

CASE STUDY

Workflow Customization and Reconfiguration for an IP Law & Consulting Firm



OVERVIEW

The client is a leading full-service IP law and consulting company with over 60 years of expertise and a global presence spanning 20+ offices. Offering strategic counseling on the protection of patents, trademarks, and designs, the company oversees more than 3 million IP rights for approximately 8,000 clients.

CHALLENGES

The client sought an adaptable workflow, which could be customized/reconfigured on the fly without any intervention from developers. A workflow is a sequence of activities that are necessary to complete a task.

The client wanted a solution to ensure that end-users are able to add new workflow steps and assignee of that step by simply using a configuration interface.

SOLUTION

Contata implemented a standard workflow step within the application, allowing the dynamic enabling or disabling of any workflow step as needed.

Additionally, a workflow configuration manager facilitated the seamless

INDUSTRY

- Intellectual Property

SERVICES

- Cloud Development
- Product Engineering
- Digital Transformation
- Custom Software Development

TECHNOLOGY

- Web API
- Angular
- SQL Server
- C#
- Entity Framework



modification of workflow steps on demand. Key features integrated into the customizable workflow include:

- **Co-Inventor Approval:** When Co-Inventor approval is activated, the workflow will route through the Co-Inventor before progressing to manager approval stages in an invention.
- **Witness Approval:** Upon enabling witness approval, the workflow will involve a witness before proceeding to manager approval stages in an invention.
- **Manager Technical Assessment:** Activation of manager technical assessment entails the workflow passing through a Manager Technical Assessment phase subsequent to manager and PRC approval stages in an invention.

In the event that workflow steps are altered by an administrator, ongoing tasks will continue to adhere to the previous version of the workflow. However, any new tasks will conform to the updated workflow steps

BENEFITS

- User-friendly workflow required minimal technical knowledge for end-user operations.
- No or minimal code changes required.
- End-users could easily modify workflow settings directly from the user interface, enhancing usability.
- Workflow could be customized based on department, roles, and other entities within the application.
- Customizable workflow settings facilitated inventions to progress through desired approval states in the workflow, as per specific requirements.
- Changes made in the workflow were recorded in the Audit log, enabling easy tracking for monitoring purposes.

About Contata

Contata Solutions is a trusted leader in technology and digital innovation. Through our work in data engineering, data analytics, machine learning, marketing automation and app development, we deliver solutions that address complex problems in ways that are simple, insightful and impactful.

Our promise and value proposition to our customers is simple: we leverage our deep technical expertise and global presence to bring software products and data-driven decision capabilities to life.

Founded in 2000, Contata is a privately-held company headquartered in Minneapolis that serves clients globally from offices in the United States and India.