



FICPI WEBINAR SERIES

Connect, Share & Grow

2020

STRENGTHENING THE PRACTICE OF THE INDEPENDENT IP ATTORNEY



FICPI

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built on trusted relationships,
which strengthens the practice
of the independent IP attorney”***

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FICPI WEBINAR SERIES

Best Practices when Automating Workflows

12 November 2020



Moderator



Chris Bird

Member of FICPI's Professional Excellence Committee // Principal
of FPA Patent Attorneys in Australia



Speakers



Teemu Lang

Chief Digital Officer and Partner at
Papula-Nevinpat in Finland



Arild Tofting

Member of FICPI's Professional
Excellence Committee and CET 4;
Head of Patent Department and
Partner at Protector IP AS in Norway



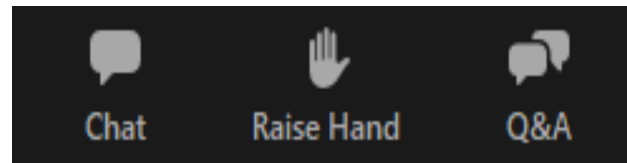
Elin Kalstad

Head of Administration at Protector
IP AS in Norway



Questions?

*Ask using the 'Q&A' function
at the bottom of your screen*





FICPI Connect & Grow Series

AUTOMATION IN IP MANAGEMENT

12 November 2020

Automation in IP management

- Introduction and background
- Survey questionnaire of August/September 2020
- What does 'automation' mean for a professional service firm
- WHAT? WHY? HOW?
- Survey results
- Guest speakers



AUTOMATION IN IP – IN CONTEXT

- Introduction and background
- What does 'automation' mean for a professional service firm?



AUTOMATION IN IP - THE DECISION AND THE PROCESS

- WHAT? Types of tasks suitable for automation
- WHY? The decision process – considerations to take into account
- HOW? The implementation process, iterations and optimisations

AUTOMATION IN IP – REALITY AND EXPERIENCE

- Results of survey questionnaire, Aug/Sep 2020
- Guest speakers
 - Teemu Lang, Papula-Nevinpat, Finland
 - Arild Tofting, Elin Kalstad, Protector IP, Norway





PAPULA NEVINPAT

STRENGTHENING THE PRACTICE OF THE INDEPENDENT IP ATTORNEY



Automation in IP Management at Papula-Nevinpat

Dr. Teemu Lang – 12 November 2020



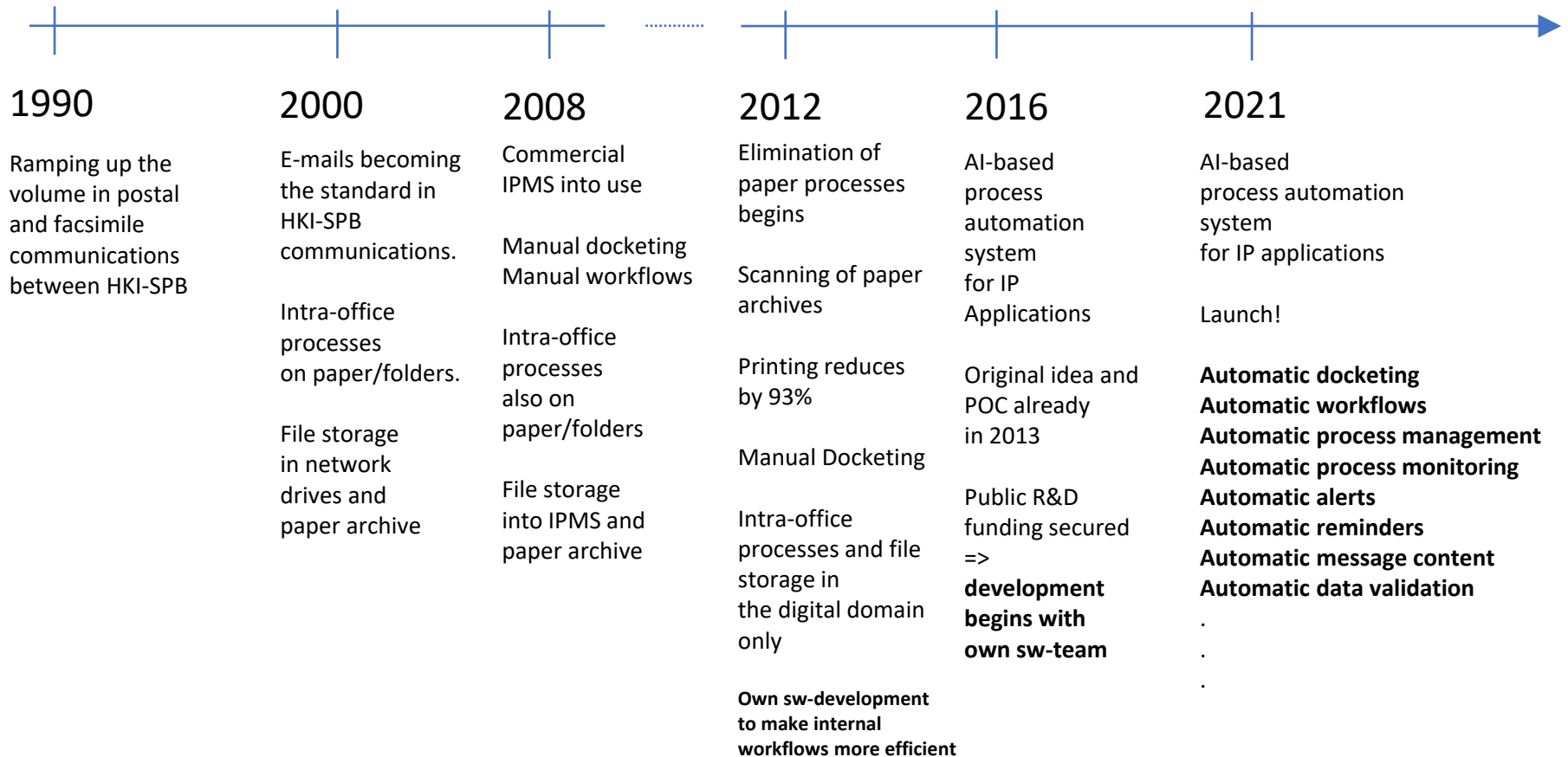
Our Need for IP Application Process Development

- Main office and firm founded in 1975 in Helsinki, Finland - branch office in Saint Petersburg, Russia, founded in 1990
- Main business is IP application prosecution; 70% patents, 30% trademarks.
- All communications and clients are managed in the main office in Helsinki while the technical work for RU/EA applications is done in SPB => **need to develop efficient workflows between Helsinki and Saint Petersburg since 1990.**



Our History and Plans in IP Application Process Development

• Timeline of internal process development:





Our Experiences in IP Application Process Automation

- Automation in IP management for us is mostly internal process automation (+ automated 3rd party search and landscaping tools)
- Speed/Responsiveness vs. 1/Cost vs. Reliability – they go hand in hand
- Automated processes may make some work a bit boring, but sense of control and reliability of the systems are more important for the paralegals (and the business)
- Clear and efficient processes have significantly facilitated remote working
- While docketing can be outsourced and/or automated relatively easily the entire process cannot => more efficient processes means own process development => internal SW development



Thank you!

PAPULA  NEVINPAT

Protector IP's experience as a pilot site for AI system in IPR

Arild Tofting
Partner and Head of Patent Department

Elin Kalstad
Head of Administration



About Protector IP

- Protector is a small firm with ~20 persons. Administration of 7.
- Started in 1998. Was the first external customer of docketing system Patricia
- Has taken new technology early in use.
 - Among first to use PCT EASY and SAFE
 - Went to paperless files many years ago
 - Pilot on online filing at NIPO
 - Early adaptor of EOLF
 - Early to receive electronic office actions from NIPO
- AI could save time and not at least increase certainty and remove potential errors, i.e. fulfill the requirement for double check



Starting with AI

- Two key persons of Protector met with the Canadian firm PCK at a Patricia User Group meeting
- PCK used and still use the system extensively.
 - Good integration with Patricia
 - Wanted to commercialize
- Protector started testing OttoDocket in 2018.
 - First and so far only outside PCK
 - Trained OttoDocket to docket OAs, search reports and trademark renewal notices from NIPO



Basic functionalities of OttoDocket

- Online portal
- Drag-and-drop documents, or browse through PDF files to upload
- OttoDocket compares the document with your database (document type, case ref., application/ registration number, deadline)
- When the document has been processed the findings are shown together with the actual document
- Possible to correct errors and resubmit document for verification if needed
- When the user has confirmed that the information is correct, OttoDocket will send the document to the correct case in Patricia
- OttoDocket populates Patricia with information regarding deadline and document type, and triggers the correct terms



Case

Open Case: V8771NO00

Case No: V8771NO00

Matter Id:

Appl No: 201907285

Reg No: 1468944

Varemerke, Norway - Pending - (V8771NO00)

Real 8K Resolution

Application Type: Via International Protocol

Service Level: Normal

Remark:

Overview	Diary
Basic	Diary Field Data
Notes (1)	Date of Order 06.04.2020
Parties	Provisional refusal 31.01.2020
Diary	National Application No. 201907285
▶ Filter on Diary Group	Bestille overvåking når registrert?
▶ Show only Supplemental Fields	Formaliaforelegg (svardato)
▶ Show only Fields with Data	Official Action DEADLINE 1 04.02.2021
▶ Show only Trigger Points	Official Action DEADLINE 2
▶ Show all Fields	Official Action DEADLINE 3
Actions	Official Action DEADLINE 4
Trademark Class	Official Action DEADLINE 5
Designations	Patentstyret avgjør innen:
Related Cases	Extension of Term
Documents	Extention no.:
Devices (1)	Sjekk status 08.09.2020
Web	Grounds for refusal Ex Officio
Data Comparison	Publication Date
▶ Add	Publication No.
▶ Edit	1. henleggelse
▶ Delete	1. gjenopptagelse
	KFIR varsler avgjørelse
	International registration date 15.02.2019
	International Registration Number (Madrid) 1468944
	US Reg. No. (Madrid)
	Open for Opposition



Case

Open Case:

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Remark:

Overview ^

Basic

Notes (1)

Parties

Diary

Actions

- Workflow
- Next Term
- Regenerate Term

Actions

Term	Person	Status / Action text	External	Date	Recorded By	#	Days	Hours			
13703	APL	FORELEGG MOTTATT er forelegget rapportert?	<input type="checkbox"/>	26.11.2020	OTTO	0					
13710	CV	FORELEGG MOTTATT rapporter forelegg	<input type="checkbox"/>	07.11.2020	OTTO	0					
13700	CV	FORELEGG forelegg besvart?	<input checked="" type="checkbox"/>	04.02.2021	OTTO	0					



Case

Open Case: **Varemerke, Norway - Pending - (V8771NO00)**

Case No: V8771NO00 **Real 8K Resolution**

Matter Id: **Application Type:** Via International Protocol **Service Level:** Normal

Appl No: 201907285 **Remark:**

Reg No: 1468944

Overview	Documents						
Basic	Checked Out By	Log Date	Logged By	Document Name	Description	Category	Inv
Notes (1)		05.11.2020	OTTO	NO Trademark Official Action	NO Trademark Official Action	Incoming PTO Correspondence	
Parties							
Diary							
Actions							
Trademark Class		19.10.2020	APL	RE: Norway - IR No. 1468944 for Real 8K Resolution in Class 9, in the name of Samsung Electronics (L&M Ref.: TX-42985-MAD-SJ) (V8771NO00)	Mail from iplaw@leemock.com to Christoffer Vedal	Incoming client correspondence	
Designations		13.07.2020	KF	VS: NIPO Alert / Varsel fra Patentstyret	Mail from Protector IP AS to Aino Loukamo	Incoming PTO Correspondence	
Related Cases							
Documents		16.04.2020	APL	Patricia_Email.rtf	International trademark registration in Norway No		

Save to File



Where are we now?

- The plan was to expand the number of documents we could run through OttoDocket and include EPO communications
- BUT:
- The key persons on our side left in 2019/20
 - Created a vacuum in further training of OttoDocket
- Then came Covid 19, which led to other priorities.
- Due to these circumstances we have recently decided to suspend further use of OttoDocket



What have we learned? (1)

- AI in IPR is still at toddler stage.
- Training of the system is continuous and time consuming
 - Demanding for a small firm
- Need for close cooperation with developer
- General IT service companies cannot contribute much
- Need for dedicated persons who commit to implement and run the system, also on the customer side.
- The project needs to be deeply rooted throughout the organization, from partners to staff.



What have we learned? (2)

- The system needs to be trained for many different types of letters and documents to become efficient.
 - It is possible to run historical documents through the system for this purpose
- Difficult to estimate potential time and cost savings
- Maybe certainty and reduction of errors will be the main benefits
- Circumstances were against us this time



The future

- We will certainly look into AI again in the future
 - OttoDocket is still relevant to us
 - We will listen to the experience of others
 - We will also investigate other systems
 - All in due time
-
- PCK tells us that they are looking for *“development partners who would be willing to invest and do tests at their site”*



Thank you!

/protector[®]
technology & law



Future Webinars

- **25 November // Partial designs**
- **9 December // Standardisation of digital communication between users of IP**



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LinkedIn Members' Group

www.linkedin.com/groups/2214472/





FICPI Webinar Series

Thank you for attending

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