



NRF Transform

# IP Portfolio Manager

## IP portfolio management solution

A robust IP portfolio is important to your company, and maximizing its value takes careful management and alignment with your business strategy. Our IP portfolio management solution was developed to give companies a clear view of their patent and trademark portfolios to drive efficiencies and provide current information to assist in making complex business decisions.



### Manage costs

- On demand access



### Streamline

- Searchability
- Family or sector view



### Gain insight

- Filing updates
- Customizable reports



### Strategize

- Executive dashboard

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#### Key contacts



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## IP portfolio management solution overview

The IP portfolio management solution keeps track, in a user-friendly manner, of your IP portfolio, and groups filings by family or business sector. For patents, our fully searchable offering shows families along with representative images at a glance, allowing families to be expanded to reveal patent members. Each family expands to reveal member patents within the families table. If member patents need to be examined directly, the solution's patent view may be filtered and sorted across all patents. For trademarks, we can report on business groups which are fully customisable.

Family ID	Representative Patent Image	Family Title	Synopsis	Earliest Application date	Case Status	Patent Count	Business Group	Sub Business Group	Technology
01234-1		System for rotary cutting mechanism designed for kitchen use	Lorem ipsum dolor sit amet.	2020-10-20	Canada: Pending (20)	20	Technology and Operations	Food	
01234-2		System for enhanced storage of consumable liquids	Sed lobortis, tortor at mattis.	2020-10-13	Canada: Pending (10)	10	Infrastructure	Water	Storage

**Filter Results**

Filters Active - 3

- Business Group: Infrastructure (96)
- Sub Business Group: Food (110)
- Technology: Storage (146)

Family ID	Representative Patent Image	Family Title	Synopsis	Earliest Application date	Case Status	Patent Count	Business Group	Sub Business Group	Technology
01234-3		System for storage of liquids below zero degrees celcius	Nullam eget dictum sem. Quisque.	2020-03-23	Canada: Pending (10)	10	Infrastructure	Food	Storage
01234-23		This application is directed towards a system which will allow for the safe transportation of temperature sensitive liquids	Donec vulputate augue vel sem.	2019-04-08	Canada: Pending (10)	10	Infrastructure	Food	Storage

The patent portfolio is easily searchable using custom tags or trademarks, specified by the user. For example, patents and patent families or trademarks may be grouped by business groups or types of technology. Tags are applied to the portfolio and populated in the portal, allowing the user to filter by one or more custom data points to see only the information that is valuable to that particular client or user.

Once filtered, searched or sorted, the user may add, remove or rearrange the table columns and export the resulting data as a PDF report.

Automotive	20	Car	0 (20)	Computing	0 (50)
Chemical	20	Communications	0 (20)	Design	0 (50)
Infrastructure	96	Construction	0 (20)	Mining	10 (110)
Technology and Operations	110	Electrical	0 (50)	Mobility	10 (110)
		Food	0 (50)	No Data	0 (50)
		Music	0 (110)	Personal	10 (110)
				Power	10 (110)

## Our roadmap

A number of useful features are in the pipeline for inclusion in 2021-2022. We can also work with your business for specific enhancements.



Our deadline tracker will allow tracking prosecution deadlines such as filing deadlines, response deadlines, fee deadlines and renewal deadlines.



Our one-stop-shop for trademark management will be expanded to include a trademark tracking and filing system, which will keep track of trademarks, manage adverse marks entering the marketplace and help manage filing and other deadlines.



Additional reporting features including automated email reporting and notifications will provide the latest IP filing information and monthly reports with visualizations of portfolios, periodic filing updates and year-over-year data comparison.