



# INVITATION TO PUG 2019



**Patricia® User Group Conference**  
7 - 9<sup>th</sup> April 2019

# CONFERENCE DETAILS PUG, Madrid 2019

## WHEN

7 - 9<sup>th</sup> April 2019

(6 - 9<sup>th</sup> April for Super User Training)

## WHERE

C/Miguel Angel 29-31 – 28010 MADRID

Tel: +34 91.452.05.29 / 30

Fax: +34 91.442.53.20

<http://www.hotelmiguelangel.com/en/>

## Booking Code is PUG2019

Special accommodation rate from 145 EUR per single BB

## REGISTRATION

To sign up for the conference, please click on the link:

[Registration Form](#)

Please note that deadline for registration is on March 5<sup>th</sup>, 2019 as well as the cancellations.

## THE PUG CONFERENCE FEE:

750 EUR per attendee which includes training, lunches, refreshment breaks on Monday and Tuesday, a dinner evening, and sightseeing.

Note: Accommodations are not included

Click [HERE](#) to read more about the Miguel Angel Hotel



# Welcome to Patricia® User Group Conference (PUG)

2019 year's **Patricia® User Group** meeting will be held in Madrid, Spain on the **7-9<sup>th</sup> April**. As usual the actual user group meeting takes place on the Monday and Tuesday (7-9th) but just as last year we have added extra training sessions on the Saturday and Sunday.

The conference has dynamic approach, make the most of it and learn hands on! Therefore, all sessions are **Bring Your Own Device**.

 Before the conference you will receive the instructions how to download the training environment into your laptop.

## LATEST PATRICIA® RELEASE 5.9

Find out more about Automated Docketing (US, EPO and BOPI)

General Inventors Remuneration

Cost estimation in PCP

## BASIC PATRICIA® SUPER USER TRAINING

Become Super User in 4 days! Saturday April 6<sup>th</sup> – Tuesday April 9<sup>th</sup>

For more details and Schedule see page 6.

## EXTRA SESSIONS ON SATURDAY AND SUNDAY

Are you Super User already but need to improve the areas below? Register for extra sessions we added based on your request.

- Saturday – PCP Training 9.00-17.00
  - Financial Basic 13.00-16.00
- Sunday – Batch Set Up 9.00-12.00
  - Use of SQL in Patricia® 9.00-12.00

Those extra sessions are included in the conference fee.

## BUILD YOUR OWN SCHEDULE!

Select the session which are of importance and value to you and your organization and have it in the palm of your hand on your device wherever you go. Instructions how to easily download and use our PUG meeting app will be sent before the conference.

## NETWORKING

We are arranging the opportunity for you to share your knowledge and get inspired from other Patricia® users. Those sessions are driven by you and your input.

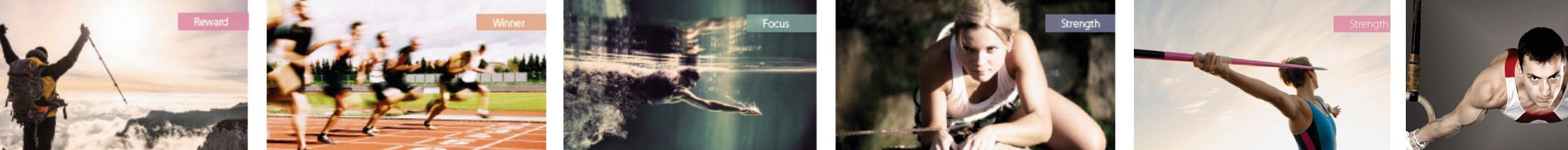
Our networking sessions take place on Tuesday, 9<sup>th</sup> April from 15:20 and take one hour.

If you are interested to share your experience please send your request to [pug@patrix.com](mailto:pug@patrix.com).

## MEET THE PATRICIA® TEAM

Meet us, your Patricia® team from all around the world.

Please note that there is a limited number of sessions and registrations are on first come first serve basis.



# General Schedule

## Patricia® User Group Conference (PUG) 2019

### SATURDAY, APRIL 6

- 08.00 - 09.00 VIRTUAL BOX INSTALLATION ASSISTANCE
- 09.00 - 17.00 Patricia® SU Training Day 1
- 09.00 - 17.00 Patricia® PCP Training
- 10.30 - 11.00 Coffee Break for SU and PCP Training attendees
- 12.00 - 13.00 Lunch for SU and PCP Training attendees
- 13.00 - 16.00 Patricia® Financial Basic Training
- 15.00 - 15.30 Coffee Break for SU, PCP and Financial Training attendees
- 15.30 - 17.00 VIRTUAL BOX INSTALLATION ASSISTANCE

### SUNDAY, APRIL 7

- 08.00 - 09.00 Registrations
- 09.00 - 17.00 Patricia® SU Training day 2
- 09.00 - 12.00 Patricia® Batch Set Up Training
- 09.00 - 12.00 Use of SQL in Patricia®
- 09.00 - 12.00 Sightseeing Tour - Group 1
- 09.00 - 17.00 Individual Work Shops – sign up via [PUG@patrix.com](mailto:PUG@patrix.com)  
*Get one hour of assistance & support on topic of your choice*
- 10.30 - 11.00 Coffee Break for SU, BATCH and SQL Training attendees
- 12.00 - 13.00 Lunch for SU, BATCH and SQL Training attendees
- 14.00 - 17.00 Sightseeing Tour - Group 2
- 17.30 - 19.00 First Time and SU Attendees Activity
- 20.00 - 22.00 ABG Welcome Reception

### MONDAY, APRIL 8

- 08.00 - 09.00 Registrations
- 08.00 - 09.00 VIRTUAL BOX INSTALLATION ASSISTANCE
- 09.00 - 10.30 Welcome and introduction  
Patricia® 5.9, Patricia® NEXT, DMS 2.0
- 10.30 - 11.00 Coffee Break
- 11.00 - 12.00 Welcome and introduction  
Patricia® 5.9 , NEXT, DMS 2.0 continuation
- 12.00 - 13.00 Lunch
- 13.00 - 17.00 Sessions (See page 4 - 5 for details)
- 13.00 - 17.00 Patricia® SU Training Day 3
- 19.00 PUG Dinner Event

### TUESDAY, APRIL 9

- 09.00 - 16.20 Full schedule found on page 4 - 5
- 16.20 - 16.50 Closing Session



For the best outcome,  
bring your own device  
to ALL sessions

# General Schedule - Patricia® User Group Conference (PUG) 2019

MONDAY cont.

12.00-13.00 Lunch

13.00-15.00	<b>EXTENDED DMS</b> Join us in this session where we dive into the Extended Document Management System. This will be a comprehensive discussion on the practical benefits, features and functionality that this solution provides. We will also focus on super user related activities such as changing EDMS behaviour, configuration settings, Maintenance integration and so on. If you are interested in implementing the EDMS or wish to sharpen up Super User knowledge then join us!	<b>REPORTS: BASIC</b> An all time favourite! A must have session to learn and make use of the powerful reporting tool in Patricia®!	<b>DOCUMENT DOCKETING INCL. AUTOMATION</b> The physical post handling methods of the past now translated into the digital world. Come along and learn how to configure this powerful feature to enable the more efficient management and delegation of work directly from the incoming communications. This session will also include the next step in the automation on incoming communication from the EPO and USPTO.	<b>BEST PRACTICE ANNUITY SET UP</b> Patricia® is one of the few IP software systems on the market that offers a very powerful off the shelf set up on how to handle all aspects of the annuity process. Come to learn how a best practice set up can look like. Most of the tasks are automated but can also be specific including price calculation after agreement with the client, official fee downloading, and specific reporting.
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15.00-15.20	Coffee Break			
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15.20-17.00	<b>DATA COMPARISON - TM VIEW AND OPS</b> The data comparison tool in Patricia® has now been around for more than two years. First out was the connection to international trademarks handled by WIPO, last year we added the OPS (Open Patent Service) which opened up for an extensive number of patents around the world. With the 5.8 we now have added more trademarks as another 35 countries have been added. This session will focus on what is offered and how, and what is needed to get started using this powerful tool.	<b>ADVANCED REPORT CREATION INCL. DASH BOARDS</b> Once you got the basics, you can move to more advanced styling and reporting options in Patricia®. Learn how to use grouping to better control the data in your reports as well as conditional styling. Also looking at the setup and configuration of Dashboard reports as well as the underlying principle of them.	<b>ADVANCED BATCH</b> In this session we will look in detail at the Advanced Batch functionality. This powerful feature gives you the ability to update sets of data in a much more robust and versatile manner. We discuss the interface, features, best practice, processes to follow and how to schedule your batchjobs. If you want to unlock this powerful feature be sure to join us in this session.	<b>COST ESTIMATION - BUDGET LIST</b> Both Patricia® and the PCP offers cost estimation features, one advance version from Patricia for you to use and set up, builds on your own pricelist or standard price estimations that you have set up. Can be used on existing cases, as well as for new case. The Cost Estimation in PCP is a simpler tool for the client to easily get an estimation on new filings. Both builds on the same financial data in your Patricia® set up. Come and learn how to make use of it and how to set it up!
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18.00	PUG Dinner Event			
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TUESDAY	09.00 - 16.20 SU Training Day 4			
9.00-10.30	<b>FINANCIAL ADVANCED</b> Collective Invoice and how to work with this tool. How to handle Advance Notes. How to Credit Invoices and Advance Notes. Exchange Rates including adjustments Financial Export/Ebilling and possibilities in relation to this area.	<b>PCP PORTALS WITH INDUSTRY FOCUS</b> How to make your PCP become an interactive tool - connecting every aspect of your business.	<b>TIPS &amp; TRICKS EXTENDED TERM, DISPLAY LAYOUT, DATA VERIFICATION</b> Join us for this tips and trick session where we will focus on extended terms which covers advanced workflow setup. We will then look at the Display layout and how changes here can benefit your firm. The last item is data verification solutions and how you can ensure the correct information is added to your cases at all times.	<b>NAME/ADDRESS INFORMATION INCL. BATCH CHANGES</b> In what shape is your current Name data in Patricia®? In this session we will go through how you keep them updated correctly by using functionalities in Patricia® such as Extended Attributes and Batch Changes. We will also work with reports and search results using Name information.



# General Schedule - Patricia® User Group Conference (PUG) 2019

10.30-11.00	Coffee Break			
11.00-12.00	<b>MAINTENANCE BC VALUES</b> We will have a look at some of the most used BC Values and what they can do for you and your installation.	<b>PATRIX IP SERVICES (PIPS)</b> More and more of existing Patricia® clients see the full benefit of making use of PIPS as their payment provider for annuities around the world. It is not just on account of competitive prices, good quality BUT also on account of the seamless move of data, incl document such as payments certificates between your own Patricia® database and PIPS.	<b>THE PATRICIA® APP (PAPP) 2.0. HOW TO GET STARTED</b> Working on-the-go has become more and more prevalent in our society today. Join us in this session to learn about our handy Patricia® APP solution. This app provides you with direct access to your case information regardless of where you are. Find cases, look up documents, track time and so much more! Join us in this session to find out more.	<b>INVENTOR REMUNERATION</b> Inventor Remuneration in Patricia® offers possibility for reporting and calculation based on already known functions in Patricia®, such as Diary Matrices, Pricelist Setup, Batch functionality and Letter creation as well as specific setup in Maintenance for Share calculation.
12.00-13.15	Lunch			
13.15-15.00	<b>DOCUMENTS INCL.EMAIL SET UP</b> Document generation is a powerful feature which, if implemented correctly, will greatly increase your productivity. This session will be hands-on where we discuss template creation and email setup. If you want to increase your template creation knowledge or how to deal with emailing from within Patricia® be sure to join us!	<b>C&amp;L FOCUS INCL. DM SET UP WITH CONDITIONS</b> Make sure you handle the Country and Law Updates in the best possible way. This session also includes Diary Matrix Setup/Changes including Conditional Rules and Terms.	<b>PCP PORTALS WITH IP PRACTICE FOCUS</b> How to setup your PCP to effectively communicate, fully digitally, with your clients to reduce your workload and make your clients happy!	<b>EDMS FROM TECHNICAL POINT OF VIEW INCL. HOW TO UPGRADE</b> Make sure that you have the needed knowledge to maintain and care for the Nuxeo and Patricia® EDMS plug in giving your users the best possible service.
15.00-15.20	Coffee Break			
<b>NETWORKING SESSIONS - DISCUSSION SESSIONS MODERATED BY ONE OF OUR CLIENTS. BE PREPARED TO SHARE YOUR EXPERIENCE AND OPINION ON THE SUBJECT</b>				
15.20-16.20	<b>INDUSTRY FOCUS HOW DO YOU WORK WITH COUNCILS?</b>	<b>MAINTAIN PATRICIA® WITH UPDATED PROCESSES</b>	<b>PATRICIA® UPGRADE FROM SU AND TECH POINT OF VIEW</b>	<b>HOW TO TRAIN NEW PATRICIA® USERS? HOW TO MAINTAIN PATRICIA® KNOWLEDGE IN YOUR ORGANIZATION?</b>
16.20-16.50	<b>CLOSING SESSION</b> Getting ready for the future By: Patrix CEO			

## Key:

All Attendees
Training
Networking
Communal Breaks

Join us in  
Madrid to  
become a great  
Patricia® user!



# Basic Patricia® Super User Training

## Patricia® User Group Conference (PUG) 2019



### SATURDAY

09.00 – 17.00 PUG Super User Day 1

- 09.00 - 10.30 Basic Configuration
- 10.30 -11.00 Coffee Break
- 11.00 - 12.00 Name Configuration
- 12.00 - 13.00 Lunch
- 13.00 - 14.00 Name Configuration cont.
- 14.00 - 15.00 Security
- 15.00 - 15.30 Coffee Break
- 15.30 - 17.00 Case Configuration

- 12.00 - 13.00 Lunch
- 13.00 - 15.00 Term Configuration
- 15.00 -15.30 Coffee Break
- 15.30 – 17.00 Term Creation
- 18.00 PUG Dinner Event

### SUNDAY

09.00 – 17.00 PUG Super User Day 2

- 09.00 - 10.00 Rules
- 10.00 -10.30 Diary Fields
- 10.30 - 11.00 Coffee Break
- 11.00 - 12.00 Diary Fields cont.
- 12.00 - 13.00 Lunch
- 13.00 - 15.00 Diary Matrix
- 15.00 - 15.30 Coffee Break
- 15.30 - 17.00 Diary Matrix cont.
- 17.30 - 19.00 First time and SU attendees activity
- 20.00 - 22.00 ABG Welcome Reception

### TUESDAY

09.00 - 16.20 Patricia® Super User Day 4

- 09.00 - 10.30 Workflow Creation
- 10.30 -11.00 Coffee Break
- 11.00 – 12.00 Terms
- 12.00 – 13.00 Lunch
- 13.00 - 15.00 Batch-Patricia®
- 15.00 - 15.30 Coffee Break
- 15.30 - 16.15 Batch Configuration
- 16.30 - 16.50 Closing Session

### Pre-Requisite:

Basic Patricia®.

Watch our tutorials in Youtube:

<https://www.youtube.com/playlist?list=PL6JfRWA880RwOa8bhSYRTkAt-a4vOxb4vn>

<https://www.youtube.com/playlist?list=PL6JfRWA880RzC0kh2yl0yuEsx-9jVxQA5D>

<https://www.youtube.com/playlist?list=PL6JfRWA880RxNJSjuFjlvXNBWcS-LQ6ks7>