



## Law Firm Files IDS in a Few Clicks and Saves 50%

Max-IDS™ enables timely IDS filings with cost-effective data migration

### EXECUTIVE SUMMARY

- Industry: Intellectual Property Services
- Location: Palo Alto, CA
- Number of Employees: 1,000+

### CHALLENGE

- Managing a 1,000-client portfolio
- Managing references in Excel
- Maintaining a huge number of references with cross-citations
- IDS generation became complex

### SOLUTION

- Max-IDS™ is a tailor-made solution for law firms
- All client groups uploaded in customized database
- References imported from Espace, INPADOC
- Envisaged at least 200 IDSes per month

### Challenge

A very large law firm was maintaining data in Excel format for each of its clients, thereby running the huge risk of missing references in IDS. While typos occurred on one hand, complications arose on the other because of bulk data being processed. There was no option for tracking modified information. Dockets and their references were maintained in separate Excel sheets with their PAIR status. Missing country codes often led to errors. Date formats were mixed up, and full citation could not be maintained properly. Users could view only the references but not the document itself. Searching through reference details was tedious. Related dockets could not be maintained in families. As a result, timely IDS generation was tedious and took a lot of attorneys' and paralegals' time and unnecessary IDS fees.

The law firm had no choice but was left with the following pressing real-time challenges:

- Handling more than 1,000 clients
- Managing complex reference matrix and cross-citation rules
- Maintaining references in Excel, resulting in chances of missing references and duplication during IDS generation
- Maintaining source information and status of the references
- Maintaining separate document management system for reference repository
- Managing a reference repository which was not searchable
- Having to deal with typos in date format, citation, and references
- Generating IDS was time consuming

### Results

1,000 client groups added to MAX-IDS™

References managed collaboratively by law firm/clients

IDS-related costs reduced up to 50%

“Manually managing a 1000+ client portfolio without errors and with data accuracy is now possible through Max-IDS with minimal effort.”

## Solution

MAX-IDS™, a cost-effective solution for IDS generation, provided a custom-made database exclusively for the law firm and its clients. Multiple users were now able to access information simultaneously. The total number of US applications, US patents, and foreign assets were easily obtainable for accounting.

The set of solutions provided by MAX-IDS was as follows:

- Asset and reference details of 1,000 plus clients were uploaded in Max-IDS and updated to match with USPTO.
- Assets were assigned to respective client groups, so that each client could easily and securely access and manage their assets and references.
- Managing reference cross-citations between families and associating references were accomplished with a mere few clicks using the comparison chart feature of Max-IDS.
- All the citation data (along with source details) was stored error-free without duplication of storage requirements.
- Date, citation, and reference formats were standardized, eliminating the need to submit revised IDS and saving valuable time and resources.
- Documents for all the references were made available in USPTO's EFS-ready format with translation type, downloadable by client.
- IDS generation in electronic filing system-ready format was automated and error-free, requiring just a few clicks.

“Max-IDS automates and streamlines the anomalies of handling multiple clients, now the law firm easily generates invoices for its diverse client portfolio and also saves 50% costs.”

## Results

After the initial upload done by MaxVal, the law firm is now managing the portfolio on its own by using Max-IDS. MaxVal's (chat/email /phone) support team extends its support on any queries from the law firm, thus making the law firm's job easier.

- The law firm is able to view entire sets of assets/references of all its clients within a single solution online.
- Both the law firm and its clients are able to collaboratively manage references, with status and source information kept up to date
- More than 300 IDSes are generated every month, with client-wise reports retrievable from Max-IDS making it easy for invoicing the clients based on the number of IDSes generated.
- Complex reference matrices are easily managed.
- The comparison chart feature is used to cross-check references between related family applications.
- Powerful search features enabled quick identification of a reference when needed. IDS generation using Max-IDS reduces cost up to 50% by filing IDSes on time and reducing the number of RCEs due to missing references identified at the last minute.

## For More Information

To find out more about MaxVal Group, Inc. visit <http://www.maxval.com> this customer story is based on information provided by the client. Many factors may have contributed to the results and benefits described; MaxVal does not guarantee identical results elsewhere.