Automating Deal and Royalty Management Tracking Opportunity and Return on Resources

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A wide range of tools are available to automate an deal and royalty management. Because each tool involves an investment of valuable time to master, it is important to spend some time selecting the appropriate tool(s) for your department. I have prepared an opinionated guide to the tools currently (and prospectively) available to assist IP practitioners in providing cost-effective quality service to their clients.

The opinions below are personal to the author. As an attorney, technology consultant and software developer, I have worked with or evaluated many of the tools listed below. I have also had the privilege of developing some tools for use for IP practitioners, specifically expert practice systems in the area of technology licensing.

EVALUATION CRITERIA

In evaluating technology, I look for inspiration to the Greeks, and in particular the father of the gods on Mt. Olympus, none other than KRONOS. I use the following criteria in evaluating all technology:

- **Keystroke Count.** The tool must be easy to use. A subjective judgment on ease of use can be reduced to an empirical keystroke count. In comparing similar tools, count the number of keystrokes (or mouse clicks) require to accomplish regular tasks. The fewer the keystrokes, the better designed the software, and the more likely it will be used properly.

- **Return on Investment.** The tool must pay for itself in increased productivity, improved work product, greater client satisfaction, or more efficient organization and information retention. Don't just look at price per seat. Look at the "total cost of ownership" (equipment requirements, training, support and customization) and compare it to the expected return on investment.

- **Opulence and Intuitiveness.** The tool must be "good looking". An ugly interface is often a proxy for poorly designed and thrown together software. If the developer did not take the time to build an elegant and appealing interface, the developer may also not have taken the time to fully test and debug the software. Also, if the icons, menus, and screens are not intuitive, you may find yourself spending a fortune on training, and your users may never fully utilize the potential of the software.

- **Networkability and Integration.** The days of stand-alone PC's are over. The tool must function in a networked environment, and allow multiple users to access the system simultaneously. And the tool should be able to communicate with other programs, sharing or exchanging data.

- **Options and Customization.** It should be easy to install software, with a single CD-ROM and a menu of options to allow you to configure the software installation for the requirements of your network/PC. A good software designer recognizes that each IP practice is unique, and should allow for some degree of customization, whether the addition of custom fields or the ability to modify or add new templates.

- **Suitability for the Task.** The tool must be designed for or configurable for the specific use desired by the practitioner. A general purpose case manager is a poor substitute for an IP portfolio database.

CATEGORIES OF TOOLS

Depending on the scope of your IP practice, there are a range of suitable tools. For the general practitioner who occasionally is called on to prepare a license, register a trademark or file a patent, there are form banks (web and CD-ROM based). For the IP specialist, there are document assembly tools and more specialized intelligent forms. For the IP litigator, there are case and matter management programs. For the IP manager, there are portfolio management programs. And for everyone, there are associations, networks and web-based research. Each of these categories is explored below. Within each category, entries are ranked alphabetically.

IP Portfolio Management

Portfolio management tools are geared for corporate IP departments, whether in-house or outsourced to a law firm. In some cases a law firm may handle the complete patent and trademark portfolio of its clients. In these instances, it might make sense to purchase a portfolio management tool like those listed below. Be sure to check whether the program allows client-specific modules (or division-specific). If not, you need to create a separate database for each client.

IP Portfolio Management		
CPi Patent and Trademark Management Systems CPI Patent Annuity Payment Service	CPi Patent Management System allows the user to keep track of any information necessary from the disclosure stage, into filing and prosecution, and then into issuance and maintenance. CPi Trademark Management System allows the user to keep track of any information necessary, from the proposal stage, into filing and prosecution, and then into registration and renewals.	**Computer Packages, Inc.** 414 Hungerford Drive Third Floor Rockville, MD 20850 Phone: 301-424-8890 Fax: 301-762-8663 www.computerpackages.com
Dennemeyer HyperMark Patent and Trademark Management System	HyperMark is a family of products, integrated and stand-alone for the systematic management of IP and related legal matters. They have patent management and trademark management modules, as well as asset and matter management systems specifically designed for IP.	**Dennemeyer & Co. LLC** 1120 G Street, NW, Suite 230 Washington, DC 20005 Tel: 202 638 0380 Fax: 202 638 1729 www.dennemeyer.com
DocPro™	DocPro™ provides automated rules-based docketing and document production scheduling; drafting of US PTO documents and other correspondence; document management and filing; IP billing; and integrated accounting. The entire document assembly process is based upon the PerfectLaw® database, which contains all information pertaining to a selected IP matter. In addition to basic matter and client information, the database contains all events, ToDo's and appointments, both pending and completed, parties and documents related to the IP matter.	**PerfectLaw Software** 2100 Ponce de Leon Boulevard, Suite 1200 Coral Gables, Florida 33134 Tel: 800-749-6200 Fax: 305-444-1428 www.perfectlaw.com

IP Portfolio Management

Global IP Estimator	Offers a simple, effective, economical way to generate cost estimates for patent, trademark and design applications all over the world. If you are responsible for securing world-wide patents for an invention, this program would be of great interest to you. For the rest of us, the program offers no functionality in actually preparing the applications.	Computer Software Associates, Inc. 5671 Cabot Drive, Oakland, California, 94611 Tel: 510-339-1323 Fax: 510-339-1646 www.globalip.com
IP LegalForm Pro IP LegalDoc Pro USPTO Postcards USPTO Drawing Labels	IP LegalForm® handles USPTO patents and trademark, US copyright forms, and PCT forms approved for use by WIPO. IP LegalDoc Pro is an IP docketing program handling patents, and trademarks, that integrates with IP LegalForm.	**LegalStar** P.O. Box 415 Williamsville, NY 14231-0415 Tel: 716 634 1614 Fax: 716 631 3428 www.legalstar.com
IPLicenseTracker	IPLicenseTracker provides a full range of software tools for the intellectual property licensing professional to maximize licensing revenue and reduce expenses. Features include: license agreement administration, complex royalty rates accommodated, detailed financial analysis, sample approval and images, insurance compliance, manufacturer disclosure tracking, infringement tracking, invention disclosure, and patent docketing.	**IPnetwork.com** 420 Lexington Ave., 18th Floor New York, NY 10170 USA Tel: (212) 986-6677 Fax: (212) 986-3565 www.ipnetwork.com
ManIPulate® HAL 9000 Systems	ManIPulate®, developed in South Africa, is billed as a complete intellectual property management system with modules for patent, trademark, domain names, agreements, docketing and costing.	**Manipulate Systems (Pty) Ltd.** Block E, Hurlingham Office Park Woodlands Ave, Hurlingham Manor, Sandton, South Africa Tel: +27 11 781 3725 Fax: +27 11 886 5697 www.manipulate.co.za
PaTex™	paTex(tm) is a patent portfolio management program from Finland that also includes modules to keep track of competitor's IP properties. It simplifies many of the routines.	**CIPS Finland Ky** PL 39 15141 Lahti Finland www.cips.fi

<u>Intellectual Property Exchanges</u>

You may be called upon to assist a client in marketing a technology for which you have secured patent protection. You may also be asked to research the competitive market as well. There are a number of web-based intellectual property exchanges that are designed to facilitate communication between sellers of IP and potential buyers. Some may simply be the internet portal to licensing organizations. Other are true IP exchanges, neutral forums that assist sellers to find buyers and vice-versa.

Intellectual Property Exchanges		
BountyQuest	BountyQuest is the place where knowledge-loving people can win large cash rewards for finding information. It works this way: • Read the Bounties: They describe the information and the reward. • Find the Info: Find a document with the required information and let us know. • Win the Cash: If you are the first to find the answer, you collect the Bounty!	www.bountyquest.com
Competitive Technologies, Inc.	An invention management, technology transfer, commercialization and licensing company that helps organizations to leverage their portfolios of patents and technology through licensing, joint ventures and the formation of start-up companies.	www.competitivetech.net
DaVinci-Online	DaVinci-Online Technology and Innovation Management has the objective to enable independent inventors, firms and R&D institutions to protect, promote and commercialize their intellectual property (technologies, patents, brands, trademarks and digital content).	www.DaVinci-Online.com
Intellectual Property License Exchange	The Intellectual Property License Exchange (IP*LX) is a free service that provides news, events and a marketplace for buying or selling intellectual property. It was founded by IP attorneys and is supported by the resources of IP law firms.	www.iplx.com
PatentAuction.com	Auctions of intellectual properties including: patents, trademarks, domain names, copyrights, part or entire companies, and means and methods of doing business, etc. 3,500+ Registered Buyers.	www.patentauction.com
PL-X.com	The Patent and License Exchange provides the Technology Transfer Community with a safe marketplace for intellectual property rights-patents, copyrights, trademarks, trade secrets and know-how.	www.pl-x.com
IPNetwork.com IP MarketZone	Information portal for IP practitioners and license exchange.	www.ipnetwork.com

TechEx.com The Discovery Exchange® Research Tools Exchange®	The Discovery Exchange is an electronic marketplace which targets the transfer of early-stage bioscience discoveries between research and commercial organizations. The Research Tools Exchange allows scientists from both research and commercial organizations are able to define their specific confidential interests in lab tools and platform technologies as well as intellectual property that they wish to out-licensed	www.techex.com
Yet2.com	Yet2.com is a global forum for buying and selling technology on the Internet. A virtual technology marketplace, yet2.com offers companies and individuals a convenient way to privately purchase, sell, license and research intellectual assets.	www.yet2.com
PATEX™ Trademark.com MicroPatent OptiPat FaxPat	Family of services for IP practitioners hosted by CorporateIntelligence.Com. It leverages the assets and technology of its existing IP business units – MicroPatent, Faxpat, Optipat, 1790.com and Master Data Center to provide a comprehensive package of solutions for researching, managing, and licensing patents, trademarks, and more on a global basis.	www.patex.com www.trademark.com www.micropat.com www.corporateintelligence.com www.optipat.com www.faxpat.com
The Intellectual Property Exchange	Hosted by PricewaterhouseCoopers LLP. You must register to explore the site. It includes Licensing Strategy Developer 2000, a tool to measure license terms against a benchmark based on PWC data. It also includes a royalty rate estimator and a trademark search.	www.ipex.net

If the predominant part of your practice is in the area of intellectual property, you should consider investing in a document assembly program and spend some time developing automated templates. These tools enable the IP practitioner to leverage his/her knowledge and become more productive. Combined with task-based billing, these tools can dramatically improve the bottom line. Some of the programs are capable of even automating complex licensing arrangements.

Look at each tool carefully. There are a number of clunkers, programs with a steep learning curve and that have limited compatibility with the word processing programs you use or the case management/database/address book programs where you store your client data. A few of these programs are legacy DOS programs, that may no longer be supported, so check with the vendor before purchasing on support issues. Other programs are the document assembly engines of commercial forms programs, designed more for programmers than for lawyers.

Document Assembly (PC and Network)		
Agility® for Windows	Until recently, Agility was a DOS-based program. The new Windows interface leaves much to be desired. It is not widely used or marketed. In fact, according to the company's website, Agility is trying to sell its Canadian software patent and may no longer be in business.	**Agility Software Company** One Broadway, Suite 600 Cambridge, MA 02142 Tel: (617) 621-7099 Fax: (617) 577-1209
DataRefresh	This is an add-on to HotDocs that allows you to update the HotDocs® data in documents which you have assembled from HotDocs® and then manually edited.	**Legal Computing Services** PO Box 728 Pleasant Grove, UT 84062-0728 www.datarefresh.com
DocAssistant for Windows	DocAssistant is the document assembly engine behind InTrust for Windows, funding software for living trusts. It is essentially a flexible client database that supports merge fields into multiple templates rather than a true rule-based document assembly system.	**AtLaw Software** Post Office Box 900831 Sandy, UT 84090 Tel: (800) 828-5154 Fax: (801) 733-8994 www.atlaw.com
DocuSmarts for Macintosh	If use you a Macintosh, you have very limited options. DocuSmarts is the only program I could find runs on the Macintosh operating system. Of course, you could use a Windows emulator (ugh). Some of the web-based systems offer the promise of releasing toolkits for individual developers, but not for quite a while.	**Cognition Technology Corporation** 1000 Massachusetts Avenue Cambridge, MA 02138 (617) 492-0246 (617) 492-0247 fax
FastDraft	If you are a programmer, you will like FastDraft, because it can do a lot. It can be run client-server. It works over the web, integrates with databases, etc. But you face a steep learning curve and an interface that is not intuitive.	**InterActive Professional Software** 1402 Bombay Lane Roswell, GA 30076 Tel: 770.674.3866 Fax: 770.674.3869 www.fastdraft.com

GhostFill® 2001	An up and coming player with some really great technology. Korbitec, an established player in South Africa, is committed to a U.S. launch in June 2001, to be followed by European Community and Australia. The interface is slick. The document assembly engine is powerful. Database integration and web deployment are central features. A redesigned dialog builder now offers you the choice to access and assembly your templates through the internet, as well as the LAN. Korbitec is building a network of Value-Added Resellers in the U.S.	**Korbitec Inc.** Great Westerford 240 Main Road Rondebosch, Newlands 7700 Cape Town, South Africa Tel: +27 21 658 9700 Fax: +27 21 658 9701 www.ghostfill.com **Basha Systems LLC** Certified Consultant 117 Oneida Avenue Croton on Hudson, NY 10520 Tel: (800) 413-6033 sgr@bashasys.com www.bashasys.com
HotDocs® 5.2 HotDocs Pro® 5.2 HotDocs Online Server	The leader in market share. An elegant, flexible and powerful program. It sets the standard for document assembly and is sold at a price that can't be beat. Simple templates are easy. But to truly customize the interface and use its full potential requires a license to HotDocs Pro and advanced training. There is a network of Capsoft certified HotDocs consultants to help you on design and development of templates. HotDocs Online Server is the engine behind LexisOne. It works with standard HotDocs templates, converting the interviews to HTML for browser independent assembly.	**Capsoft Development Corp.** 2222 South 950 East Provo, Utah 84606 Tel: (801) 354-8000 Fax: (801) 354-8099 www.capsoft.com **Basha Systems LLC** Certified Consultant 117 Oneida Avenue Croton on Hudson, NY 10520 Tel: (800) 413-6033 sgr@bashasys.com www.bashasys.com
MacroSuite™	While not a document assembly program, MacroSuite is a collection of templates, menus, macros, and toolbars for the legal market. Address book integration can take data from Corel Address Book, Interface InterAction, METZ Phones and Microsoft Outlook. Document management integration can pass data to DOCS Open® and iManage.	**SoftWise Consulting** 53 Hamilton Avenue Staten Island, NY 10301-1807 Tel: 718.876.9776 Fax: 718.876.9736 www.softwise.net
PowerTXT Draftsman PowerTXT Architect	Once heavily marketed, PowerTXT continues to have its loyal followers. Its outline interface is unique, appealing to those who are structured linear thinkers. For others, however, the outline metaphor is too restrictive to allow a truly user friendly interface for the user.	**Intercon® Associates Inc.** Building 2 Suite 200 95 Allens Creek Road Rochester, NY 14618 Tel: 800-422-3880 Fax: 716-473-4387 www.interconweb.com
ProDesign® ProForm®	Form design engine used to power ProForm, SoftPro Corporation's closing and title insurance program. Work with word processing documents and graphic forms.	**SoftPro Corporation** 333 East Six Forks Road Raleigh, NC 27609 Tel: 919-829-1122 www.softprocorp.com

Document Assembly (PC and Network)

ProDoc® ProDoc® Systems ProDoc® Supplemental Developer	ProDoc is a document automation engine that powers the ProDoc Systems for Texas, Florida and California forms. It is both powerful and complex. ProDoc is available as a stand-alone development tool for those willing to commit significant time to learn the tool.	**ProDoc®, Inc.** 962 Coronado Blvd Universal City, TX 78148-3228 Tel: (800) 759-5418 Tel: (210) 659-1973 Fax: (210) 659-0637 www.prodoc.com
SmartWords® 2000	Available only through certified consultants, SmartWords® 2000 is the most powerful and flexible of the document assembly programs. It may also be the most elegant in its user interface. It has seamless database integration, supports simultaneous web and desktop deployment, and comes with multi-level security. The program is designed for client-server enterprise applications. Its power comes at a cost, a steep learning curve, which is why it is sold through certified consultants.	**The Technology Group** 1 N. Charles Street, Suite 1300 Baltimore, MD 21201-3721 Phone: (410) 576-2040 Fax: (410) 576-1968 www.TheTechnologyGroup.com **Basha Systems LLC** Certified Consultant 117 Oneida Avenue Croton on Hudson, NY 10520 (800) 413-6033 sgr@bashasys.com www.bashasys.com
ThinkDocs	Originating in the HR and Real Estate forms business, DataTech has recently released its document assembly engine under the name ThinkDocs. Time will tell whether it can move from a niche player to the mainstream.	**DataTech Software, Inc.** 4800 Linglestown Rd., Suite 201 Harrisburg PA 17112 Tel: 800-556-7526 www.thinkdocs.com
WinDraft	WinDraft was one of the first truly windows-based document assembly systems. It is well designed and slick. It has good integration with DOCSOpen. It is a popular second choice to HotDocs.	**Eidelman Associates** 317 S. Division, Suite 187 Ann Arbor, MI 48104 Tel: 734-769-1500 Fax: 734-769-1501 www.lawtech.com

This is a brand new category of document assembly tools. There is some overlap with the PC and Network tools described above. For example, GhostFill, HotDocs and SmartWords allow development of desktop practice systems that can be deployed over the internet without extensive recoding. Each of the systems below allows for a browser-based interview, to be followed by the assembly of either a wordprocessing document or a graphic form (usually in PDF). Some of the vendors do the coding for you, for a development fee or a volume usage commitment. Some of the products are part of e-commerce solutions, where the company hosts your documents, feeds you referrals and pays you a royalty or transaction fee. If you have a collection of IP Practice forms that you feel would be valued by others, you might consider contacting one of the organizations listed below.

Document Assembly (Web-tools and ASPs)		
DAS@H - Document Assembly System at Hyperspeed Online	The model used by DAS@H is for the law firm to make its forms accessible to its clients over the web. The firm provides DAS@H the original documents and DAS@H applies DAS@H technology to the documents, producing automated documents that can be accessed and delivered to you or your customers. DAS@H takes care of the headaches of automation, web-hosting, document-delivery and server-side technical support, for a fee of course.	www.das-h.com Address info not available on website
DocDoLittle® OwlCentral Limited OwlDocuments.com	OwlDocuments™ is a web-based document assembly system developed in New Zealand. The docdolittle™ client software is a Microsoft Word 2000 add-in that creates web pages and database fields to capture information for later inclusion in the document. The web pages are then loaded onto a web server where the docdolittle™ server application processes, assembles and either e-mails, stores or prints the completed document.	**OwlCentral Ltd (New Zealand)** www.owldocuments.com www.owltechonline.com www.owlcentral.com
eForms® TeleForm®	Billed as an Adobe Acrobat extension, eForms and TeleForm are powerful tools for gathering data in graphic forms (over the web, desktop and paper) and transferring that information directly to databases. It is a pricey tool, but well worth it for high volume information gathering.	**Cardiff Software, Inc.** 3220 Executive Ridge Drive Vista, California 92083, USA Tel: (760) 936-4500 www.cardiff.com
HotPaper.com	Hotpaper.com is a Web-based infrastructure provider that enables automated creation and delivery of documents. Through any Web-enabled device, your users can access a library of content, choose and customize a document for their business-specific purpose, and create and deliver it in seconds.	**Hotpaper.com, Inc.** 33 New Montgomery, 10th Floor San Francisco, California 94105-4509 Tel: (415) 677-9990 Fax: (415) 677-9997 www.hotpaper.com

Document Assembly (Web-tools and ASPs)

Rapidocs	Another up and coming player with solid technology. Rapidocs' strength is its e-commerce module, allowing a firm to deploy forms over the web to potential clients and charge them a fee. But it is also a solid tool for internal template development.	**Epoch Software** Number One, The Technology Park Colindeep Lane London NW9 6BX United Kingdom Tel: +44 (0) 20 8931 3066 Fax: +44 (0) 20 8931 3031
ReachForm®	High-end graphic forms automation with extensive database integration. Graphic forms can be filled in over the web either in context or through cascading windows controlled by a powerful scripting language. Only economic for high volume practices which require extensive data input from clients.	**JetForm Corporation** 1875 Charleston Road, Suite 224 Mountain View, CA 94043 Tel: 1-800-JETFORM (538-3676) Fax: (650) 316-3925 www.jetform.com
Tower IDM	Integrated web-based solutions for corporate transaction content processing solutions, including a document assembly module. Software only sold in conjunction with consulting services.	**Tower Technology, Inc.** 800 Boylston Street, 13th Floor Boston, MA 02199 Tel: 888.733.5500 Fax: 617.236.1113 www.towertech.com
SmartPrecedent Server Suite from SpeedLegal	SpeedLegal, a recently formed Australian company, has developed the SmartPrecedent Server Suite. This suite uses web technology to capture legal and industry know how in SmartPrecedents, allows you to create the content and define the questions for a browser-based interview, and then assemble the document. SpeedLegal uses a pure XML editor which adds speed to its document assembly engine, but complexity for developers.	**SpeedLegal Pty Ltd** ACN 090 810 549 Level 4, 85 Queen Street Melbourne 3000 Victoria, Australia Tel +61 3 9670 0141 Fax +61 3 9670 0142 www.SpeedLegal.com
SmartWords® 2000	The Technology Group, working with certified consultants, will set up private intranet or public sites for custom client forms using SmartWords® 2000, one of the most powerful and flexible of the document assembly programs. It has seamless database integration, and comes with multi-level security. The program is designed for the web. Because of its flexibility, it requires a set of plug-in for the Internet Explorer browser.	**The Technology Group** 1 N. Charles Street, Suite 1300 Baltimore, MD 21201-3721 Phone: (410) 576-2040 Fax: (410) 576-1968 www.TheTechnologyGroup.com **Basha Systems LLC** Certified Consultant 117 Oneida Avenue Croton on Hudson, NY 10520 (800) 413-6033 sgr@bashasys.com www.bashasys.com
SML-Script	eFormity, a Dutch software company, has developed a scripting language that lets you deploy assembly systems over the web. eFormity has yet to enter the U.S. market.	**eFormity Software** www.eformity.com support@eformity.nl

This category is a real mixed bag. There are a few collections of forms for IP professionals. Most, however, are geared to the consumer and small business market. Buyer beware on all the forms; you get what you pay for. The vendors listed below general sell forms packages on disk, though they may be distributed through a web-site, and even downloaded from the web. Look carefully at the offerings and the description of what you are buying, and who authored the documents. Try to get an evaluation period so you can return the package if you don't like it. Also, try to work with intelligent forms. And best of all, get a package that allows you to copy templates and revise them to suit your requirements.

Forms and Intelligent Forms		
ContractMaker®	Digital Contracts sells a family of interactive contract and proposal forms for information technology and web-based transactions. These forms can be assembled using the ContractMaker document assembly engine. You can buy the complete library of forms or document kits on subject including: I/P Asset Protection, Consulting/Development, End-User Licensing, Reseller Rep Channel, OEM Channel, Publishing, Web-Site hosting and more. While designed for the consumer market, these kits may be useful to the practitioner.	**Digital Contracts, Inc.** 2370 Roxburgh Drive, Suite 100 Roswell, Georgia 30076 Tel: 770-664-8555 Fax: 770-667-9203 www.digicontracts.com
ProForms™ 2001 Law Forms CD	Collection of forms on CD-ROM include several license forms and assignment form, but otherwise, quite limited and more consumer oriented.	**Institute of Professional and Consumer Education, LLC** 6666 Odana Road, Suite 212 Madison, WI 53719 Tel: 608-827-8500. www.proguide.com
DL Drafting Libraries™	Extensive suite of canned forms for general practitioners, including corporate kits and organizational documents. None of the libraries currently are addressed to the needs of IP professionals.	Attorney's Computer Network 415 Marlboro Rd Kennett Square, PA 19348 tel: 610.347.1500 www.draftinglib.com
DPS Document Production System	The current suite of canned forms includes estate planning, probate, corporate and limited liability companies. It is unclear whether their forms will extend to meet the needs of IP professionals.	**Advanced Logic Systems** 558 28th Street Des Moines, Iowa 50312 Tel: 800-454-7703 Fax: 515-282-7706 www.DPSbyALS.com
IPDAS	IPDAS is a relational database and collection of over 300 USPTO and related forms specifically designed for intellectual property patent and trademark prosecution.	**AutoDocs** 7115 Leesburg Pike, Suite 207 Falls Church, VA 22043 Tel: 703-532-9720 Fax: 703-532-9724 www.auto-docs.com
IPPO Trademark Administrator® WebTMS® IPPO Express®	IPPO Trademark Administrator® is for trademark practice automation with full text record keeping, docketing and trademark document assembly. It includes additional modules for patent records. IPPO Express is a trademark and patent docketing and reporting system (a stripped down version of Administrator). WebTMS® is a web front-end for the Administrator.	**Intellectual Property Online Ltd** 3905 State Street Suite 7-142 Santa Barbara CA 93105 www.ippo.com

Forms and Intelligent Forms

Lawgic®	Lawgic produces a family of interactive forms for family law, estate planning, corporate law, and employment law. Originally built for the MacOS, but now designed for Windows. Forms are state specific, with many offerings limited to California and Florida. No forms at present for IP professionals.	**Expert Systems Publishing Company d/b/a Lawgic Publishing Company** 7200 Redwood Boulevard Novato, CA 94945 Tel.: 1-800-9-LAWGIC (952-9442) Fax: 415-898-8875
LSI.Online	Collection of forms modules which can be ordered over the web for a limited number of states and a limited number of practice areas.	**Legal Software, Inc.** 30524 Quinkert St. PO Box 568 Roseville, MI. 48066 Tel: 810-771-3650 www.legalsoftwareforms.com www.nolo.com
Nolo Press eForm Kits	Collection of forms and guides for the consumer market, including: NDA's, estate planning, small business, employment, real estate, divorce, and limited basic offering for patent, trade secret and copyright protection.	
WorldMark® WorldSuite® E-Mark®	WorldSuite® is a client-server system for managing trademarks, patents, designs, and domain names. It is also used for the tracking of related matters such as licensing, oppositions, change of ownership, cease and desist, etc. WorldMark is used for the management of trademarks. E-Mark is a compilation of trademark laws worldwide.	**Intellectual Property Network Ltd.** 19 S. LaSalle Street, Suite 603 Chicago, IL 60603 Tel: 312-857-7015 Fax: 312-857-7001 www.ipnsoft.com

<u>Web-Based Forms (Intelligent and Static)</u>

This is a brand new category and one under great development. By the time you read this, there will likely be five new forms portals, and the number of forms on each portal will be doubled. At present, there is little quality control or branding for these forms. You use them at your risk. Some of the material is very good and worth the money. Some organizations gather everything they can find: the good, the bad, and the ugly. The best site give you information about both the form and the author, as well as an email link to the author (e.g. LawOnTheWeb.com).

Apart from the source of official government forms (UPTO and Copyright Office), the most valuable collections are those of actual executed forms (e.g., TechAgreements.com) which offer an insight into the more complex transactions. I did a quick search of each site for IP related forms; the results are listed below.

Web-Based Forms		
atforms.com	Subscription and fee-based forms. Promoted as containing tens of thousands of forms, there are currently 169 forms in the database and none of them specific for IP professionals. The main thrust of the forms seems to be on graphic forms (federal and state court, bankruptcy, etc.).	www.atforms.com
ComputaLaw.Com	Web-based forms hosted by an English law firm on computers, internet and e-commerce contracts	www.computalaw.com
e-TEAS PrinTEAS	TEAS is the Trademark Electronic Application System, developed by the U.S. Patent and Trademark Office to automating all their forms so that submissions can be made over the web or forms can be completed over the web.	www.uspto.gov/teas/
FindForms.com	Thousands of free forms and over 14,000 premium fee-based forms. Quality is quite mixed. And there are surprisingly few forms on copyright, patents or trademarks in the database.	www.findforms.com
FindLaw.com	Comprehensive portal for lawyers and business. Site contains comprehensive set of federal and state court forms. More interesting for IP professionals is a set of actual technology deals.	forms.lp.findlaw.com techdeals.biz.findlaw.com
FormsonNet.com	FormsOnNet.Com is based in India. That said, it has an extensive collection of Patent forms, especially if you do an international IP work.	www.formsonnet.com
Internet Legal Resources Guide	Basic grouping of free forms for the legal practitioner and links to other forms sites.	www.ilrg.com/forms/index.html
Law.com	Subscription based service with an IP Law practice center with news, practice tools and forms. There is an effort to create a real tool for IP professionals, but as yet the actual content is very limited, and comes at a steep cost. This is among the more commercial sites. Even a subscription is only a beginning.	www.law.com

LawExpress.com	A consumer oriented site currently covering family law and estate planning. Documents, when they come available, will be built with Rapidocs and available on a per document basis.	www.lawexpress.com
LawOnTheWeb.Com	Internet portal for web-based expert practice systems using SmartWords 2000 technology. Draft customized documents, opinions and analyses without performing time-consuming research or having special knowledge about a practice area. All documents are authored by legal experts in the field and are continuously updated. LawOnTheWeb.com also provides legal discussion forums and links to other legal resources. The Technology Group is developing an Intellectual Property practice area specifically designed to meet the needs of IP practitioners	www.lawontheweb.com
Lawsmart.com	Collection of thousands of free legal forms of mixed quality, organized by topic and state. None, however, are specific to the needs of IP professionals.	www.lawsmart.com
'Lectric Law Library	Limited collection of free forms in three areas: general law practice forms, general business, and real estate.	www.lectlaw.com
LegalAdviceLine.com	Collection of fee-based forms built with D@SH technology. Has a limited collection of IP forms: a basic assignment agreement and a basic license agreement.	www.legaladviceline.com
LegalDocs.com	Limited collection of fee-based forms (and a few free forms) in the following categories: estate planning, sales, leases, partnerships, employment, real estate and general business. No forms specific to IP professionals.	www.legaldocs.com
LexisOne.com	Collection of over 6,000 free forms in various levels of automation, some automated with HotDocs Online Server, others with Acrobat, and others not at all. Given the scope and the marketing, there are surprisingly few forms for the IP Professional. However, the implementation of HotDocs Online is quite impressive, and there promise to be more offerings in the future.	www.lexisone.com
MyLawyer.com	Collection of intelligent forms built with RapidDocs, geared primarily for the consumer market. Advanced technology, but very limited offerings, and none for IP professionals.	www.mylawyer.com

Web-Based Forms		
QuickForm Contracts	Invisible Hand Software, Inc. has released a set of web-based interactive forms for the computer industry, internet commerce and general business transactions. None are specifically for IP professionals, but some could be of use to a practice that serves the computer industry.	www.quickforms.net
TechAgreements.com	Similar to FindLaw's TechDeals, this site has a comprehensive collection of technology agreements. However, unlike FindLaw, these agreements are not free. They are sold on a per document downloaded basis.	www.techagreements.com
theLaw.com	Website hosted by former NYC Mayor Ed Koch. Contains a collection of consumer oriented forms in PDF. Limited understanding of the needs of IP professionals is evident from the single IP form on the site, a Utility or Design Patent Application which is indexed under "Copyright".	www.thelaw.com
U.S. Copyright Office	The U.S. Copyright Office has a complete collection of copyright forms available for download. Many of them are fillable Adobe Acrobat forms.	www.loc.gov/copyright/
U.S. Patent Office	The U.S. Patent and Trademark Office has converted most of their forms to fillable Adobe Acrobat forms and made them available on their website.	www.uspto.gov/web/forms/
USLegalForms.com	A subscription based service. Billed as a collection of over 20,000 forms. There are 96 forms under "Patents and Trademark" and 33 forms under "Copyright." All of them appear to be the official forms in PDF available for free on the USPTO and U.S. Copyright Office websites.	www.uslegalforms.com

Web-Based Resources

This is a catch-all for everything else. There are a number of associations of interest to IP professionals which have put resources on the web for their members (e.g. ABA, LES and AIPLA). There are also some interesting organizations that are actually providing legal services over the web and may serve as a good source for referrals of business (e.g. AmeriCounsel.com and LegalAdviceLine.com).

Web-Based Resources		
ABA Intellectual Property Law Section	ABA's resource for IP professionals available to all members of the IP Law Section	www.abanet.org/intelprop/home.html
American Intellectual Property Law Ass'n	Website of the American Intellectual Property Law Association.	www.AIPLA.org
American LegalNet	Website for litigators … repository for court forms.	www.AmericanLegalNet.com
Americounsel	Network of lawyers offering flat fee business services. Network uses technology, in particular, HotDocs Online server to host interactive templates to allow its network of attorneys to deliver cost-effective quality services for flat fees. Currently offers trademark and copyright services.	www.americounsel.com
Digital Lawyer	Resource for information on legal technology and related issues.	www.digital-lawyer.com www.legaltechnologyonline.com
Intellectual Property Owners Association	Resource for news affecting owners of intellectual property. IPO has nearly 100 large and mid-size companies and 350 small businesses, universities, inventors, authors, executives, and attorneys members.	www.ipo.org
Licensing Executives Society (USA-Canada)	LES (USA-Canada) is a professional society comprised of over 4,700 members engaged in the transfer, use, development, manufacture and marketing of intellectual Property, including business executives, lawyers, licensing consultants, engineers, academicians, scientists and representatives of government. LES (U.S.A. & Canada), Inc. is a member society of the Licensing Executives Society International, which has a worldwide membership of over 9,000 members in more than 25 national societies, representing over 60 countries.	www.usa-canada.les.org
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