

RightHub[®]

Enterprise Solution



Updated June 2023

Introduction

The RightHub Enterprise platform (RH Enterprise) has been designed to support all aspects of IP operations, with unparalleled flexibility to specially configure, extend, and integrate to meet any requirements. Unlike traditional one-size-fits all SaaS solutions, the RH Enterprise solution ‘appifies’ the IP management system providing the ultimate alignment between the users and technology.

Built on the Microsoft Power Platform, users work in a familiar software environment including direct integration to Power Apps, Power Automate, Power BI, O365, Outlook/Exchange, Teams and SharePoint—plus Microsoft Azure enterprise-class architecture that ensures 24x7 access, performance, data integrity and security protections. The platform is easily extended through Microsoft’s Power Platform™ tools allowing for custom processes, analytics, and other capabilities.

The core modules include:

- Patents
- Trademarks
- Designs
- Inventions (for corporates)
- Agreements
- Finance (for firms)
- DocketHub™ centralized mailbox
- DocketEngine™ global country laws
- Microsoft Power BI for reporting and analytics
- Microsoft SharePoint integration
- Microsoft Teams integration
- Microsoft 365 integration including Outlook/Exchange
- Microsoft Azure cloud infrastructure

Patents

The patent management module supports the complete end-to-end process of filing, prosecuting, and maintaining a global patent portfolio. RH ENTERPRISE provides full capabilities for all jurisdictions including U.S., all national PTO procedures, and treaties such as Paris Convention, PCT, EP, and other regional conventions.

Key features of Patent Management include:

Patent Families

- Common information and documents inherited to family members
- Easy to read graphical Family Tree with one-click navigation to patent records
- Applicant and ownership conveniently maintained at the family level
- Inventorship information with data copying to related patents
- Contacts for client, US counsel and foreign associates easily accessible
- Annuity payment information rolled-up to the family for easy status checking
- Full reference and prior art library from all related family members

- Categories to structure portfolio by technology, products and client defined criteria

Patent Records

- Quick create to copy family data and streamline record creation
- Easy to read graphical Family Tree with one-click navigation to patent records
- DocketEngine global docketing rules with coverage for 265+ jurisdictions
- Interface to electronic PTO data for bibliographic data verification and document access
- Elegant, easy to understand reference numbering
- Graphical prosecution workflows for provisionals, national filings, PCTs, and EPs
- Docket Timeline Gantt chart of docket tasks and actions
- Prosecution correspondences and documents saved with each docket activity
- References flagged for prior art review and IDS compliance
- Multiple priorities and continuity relationships
- List designated states for PCT, EP and other convention filings
- Contacts including client, US counsel and foreign associates
- Assignments including history, documents, and link to PTO assignment database
- Create and track Power of Attorneys
- Detailed inventorship information linked to contact resources
- Docket audit to check existing data against electronic PTO data

Patent Annuities

- Global annuity rules and procedures through DocketEngine
- Direct integration to the Helios IP Network annuity payment services
- Automated due date and fee calculation including foreign currency conversion
- Full lifetime of patent due date and fee schedule
- Graphical payment workflow to visualize process steps
- Electronic payment receipts saved for each payment
- Optional Renewals Services Module

Instructions Projects

- Organize review and decision projects for inventions, foreign filing, and annuities
- Secure instruction data entry with
- Assign reviews via email and workflow
- Track instruction due dates, completion dates and reminders
- Create agendas for online review meetings via Teams

Filing Projects

- Automates national, PCT, EP and other multi-record filing projects
- Quick create to copy family data and streamline record creation
- Graphical filing workflow to visualize process steps
- Consolidated budget and cost data
- Direct integration to the Helios IP Network for filing services
- Request, execute and save POAs in centralized location
- Document repository for all filing related information
- Filing decisions through the client portal

Patent Assignments

- Track all assignment history including inventorship, ownership, and security interests

- Visual workflow for tracking request, execution and recordal
- Link to PTO assignment recordal database
- Store executed documents

References (Prior Art) Management

- All references managed in centralized library
- Electronic reference documents archived in SharePoint
- Easy creation of references with electronic PTO data interface
- Office actions and search reports reviewed through Helios IP service
- References flagged and routed for review via managed work queues

Information Disclosure Statements

- Track and create information disclosure statements (IDS)
- Automatic SB08 form creation
- Uncited foreign references easily identified in co-pending US family members
- Related references identified by both family and subject matter
- Easy packaging of required reference documents included with IDS
- Tracking of IDSs filed in each patent and across related family members
- Reports including cross family and missing references audits

Special Proceedings

- Create Oppositions, Appeals, Interferences, IPR, and Litigation matters
- Link to related IP records including patents, trademarks, and designs
- Identify parties and contacts
- Docket actions and tasks for monitoring and tracking activities
- Save emails and documents

Agreements

- Create any type of agreement linked to related patents
- Link to related IP records including patents, trademarks, designs, special proceedings
- Identify parties and contacts
- Docket action and tasks for monitoring and tracking activities
- Save emails and documents
- Integrate to electronic signature services (Adobe Sign, DocuSign)

Trademarks

The trademark management module supports a complete end-to-end process for filing, prosecuting, and maintaining a global trademark portfolio. Not merely a repurposed patent system, RH ENTERPRISE's trademark module manages national filings, international registrations, community trademarks and other treaty-based registrations. Also supports designs and domain names, as well as oppositions, cancellations, and enforcement actions as part of overall brand protection and management process.

Key features of Trademark Management include:

Trademark Families

- Common information and documents inherited to family members

- Easy to read graphical Family Tree with one-click navigation to trademark records
- Goods & Services including official Nice Classifications and client customized descriptions
- Ownership information conveniently maintained at the family level
- Contacts for client, US counsel and foreign associates easily accessible
- Renewals payment information rolled-up to the family for easy status checking
- Categories to manage brands, products, and other portfolio structures

Trademark Records

- Quick create to copy family data and streamline record creation
- Easy to read graphical Family Tree with one-click navigation to trademark records
- DocketEngine provides most comprehensive and complete global docketing rules
- Interface to electronic TSDR data for auto-docketing and document access
- Elegant, easy to understand reference numbering
- Graphical prosecution workflows for national filings, IRs and CTMs
- Docket Timeline Gantt chart of docket tasks and actions
- Correspondence documents saved with each docket activity
- Goods & Services including official descriptions and client modified version
- Basis of Use tracking including related evidence
- Trademark search and clearance results
- List of designated states for IRs, CTMs, and other treaty registrations
- Contacts including client, US counsel and foreign associates
- Mark ownership and assignments including history and documents
- Create and save Power of Attorneys
- Categories to manage brands, products, and other portfolio structures
- Docket audit to check existing data against electronic PTO data

Trademark Renewals

- Global renewal rules and procedures through DocketEngine
- Direct integration to the Helios IP Network renewal payment services
- Automated due date and fee calculation including foreign currency conversion
- Graphical payment workflow to visualize process steps
- Formalities documents saved with each renewal payment record
- Electronic payment receipts saved for each payment
- Optional Renewals Services Module

Filing Projects

- Automates national, IR, CTM and other multi-record filing projects
- Quick create to copy family data and streamline record creation
- Graphical filing workflow to visualize process steps
- Consolidated budget and cost data
- Direct integration to the Helios IP Network for filing services
- Request, execute and save POAs in centralized location
- Document repository for all filing related information
- Filing decisions through the client portal

Trademark Assignments

- Track all assignment history including inventorship, ownership, and security interests
- Visual workflow for tracking request, execution and recordal
- Link to PTO assignment recordal databases
- Store executed documents

Special Proceedings

- Create Oppositions, Appeals, Interferences, IPR, and Litigation matters
- Link to related IP records including patents, trademarks, and designs
- Identify parties and contacts
- Docket actions and tasks for monitoring and tracking activities
- Save emails and documents

Agreements

- Create any type of agreement linked to related patents
- Link to related IP records including patents, trademarks, designs, special proceedings
- Identify parties and contacts
- Docket action and tasks for monitoring and tracking activities
- Save emails and documents
- Integrate to electronic signature services (Adobe Sign, DocuSign)

Industrial Designs

The Designs Management module supports the complete end-to-end process for filing, prosecuting, and maintaining a global industrial designs portfolio. RH Enterprise provides full capabilities for all jurisdictions including U.S., all national PTO procedures, and the Hague system.

Key features of Industrial Designs Management include:

Design Families

- Common information and documents inherited to family members
- Easy to read graphical Family Tree with one-click navigation to patent records
- Applicant and ownership conveniently maintained at the family level
- Inventorship information with data copying to related design records
- Contacts for client, US counsel and foreign associates easily accessible
- Renewal payment information rolled-up to the family for easy status checking
- Categories to structure portfolio by technology, products and client defined criteria

Design Records

- Quick create to copy family data and streamline record creation
- Easy to read graphical Family Tree with one-click navigation to patent records
- DocketEngine global docketing rules with coverage for 265+ jurisdictions
- Interface to electronic PTO data for bibliographic data verification and document access
- Elegant, easy to understand reference numbering
- Graphical prosecution workflows for national filings and Hague system filings

- Docket Timeline Gantt chart of docket tasks and actions
- Prosecution correspondences and documents saved with each docket activity
- Multiple priorities and continuity relationships
- List designated states for Hague system convention filings
- Contacts including client, US counsel and foreign associates
- Assignments including history, documents, and link to PTO assignment database
- Create and track Power of Attorneys
- Detailed inventorship information linked to contact resources
- Docket audit to check existing data against electronic PTO data

Design Renewals

- Global annuity rules and procedures through DocketEngine
- Direct integration to the Helios IP Network annuity payment services
- Automated due date and fee calculation including foreign currency conversion
- Full lifetime of patent due date and fee schedule
- Graphical payment workflow to visualize process steps
- Electronic payment receipts saved for each payment
- Optional Renewals Services Module

Filing Projects

- Automates Hague system and other multi-record filing projects
- Quick create to copy family data and streamline record creation
- Graphical filing workflow to visualize process steps
- Consolidated budget and cost data
- Direct integration to the Helios IP Network for filing services
- Request, execute and save POAs in centralized location
- Document repository for all filing related information
- Filing decisions through the client portal

Design Assignments

- Track all assignment history including inventorship, ownership, and security interests
- Visual workflow for tracking request, execution, and recordal
- Link to PTO assignment recordal database
- Store executed documents

Information Disclosure Statements

- Track and create information disclosure statements (IDS)
- Automatic SB08 form creation
- Uncited foreign references easily identified in co-pending US family members
- Related references identified by both family and subject matter
- Easy packaging of required reference documents included with IDS
- Tracking of IDSs filed in each patent and across related family members
- Reports including cross family and missing references audits

Special Proceedings

- Create Oppositions, Appeals, Interferences, IPR, and Litigation matters
- Link to related IP records including patents, trademarks, and designs
- Identify parties and contacts
- Docket actions and tasks for monitoring and tracking activities
- Save emails and documents

Agreements

- Create any type of agreement linked to related patents
- Link to related IP records including patents, trademarks, designs, special proceedings
- Identify parties and contacts
- Docket action and tasks for monitoring and tracking activities
- Save emails and documents
- Integrate to electronic signature services (Adobe Sign, DocuSign)

Renewals Services Module

The Renewals Services Module provides a full featured platform for managing the end-to-end process for patent, trademark and design renewals. The module is designed for law firms and service providers to track renewal due dates, calculate fees, manage client instructions, send agent payment orders, and financial tracking with integration to finance systems.

Key features of Renewals Services include:

Renewal Due Date

- Global renewal rules automatically calculate due dates for all countries
- Set first pay date, regular due date, and final due date with surcharge
- Roll up to related matter record including next due date
- Automated notification and reminder messages

Fee Calculations

- Fees automatically calculated based on official fees, agents fees, and service fees
- Updated official fee schedules
- Configurable agent fee schedules
- Full lifetime and remaining fees tracked for each record and entire portfolio
- Renewal budget dashboards

Client Instructions

- Workflow for managing client 'pay/don't pay' instructions
- 'Auto-Pay' option to ensure payments without instructions
- Track 'paid by other channel'
- Client portal for instruction input

Agent Orders

- Manage agent instructions including transmittal and confirmation dates
- Track payment steps throughout process
- Save electronic confirmation receipt

Financial Tracking

- Create quotes and payment orders to lock rates
- Integration to currency rate service
- Calculate and track both official/agent payments and client invoice amounts
- Integrate to third party systems (with additional API connector)

Finance

The Finance module supports all aspects of managing work activities and related billing. Built for law firms and service providers looking for financial tools directly integrated to the IPMS, the Finance module enables full end-to-end management of time and billings, with integration to third party accounting and finance systems.

Key features of Finance include:

Service Activities

- Manage all client work items including annuities, docketing, filing, and formalities
- Setup service schedule of work items to be tracked by staff
- Enter both billable and non-billable work
- Setup whether time-based or fixed rate activity
- Enter client billing information including client, contact, and reference number
- Setup and associate billing codes for all service activities including standard LEDES

Time Tracking

- Users track work time against service activities
- Multiple users can track time against a service activity
- Rollup total time spent on a service activity
- Stopwatch to start/pause/stop work time being tracked
- Multiple stop watches open at the same time to allow switching between activities
- Manually enter time entries

Service Products and Price Lists

- Create service product catalog of all service activities
- Price Lists for official fees, agent fees and service charges
- Schedule of fees in local and base currencies
- Out of the box PTO official fee schedules pre-populated
- Adjust special charges, surcharges, and margins by fixed or % calculation

Client Fee Calculations and Quotes

- Automated client fee calculations for renewals, filing and other activities
- Integration to daily currency rate services
- Automatic re-calculated estimated fees based on currency fluctuations
- Create Quotes to clients for instructed services such as renewals, filings, and formalities
- Lock rates and fees based on client quote
- Email and Online access to review and approve Quotes

Agent Orders

- Automated agent fee calculations for renewals, filings, and other activities
- Integrated daily currency rate services
- Create Orders including multiple instructed services
- Email and Online access to review and approve Orders

DocketHub™ and Docket Engine™

DocketHub and DocketEngine offer the industry's most innovative approach to managing the complexities of the IP management process. DocketHub provides a single, centralized intake port for all IP related information, with a structured process to ensure client data is always complete and accurate. DocketEngine provides comprehensive rules that automate docketing including due date calculations, integration to electronic PTO data, and docket quality control with both machine and human review.

- Centralizes emails, documents, and electronic PTO data
- Automates data entry and source record storage
- Discrepancy auditing to compare in-house docket against official prosecution data
- Provide central mailbox for easy coordination and transparency
- Organizes activities into work queues with resource allocation, tracking and reporting
- Integrates to DocketEngine for auto-docketing
- Global docket rules and PTO data for patents, trademarks, designs, and utility models
- 4,000+ rules, generating 78,000+ outcomes, covering 230+ jurisdictions
- Automated docket due date calculations based on country specific procedures
- Integrated to PTO data for auto-docketing and access to electronic file wrapper
- Maintained through the global Helios IP Network of IP professionals

Reporting and Analytics

The RH Enterprise system enables robust reporting and analysis providing users deep insights into the details of their IP processes and portfolio. Built on Microsoft's industry leading tools, users can use Excel, SQL Reporting Services and PowerBI to create access and share information across their teams.

- Real time reporting and analytics directly accessible in all formats
- Dashboards provide rich infographics of key data
- Portfolio reports are represented by graphs, charts, and advanced visuals
- PowerBI enables sophisticated measures to analyze data
- Scheduled reports ensure awareness and visibility to important information
- Specialized visuals such as geographic coverage maps and product schematics
- Client access through the client portal

Document Management

The platform's document management (DMS) allows for either native Microsoft SharePoint integration, or integration to other DMS such as iManage or NetDocuments. RH Enterprise system provides a full-capability document management system that ensures all documents are easily accessible and just one-click-away from their

source. Emails, PDFs, image files, Office Documents, or any other file types are securely stored in the system, with access through the cloud.

- Out of the box integration to Microsoft SharePoint
- Documents are stored in-line with IP work activities
- Filed are organized by family and record to provide structured retrieval
- WORD and PDF templates allow for easy document creation
- One-click send for collaboration
- Full text searching to find documents quickly and accurately
- All document types are stored in their native file format
- Documents are encrypted for maximum protection
- Easily package large document sets for bulk exporting and sharing

Microsoft Teams Integration

The platform is integrated to Microsoft Teams providing users full complement of IP management capabilities directly within their Microsoft Teams environment. The integration creates a shared workspace of information access, reporting, collaboration, and communications, enabling IP departments, law firms, foreign associates, and service providers to work seamlessly across all steps in the IP process.

- Full access to all modules directly in Teams
- Collaborate with both internal and external (guest) team members
- Create special teams and channels with embedded IP records
- Publish lists, reports, and dashboards
- Directly enter decisions for annuities and filings
- Online meeting for invention reviews, filing decisions and portfolio review

The Client Portal

For read-only users including business users, clients, and external service providers needing access to important IP information, documents and decision workflows, the Client Portal provides a direct connection to the RH Enterprise core system in a less complex and easy to use package. Inventors, attorneys, outside counsel, foreign associates and service providers can be granted tailored access, enabling efficient collaboration, while protecting access to confidential or sensitive information.

- Supports inventions, patents, trademarks, and other IP work areas
- Inventors can submit, revise, review and save invention disclosures
- Submit requests for publications, conference materials and other IP sensitive activities
- Get easy views of IP information
- Check progress and status on records and important IP work activities
- Quickly retrieve portfolio, docket, and other IP reports
- Find, open, and download documents and other materials
- Review and approve services requests for annuities, filings, and other activities
- Submit requests and questions to HIP through portal comments

Enterprise Grade Infrastructure with Microsoft Azure

Built on the industry's most highly rated enterprise-grade cloud computing platform: Microsoft Azure. The system is built to meet the availability and security demands of any organization, proven with certifications across the full range of infrastructure components. Including Center for Internet Security (CIS) benchmarks, Cloud Security Alliance (CSA) STAR attestation, and the International Organization for Standardization (ISO) certifications. In addition, hosting site flexibility allows directed geo-location of infrastructure to ensure data privacy and governance regulation compliance.

The optional third party API connector allows for custom configured integrations to any external system including DMS, portal, finance systems, time tracking, and general legal matter management.

Deployments in a dedicated single-tenant and geo-location specific data center is available.

- CIS Microsoft Azure and Microsoft 365 Foundations Benchmarks
- ISO/IEC 20000-1:2011 Information Technology Service Management System (SMS)
- ISO 22301:2012 Business Continuity Management Standard
- ISO/IEC 27001:2013 Information Security Management Standards
- ISO/IEC 27017:2015 Code of Practice for Information Security Controls
- ISO/IEC 27018 Code of Practice for Protecting Personal Data in the Cloud
- ISO/IEC 27701 Privacy Information Management System (PIMS)
- ISO 9001:2015 Quality Management Systems Standards
- Service Organization Controls (SOC) - SOC 1 and SOC 2
- General Data Protection Regulation (GDPR) Action Plan and Policy

Getting Started

With the RH Enterprise system clients work in an efficient, easy to use platform that supports every aspect of their IP operations. All critical data, information and workflows are supported with world class technology that optimizes the accuracy, reliability, and efficiency in IP processes.

All RightHub clients are onboarded to the platform to gain the benefits of the platform's capabilities. We start by importing the client's existing data either from their current system, or with spreadsheets and provided lists. The data then goes through a rigorous review and verification process, including using electronic PTO data, checking online registers, and working with foreign agents to confirm key data.

In addition to initial data onboarding and verification, we also setup the client's account including their centralized DocketHub for prosecution intake, various online PTO account integrations, and the client's users, outside firms and agents.

We also work with the client to setup special reporting, notifications and other templates that are critical to efficiently manage the process. We help the client define any special views and dashboards so users can quickly find the information they need.

Finally, we provide the client with both getting-started training and ongoing training to ensure the RH Enterprise system is providing value and supporting the client's needs.

About RightHub

RightHub is redefining how the industry collaborates across the IP lifecycle. Driven by technology, the RightHub ecosystem bring owners, counsel, and service providers together in a collaborative, inclusive environment. Our Enterprise solution provides an end-to-end platform that enables law firms and companies to manage all aspects of their patents, designs, trademarks, and related information. With direct integration to our global network of IP law firms and agents, users file, prosecute and maintain their IP in a seamless and efficient process.

Find more information at www.righthub.com