   |
|--|--|---|
| Type of Dispute                        | E.g. Opposition in, infringement             | Principal entries provided; user may amend, delete or add |
| Owner Status                           | E.g. Plaintiff, TM Applicant                 | Principal entries provided; user may amend, delete or add |
| Matter Status<br><i>Dispute status</i> | E.g. in negotiation, settled                 | Principal entries provided; user may amend, delete or add |
| Country                                | The jurisdiction in which the Dispute occurs | Principal entries provided; user may amend, delete or add |
| Supervisor                             | The attorney or other responsible person     | User entries  |
| Business Groups                        | Used in all modules                          | User determined   |

| <b>Assignments Module</b>                 |   |   |
|---|---|---|
| Type of Transfer                          | E.g. Assignment, Merger                         | Principal entries provided; user may amend, delete or add |
| Owner Status                              | E.g. Assignor, Assignee                         | Principal entries provided; user may amend, delete or add |
| Matter Status<br><i>Assignment status</i> | E.g. Completed, Recorded                        | Principal entries provided; user may amend, delete or add |
| Country                                   | The jurisdiction in which the Assignment occurs | Principal entries provided; user may amend, delete or add |
| Supervisor                                | The attorney or other responsible person        | User entries  |

| Case Management                           |  |   |
|---|--|---|
| Type of file<br><i>Case Mgt File type</i> |  | Principal entries provided; user may amend, delete or add |
| Country                                   | The jurisdiction to which the Matter relates | Principal entries provided; user may amend, delete or add |
| Matter Status<br><i>Case Mgt status</i>   | E.g. Completed, Recorded                     | Principal entries provided; user may amend, delete or add |
| Attorney                                  | The attorney or other responsible person     | User entries  |
| Business Groups                           | Used in all modules                          | User determined   |

| TM Searches Module |   |   |
|--------------------|---|---|
| Country            | The jurisdiction in which the search was made | Principal entries provided; user may amend, delete or add |
| Supervisor         | The attorney or other responsible person      | User entries  |
| Business Groups    | Used in all modules                           | User determined   |

| Other Party Trademarks |   |   |
|------------------------|---|---|
| Country                | The jurisdiction in which a mark is registered or pending | Principal entries provided; user may amend, delete or add |
| Status                 | The primary status of the trademark                       | Principal entries provided; no amendment allowed          |

| Patent Module                          |   |   |
|--|---|---|
| Country                                | The jurisdiction in which the patent or design is registered or pending | Principal entries provided; user may amend, delete or add |
| Status<br><i>Patent status</i>         | The primary status of the patent  | Principal entries provided; no amendment allowed          |
| Sub status<br><i>Patent sub status</i> | The secondary status of the patent                                      | Sample entries provided; use may amend. Delete or add     |
| Type of registration                   | E.g. Provisional, National  | System generated  |
| Supervisor                             | The attorney or other responsible person                                | User entries  |
| Designating Office                     |   | Principal entries provided; user may amend, delete or add |

| Domain Names Module                        |   |   |
|--|---|---|
| Country                                    | The jurisdiction in which the domain name is registered | Principal entries provided; user may amend, delete or add |
| Domain Status<br><i>Domain Name status</i> | E.g. Registered, Disputed                               | Principal entries provided; user may add classifications  |
| Business Groups                            | Used in all modules                                     | User determined   |
| Domain Name Other Party Status             |   | Principal entries provided; user may amend, delete or add |
| Type of Domain change                      |   | Principal entries provided; user may amend, delete or add |

**The Attorneys table**

To amend entries in the Attorneys table, click "Select" under the "Attorneys" entry. A list of all the entries in the table will then appear.

To amend an entry, click on the triangle box to the left of the name.

To add an entry, click on the asterisk box at the end of the list.

**Amend Entries**

| Attorney | Position          | Bar | E-mail Address |
|----------|-------------------|-----|----------------|
| *        |                   |     |                |
| ▶        | Audrey Whelan     |     |                |
| ▶        | Elsworth Coutinho |     |                |

**Edit Attorney Group**

|                |               |
|----------------|---------------|
| Attorney       | Brid Madeley  |
| Position       | partner       |
| Bar            |               |
| E-mail Address | brid@ippo.com |

Enter the required information, then click Save, then Close when the system confirms that the entry has been saved.

**The Statutory Deadlines Table**

From the Main Menu, select "Utility Wizard", then select "Statutory Deadlines"

To amend an entry, click on the triangle box to the left of the name.

To add an entry, click on the asterisk box at the end of the list.

Please note that this only adds the new deadline to the list of deadlines; use the "Deadline Rules" section to add date calculation

**The Countries Table**

From the Main Menu, select "Utility Wizard", then select "Countries"

To amend an entry, click on the triangle box to the left of the name of the country.

To add an entry, click on the asterisk box at the end of the list, and complete and save the Entries in the pop-up window.

**The Standard Goods Table**

**Edit Standard Goods**

International Class: 1

Goods: Chemicals used in industry, science and photography, as well as in agriculture, horticulture and forestry;

Description: Text of the class heading.

Language: English

Save Delete Close

This table comes with the class headings of the International Classification system, in English and in French

You may add your own client specific specifications.

To amend an entry, click on the triangle box to the left of the entry.

To add an entry, click on the asterisk box at the end of the list, and complete and save the Entries in the pop-up window.

**The Date Calculation Rules Table**

From the Main Menu, select "Utility Wizard". Select the record type from "Deadline Rules, Record Type" (Trademarks, Patents, etc.). Then select the country from the drop down list at "Deadline Rules, Country"

Click select and the rules for the selected country will be displayed

To print a list of rules for all countries, leave the field "Deadline Rules, Country" blank, click Select and then "Print all records". This will give an alphabetical listing by Country.

| Record update status |    |              |               |  |
|----------------------|----|--------------|---------------|--|
| Record created       | By | Last updated | By            |  |
|                      |    | 27 Apr 2001  | bmlondonsuper |  |

Click the triangle box at the left of the rule which you wish to review or amend.

You must enter an effective date for the rule; otherwise the system will not be able to calculate the due dates.

Please be sure to review the date rules in this Date Rules table before relying on the dates calculated by the system.

The second rule in the series of 3 for the United Kingdom is displayed at the left.

**Duplicate Removal Wizard**

The duplicate removal wizard enables you to remove any duplicate records within your system.

First select the duplicate section you wish to remove.

**Duplicate Removal Wizard**

**Menu**

- [Remove Duplicate Companies](#)
- [Remove Duplicate Contacts](#)
- [Remove Duplicate Attorneys](#)
- [Remove Duplicate Trademark Profiles](#)
- [Remove Duplicate Patent Profiles](#)
- [Remove Duplicate Other Party Trademarks](#)
- [Remove Duplicate Image Files](#)
- [Rename Image Files](#)

Once you have clicked on the appropriate duplicate field

Then just complete the relevant sections.

E.G. If removing a duplicate company first search and select the duplicate, then search and select the replacement and you can even choose to keep classifications, Jurisdictions and Addresses of the duplicate record.

**Remove Duplicate Company**

|                      |                        |                      |                        |
|----------------------|------------------------|----------------------|------------------------|
| Duplicate            | <a href="#">Select</a> | <a href="#">View</a> | <a href="#">Delete</a> |
| <input type="text"/> |                        |                      |                        |
| Replacement          | <a href="#">Select</a> | <a href="#">View</a> | <a href="#">Delete</a> |
| <input type="text"/> |                        |                      |                        |

**Linked Tables**

|                      |                                     |                    |                                     |                |                                     |
|----------------------|-------------------------------------|--------------------|-------------------------------------|----------------|-------------------------------------|
| Keep Classifications | <input checked="" type="checkbox"/> | Keep Jurisdictions | <input checked="" type="checkbox"/> | Keep Addresses | <input checked="" type="checkbox"/> |
|----------------------|-------------------------------------|--------------------|-------------------------------------|----------------|-------------------------------------|

Then you simply click the remove duplicate button and the duplicate record is deleted.

*Use the same process in each duplicate category*

***Chapter 10: Batch Updating a Set of Records***

*Please use this facility carefully, as large numbers of records can be changed very quickly, but can only be changed back by hand.*

To batch update one or more fields in a set of records, select the Module, enter search criteria and obtain a hit list. Indicate the records to be updated by manually putting checks in the boxes in the Select column, or click "Select all"

On the reports menu, click on the Batch Update link towards the foot of the page. An entry screen will appear showing all the fields in the Module which can be batch updated. Enter the data to be batch updated in the appropriate fields and click the "Batch Update" button.