



## Tasks & Work Items

Client and Matter related assignments to timekeepers, legal support teams and matter personnel are the business vehicle for contextualized information transfer, decisions and actions in Intellectual Property prosecution.

The speed of business is progressively accelerating in our modern times and the methods in which we communicate with our teams in the context of business goals must evolve within an organization at a symbiotic pace in order to continually economically flourish. Patent and Trademark prosecution pivots around Patent and Trademark Office communications and the impact of those documents and dates on a client's application or matter. The arrival of documents, upcoming due date management, legal support team assignment and task status transparency have outgrown email as an efficient communication tool.

Task – An assignment of work or execution to a specific individual or team in relation to a specific event or decision and an expected due date.

Work Item – System generated task record managed within the **PracticeLink**<sup>®</sup> database which holds reference to the contextualized information relevant to the action or decision of the task. The work item object holds information regarding the task assignment, due date, reference information

consolidated from separate source systems and a history or other related work items in the same sequence of tasks or business process.

Process – Sequence of Work Items woven together with intrinsic conditional routing and assignment destinations triggered by environmental events as tasks and work items are created and completed.

## Groups, Teams & Users

Responsibility of a business task can be shared and divided amongst various roles of individuals and teams in relation to the client, matter or assignment type. Work Items generated within **PracticeLink** can be assigned to either Groups or Users.

Users: Each individual person who uses the **PracticeLink** regardless of role is considered a User and must have a **PracticeLink** user record in order to access the system. The User record contains the firm's domain user account name and the docketing system user identifier mappings.

Every user must be a member of at least one Group. Users can be members of multiple Groups.

Groups: Groups are made up of multiple users which share security protocols and settings relating to how task assignment in relation to the group is managed.

- Each User within the Group is allowed individual work item assignment.
- Work Items are pooled and the entire group works off of a single list, membership to the group grants the user access to the shared Work Item List.

Teams: Users can also define relationships with other users to form team relationships. Team relationships can be used to assist with quick views of other team member's tasks and the optional ability to allow completion of team member's tasks.

## Work Item Inbox

Business tasks driving PracticeLink Work Items assigned to users and groups can be viewed in the 'Work Item Inbox' which is a list of Work Items with relevant due date, context and type information. Each item in the Work Item Inbox has available links to relevant matter and client information when available as well as a link for actions specific to the work item.

**PracticeLink**
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Viewing Inbox For:

**All (34)**

**Sheehan Lake's Tasks** Export All Records

Description	Action	Assigned To	Received Date	Docket Number	
QPIDS.REQ--QPIDS.REQ - Quick Path Information Disclosure Statement 9/6/2016	Review PairLink Document	Sheehan Lake	1/22/2017 1:16:03 PM	100019.73239-US	<a href="#">Review</a>
QPIDS.REQ--QPIDS.REQ - Quick Path Information Disclosure Statement 9/6/2016	Review PairLink Document	Sheehan Lake	1/22/2017 1:16:38 PM	100019.73239-US	<a href="#">Review</a>
PET.DEC.AUTO--PET.DEC.AUTO - Petition Auto Grant letter9/6/2016	Review PairLink Document	Sheehan Lake	1/22/2017 1:16:58 PM	100019.73239-US	<a href="#">Review</a>
PETAUTO--PET.AUTO - Petition automatically granted by EFS 9/6/2016	Review PairLink Document	Sheehan Lake	1/22/2017 1:17:38 PM	100019.73239-US	<a href="#">Review</a>
INTV.SUM.EX--INTV.SUM.EX - Examiner initiated interview summary (PTOL-413B) 12/20/2016	Review PairLink Document	Sheehan Lake	1/22/2017 1:17:59 PM	100019.73239-US	<a href="#">Review</a>
1449--1449 - List of References cited by applicant and considered by examiner12/20/2016	Review PairLink Document	Sheehan Lake	1/22/2017 1:19:00 PM	100019.73239-US	<a href="#">Review</a>
A.NE--A.NE - Amendment After Final 11/25/2016	Review PairLink Document	Sheehan Lake	1/22/2017 1:19:40 PM	100019.73239-US	<a href="#">Review</a>
A.NE.AFPCP--A.NE.AFPCP - After Final Consideration Program Request 11/25/2016	Review PairLink Document	Sheehan Lake	1/22/2017 1:20:00 PM	100019.73239-US	<a href="#">Review</a>
OA.EMAIL--OA.EMAIL - Email Notification11/23/2016	Review PairLink Document	Sheehan Lake	1/22/2017 1:21:39 PM	100019.73239-US	<a href="#">Review</a>
892--892 - List of references cited by examiner9/28/2016	Review PairLink Document	Sheehan Lake	1/22/2017 1:21:59 PM	100019.73239-US	<a href="#">Review</a>
N417--N417 - EFS Acknowledgment Receipt8/24/2016	Review PairLink Document	Sheehan Lake	1/22/2017 1:23:00 PM	100019.73239-US	<a href="#">Review</a>
CTNF--CTNF - Non-Final Rejection1/3/2017	Review PairLink Document	Sheehan Lake	1/22/2017 1:23:40 PM	100019.73239-US	<a href="#">Review</a>
INTV.SUM.APP--INTV.SUM.APP - Applicant Initiated Interview Summary (PTOL-413) 1/3/2017	Review PairLink Document	Sheehan Lake	1/22/2017 1:23:59 PM	100019.73239-US	<a href="#">Review</a>

Clicking a Work Item link action link will open the Work Item in the PracticeLink WorkCenter.

# Work Center

Actions by users against assigned tasks delivered via Work Items must consider the context from which the Work Item was created along with the available actions and decision points in order to effectively complete the task towards the larger business goals. The **PracticeLink Work Center** is the Work Item action screen for reviewing, modifying or updating assigned tasks. As a web based system typical use is within a browser on a single screen so the **Work Center** is broken into two parts:

- Left (70%) – Contextualized system, document, matter or information directly related to the assigned work item and business process.
- Right (30%) – Work Item Specific summary information and action buttons along with input fields for captured input by the user about the task execution and work Item completion.

**PracticeLink**
Daryl Docketer   Edit Page Security

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Docketing Request

## 100001.0011INDI-IN (IN - India)

**IP Rules: Provisional filings are obtainable in India and are valid for 1 year. The Expiration Date will be calculated on a pending provisional application to indicate the one year date.**

<b>Client:</b> Real Technologies	<b>Application Status:</b> Filed	
<b>Case Type:</b> Provisional Filing	<b>Filing Date:</b> 10/13/2009	
<b>Application Number:</b> 99/000.306 (Filed)	<b>Publication Date:</b> 09/28/2011	
<b>Publication Number:</b> IN 2010 7485163 A2	<b>Confirmation Num:</b> 7527	
<b>Patent Number:</b> 1397475571	<b>Important Client Special Instructions:</b> Special Billing instructions for client. Please send invoices 2wks prior to final bill.	

Docket Actions (32)
Matter Docket History (0)
Attachments (0)

Due Date	Deadline Date	Action	Notes	Completed Date
08/12/2015		GRP: REMINDER		
08/28/2015		Issue fee paid		
10/09/2015		Computing of additional claims fee		
10/13/2015		Concept exposed prior to filing		
10/23/2015		Customs Renewal Date		
11/07/2015		Drawings due - 1 month		
12/02/2015		Foreign filing completed		
01/09/2016		Publication of Inventors names		
01/17/2016		Licensed		
04/04/2016		File Demand For Chapt 2.		
05/04/2016		Response third OA filed		
05/17/2016		Response Due		

### De-Docket

Actions
History
Tasks

**Docket Number:** 100001.0011INDI-IN

**Response:** Complete

**Date Completed:** 01/25/2017

**Comments:** Please mark as completed

**Submitting User:** Adam Attorney

**Assigned To:** Docketing

**Locked By:** Daryl Docketer

**Current Step:** Docketing Request

Back To Inbox

Next Item

Add Note

Unclaim

Accept

Reject

Double Check

Review Comments:

Accept
Clear

Task Assignment Work Panel & Document Viewer allows users to view documents and related aggregated data on the left while making their actionable decision on the right within a single view.

**PracticeLink** Sheehan Lake Edit Page Security

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Matters

**Task Assignment**

Matter Summary - 100022.10004-DE - Glutathione based delivery system

**Docket Number:** 100022.10004-DE **Client:** Fitzpatrick Wholesalers

**Action Description:** Corrected Application Papers - mail date **Due Date:** 01/25/2017

**App. Number:** 99/000.337 **Client Ref. Num:** FW-922

**Notes:**  
Assignments Assignments History

**Corrected Application and Review**  
Complete missing information. Send to Responsible Attorney for Approval

1	Sheehan Lake	Due Date: 1/25/2017
2	Adam Attorney	Due Date: 1/25/2017

**Legend:**  
Current Task.  
Upcoming Task.  
Late Task.  
Completed Task.

**Corrected Application and Review**

Actions History Tasks

**Task Due Date:** 01/25/2017

**Last Assigned To:** Adam Attorney

**Assigned To:** Sheehan Lake

**Current Step:** Task Assignment

Back To Inbox Next Item Add Note

Complete Forward

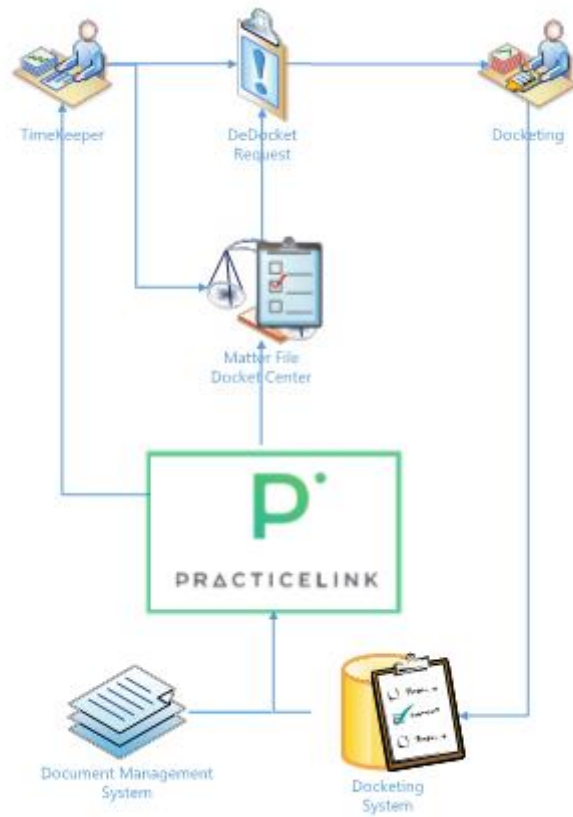
Notes:

Complete Clear

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## Docket Clearing Module

**Docket Clearing** requests typically requiring date update, comments, type of request, and related attachments such as filing receipts. Multiple streams and formats of docket clearing requests from time keepers to docketing staff generates risk and loss of efficiency. Document Management Systems and Docketing Systems functioning in user interface silos make it difficult to rapidly generate the appropriate reference to Docket Action and add DMS File references in a transparent and centralized manner.



Our Centralized Matter perspective displaying relevant data from both the docketing system and the document management system and role based upcoming docket action views allow time keepers to rapidly generate Docket Action Clearing requests rapidly. Docket Clearing requests have access to the document management system for generating attachments related to the request.

The Docketing team can view a shared list of incoming Docket Clearing requests from Attorneys. Docketing team distribution and routing based on attributes of the associated matters allows for a flexible configurable solution to fit the docketing group's practices.

The Docketing team can update the related Docketing Action using the Docketing System interface or the **PracticeLink** Docket Clearing SQL update tool. This tool utilizes SQL-based execution to directly update the necessary SQL in the docketing system.

The queries used to load the Docket Actions into the My Docket search or the Matter Docket screens in **PracticeLink** load the upcoming Docket Actions On Demand. When the Docket Action request has been submitted it will display with a status of "pending" until the Docket request is completed and the related update has been made to the Docketing system. Once the Docketing group has made it's update in the Docketing System, the Docket Action, if no longer upcoming, will no longer appear in the timekeepers My Docket search.

## Docket Clearing Components

- “Clear” Button on Docket Action Rows in My Docket Grid and Matter Docket Grids
- Docket Action Clear Request Form – Date Selection, Comment, Request Type, Attachment
- Docketing Inbox – List of Docket Action Clear Request Work Items assigned to Docketing Group
- De-Docket Work Item View in **Work Center**
  - Left Panel – Docket Action and Matter Details, Related Attachments
  - Right Panel – Action Buttons
- Docketing System Docket Action Update SQL Automation for Accepted Docket Action Clearing Requests
- Docketing Outbox
- Matter Details Open Tasks
- Matter Details Completed Tasks
- Matter Details Docket History

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## Client Reporting – An Add-on Feature to Support Client Relations

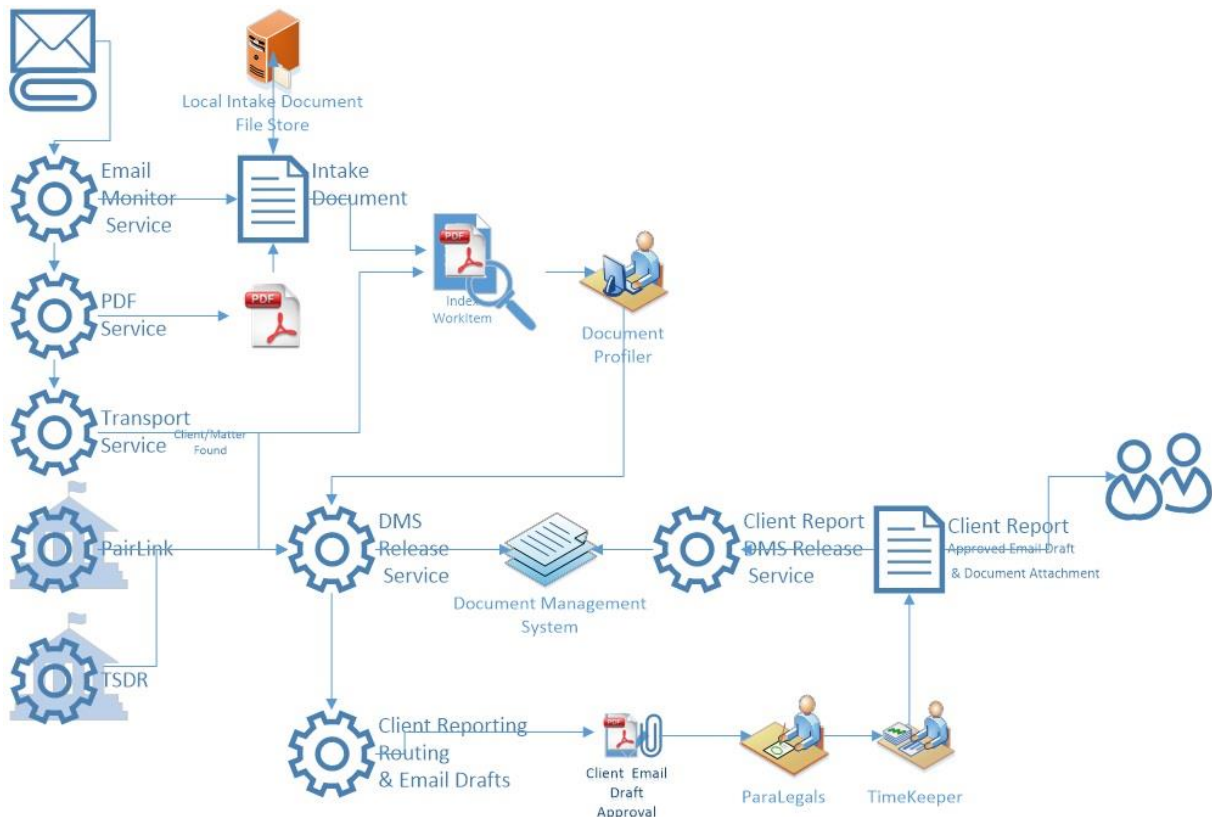
**Client Reporting** automatically reports to a firm’s clients the availability of recently received documents. The continuous influx of documents arrived and captured by **PracticeLink** services are associated with document types, clients, and matters. The **Client Reporting** module enables the firm to setup rules based on Client, Matter, and Document Type to automatically generate a token-filled email draft and approval process instance.

Configurable and customizable email templates are associated with the reporting rules. When the condition value pair setup within the rule is met, an email template and the value filled tokens create a client bound report email draft and a trackable outbound email approval process.



## Client Reporting Functions

- Identifies recently received documents that meet Client, Matter or Document Type conditions which dictate the received document be reported to the client.
- Drafts email reporting letter to client based on an email template associated with the identified conditions.
- Creates an approval process within **PracticeLink** for email draft and attachment approval by appropriate matter personnel.
- Sends the outgoing email to the client.
- Captures the reporting letter email and the attachment, then saves it to the document management system.
- Facilitates matter level transparency regarding client correspondence for reported documents and associated letters.



## Client Reporting Solution Elements

Rules and Routing Service - Following the release of the document to the document management system and notification generation, the document will be reviewed for client, matter, and document type conditions which trigger a **Client Reporting** Rule. If a **Client Reporting** Rule is triggered, an email draft will be created from an email template and a **PracticeLink** Work Item, for review and approval of the email draft, will be sent to the appropriate matter personnel.

Email Draft Work Item Approval Screen – The original initiating document and the resulting email draft are viewable in a **work center** screen associated with the work item assigned review and approval task. The larger viewable area on the left will have 2 tabs, one for viewing the original document the other for reviewing and editing the final email to be sent to the client. Upon completion of edits, buttons on the narrower right hand portion of the **work center** will allow the user to submit the item for subsequent approval or to be actually sent to the client.

Send Mail Service – SMTP Service automatically sends queued items asynchronously. The services asynchronous nature allows for additional logging, tracking, QA, and error recovery.

DMS Release Service – After the final **Client Reporting** email and associated attachment are sent to the client the **Client Reporting** DMS service can place a record of the reported email in the Document Management System. There are 3 options for saving the reported email:

- HTML File of the Subject and Body of the reported email
- HTML File of the Subject and Body converted to PDF
- PDF Copy of the Subject and Body along with a merged copy of the attached reported document.

Rules Condition & Email Template Admin Screens – As each document arrives, it is reviewed for Client, Matter, and Document Type conditions held in rules directly tied to email templates.

The **PracticeLink** administration user interface has screens which enable the ability to manage the Client, Matter, and Document Type conditions triggering reporting, who under those conditions should approve the outbound email and the email template subject and body, and how client matter and document specific data should be displayed replacing tokens in the email template.