

IP Operations Guide

Meet Tammi, an IP Docket Supervisor at a bustling global law firm. She helps her department grow and thrive by improving daily docketing operations and processes. Her team is responsible for managing timely patent and trademark filings, maintaining attorney dockets, and ensuring IP data integrity. She is the go-to person for all things AQX® Law Firm, her firm’s IP management platform.



A Day in the Life of an IP Administrator Using AQX 11

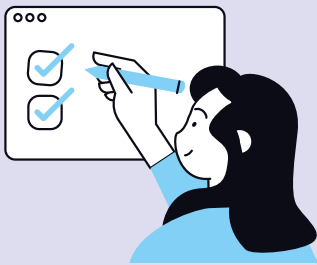
8:00 AM

Tammi checks the results of [Document Auto-Processing](#) in her docketing inbox in AQX. The Document Auto-Processing capability collects bibliographic data and due dates, identifies the document type, and extracts the data from the PTO forms. The AQX platform automates many of the steps that Tammi used to do manually. This gives her more time to review client and foreign associate communications and ensure that attorneys are informed.



8:30 AM

Tammi organizes and prepares work for her IP support team, so they have what they need to start their day. She works on PTO correspondence that needs to be validated or manually docketed. She uses AQX to validate the data and assign others to review it. She can track the progress of the correspondence in AQX instead of manually entering the data. This allows her to spend more time helping her team with any docketing questions.



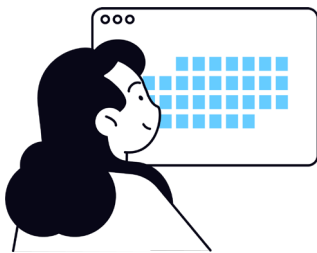
10:15 AM

Tammi’s team member Beth logs into AQX and receives a notification to review and validate a Notice of Abandonment. After Tammi validates the docketing of the notice, it is automatically routed to Beth to ensure that the attorney has requested abandonment per the firm’s internal guidelines, and she validates the Notice of Abandonment.



11:30 AM

One of Tammi’s team members, Andrew, will be out of town next week. Tammi uses the [AQX Calendar View](#) to balance the workload of the rest of her team. She logs into AQX to review Andrew’s upcoming tasks for the week and reassigns them. Tammi can now focus on additional data validation work and reporting.



2:40 AM

Tammi is managing incoming email for her team and sees that she has received instructions with a foreign filing deadline coming up this week. The email is uploaded using the Outlook plugin, and based on the subject, it identifies the record and saves the email and attachments to the record. The file is ready with instructions for the appropriate attorney to review.



4:30 PM

Tammi meets with one of her paralegals, Paul. She reviews all reports to ensure all critical tasks for the day have been filed and closed out. If items are not filed, she will contact the attorneys.



5:30 PM

It was an extremely busy day, but Tammi was able to get everything done with AQX’s help. She can go home now and relax, knowing that everything was received, docketed, and validated correctly in their IP management platform.



Evolve Your IP Operations with Document Auto-Processing in [AQX 11](#)

“The Document Auto-Processing capability in AQX is crucial to us, which processes our incoming PTO files. In our previous paper-based file workflow when a file came in from the PTO, it might take three days to process a document and get it to a professional to review. Now, we can get those documents processed and reviewed in half an hour or less.”

Chris Farrell
Operations Process Analyst
Smart & Biggar

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