

**A software solution for all your Patent, Trademark, Design and other IPR Management Operations, adding a new dimension to your public and private communication requirements.**

## **A Web based Case Management Platform**

PTOLEMY® offers functionalities for the digital management of any type of procedure in the life of IPR, covering examination, publication, opposition, grant/registration, maintenance of the register, cancellation, renewal or annuities, assignments etc.

### **Multi-channel Capture:**

IPR Case is the principal vertical business addressed in PTOLEMY®. It ensures the management of the process but also of any kind of document and correspondence on the case. These additional documents are captured via the Office's website or electronic exchanges, from the mailroom or entered directly on screen from paper forms.

### **Outgoing correspondence:**

PTOLEMY® aims at complete digitisation and traceability in the procedure, and offers functionalities dedicated to the automation of correspondence. IP examiners will be able to use the business data of the file in a transparent way for the elaboration of the correspondence by generating enriched documents in OOXML.

### **Publication:**

PTOLEMY® offers highly configurable publishing mechanisms, both in terms of content and layout, to meet the Office's requirements for publishing websites or gazettes.

## **Other Business Areas**

Contracts Management – including royalties' calculation

Companies Registration

Domain names Registration

Dispute Resolution Services

## **Step-by-step and global monitoring of procedures:**

Patent and trademark life cycle management and required actions are managed in a timely manner through specific and consolidated tables and agendas. Configurable examination checklists, combined with correspondence facilities, provide a powerful tool for IP examiners in their daily work.

### **Statistics:**

The PTOLEMY® database is configured to track all information for WIPO's statistics and management reporting purposes, and allows for close monitoring of the Office's activity.

### **Fees:**

Comprehensive key-in, follow-up and management of all income received.

## **Coexya in Paris**

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## Trademarks and Industrial Designs searches:

Search requirements are covered by PTOLEMY®'s integration with ACSEPTO®.

## Mailroom:

Data capture, automatic process & dispatch of incoming and outgoing documents.

## Coexya Simple Data Update (SDU):

SDU is used with PTOLEMY® to download and process International trademarks (the Madrid system), EUTM, and Industrial designs (the Hague system).

## Electronic Document Management:

PTOLEMY® can be interfaced with all major Automatic Document Capture, EDM and Workflow systems.

## e-Services & e-Payment:

Online services and payment for all applications and Maintenance requests.

## Good & Services search and vocabulary:

GSSEARCH provides IP examiners and end-users with tools and routines (API and Web interface) to facilitate the search for goods and services during application or examination to deduce and check Nice classes and extended / pre-approved categories. Based on Artificial Intelligence and Natural Language processing GSSEARCH can be used to search, detect, propose and manage expressions in 157 languages.

## PDF Editor:

PDF Editor offers everyday functionality for viewing, manipulating, merging, annotating and deleting parts of documents.

## A communication tool Intranet / Internet:

All components of the system are designed using Internet/Intranet technologies. The user interface is based on Internet browsers. The platform is composed of a Back-office for internal uses and a Front-office for external Clients/Agents uses

## Communication with applicants, agents and all parties:

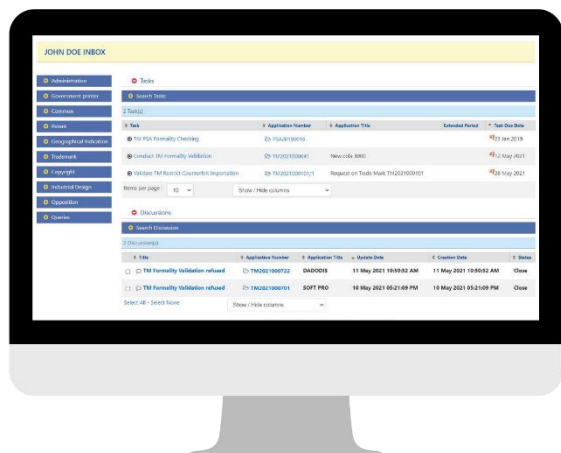
The communication with external parties uses various means, from the paper form to electronic exchanges based on e-mails/discussions, xml files compliant with IP standard, forms downloaded from the Office's website, or on-line services for e-filing or maintenance requests.

## Web-Services/API:

Features being available via the means of web-services for integration with third party software.

## Data Exchange:

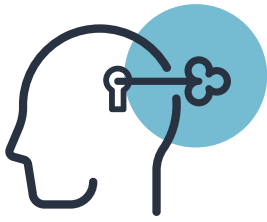
PTOLEMY® is designed in compliance with the standards used in data exchange within the I.P. Community (WIPO standards, PCT, LATIPAT, etc..). It is adaptable to all requirements.



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## Coexya PDF Editor Solution

A viewer, annotation and merge tool for working on multiple PDF documents.

A redact tool for publication of PDF documents containing sensitive information.

### Client context

Where the processing and review of a case requires consultation of several documents and can be done cooperatively, the officer will use Coexya's PDF editor to navigate between multiple PDF documents, meet the requirements of the procedural review, share annotations with others, and produce a single PDF document with annotations or deletions, as appropriate, prior to public release.

### Coexya achievement

Coexya PDF Editor key features:

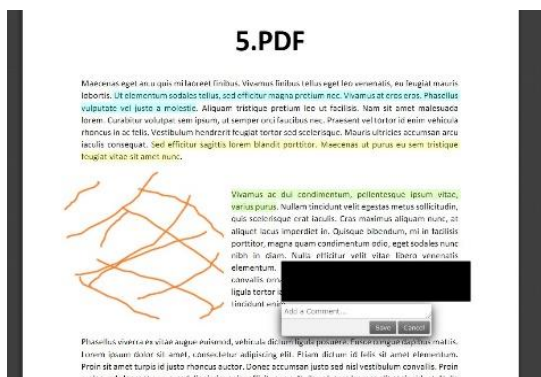
- Display a set of PDF documents
- Annotate documents
- Mask parts of the documents for anonymization
- Merge documents
- Create a merged rendition with annotations

Basic document functionalities are embedded in the user interface: navigation, rotation, search and zoom.

The annotations are not inserted in the original documents but are viewable, removable and editable through Coexya PDF Editor.

The user has access to the annotations added by other users as well and can filter per user.

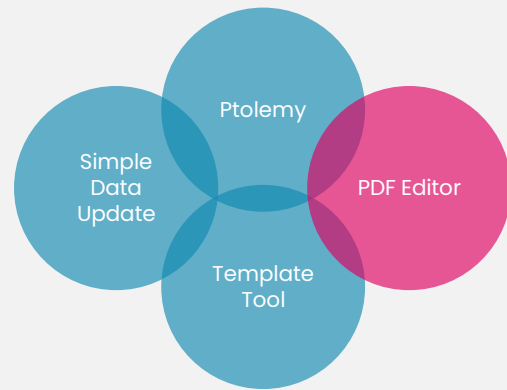
A comment can be superimposed in a redacted text box.



### Why Coexya?

As a business and information technology integrator, Coexya offers a range of high-added value specialized services and solutions. Coexya Intellect designs leading Intellectual Property Search, Watch and Complex Case Management Software Solutions since many years. Our customers investigate complex file cases in the field of IPR or resolution services, make decision and publish information in compliance with Data Protection regulations.

### Ptolemy software suite



### Technical Environment

{REST:API}

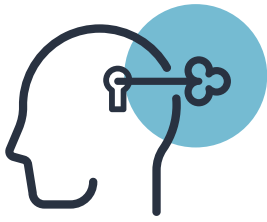


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## Coexya Template Tool

A letter template management tool for template administration, test and deployment.

A Microsoft Word-Addin for inserting dynamic content holder (tags).

A .NET library based on openXML for letter generation

### Client context

When processing file from its application and throughout its life cycle, multiple events will trigger the generation of letters and certificates to communicate with the customers. There can be a large variety of different documents generated and the Coexya Template Tool allows users to create and manage Template under a well-known format "Microsoft Word docx" with a user-friendly tag system.

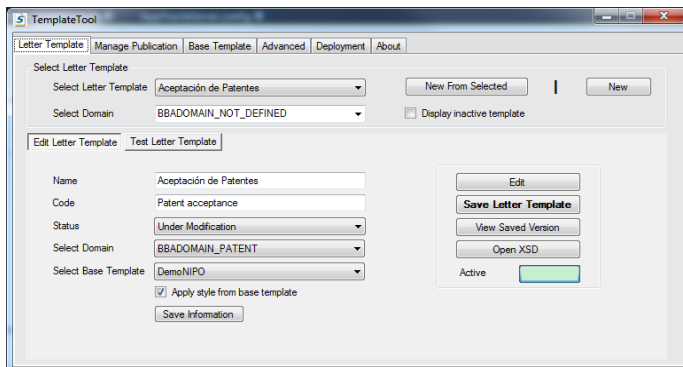
### Coexya achievement

Coexya Template Tool key features:

- Letter Template Management
- Base template feature
- Add-in for tag search and insertion
- Add watermark and stamps facilities
- Conditional tags
- Microsoft Word and Excel report generation

The base templates defines header, footer, margins and all styles information and allow to update several template with one click if any of these elements changes (e.g: office address).

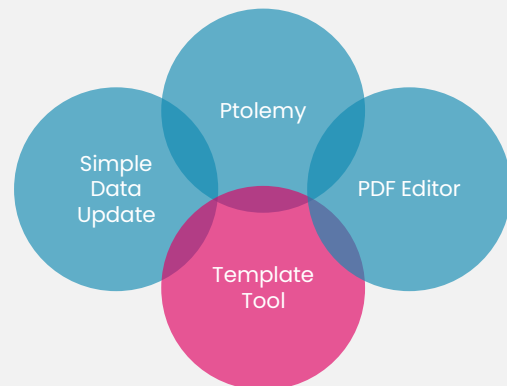
Conditional tags offer the ability to add some logic in your template and show or hide information based on Boolean values in your data.



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### Technical Environment



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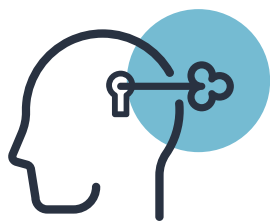
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# PTOLEMY

by COEXYA

## Simple Data Update (SDU)

Ensure the quality of your IPR data and update processes

### A management tool for your IPR data

Industrial property offices process applications for patent, trademark and design protection and administer and maintain these IPRs, whether they have been claimed through national route or under an international treaty.

Consistency, freshness and coherence of data are essential to the efficiency and reliability of your IPR management system and associated processes.

SDU facilitates the organisation of your data sources, harmonises their maintenance and ensures that your management or search systems are updated properly aligned with international repositories.

### Integrate data in your Back Office applications

The data governed by SDU is available for integration with your PTOLEMY® and ACSEPTO® platforms, but also with any Back Office application through generic connectivity (APIs / Webservices).

### Choose & Manage your data sources

SDU has been designed to natively integrate the following sources of IPR data:

- Madrid system (Marks International registrations designating your country or EU), Hague system (International designs), Article 6ter of the Paris Convention (source: WIPO)
- European Trade Marks (source: EUIPO)
- EU geographical indications (Food, Wine, Spirit drinks, Agreements between European union and other countries)

SDU, using the WIPO Standards as an exchange format, can also be used to import into Ptolemy, data submitted by your customers using external online services for filing or maintaining an IPR.

### Schedule, Qualify and manage updates on your data

SDU checks availability of new data and can be scheduled to ensure file download, data verification and updates.

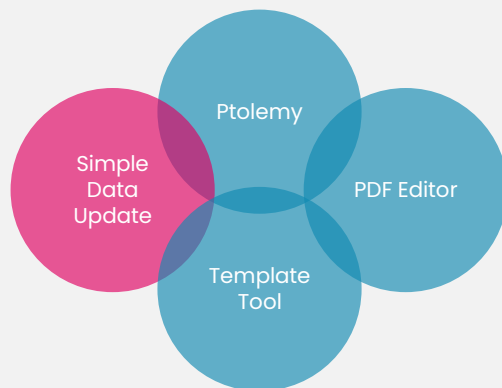
### Administration Website for the control and monitoring of your IPR

SDU comes with an administration website that enhances process monitoring and keeps track of any event. Detailed error logging allows errors to be detected, analysed accurately and small defaults to be changed easily through the Web interface.

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## SDU Functionalities

- Monitor and manage the download of IPR data files from multiple sources (WIPO, EUIPO,...) and their export into IPR management system.
- File integrity check (DTD/XSD validation) and transformation to standards pivot format (ST66, ST86, ST36, ST96 ...)
- Search tool. Visualize the history of imports of a Trademark, Patent, Design or GI
- Generation of reports and PDF notifications
- Archive module
- Natively integrated with ACSEPTO® and PTOLEMY®
- API for integration with any Back Office applications

## Integrate Patent specific data from EPO

EPO is publishing its data in a specific format. To address this problematic in the same way as in SDU, we developed EBD. This additional component to the PTOLEMY® framework is dedicated to the management of IPR data files (patents in EP-Bulletin format) from European Patent Office. EBD is designed to manage scheduling and automated download of data, keep track of history and make data available for integration into PTOLEMY®.

## SDU Web Administration:

Select source and associated treatment:

The screenshot shows the 'SDU IMPORT - SEARCH AND TREATMENT' interface. It includes an 'Overview' section with instructions on how to use the search and treatment functions. Below this, there are 'Search Criteria' and 'Treatment' sections. The 'Search Criteria' section has dropdown menus for 'Domain' (set to 'WIPO') and 'Import Date' (set to 'to'). There are also input fields for 'ZIP File Name' and a 'Status' dropdown set to 'None Selected'. The 'Treatment' section has two options: 'Import of ZIP files from provider(s) repositories' and 'Import from XML files corrected'. The 'Import of ZIP files from provider(s) repositories' option is selected, and it includes a 'Select the domain' dropdown and an 'Import File' button.

Manage your sources through history:

The screenshot shows the 'SDU IMPORT - SEARCH AND TREATMENT' interface with a table of import history. The table has columns for 'ZIP File Name', 'XML File Name', 'XML Notification Name', 'Status', 'Error Message', and 'Notification number'. The table contains several rows of data, including file names like 'N201817\_210.XML' and 'N201817\_200.XML', and statuses like 'Imported'. The table is paginated, showing 1000 files per page.

Edit and correct a file:

The screenshot shows the 'SDU IMPORT - SEARCH AND TREATMENT' interface with a detailed view of a file import error. The 'Overview' section shows the search criteria and treatment options. The 'Treatment' section is selected, and it shows a table of files with a status of 'XML file error'. One file is highlighted, and its details are shown in a modal window. The modal window displays the XML file content and the error message: 'There is an error in XML document (123, 72): (Instance notification error: 'is not a valid value for #type=System.DateTime').'