

Workflow Customization / Reconfiguration for an IP Law & Consulting Firm

Introduction

The client is one of the full-service providers in IP law and consulting, addressing services to the entire chain of IP management. With 60 years of experience in the industry and 20+ offices worldwide, it manages over three million IP rights of around 8,000 customers. It works on all aspects of Intellectual property management and advises on the strategic protection of patents, trademarks, and designs.

Need

Workflow is the series of activities that are necessary to complete a task. Each step in a workflow has a specific step before it and after it, except for the first and last steps. Under this use case customer wanted a customizable workflow, which can be customized/reconfigured on the fly without any intervention from developers. For example, end-user should be able to add a new workflow step and assignee of that step just by using a configuration screen.

Solution

We developed a standard workflow step for the application with the feature of enabling/disabling any workflow steps at any point in time. Also, a workflow configuration manager can be used for setting up, or editing the workflow steps on the fly. Key implemented features in customizable workflow include:

- **Co-Inventor approval:** On enabling the Co-Inventor approval, the workflow will go through Co- the inventor before manager approval states in an invention.
- **Witness approval:** On enabling the witness approval, the workflow will go through witness before manager approval states in an invention.
- **Manager technical assessment:** On enabling the manager technical assessment, the workflow will go through Manager Technical Assessment once again after the manager and PRC approval states in an invention.

In case, workflow steps are changes by admin, existing ongoing workflow tasks will keep using the previous version of workflow however, any new task will follow the updated workflow steps.

Advantage

- Customizable workflow settings do not require much technical knowledge which makes it easy for all kind of end user operations.
- In customizable workflow there are generally no/minimum code changes that are required.
- End user can change the workflow settings from the UI itself which makes it easy to use and user friendly.
- Workflow settings can be customized as per department, roles and other entities present in the application.
- Customizable workflow settings help the particular invention to pass through the desired approval states in the workflow depending on the requirements.
- Changes made in the workflow are being captured in the Audit log which makes it easy for tracking purposes.

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