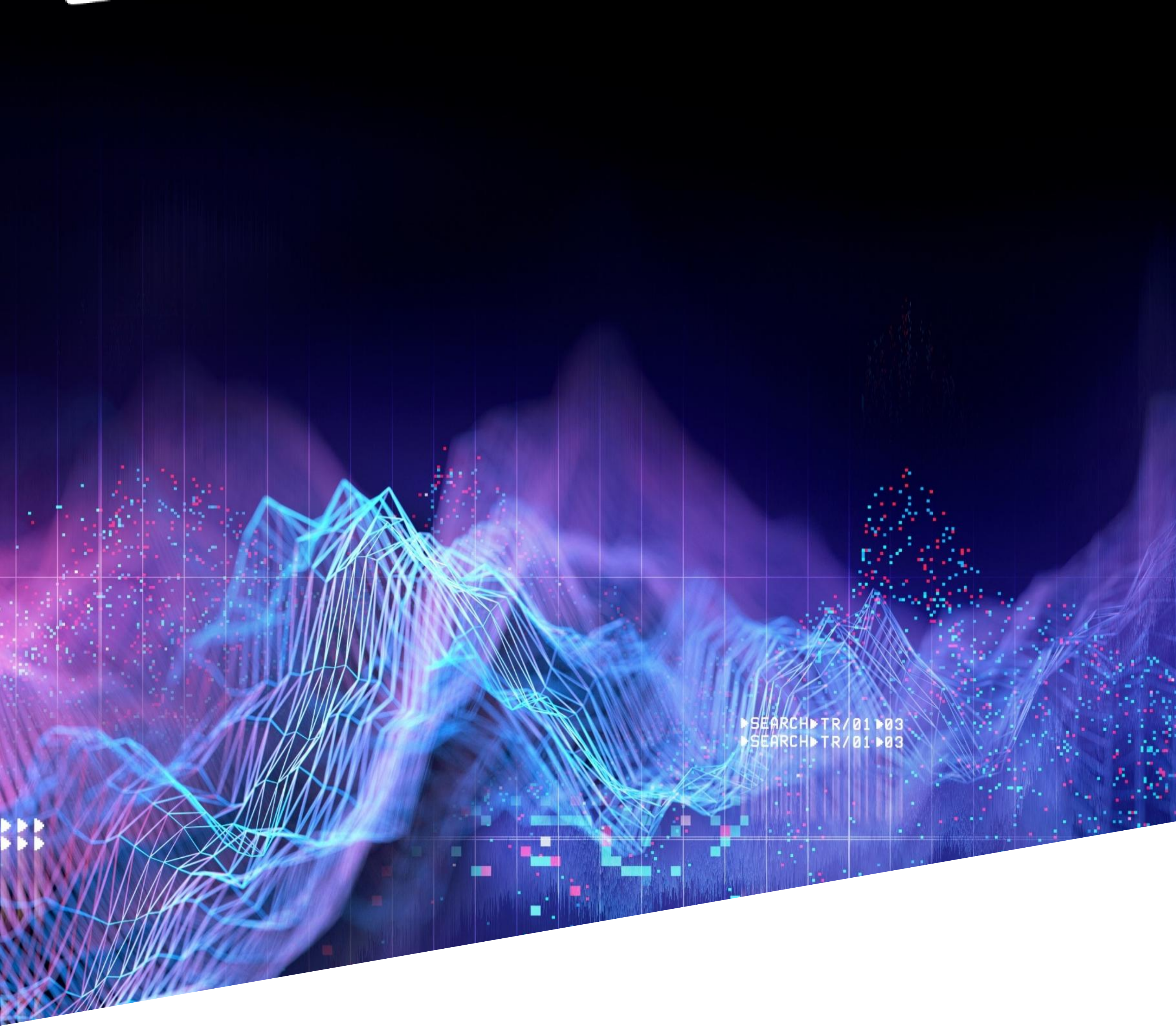
Dennemeyer
The IP Group



DIAMS

Guide: Configuration and Administration

Version 2026.3

Contents

DIAMS U User-defined structure Add-on

Consisting of: Asset Rules (e.g. automatically assign IP's of specific owner to attorney X), **Additional fields** (for example for customer ID's used in CRM), **custom categories** (brand, product, technology...)

Asset rules / auto assign records to a responsible party– add on feature

Asset rules are a convenient way of customizing the default setup of an asset with rules set for companies/contacts by jurisdiction during creation by offering an extra layer of customization of the default values.

When creating an asset with the creation wizard, if the user does not manually add or modify certain entities for which rules have been created, the system will automatically complete them with a default value based on the existing, customized asset rules.

Additional fields – user defined scope configuration (optional add-on)

Additional fields allow clients to specify their own custom fields for any asset type. Various field types are available when configuring the additional fields, as follows:

Text Fields
Memo Fields
Number Fields
Date Fields
Lookup Fields

Categories

Using categories and category types gives the user another level to "group" their assets using their own configurations.

Categories is very flexible and allows for simple lists within a group, to quite complex hierarchy levels. With quick and advanced search fields available, it can be an effective way to filter assets by product line, internal cost centers, the technology etc.

Standard Row Level Security (RLS)

Standard RLS (Row Level Security) is a new feature in ***DIAMS*** designed to enable Administrators to restrict data access according to predefined rules. This functionality ensures that users can only access and interact

with the data they are permitted to, enhancing both security and compliance within the system.
See the separate guide "Optional add-on modules" for more information.

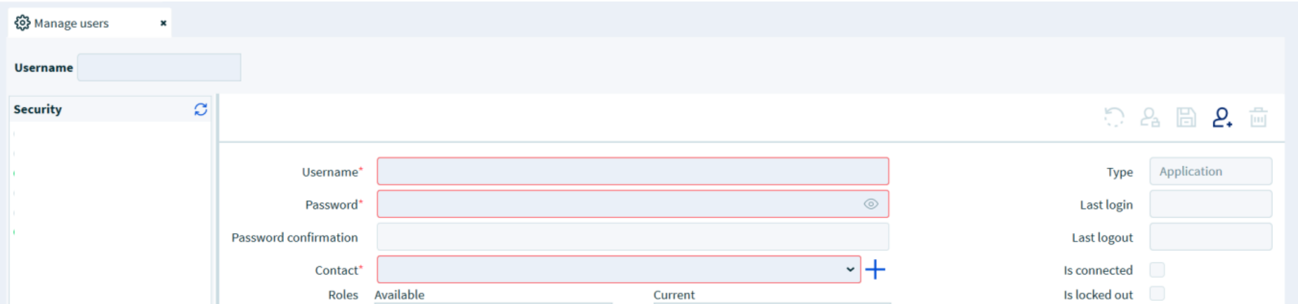
Configuration

Security

How to manage users and user roles

Add a new User

To add a new ***DIAMS U*** user, select from the menu **Administration >> Security >> Manage Users** and click on the icon .



Enter the **users name** and a temporary password which will **create the new** user.

The user, logging in for the first time, is able to change their password. Once the user has been saved, it is also possible to make changes to their access levels from the left-hand "Security" pane to add/remove roles.

Assign **roles** (see below) to the user by selecting the role from the left-hand pane and clicking the arrow → ← to move the role to the right-hand pane. Continue adding the necessary roles for the user in this way.

Make sure a contact has at least one role assigned otherwise the newly created user will not be able to log in.

DIAMS User roles

User roles determine the users' access to the various functions within ***DIAMS.*** These roles are assigned to the individual user by the Administrator.

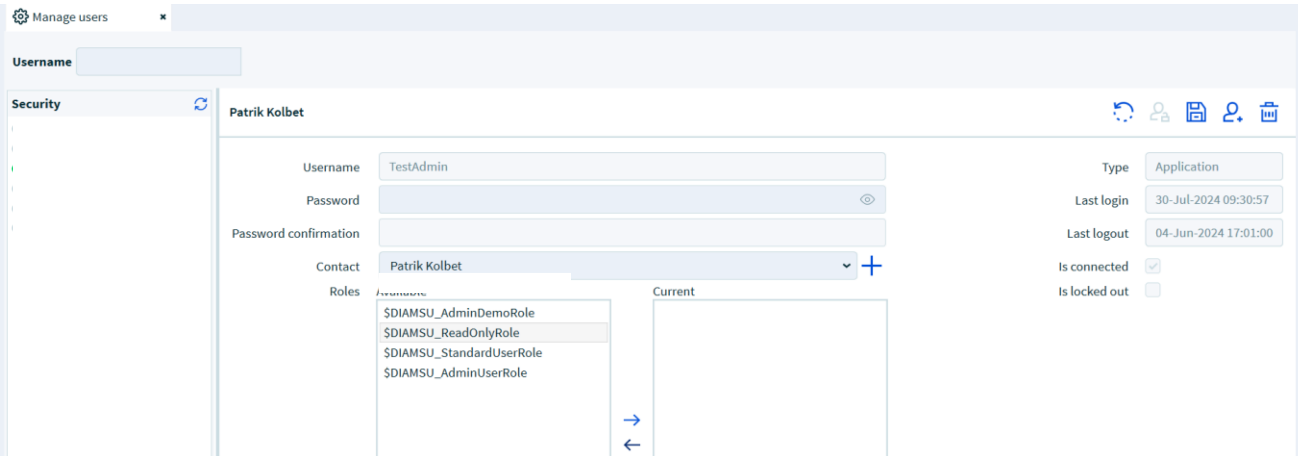
Currently there are three predefined system roles available:
- $DIAMSU_AdminUserRole
- $DIAMSU_StandardUserRole
- $DIAMSU_ReadOnlyRole

- **Admin User Role description**:
  - Full access to Patents, Trademarks, Design, Companies, Contacts, Cost Items, Documents, Matters (DIAMS U addition)
  - Full access to Renewal section of Payment service Annuities and Renewals to send instructions for upcoming annuities and renewals to Dennemeyer – necessary for users of our Annuity and Renewal services
  - Reporting

   - List Layouts
   - User management: User creation and role assignment
   - Admin configuration: Asset Rules (DIAMS U addition), Categories (DIAMS U addition), Cost Item Types, Currencies, Currency Exchange Rates, Action Types, Document Names, Document Types, Events, Regions
   - Data Exchange & Data Import
   - Country Law Update administration: Download and Deploy Country Law updates
   - Maintenance: Purge deleted records and recover deleted records
   - Management of Batch Updates
   - Access to Audit Trail, Job History, EPO OPS Access key, UPC Developer App key

- **Standard User Role**
   - Full access to Patents, Trademarks, Design, Companies, Contacts, Cost Items, Documents, Matters (DIAMS U addition)
   - Read access to Renewal section of Payment service Annuities and Renewals – necessary for users of our Annuity and Renewal services
   - Reporting
   - List Layouts

- **Read Only User Role**
   - Read access to Patents, Trademarks, Design, Companies, Contacts, Cost Items, Documents, Matters (DIAMS U addition)
   - Read access to Renewal section of Payment service Annuities and Renewals – necessary for users of our Annuity and Renewal services
   - Reporting
   - List Layouts



Delete a User

To delete a user from ***DIAMS***, select the user from the left-hand pane and then click on the delete icon

Unlock a User

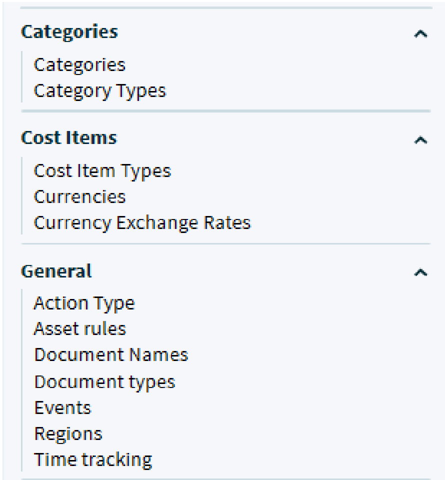
If a user should lock themselves out of ***DIAMS*** due to exceeding the maximum incorrect password entries, select the user from the left-hand pane and then click on the icon as shown in the menu bar to reset.

New Email Delivery Option

An additional email delivery option has been introduced in ***DIAMS***, allowing switching between the default SMTP transmission system and ACS (Microsoft Azure Communication Service), an alternative that offers enhanced security and reliability.

This improvement is especially relevant for our client's technical teams. For more information or assistance, please contact DIAMSSoftwareSupport@denneyemer.com.

Configuration menu



System Configuration allows you to centrally manage and create:

- **Categories** (**add-on feature**)
- **Costs** (import of costs, creation of cost item types, maintain and manage currencies and exchange rates)

General allows you to centrally manage and create:

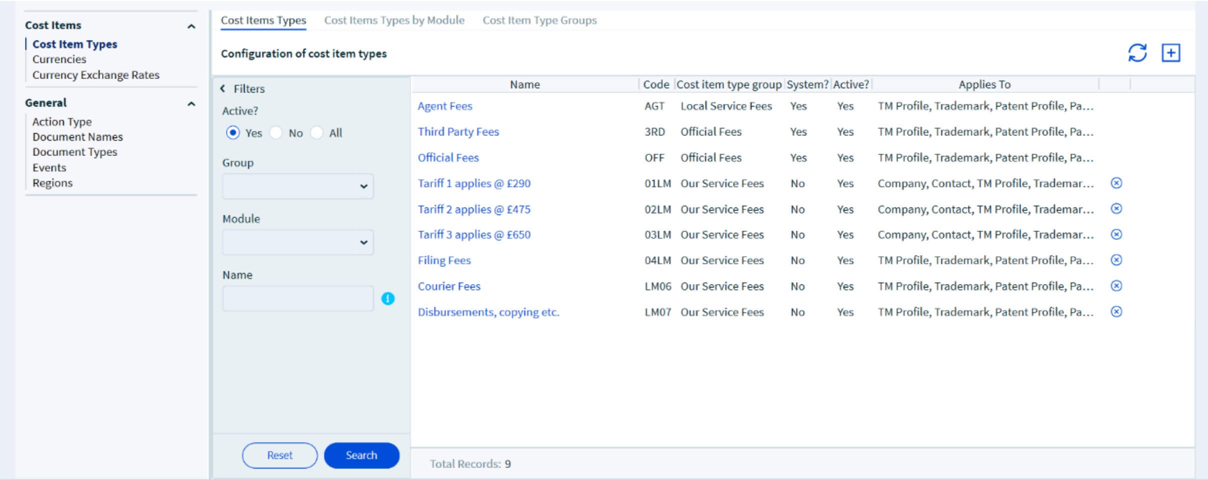
- **Actions**
- **Asset Rules (add-on feature)**
- **Document names**
- **Document types**
- **Events**
- **Regions**
- **Time Tracking (add on feature)**

Cost item “types” management

When creating **cost item types**, the user will need to have **cost item type group(s)** configured first.

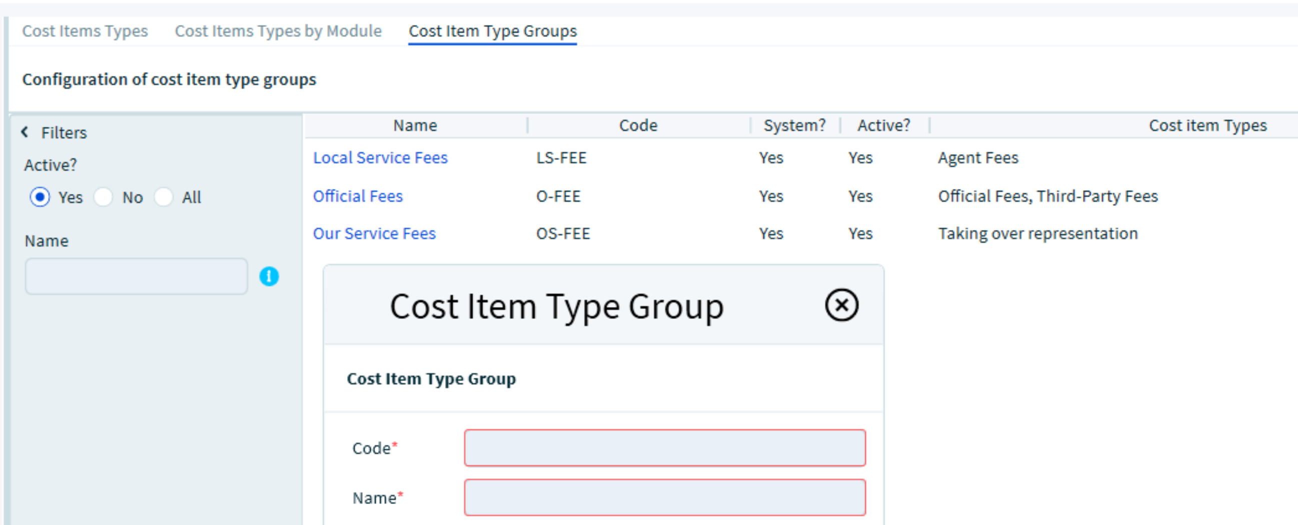
Consideration should be given on how these **cost item types** are configured as they are linked to the mandatory fields **cost item groups** and to a **module or modules**.

Cost item type groups are located from a tab in **cost item types** coming from the **cost Items** section of the System Configuration menu. On selecting cost item types, it will open by default with the following screen. Here you will see how under **name**, the cost items are linked to a cost item type group and further, the modules where they will be available for use from a drop-down list:



To add a cost item type group

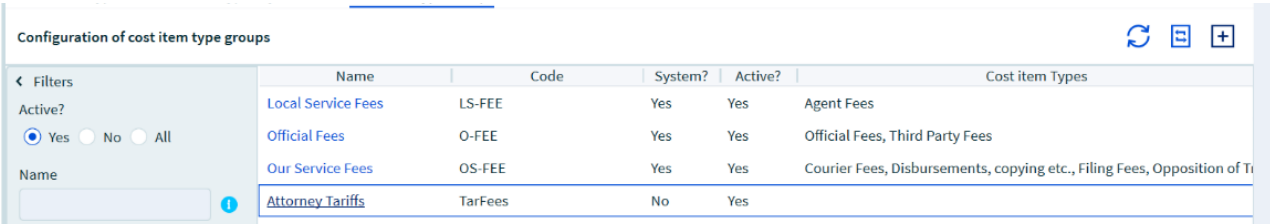
Click the **Add a new cost item type group** icon from the **cost item type groups** tab, the pop-up window is presented as shown below:



The following should be specified:

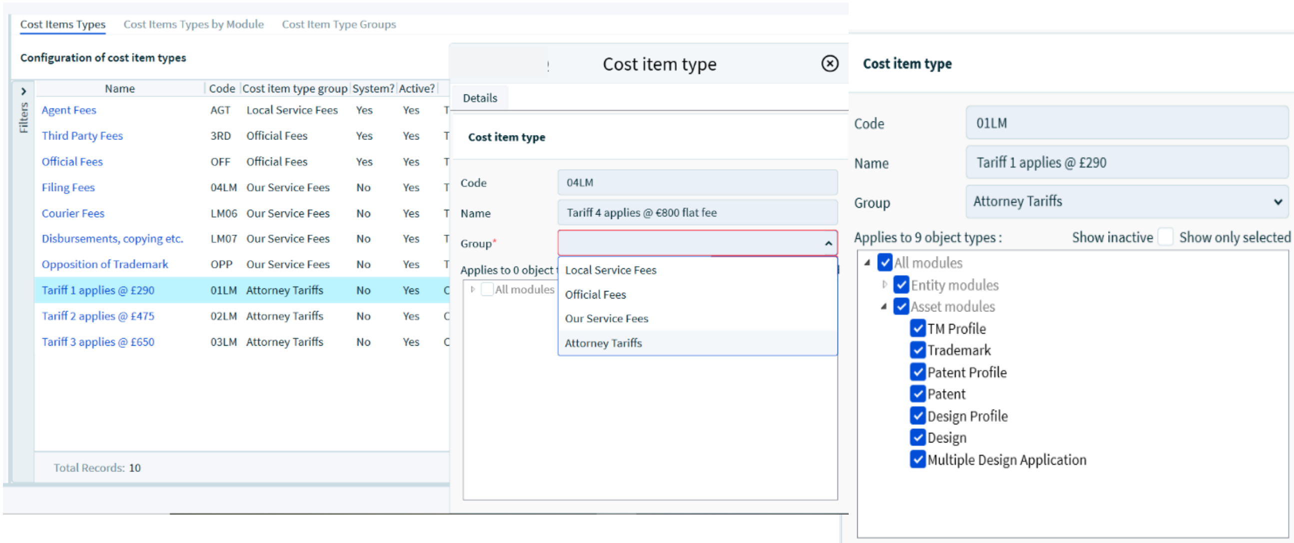
- The **unique** "cost item type group code" (this field is mandatory)
- The "cost item type group name" (this field is mandatory)

Once saved, the new “cost item type group” is added and available to be used, for assigning various “cost item types” belonging within that group. For this example, “Attorney Tariffs” has been created as a “cost item type group”:

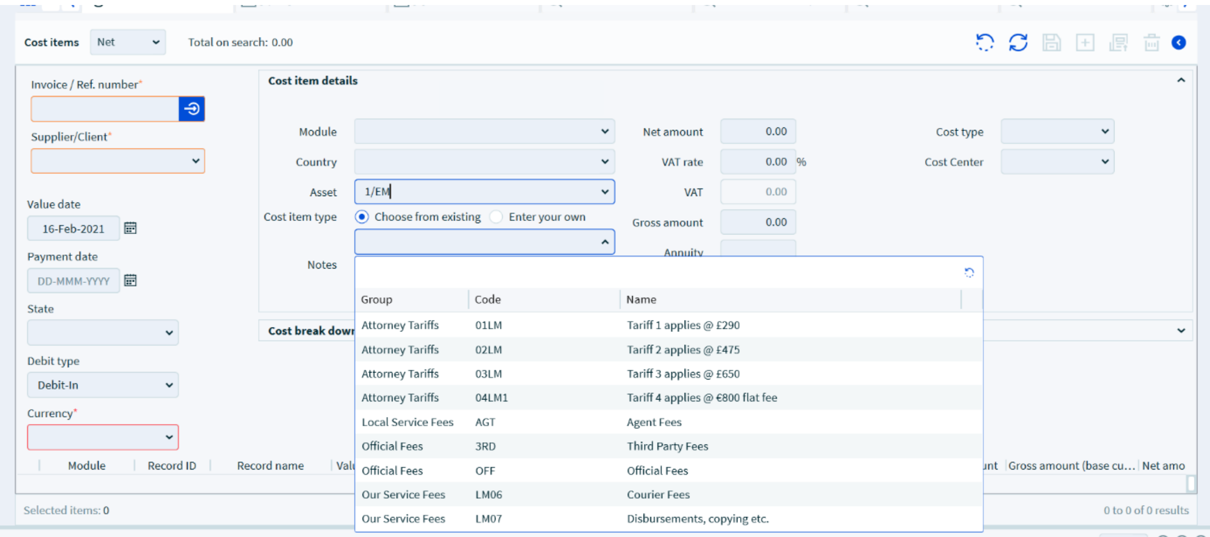


Either create new or use existing “cost item types” that you want to include within the selected group.

The user is also required to check the boxes of the modules that these cost item types should be available. By checking the box **Asset modules,** will assign the “cost item types” in **all** asset records including their profiles:



The newly created “cost item types” will be added to the drop-down list for the user, to make their selection when **creating a cost item entry.** The example below includes the newly created group “Attorney Tariffs”:

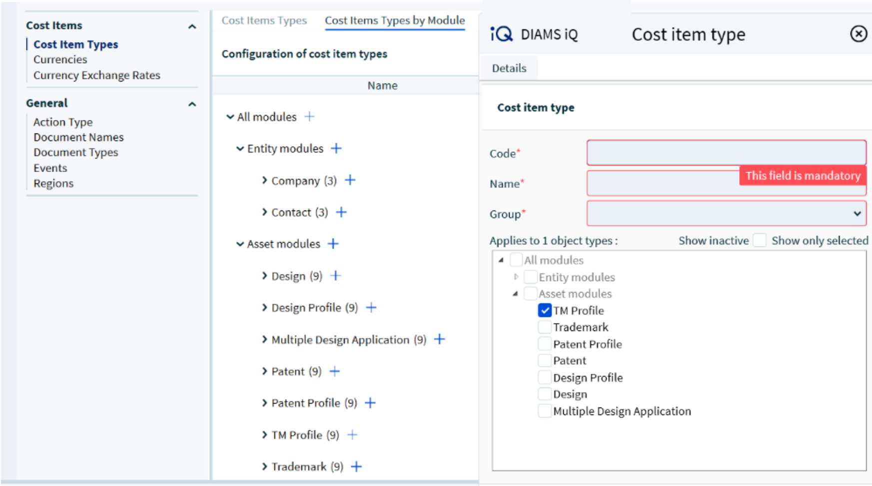


To add a cost item type

There are two ways to **create a new cost item type:**

- Clicking the “add a new cost item type” icon from the **cost item types** section.
- Clicking the “add new configuration link” icon from the **cost item types by module** section.

After clicking either of the two buttons, the **cost item type** pop-up is presented.

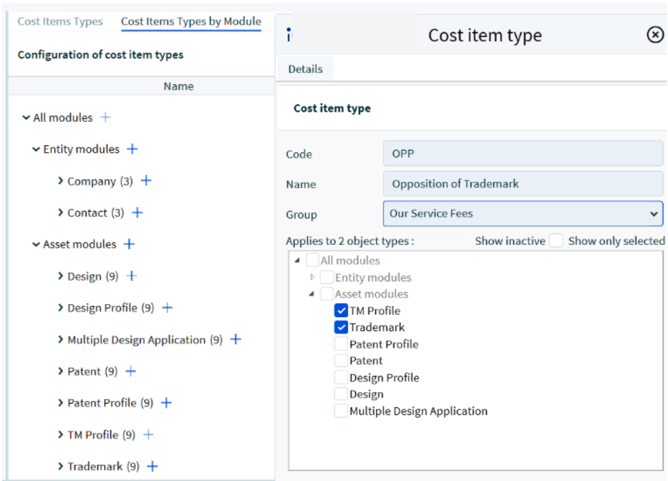


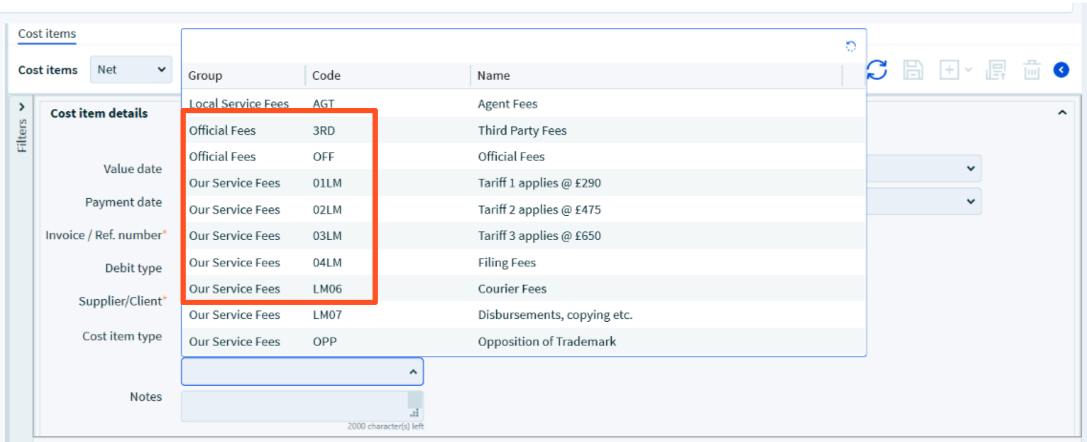
Here you should specify the following:

- The **unique** cost item type **Code** (this field is mandatory)
- The cost item type **Name** (this field is mandatory)
- The cost item type **Group** (this field is mandatory)
- The **modules** where the cost item type can be used (at least one module should be selected)

When using LEDES for the import of costs, configuration will be required upfront.

Once all of the mandatory fields are completed, the **Save** button becomes available for use. Upon saving, ***DIAMS*** will add the new cost item type to the database and from now on, it will be possible to use it to determine the type of work when entering cost items.





Edit/delete cost item type groups and cost item types

To **edit an existing cost item type group**, click on the name from the list presented in the **cost item type group** tab which will bring up the window to edit.

To find the required cost item type group(s), you can filter the list with the help of the **Filters** area provided in the cost item type group tab.

Delete a cost item group

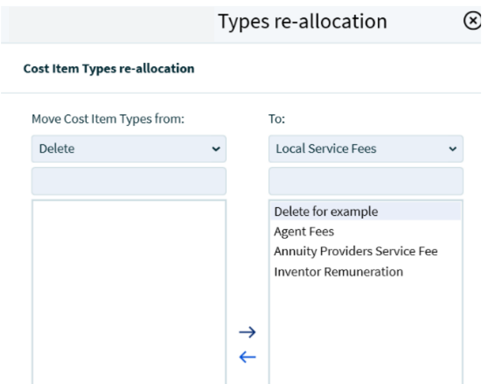
You can **delete the cost item type group** by clicking the Delete icon in the **cost item type groups** tab.

The corresponding cost item type group may be:

1. Deleted (if there are **no cost item types** that belong to the group)
2. Deactivated (if at least one cost item type belongs to the group)

During the Deactivation process, ***DIAMS*** allows you to re-allocate cost item types of the cost item type group to another group by clicking the icon . In case of re-allocation of cost item types, the cost item type group being deactivated can be deleted.

You can also re-allocate cost item types**:** from the cost item type group to another by clicking the re-allocate **cost item types** icon in the **cost item types groups** tab.



To edit an existing cost item type, click on the cost item type's **name** from the list in the "Configuration of cost item types" tab or the "cost item types by module" tab.

You can also do the following with the existing cost item types:

- Add/Delete the cost item type link(s) with the module(s)
- Delete the cost item type.

To find the required cost item type(s), you can filter the cost item type list with the help of the "**Filters**" area provided in the **cost item type** tab.

Delete a cost item type

You can delete the cost item type's link with a module by:

- Clicking the **Delete configuration link** icon ⓧ in the c**ost item types by module** section of the page.
- Deselecting the specific module in the **cost item type** pop-up window.

However, existing assets having this cost item type will be retained unless manually overwritten or "**batch updated**" with another cost item type.

If the cost item type is deleted without change, it would still be searchable as a cost item type, however, **it is recommended to batch update with a change of cost item type.**

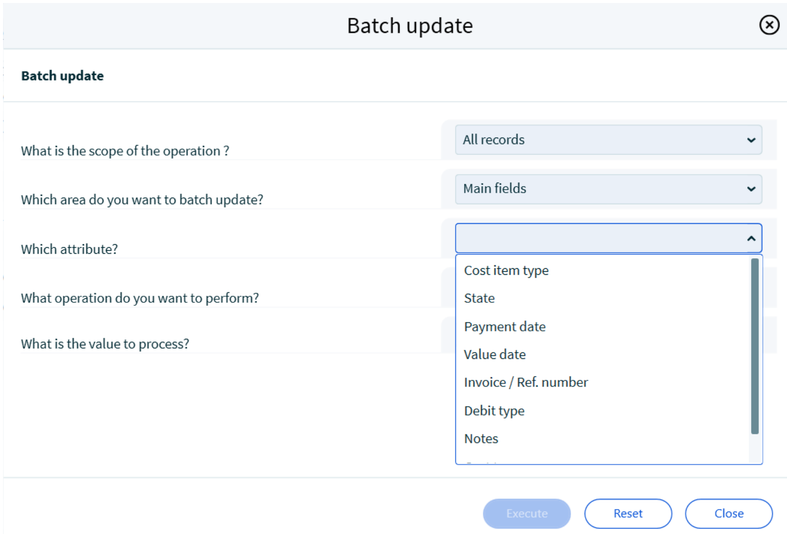
From the same search result, a further batch update could be run based on the "Notes" field; here it could be used for recording any changes.

Upon clicking the **Delete** configuration link icon ⓧ in the **cost item type** tab, the corresponding cost item type may be deleted as an available cost item type for further selection.

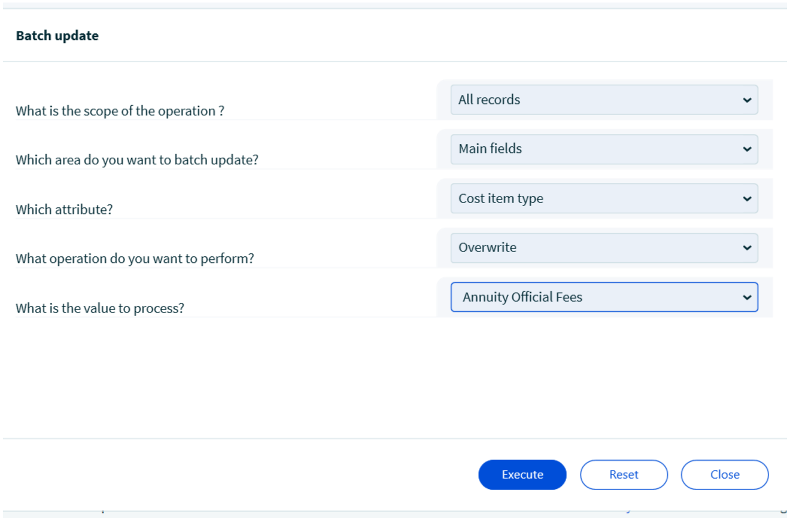
Batch update for cost items

From a search result list in the **cost items** module, you can, using the various fields available, run a **batch update** by clicking the "Start a batch update" icon :

The batch update pop-up is presented showing the following fields in the **Main fields**:



Besides other available fields, you can batch update with a change of cost item type:



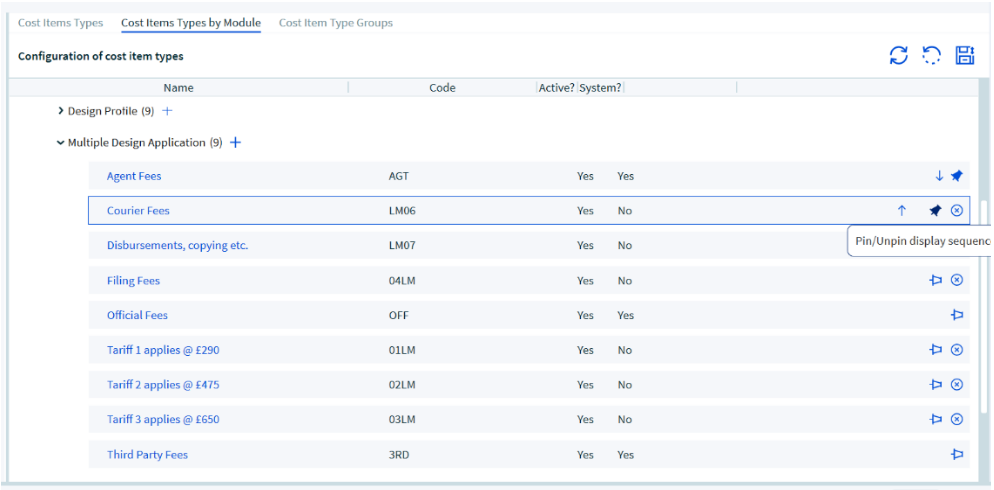
Using the **Companies/Contacts** field, you may **batch update**:

- Cost center
- Supplier / Client

Configure the display sequence

To configure the display sequence, you should do the following on the “**cost item types by module**” tab:

1. Click on the icon to expand the list of cost item types configured with the module.
2. Click on the “Pin display sequence” icon to start configuring cost item type’s display sequence.
3. Click either of the “Move select item [up/down]” icons or to change the cost item type’s display sequence.
4. Click the “Save order changes” icon to save these changes.



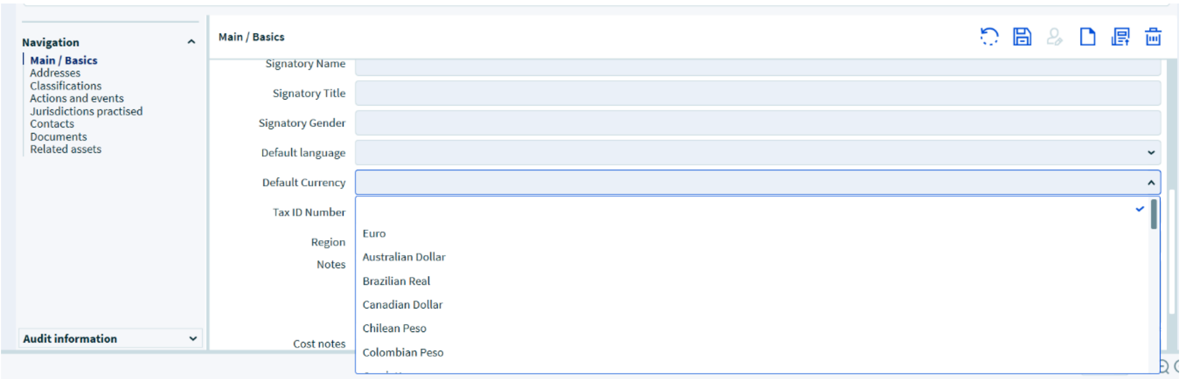
To cancel the display sequence configuration for a certain cost item type**,** click the “Unpin display sequence” icon.

To cancel the applied changes for all cost item types**,** click the **Cancel order changes** icon.

Currencies

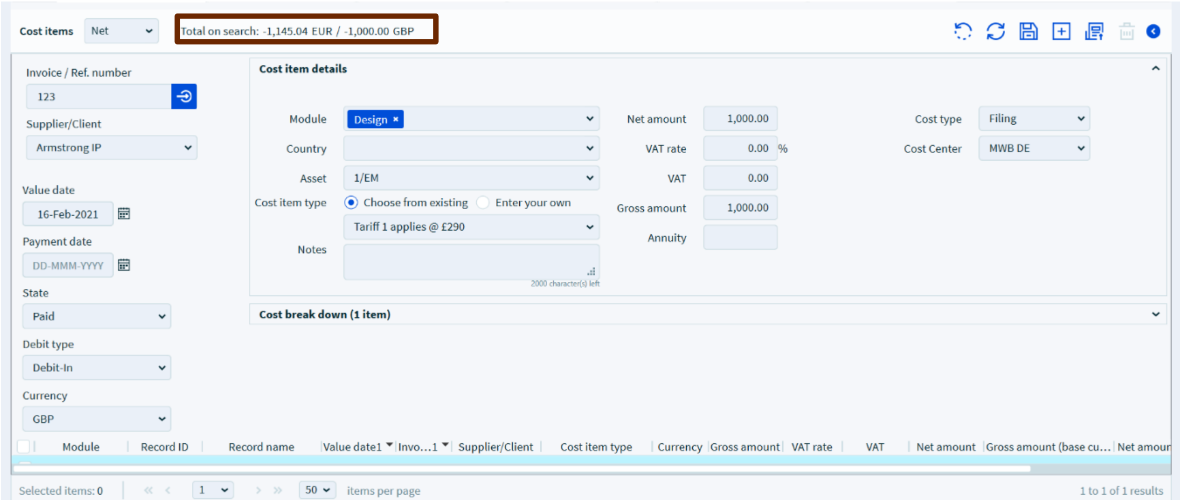
When using **cost Items**, the management of currencies will be of value when entering invoice costs in multi currencies.

Company records have under **Main / Basics**, a field for the “Default Currency”; here the “Company” could be either a Supplier or a Client.



When entering costs for an invoice, either “from a Supplier” or “to a Client”, the default currency of the Company is inherited but can be changed.

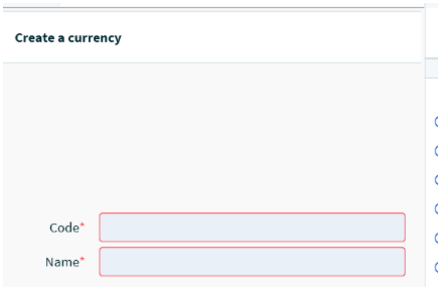
As an example of how currencies are working with cost items; the screenshot below shows the invoiced amount in GBP, but the Client’s home **default currency** is Euros. In the summary, the invoiced amount will automatically show the converted rate in Euros.



Add a new currency

Click the blue [+] icon in the icons bar and enter the code and name of the currency.

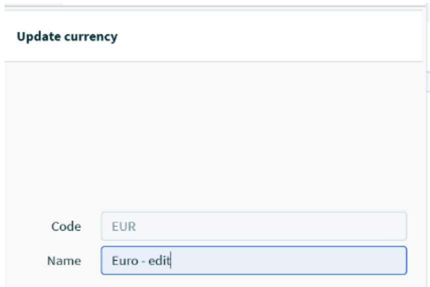
Click **Save**.



Updating a currency

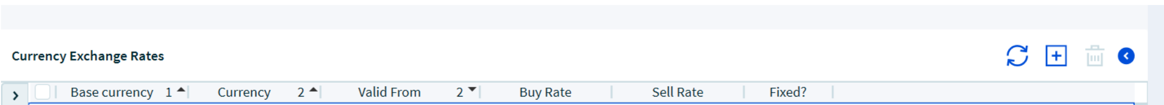
Click the **currency name** and edit the entries for **Code / Name** you wish to modify.

Click **Save**.



Currency exchange rates

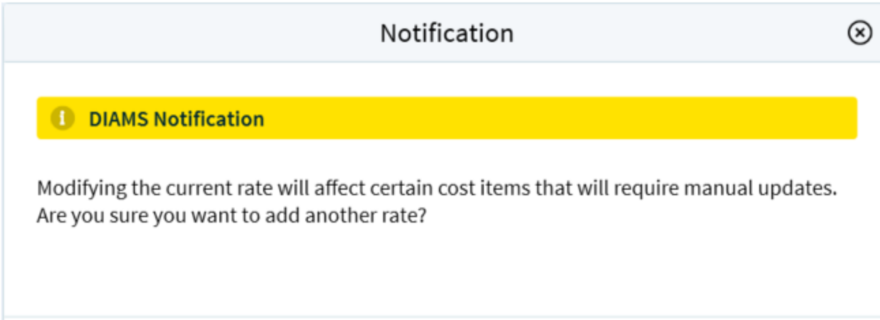
The currency exchange rates screen shows the columns Base currency, Currency, Valid From, Buy Rate, Sell Rate, and Fixed?



Add/edit currency exchange rates

Managing currency exchange rates for cost items is now easier and more efficient.

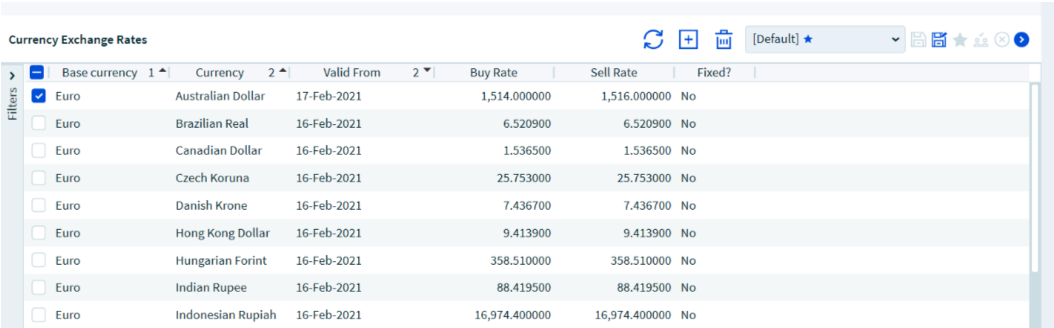
A warning message will be displayed when changing the exchange rate for an already existing cost item.



–

The cost item can then be easily updated and recalculated by pressing "Save" or "Save and Close" buttons while in the Cost items area on the Record.

To add or edit, select a currency from the list by checking the box.


Currency Exchange Rates

Base currency	Currency	Valid From	Buy Rate	Sell Rate	Fixed?
Euro	Australian Dollar	17-Feb-2021	1,514.000000	1,516.000000	No
Euro	Brazilian Real	16-Feb-2021	6.520900	6.520900	No
Euro	Canadian Dollar	16-Feb-2021	1.536500	1.536500	No
Euro	Czech Koruna	16-Feb-2021	25.753000	25.753000	No
Euro	Danish Krone	16-Feb-2021	7.436700	7.436700	No
Euro	Hong Kong Dollar	16-Feb-2021	9.413900	9.413900	No
Euro	Hungarian Forint	16-Feb-2021	358.510000	358.510000	No
Euro	Indian Rupee	16-Feb-2021	88.419500	88.419500	No
Euro	Indonesian Rupiah	16-Feb-2021	16,974.400000	16,974.400000	No

Click the blue icon in the icons bar and select the currency from the list.

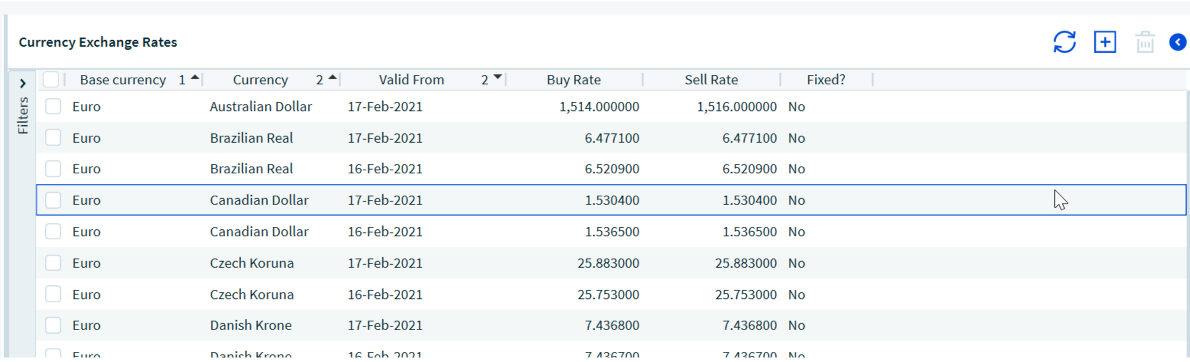
Enter a buy rate and a sell rate and select a valid date from the calendar as shown below:

Click **Save** and the new exchange rates for the currency will be added to the list.

Update currency exchange rates with the ECB

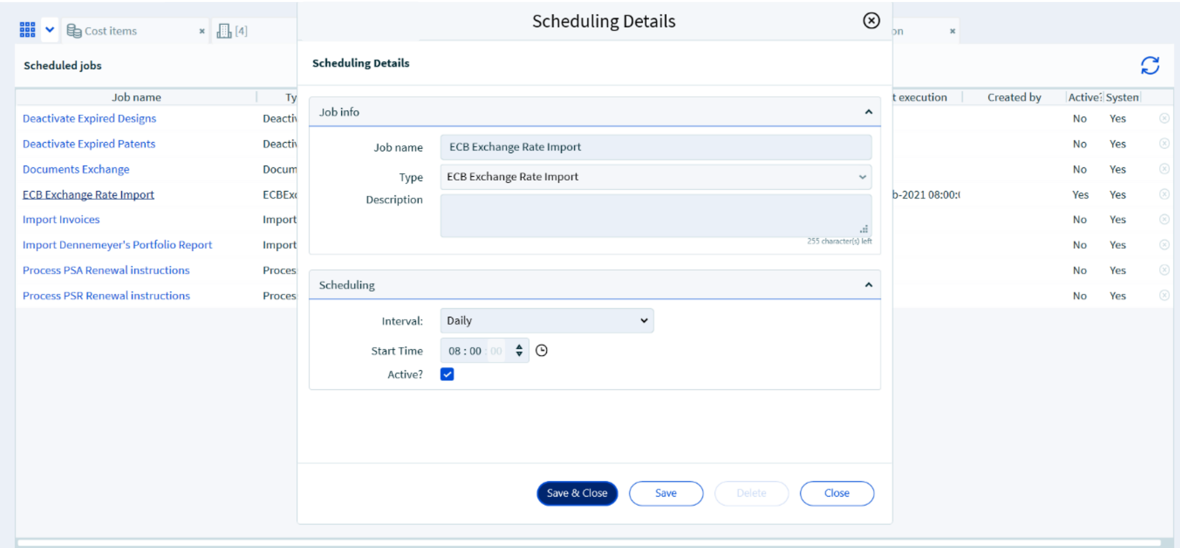
By clicking on the blue icon and then clicking on the **Load** icon, this function connects the application with the European Central Bank in order to retrieve the official exchange rates.

This upload from the ECB can be done across all currencies that are being managed, or by simply checking the boxes of those to be updated.



ECB exchange rate import scheduled job

Loading exchange rates based on ECB public information may also be performed with the help of the ECB Exchange Rate Import. This is available under **Jobs > Manage Scheduled jobs**:



Here you may schedule the update as required with interval and start time.

How to manage actions

DIAMS allows authorized users to configure **actions** directly within **DIAMS**, including:

- Creating new actions
- Managing existing actions

You can manage the configuration from the following location in ***DIAMS***: **Administration >> System Configuration >> General >> Action Type** and **Actions by module.**

There are many actions within the existing configured list that are supporting the **prosecution** and **maintenance due date calculations** for: Designs, Patents, Trademarks and Matters.

These **actions** are governed by ***DIAMS*'s country law** and should not be edited other than by assigning a responsible party (named), or by Role i.e. an Attorney or a Paralegal.

Once the **Action Type** option is selected, the **Configuration of actions** page – with the **Action Type** window selected by default, appears in the display area:

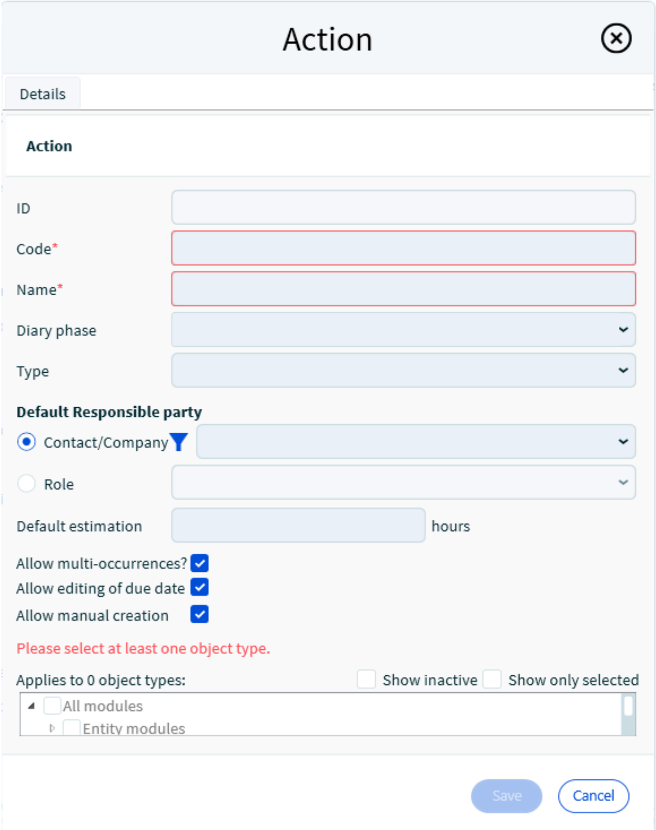
How to create actions

There are two ways to create a new action:

Clicking the **Add a new action** icon from the **Action Type** window.

Clicking the **Add new configuration link** icon from the **Actions by module** window.

After clicking either of the two icons, the **Action** pop-up is presented.



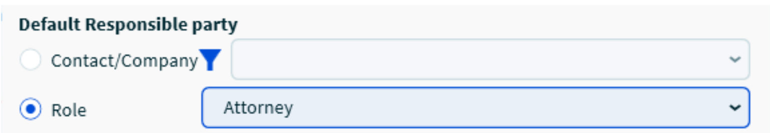
Here you can specify the following:

- The **unique** Action **Code** (this field is mandatory)
- The Action **Name -** i.e., office action, agent communication and so forth (this field is mandatory)
- The Action **Diary phase** – (for example: application and maintenance). This is not a mandatory field.
- The Action **Type – see the separate section on how this is working below, not to be confused with creating Action "names (types)".**
- The Action **Default Responsible party**
- The Action **Default estimation** (in hours)
- If the Action **multi occurrence** is allowed in an asset
- If allowed to **edit the due date** of the action
- The **modules** where the action may be created (at least one module should be selected)

- The **Action Default Responsible party**

  Here "**Contact/Company"** can be a named person or company whereas the "**Role"** can be selected from the drop-down as shown below.

  The result that this action when assigned to a record would be the responsibility of either the named "contact / company" or that of the assigned role, i.e., "Agent" on record.



- The **modules** where the Action should be assigned and to be available from the drop-down list (at least one module should be selected)
- Allow manual creation" flag – see the section "Action and Event Types Visibility" below.

Once all of the mandatory fields are provided, the **Save** icon becomes available. Upon saving, ***DIAMS*** will add the new **Action Type** to the database. This newly created **action** will then be available in the specified module(s) from the "Actions drop down list". Searches can be performed on all configured actions.

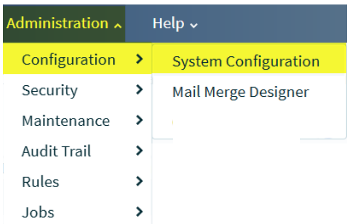
Besides selecting by module, when checking the box **all modules** will also select entity (Company & Contact) as well as all asset modules. There are also separate check boxes for "all entities" and for "all assets".

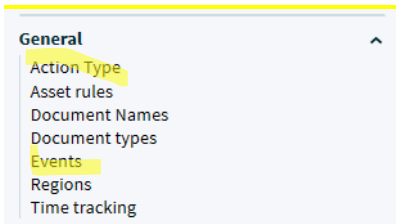
Once the mandatory fields are provided, the **Save** icon becomes available. Upon saving, ***DIAMS*** will add the new **Action Type** to the database. It will then be available to the user to select from a drop-down list when creating this **Action (type)** in the specified module(s).

Action and Event Types: creation restriction

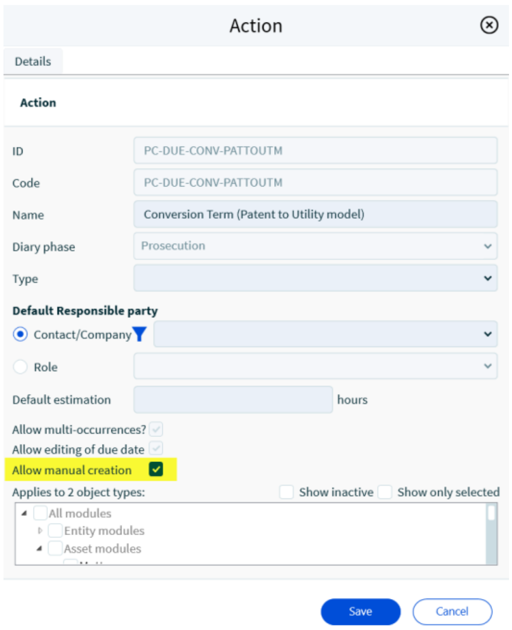
In ***DIAMS*** you can now choose which Action and Event "types" should be proposed for creation. This feature then restricts the number of entries in the drop-down lists, allowing you to navigate more quickly to the desired value.

To access the configuration screen, select the **System Configuration** menu item and access the "Action Type" or "Events" panel listed under the "General" section:





The rest of this section describes the process to configure action types. The **same process can be applied to event types**.

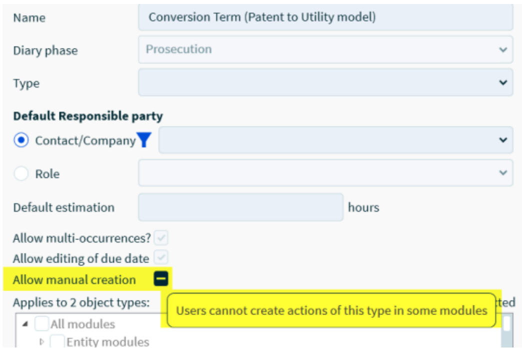


From here, there are two ways in which you can configure the system. Firstly, if you do not want to create a particular action type for any asset type, select the "**Action type**" and in the resulting window, uncheck the "Allow manual creation" flag

Secondly, if you would like an action type proposed for some but not all asset types, then navigate to the "Actions by module" tab where you can choose to suppress the ability to manually create action types for specific asset types only:

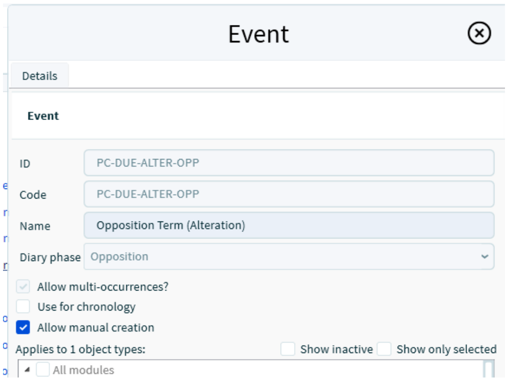
Use the “eye” icon on the right hand side to switch on or off the visibility of that action type for the selected object type. The icon displays the action which will be taken on clicking it.

The column “Allow manual creation” shows the current visibility status of that action type.



If an action type is visible for some object types but not others, then the checkbox in the action window will be shown with explanatory tooltip text:

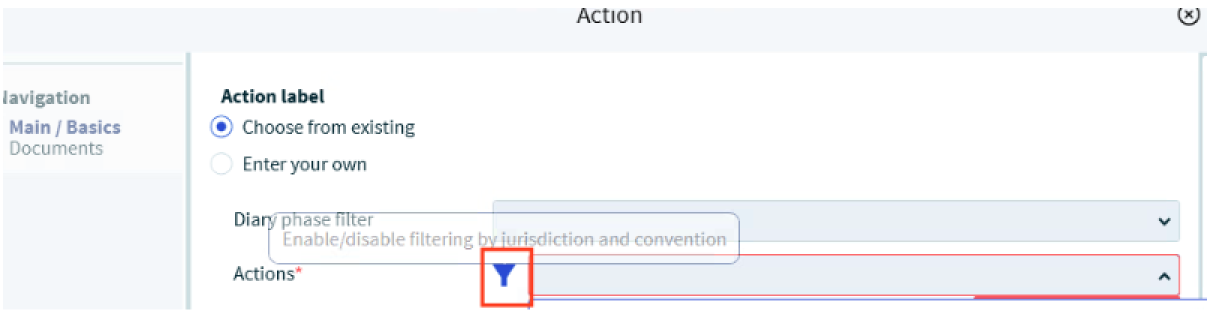
Corresponding functionality exists for “**Event types**”:



Note that this functionality does not affect searches nor country law calcuations, so when searching for actions or events, all of those which are calculated by country law scripts can still be found. If you wish to configure which actions and events are calculated by country law, see the section “**Rules – Country Law Rules (script format)**”. Rules : Country Law For Country Law Prosecution and Maintenance rules, see the separate guide for full details.

Actions / Events filtering improvements

With the release of the Prosecution rules 2026.1 package and using ***DIAMS iQ*** 2026.2v, users can now use the funnel at the Action / Event level to **enable or disable** filtering **by jurisdiction and conventions**, including the Actions / Events used in Prosecution Rules.



Good to know:

This improvement is applied automatically to all system Actions and Events.

The funnel is disabled by default and can be enabled upon client request, please contact ***DIAMS iQ Software Support.***

This improvement applies to all system Actions / Events, except: Application Date, Registration Date, and Grant Date (these remain available under Main / Basics).

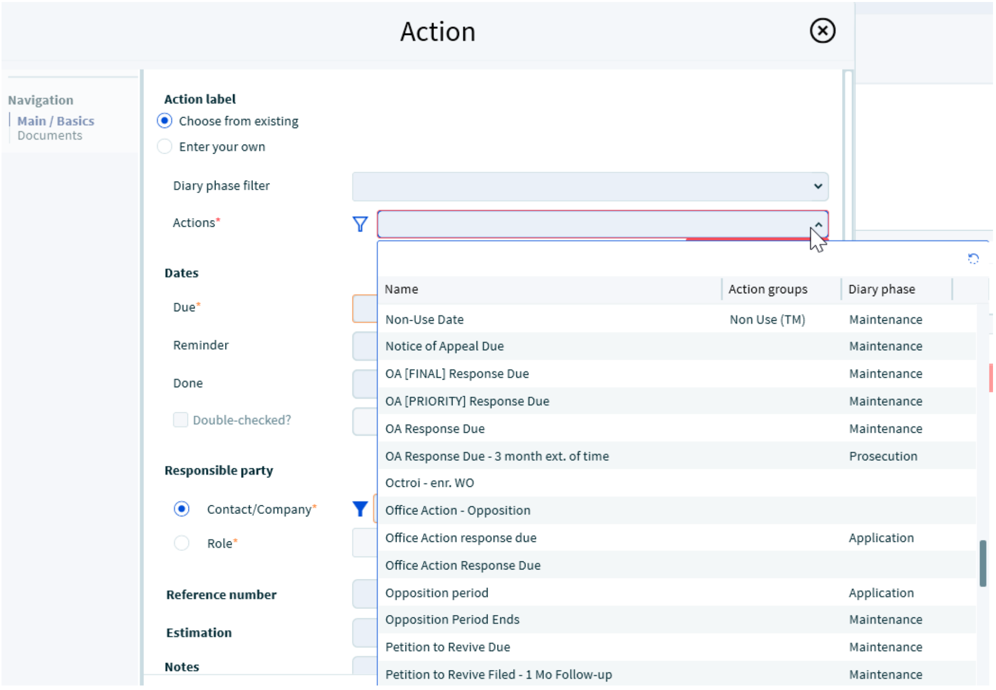
To view Custom Actions / Events, remove the filter using the funnel icon.

For Custom Actions / Events configuration, please contact our ***DIAMS iQ*** Implementation team.

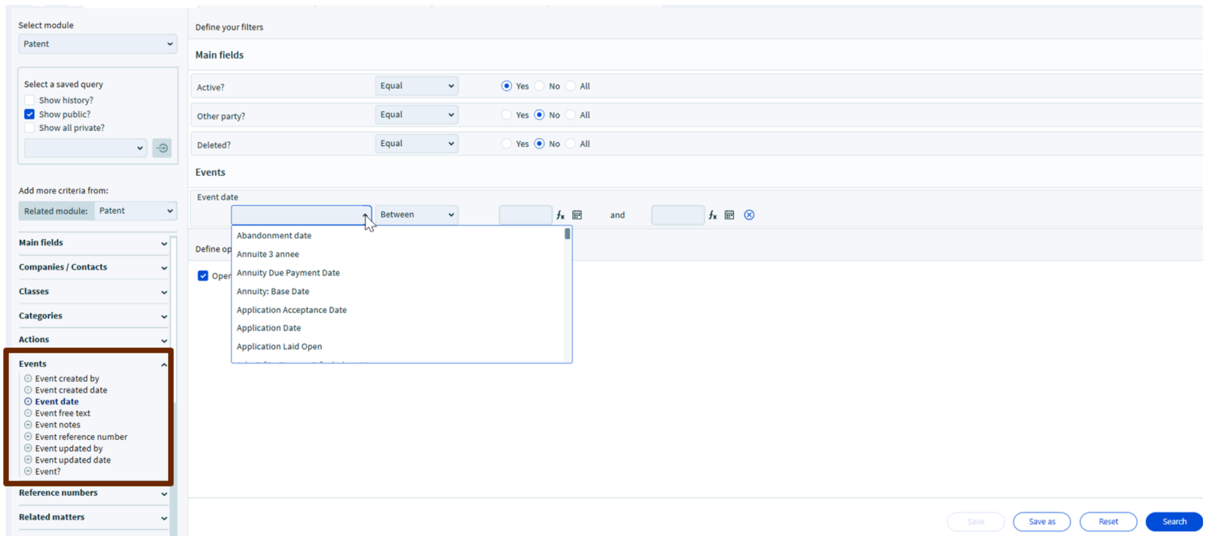
Although the users can create **free text** Actions and Events, when searching for specific items, there is some benefit to selecting from a pre-configured drop-down list, rather than search on any “potential” free text”.

When **searching for actions**, users can choose the field **Action** and select from the pre-configured list. The field **Action’s free text** will require entering some text for the search.

Below shows an **example** of a drop-down list of configured actions that include both system and user’s own configuration:



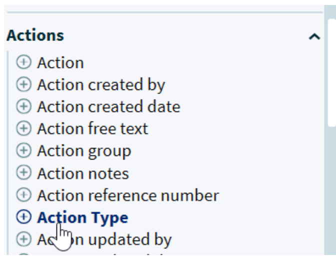
When **searching for an Event**, you will need to use the Advanced search within the module i.e., for this example Patent. The Event(s) can easily be selected from a drop-down list giving a filtered search result. There is also the option to search based on a free text event:

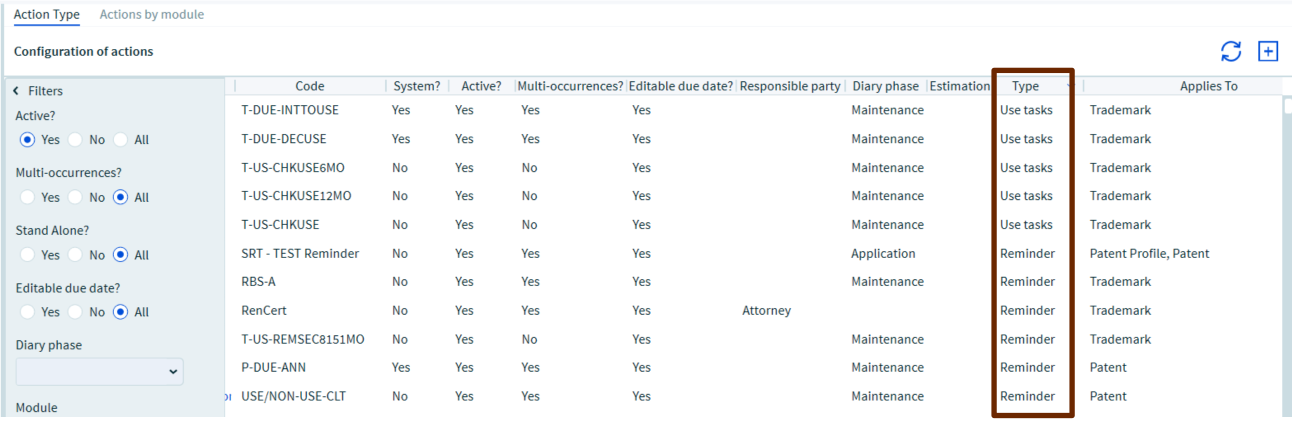


Action type

The user can configure the field Action "**Type**" where different actions can be **grouped** giving the user another level to search and report on their assets.

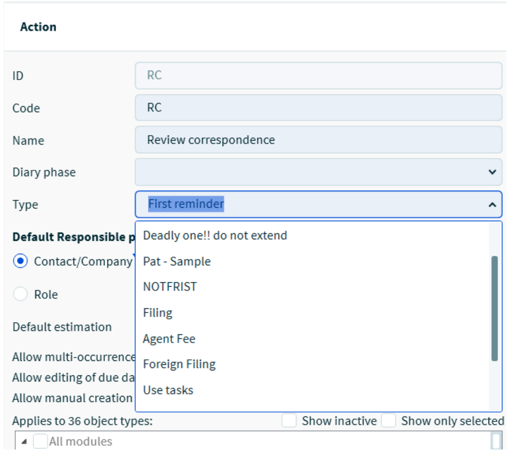
This optional field could be used in many ways, such as actions grouped with date values or as the example shows, a mix of "items":





Code	System?	Active?	Multi-occurrences?	Editable due date?	Responsible party	Diary phase	Estimation	Type	Applies To
T-DUE-INTTOUSE	Yes	Yes	Yes	Yes		Maintenance		Use tasks	Trademark
T-DUE-DECUSE	Yes	Yes	Yes	Yes		Maintenance		Use tasks	Trademark
T-US-CHKUSE6MO	No	Yes	No	Yes		Maintenance		Use tasks	Trademark
T-US-CHKUSE12MO	No	Yes	No	Yes		Maintenance		Use tasks	Trademark
T-US-CHKUSE	No	Yes	No	Yes		Maintenance		Use tasks	Trademark
SRT - TEST Reminder	No	Yes	Yes	Yes		Application		Reminder	Patent Profile, Patent
RBS-A	No	Yes	Yes	Yes		Maintenance		Reminder	Trademark
RenCert	No	Yes	Yes	Yes	Attorney			Reminder	Trademark
T-US-REMSEC8151MO	No	Yes	No	Yes		Maintenance		Reminder	Trademark
P-DUE-ANN	Yes	Yes	Yes	Yes		Maintenance		Reminder	Patent
USE/NON-USE-CLT	No	Yes	Yes	Yes		Maintenance		Reminder	Patent

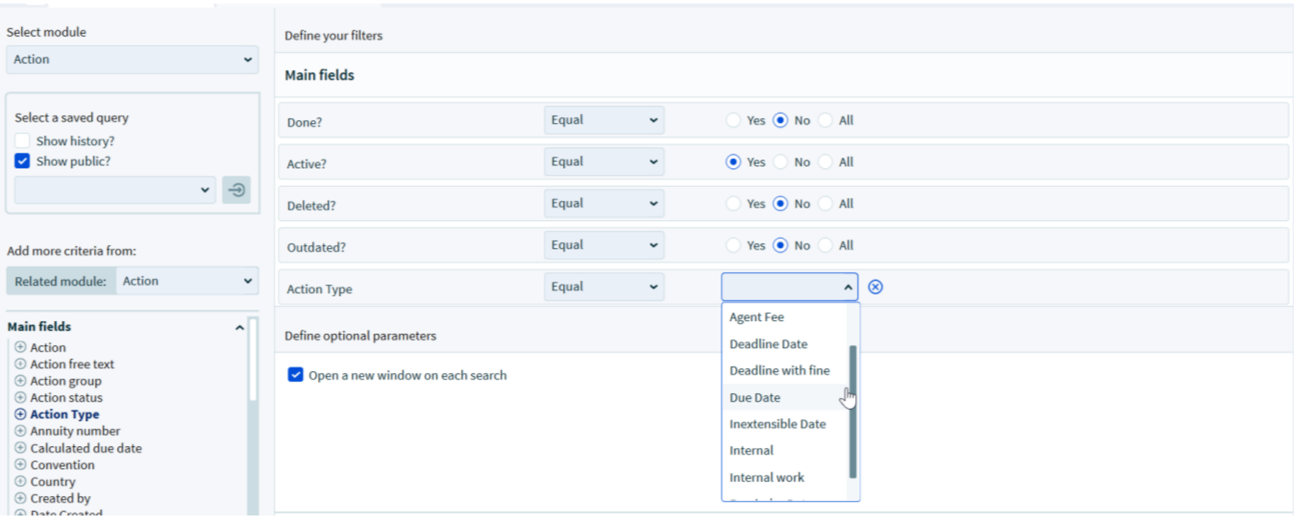
This will give the user another way to filter and report from a list result.



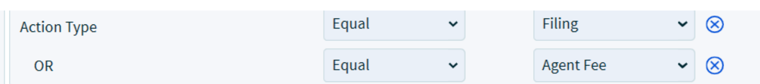
Either when creating or editing an action, the user only needs to enter a title into the “Type” field in order to make them available for selection from the drop-down. Consideration should be given here as there is no possibility to edit the descriptions.

The user may search by the **action types** from the module the action has been assigned, i.e., using an advanced search in the **Asset** module(s) and from the list of categories, choosing **Actions >> Action Type**.

Action Type as a search field is also available in the advanced search in the module “**Actions**” and when selecting Action Type from the Main fields:



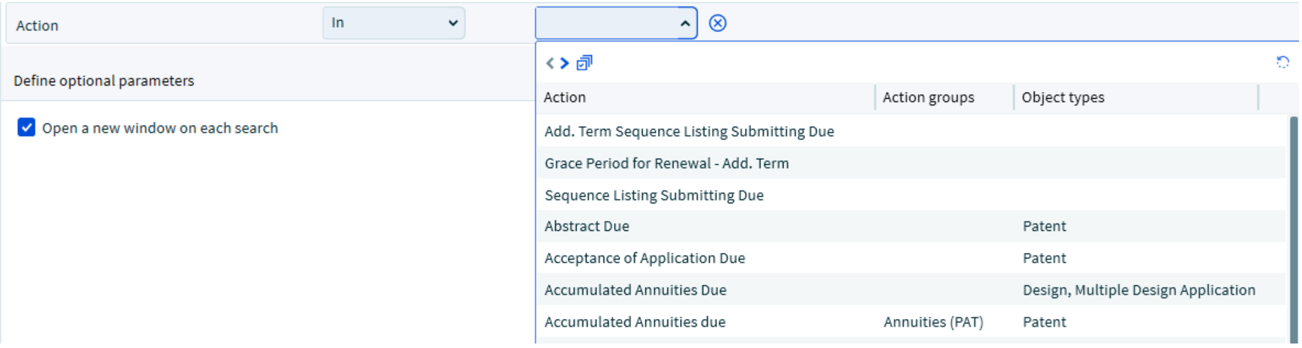
If you want to search across more than one “Type” of action, just click on Action Type in the categories to add the line as many times as you need:



This would give a result of all due Actions that have been grouped within the Action type configuration:

Action type	Module	Record ID	Record name	Action	Due Date	Action group	Reminder d…	Done?	Responsible party
Agent Fee	Patent	ABB001/W…	ENSEMBLE DE…	Prepare draft response	19-Jul-2021				Dr. Dominique Gobert
Agent Fee	Patent	WG04/W…	IMPROVED PRODUCTION OF…	Prepare draft response	30-Sep-2021				
Agent Fee	Patent	LNK01/W…	SLIDER ELEMENT FOR…	Prepare draft response	31-Oct-2021				Ovidiu Dulacioiu
Agent Fee	Patent	E.ON10…	HANDLING SURPLUS AND/…	Prepare draft response	11-Feb-2022				Inhouse Assistant
Filing	Trademark	JMO-2023…	AMAZON BLINK	Awaiting Filing Receipt	26-Mar-2018				
Filing	Trademark	TM-RA-01…	Riyadh Air	Awaiting Filing Receipt	20-Mar-2023				
Filing	Trademark	927888.00…	IT'S A GREAT DAY!	Awaiting Filing Receipt	01-Oct-2014				
Filing	Trademark	100000004…	busitrade	Awaiting Filing Receipt	06-May-2024				

As opposed to using the field "Action" based on tasks and their due dates, where multi selection is possible from the drop-down menu:



The field "Action Type" can be added to a search result list as an additional column using the Visible Columns menu. Main fields > Action type:

How to manage existing actions

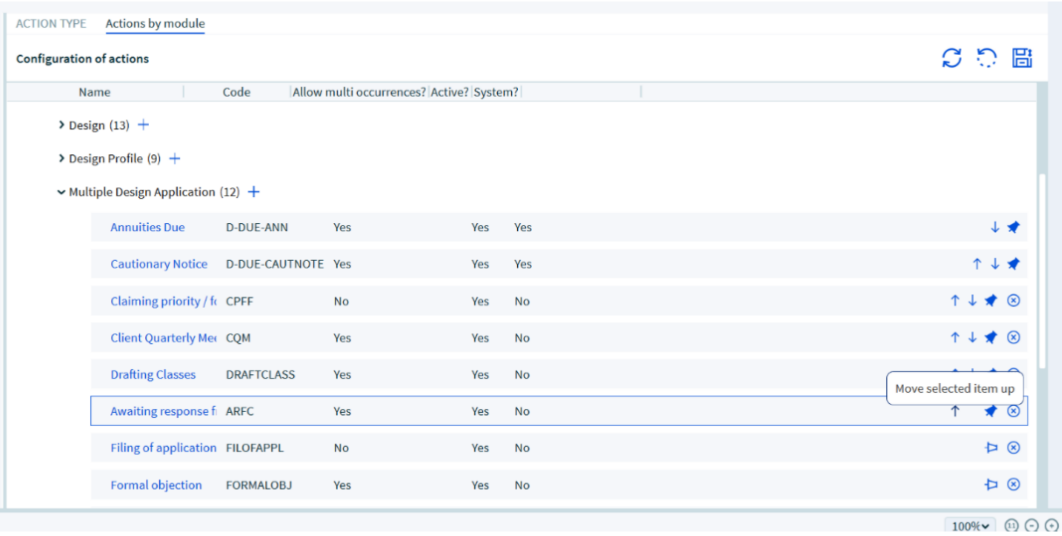
With existing actions, you can do the following:

- Edit the action details.
- Change the display sequence of actions in the **Action** pop-up when creating an action in the record.
- Delete the action link(s) with the module(s) if the action is not system generated.

To find the required action(s), you can **filter the actions** list with help of the **Filters** area provided on the **Actions** window of the page.

After clicking on the name, the action pop-up is displayed. Modifications may be applied here.

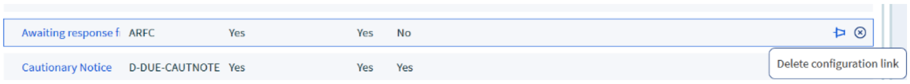
You can also **configure the display sequence of actions** using the pin display sequence icons.



To cancel the applied changes for all actions, click the **Cancel order changes** icon.

You can **delete** the **action link with a module,** if the action is not system generated and governed by Country Law and if there is no such action existing in any asset.

- Clicking the **Delete configuration link** icon in the **Actions by module** window of the page.

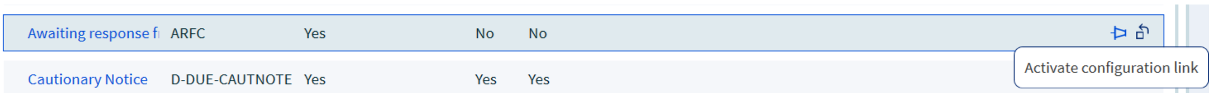


- De-selecting the required module in the **Action** pop-up.

You will receive a pop-up window for confirmation of deletion.

Upon clicking the **Delete configuration link** icon in the **Actions** window of the page, the corresponding action may be deleted.

You can re-activate the action by clicking the **Reactivate this action** by clicking on the Activate configuration link as shown below:



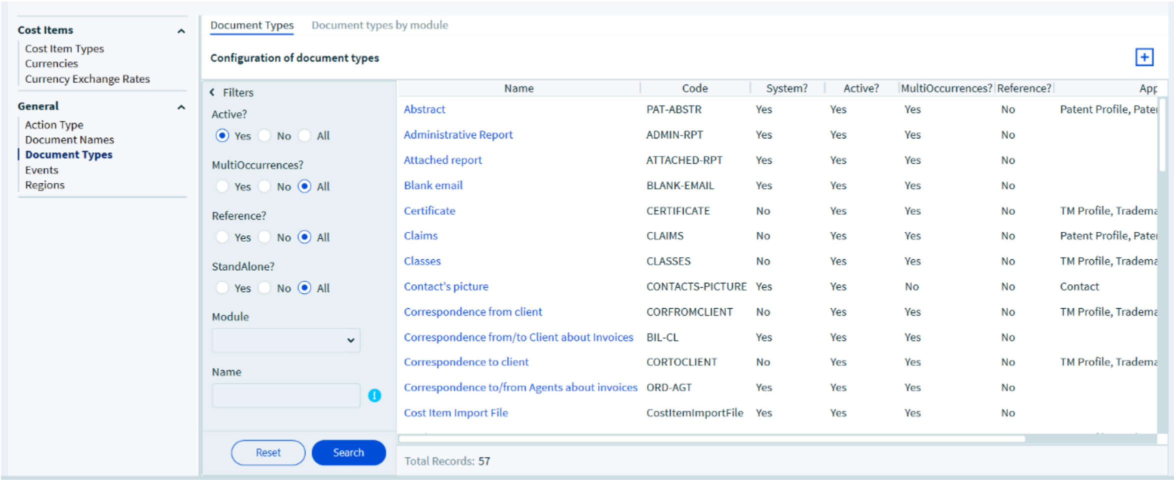
How to manage document types

When saving documents to a record, the field's document types and document names are **mandatory**, and both **searchable**, hence acting as a filter for easily retrieving saved documents. If the client uses the document folder structure, here the documents can be identified for filing into the relevant document folders by their type and name.

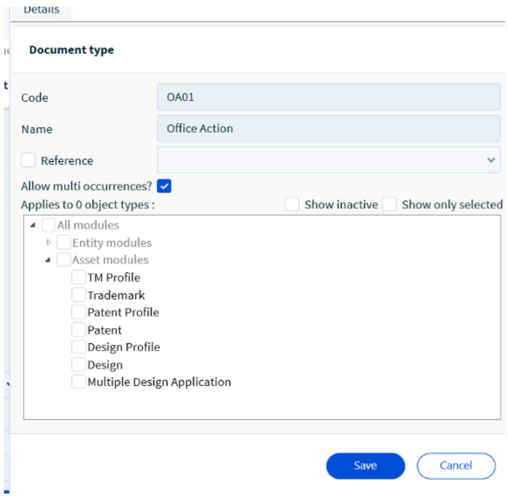
You can manage the list of document types from the following location in ***DIAMS*****: Administration >> Configuration >> System Configuration >> General >> Document Types**.

To add document types

Click the tab **Document types** and the **Configuration of document types** is presented:-



Click the Add new document type icon. From the pop up, enter a code and a name for the Document.



Decide to allow for multi-occurrences by ticking the box.

Select the modules this document type should be available. If you select **All modules**, this will include Company and Contact as well as the Asset modules.

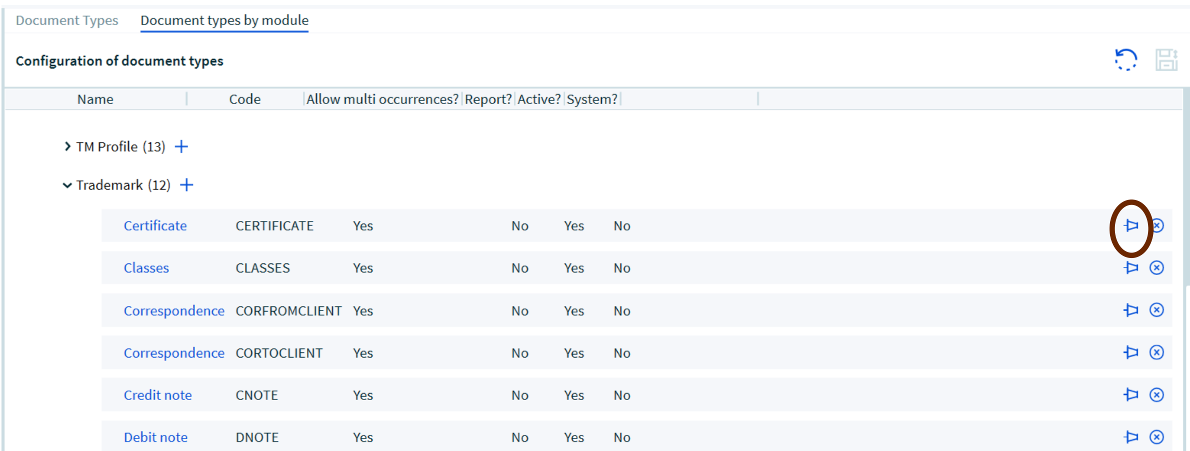
Click **Save**

This document type will then be available for selection in the assigned modules.

To **delete a document type**, click the icon with the blue "**Cross**" at the end of the row **Delete / Deactivate the document type.**

Document types by module

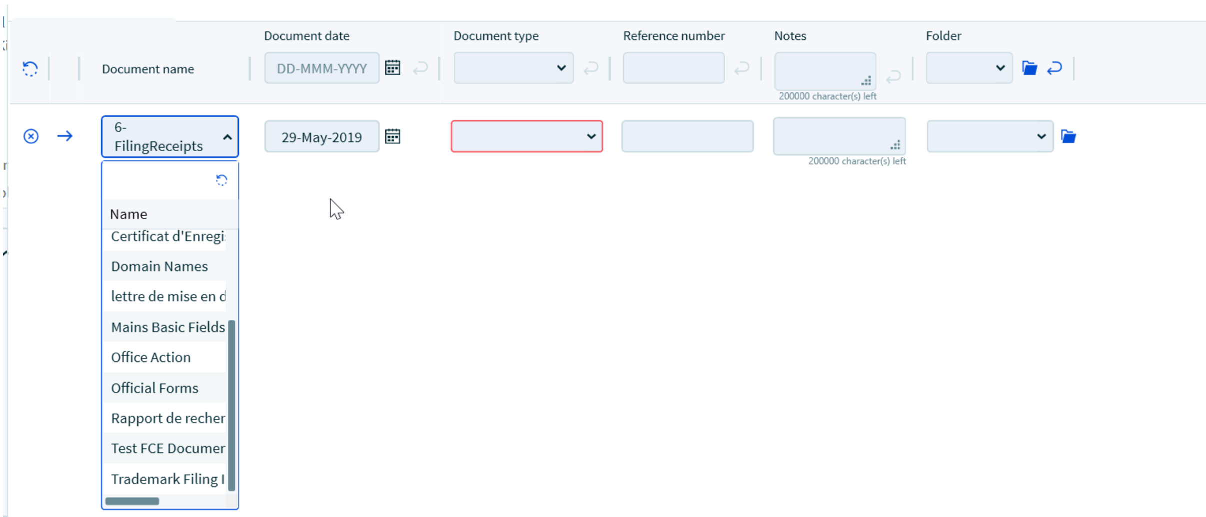
Click the second tab: you can expand the **documents list** by clicking on the small arrow in front of an entry. From this screen you will see by module the various documents that will be available via a drop-down menu.



As with the other modules, the display sequence can be sorted using the pin/unpin icon and subsequent arrows.

Naming documents

You can name documents with your own configuration of a **predefined list** that they are available from a drop-down list for selection. Although the user would still have the option to save documents with a different name, the predefined list could offer the most commonly used document names.

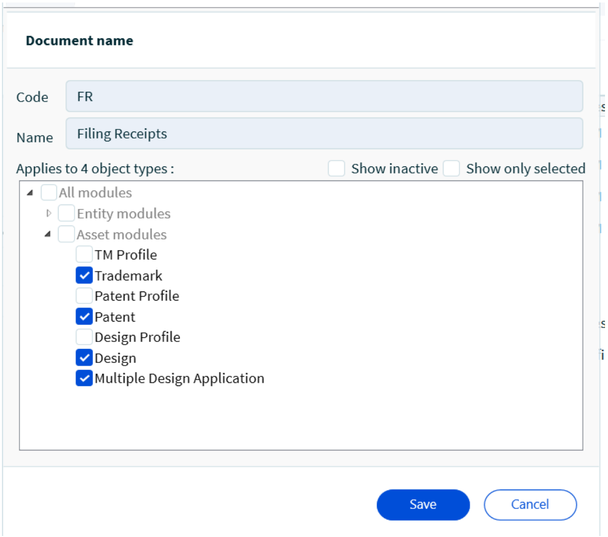


Once the **Document Names** option is selected, the “**Configuration of document names**” page appears in the display area:

To **add a new name** to the **Document names** list, do the following:

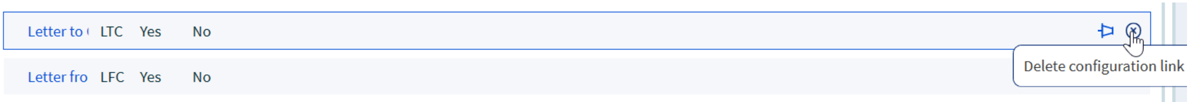
Click [+] to open the pop up:

Give the document a code and document name and check the boxes of the modules the document name should be available from the drop-down list.

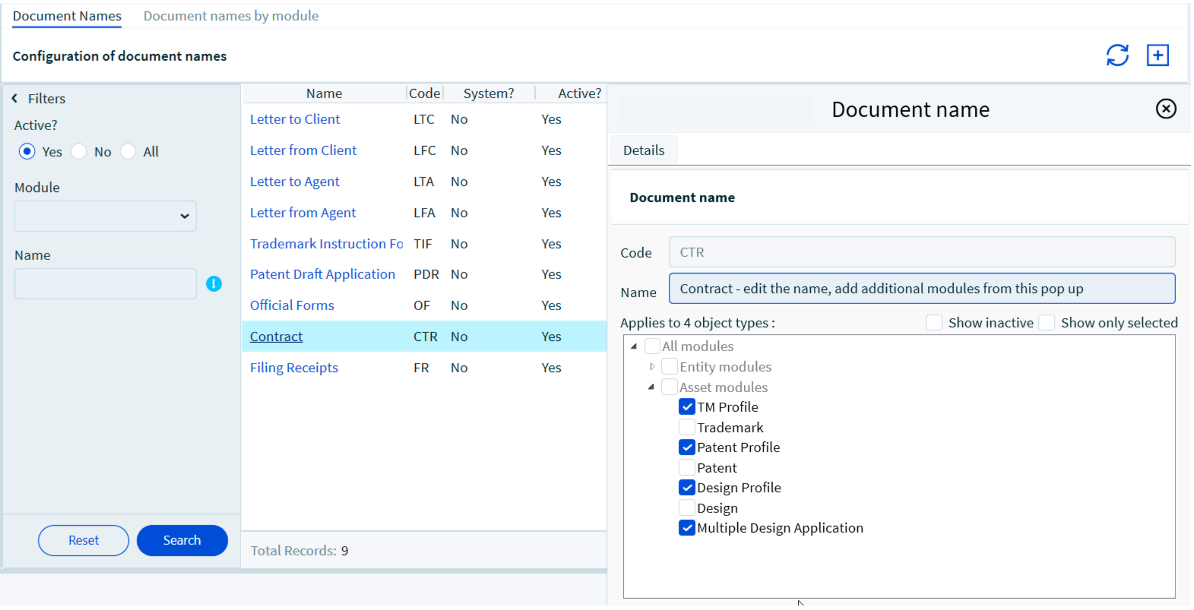


Once saved, the document name “Filing Receipts” will be available in the drop-down list of the selected modules.

To **delete a document name**, open **Document names by module,** select the document name and click on the delete icon:



To **edit a document name**, open **Document Names** and click on the document name. From the pop up, you may edit and add further modules where the document name should be available.



Document names in drop-down lists

Drop-down lists with the “document names” appear in the following places:

- The **Document** pop-up when creating a document or editing a document's details.
- Uploading one or more documents
- Saving a sent email:
- Document **Quick search**
- Document **Advanced search**

Note: For both **Quick** and **Advanced search**, you can enter any value

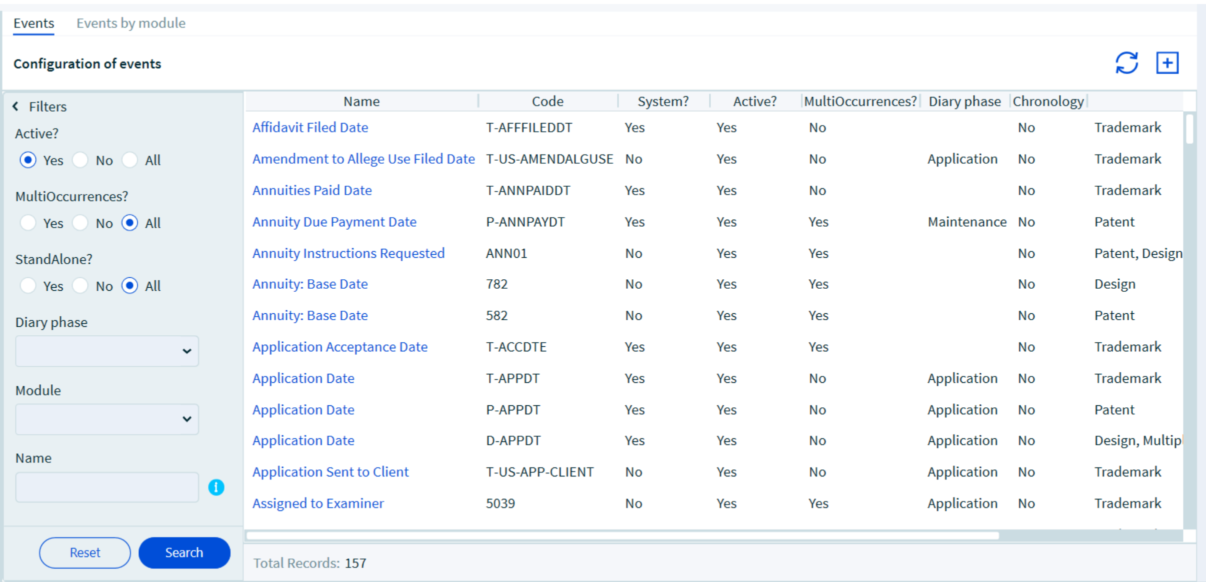
How to manage events

DIAMS allows authorized users to configure **Events** directly from ***DIAMS***, including:

- Creating new events
- Managing existing events

You can manage the configuration from the following location in ***DIAMS***: **Administration >> System Configuration >> General >> Events**: **Events** and **Events by module**.

Once the **Events** option is selected, the **Configuration of events** page with the **Events** window selected by default, appears in the display area:



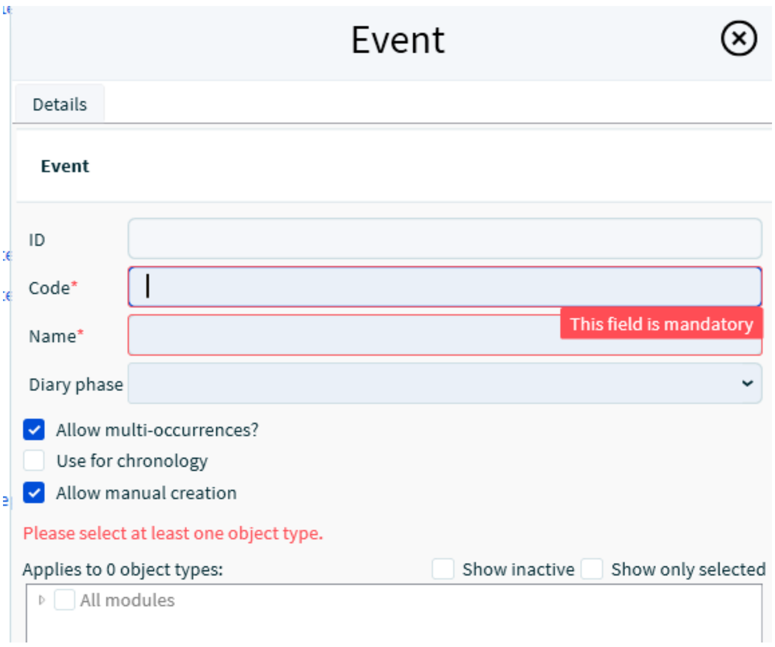
Name	Code	System?	Active?	MultiOccurrences?	Diary phase	Chronology	
Affidavit Filed Date	T-AFFIFILEDDT	Yes	Yes	No		No	Trademark
Amendment to Allege Use Filed Date	T-US-AMENDALGUSE	No	Yes	No	Application	No	Trademark
Annuities Paid Date	T-ANNPAIDDT	Yes	Yes	No		No	Trademark
Annuity Due Payment Date	P-ANNPAYDT	Yes	Yes	Yes	Maintenance	No	Patent
Annuity Instructions Requested	ANN01	No	Yes	Yes		No	Patent, Design
Annuity: Base Date	782	No	Yes	Yes		No	Design
Annuity: Base Date	582	No	Yes	Yes		No	Patent
Application Acceptance Date	T-ACCDTE	Yes	Yes	Yes		No	Trademark
Application Date	T-APPDT	Yes	Yes	No	Application	No	Trademark
Application Date	P-APPDT	Yes	Yes	No	Application	No	Patent
Application Date	D-APPDT	Yes	Yes	No	Application	No	Design, Multip
Application Sent to Client	T-US-APP-CLIENT	No	Yes	No	Application	No	Trademark
Assigned to Examiner	5039	No	Yes	Yes	Application	No	Trademark

How to create events

There are two ways to create a new event:

- Clicking the **Add a new event** icon from the **Events** window.
- Clicking the **Add new configuration link** icon + from the **Events by module** window.

After clicking either of these two icons, the **Event** pop-up is presented with an example:



Here you can specify the following:

- The **unique** Event **Code** (this field is mandatory)
- The Event **Name** (this field is mandatory)
- If the Event **multi occurrence** is allowed in an asset
- If the Event is used for **chronology**
- The **modules** where the Event may be created (at least one module should be selected)
- By checking the box **All modules** will select Entity (Company & Contact) as well as all Asset Modules.

Once the mandatory fields are completed, the "**Save**" icon becomes available. Upon saving, ***DIAMS*** will add the new event to the database and from then on, you can create this Event in the specified module(s).

See the section Action and Event Types: creation restriction

How to manage existing events

For existing events, you can:

- Edit the event details.
- Change the display sequence of events in the event pop-up when creating an event in the asset.

To find the required event(s), you can filter the events list with help of the **Filters** area provided on the **Events** section of the page.

To **edit the existing event**, click the event's name from the list in the **Events** or **Events by module** section of the page (event names are highlighted in blue).-

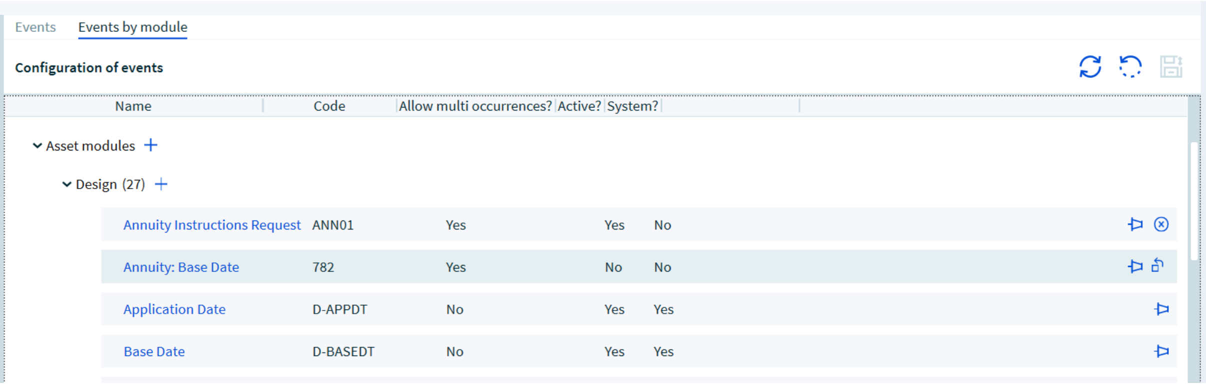
After clicking on the name, the event pop-up is presented, you can now apply modifications / edits.

To cancel the display sequence configuration for a certain event, click the "**Unpin display sequence**" icon.

To cancel the applied changes for all events, click the **Cancel order changes** icon.

You can **delete the** Event link with a module, provided it is not a system event or if there is no such event existing in any asset.

1. Clicking the **Delete configuration link** icon in the **Events by module** section of the page.
- De-selecting the required module in the **Event** pop-up.



An event can be deleted completely but cannot be reactivated.

Regions

DIAMS allows users to create **customized regions: Administration** >> **System Configuration** >> **General** / **Regions.** This field is available in the Main / basics for all assets and entities, adding another layer to search and group your records. Only one region can be selected per record.

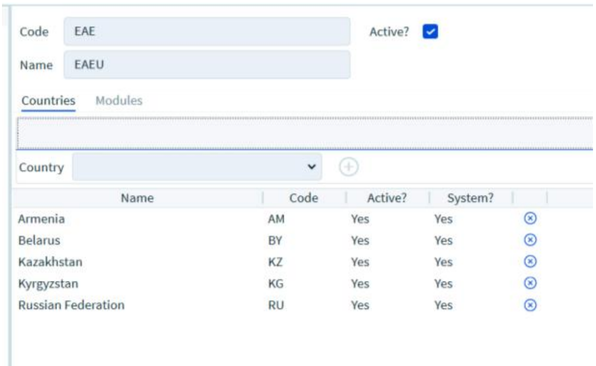
Two fields are mandatory: **Code** and **Name** and thereafter, you can select your **countries** and the **module(s)** to form the **region.**

On the left-hand side of the window, all saved regions are listed. To edit or delete an existing region, the user simply needs to click to add it to the right-hand side of the window.

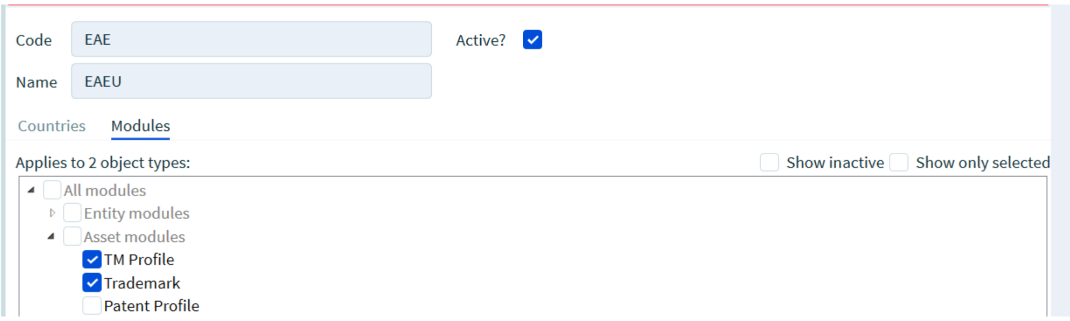
To add a Region, click on the blue enter a code, a description and then select the countries that will belong to the region.

Before assigning the modules where the region should be available, click on **Save**.

For this example, a region EAEU is created, and five countries selected to form the region:

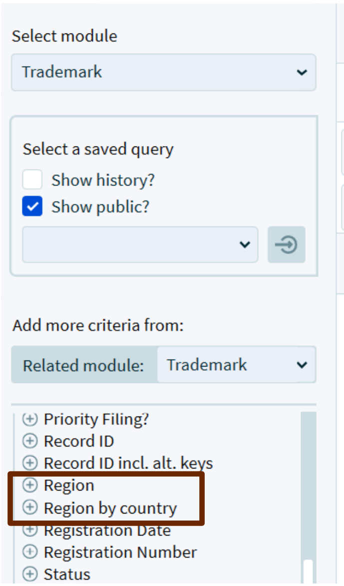


You will be prompted to add and link modules to the region. In this example the TM Profile and Trademark are selected. Once saved, the region is added to the list.



The user when in either a TM Profile or a Trademark record, will have this region available to select from a drop-down list:

When searching for records belonging to a region, the user will need to use the Advanced Search for this field:



By adding the field “Region” to the “Define your filters” pane and selecting the region and clicking on “Search”, will give you a result of all Trademarks that have this region allocated on the record.

Further, with the search result list, the column field “region” (right click of the mouse and from the Main fields > Region) can be added to the display for a customised export report:

Region	Record ID 2	Trademark... 1	TM Kind	Country	Convention	Active?	International cl...	Status	Sub status	Application...	Application nu...	Registration...	Registration Nu...
EAEU	KHR310...	ADDITIVE.DES...	Word	European...	European...	Yes	9	Registered		11-Nov-2016	016026114	28-Feb-2017	016026114
EAEU	KHR310...	ADDITIVE.DES...	Word	United...	National...	Yes	9	Registered		11-Nov-2016	016026114	28-Feb-2017	UK009016026...
EAEU	KHR310...	Continental...	Logo	European...	European...	Yes	1, 4, 6, 7, 8, 9,...	Registered	Published,...	25-Feb-2013	011602323	18-Nov-2013	011602323
EAEU	KHR310...	Continental...	Logo	United...	National...	Yes	1, 4, 6, 7, 8, 9,...	Registered	Published,...	25-Feb-2013	011602323	18-Nov-2013	UK009011602...
EAEU	KHR310...	Continental...	Logo	European...	European...	Yes	1, 4, 6, 7, 8, 9,...	Registered	Published,...	23-Oct-2018	017971285	25-Jul-2019	017971285
EAEU	KHR310...	Continental...	Logo	United...	National...	Yes	1, 4, 6, 7, 8, 9,...	Registered	Published,...	23-Oct-2018	017971285	25-Jul-2019	UK009017971...
EAEU	KHR310...	GEIST	Word	European...	European...	Yes	35, 41, 45	Registered	Published,...	11-Feb-2019	018021490	18-Jun-2019	018021490
EAEU	KESO-06/CH	KESO	Word	Switzerland	National...	Yes	6	Registered	Published,...	08-Aug-1958	171 468	08-Aug-1958	171 468
EAEU	KESO-06/EM	KESO	Word	European...	European...	Yes	6, 9, 42	Registered	Published,...	21-Aug-1996	000341347	15-Feb-1999	000341347
EAEU	KHR310...	Molly	Word	European...	European...	Yes	10	Registered	Published,...	17-Aug-2010	009318031	25-May-2011	009318031
EAEU	KHR310...	NYLOFLEX	Word	European...	European...	Yes	1, 9	Registered	Published	01-Apr-1996	000097717	17-Aug-1999	000097717
EAEU	KHR310...	THE FUTURE...	Word	European...	European...	Yes	1, 4, 6, 7, 8, 9,...	Registered	Published,...	05-Nov-2018	017980167	26-Jul-2019	017980167

By adding the field column **Regions by country**, will show where certain countries are also used in other "regions":

Trademarks #4

Regions by country	Region	Record ID	Trademark Name	TM Kind	Country	Convention	Active?	International cl...	Status
Europe, European Customs Recordals	EAEU	KHR31037/GB	ADDITIVE.DES...	Word	United Kingdom	National...	Yes	9	Registered
Europe	EAEU	KHR31037/EM	ADDITIVE.DES...	Word	European Union...	European...	Yes	9	Registered
Europe	EAEU	KHR31029/EM	GEIST	Word	European Union...	European...	Yes	35, 41, 45	Registered
Europe	EAEU	KHR31027/EM	THE FUTURE...	Word	European Union...	European...	Yes	1, 4, 6, 7, 8, 9,...	Registered
Europe, European Customs Recordals	EAEU	KHR31026/GB	Continental...	Logo	United Kingdom	National...	Yes	1, 4, 6, 7, 8, 9,...	Registered
Europe	EAEU	KHR31026/EM	Continental...	Logo	European Union...	European...	Yes	1, 4, 6, 7, 8, 9,...	Registered
Europe, European Customs Recordals	EAEU	KHR31025/GB	Continental...	Logo	United Kingdom	National...	Yes	1, 4, 6, 7, 8, 9,...	Registered
Europe	EAEU	KHR31025/EM	Continental...	Logo	European Union...	European...	Yes	1, 4, 6, 7, 8, 9,...	Registered
Europe	EAEU	KHR31016/EM	Molly	Word	European Union...	European...	Yes	10	Registered
Europe	EAEU	KHR31015/EM	NYLOFLEX	Word	European Union...	European...	Yes	1, 9	Registered
Europe	EAEU	KESO-06/EM	KESO	Word	European Union...	European...	Yes	6, 9, 42	Registered
Europe, European Customs Recordals	EAEU	KESO-06/CH	KESO	Word	Switzerland	National...	Yes	6	Registered
EAEU	EAEU	dayt/WO-AM	DAYTONA	Word	Armenia	Madrid...	Yes	14	Not Yet Fil
EAEU, Europe, European Customs Recordals	EAEU	30006/WO-RU	Molly Hatchet	Word	Russian Federation	Madrid...	Yes	41	Not Yet Fil
EAEU	EAEU	151/WP-KG	LEGO <fig>	Device	Kyrgyzstan	Madrid...	Yes	09, 16, 25, 28, 41	Registered
EAEU	EAEU	112/WO-AM	Chris Colter	Trade Name	Armenia	Madrid...	Yes		Registered

Selected items: 0 | 1 | 100 items per page | 1 to 18 of 18 results

If you have several regions created where a country(s) could belong to more than one region, you may benefit with using another search level; from the Advanced Search, there is a field called **Region by country**.

Region by country	Equal	EAEU

"

By adding the field to the **Define your filters** window and executing a search on the region, will give a greater result of records. The example below shows that all records (including those without a region allocated), are listed since the country is part of the searched upon region.

Trademarks #6 (Region by Country)

Region	Regions by country	Record ID	Trademark Name	TM Kind	Country	Convention	Active?	Internatic
European Customs Recordals	EAEU	111/KZ	Danaos	Word	Kazakhstan	Madrid...	Yes	14
European Customs Recordals	EAEU, Europe	030000/BY	Blue Sky Blue...	Picture	Belarus	National...	Yes	13, 27
European Customs Recordals	EAEU	030000/AM	Blue Sky Blue...	Picture	Armenia	National...	Yes	2
European Customs Recordals	EAEU, Europe	30002/WO-BY	AMELIE	Word	Belarus	Madrid...	Yes	14
Europe	EAEU, Europe	KHR31015/WO-BY	NYLOFLEX	Word	Belarus	Madrid...	Yes	1, 7, 9
EAEU	EAEU	151/WP-KG	LEGO <fig>	Device	Kyrgyzstan	Madrid...	Yes	09, 16, 25
EAEU	EAEU	104/AM	Once Upon A...	Word	Armenia	National...	Yes	
EAEU	EAEU	104/KZ	Once Upon A...	Word	Kazakhstan	National...	Yes	
EAEU	EAEU	dayt/WO-AM	DAYTONA	Word	Armenia	Madrid...	Yes	14
EAEU	EAEU	112/WO-AM	Chris Colter	Trade Name	Armenia	Madrid...	Yes	
EAEU	EAEU, Europe, European Customs Recordals	30006/WO-RU	Molly Hatchet	Word	Russian...	Madrid...	Yes	41
Asia	EAEU, Europe, European Customs Recordals	KHR31015/WO-RU	NYLOFLEX	Word	Russian...	Madrid...	Yes	1, 6, 7, 9
Asia	EAEU	KHR31015/WO-KG	NYLOFLEX	Word	Kyrgyzstan	Madrid...	Yes	1, 7, 9
Asia	EAEU	KHR31015/WO-KZ	NYLOFLEX	Word	Kazakhstan	Madrid...	Yes	1, 7, 9
	EAEU	104/KG	Once Upon A...	Word	Kyrgyzstan	National...	Yes	
	EAEU	103/WO-AM	A Horse Is A...	Device	Armenia	Madrid...	Yes	1

Selected items: 0 | 1 | 100 items per page | 1 to 100 of 251 results

How to do a batch update

A **batch update** is a way of changing, adding or deleting common information in a group of records resulting from a search result. Batch updates are available in **all modules**.

Note: Only users with Admin User rights will be offered this option.

Note: A batch update is specific for each module and therefore **cannot** be used for a search based on "**All assets**".

1. To start a batch update, open the respective search screen and perform a search. For this example, the patent module was used.

2. From the search result, you can select a part of the displayed records by ticking the boxes and thus, only the selected records would be subject to the modification made by the batch update. If you do not make a selection, the batch update automatically addresses all of the records in the search window.
3. Click on the icon on the top right-hand side
   If "Process with re-calculation" (the update of due dates via the country rules engine) is not required, re select from the drop down, process without re-calculation, in order to run the necessary batch update.

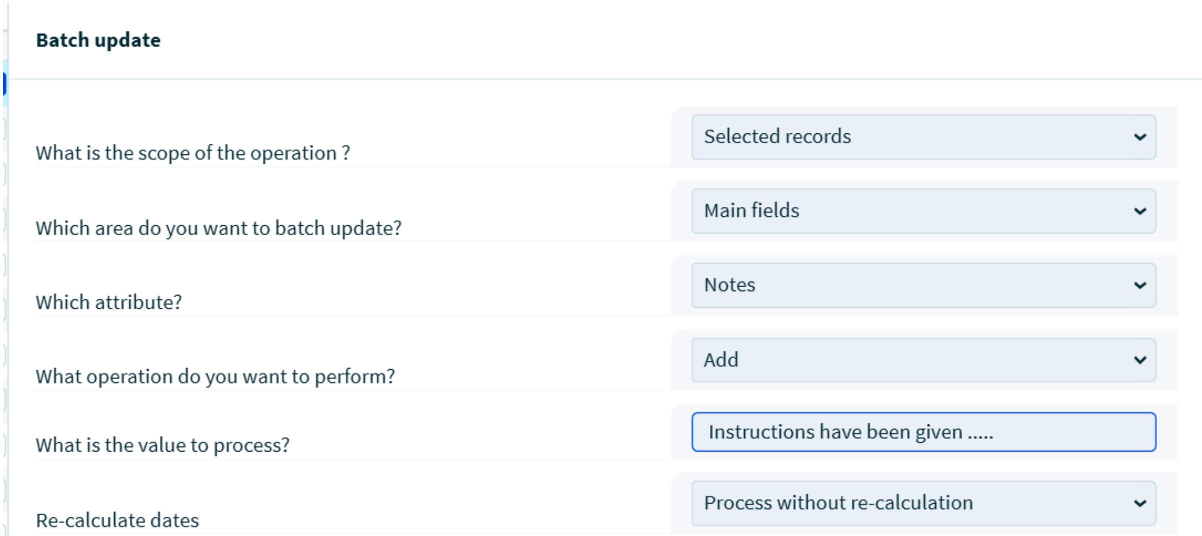
4. Select the data and operations for the batch update from the drop-down lists.

The "which **area**" such as the **Main fields**

Attributes will differ according to the chosen "area", for example: File Status, Notes, Region or change of Status/Sub-status.

The operation to perform i.e., overwrite, add, remove.

The value of the update, in this example addition of a **"Note"** will be added to the seven selected records.



5. The **batch update** will give a warning asking for confirmation.

A tab window “**My Job**” will open showing “**Batch update**” jobs in progress.
It will show **status**, **progression** (progress bar) and **details** of the jobs being processed.

6. After the job has finished, a report will be generated and added to **My Page >>My Reports**.

7. Additionally, the job report should be opened and checked that the batch update was successful:

BATCH JOB SUMMARY

Module: Patent
Operation: Add
Attribute: Notes
Value: Selected for batch update

7 total, 7 processed, 7 succeeded, 0 failed, 0 warning(s), 0 ignored.
Total execution time: 2 sec

Success : Patent [COMPUESTOS DE NICOTINAMIDA SUSTITUIDA Y SUS USOS EN MEDICAMENTOS]
Record ID = GRÜ1002/AR , Database ID = 1000023149
Message = Has been processed
12/23/2020 4:00:05 PM

Success : Patent [COMPRESSOR UNIT, HEAT SOURCE UNIT, AND AIR CONDITIONER]
Record ID = KHR31021/WO-JP-DIV02 , Database ID = 1000024096
Message = Has been processed
12/23/2020 4:00:05 PM

Success : Patent [COMPRESSOR UNIT, HEAT SOURCE UNIT, AND AIR CONDITIONER]
Record ID = KHR31021/WO-VN , Database ID = 1000024085
Message = Has been processed
12/23/2020 4:00:06 PM

Success : Patent [COMPRESSOR UNIT, HEAT SOURCE UNIT, AND AIR CONDITIONER]
Record ID = KHR31021/WO-US , Database ID = 1000024084

Note: Only mandatory fields are copied across family members, according to the rules and regulations. Optional fields are ignored.

Maintenance

Delete and purge records

DIAMS has a comfortable, safe and comprehensive method to delete records.

You can delete a record in a way that it will not be visible any more for your daily work, but it remains in the database.

You can also delete records completely by purging them, so that the records are no longer retrievable.

You can restore **deleted** records, as long as they are **not purged**.

Note: Only users with Admin User rights will be offered this option.

How to delete a record

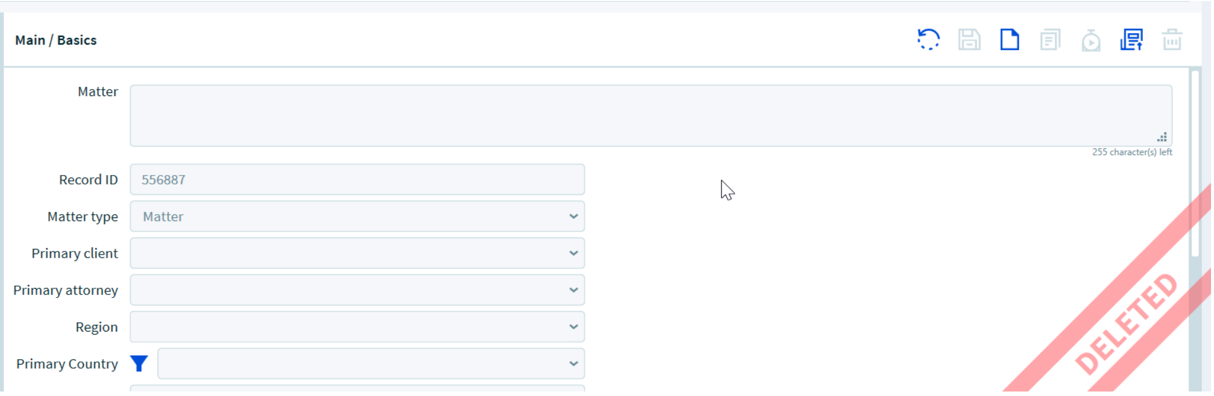
If you wish to delete a record, you must first open it.

Go to the **Main / Basics** window and click the delete icon on the right-hand side.

You will receive a pop up to confirm deletion with a check box if you also want to “**purge**” the record.

To purge a record means that it will be irreversibly removed from the ***DIAMS*** database. If that is what you want, you should tick the “**Purge**” option and thereafter click “**Yes**”.

If the purge option is not selected, the deleted record will show as follows with a red banner in the bottom corner of the record:



Note: Only users with Admin User rights will be offered this option.

If the record is purged, after having clicked the “**Refresh**” icon, you will no longer see the purged record. However, a blank screen remains, and this must be closed manually.

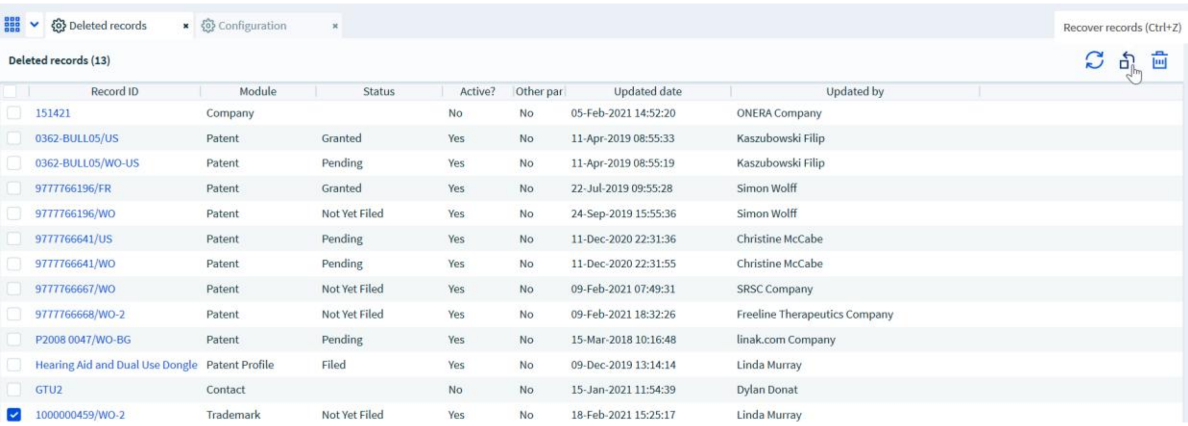
You cannot always delete a record if it is **linked to other records or assets**. In this case you will be presented with a warning message.

How to handle deleted records

Deleted records may be either purged (permanently deleted) or restored.

To purge or restore deleted records.

Click **Administration – Maintenance – Purge deleted records.** A list of deleted records is presented.



Record ID	Module	Status	Active?	Other par	Updated date	Updated by
151421	Company		No	No	05-Feb-2021 14:52:20	ONERA Company
0362-BULL05/US	Patent	Granted	Yes	No	11-Apr-2019 08:55:33	Kaszubowski Filip
0362-BULL05/WO-US	Patent	Pending	Yes	No	11-Apr-2019 08:55:19	Kaszubowski Filip
9777766196/FR	Patent	Granted	Yes	No	22-Jul-2019 09:55:28	Simon Wolff
9777766196/WO	Patent	Not Yet Filed	Yes	No	24-Sep-2019 15:55:36	Simon Wolff
9777766641/US	Patent	Pending	Yes	No	11-Dec-2020 22:31:36	Christine McCabe
9777766641/WO	Patent	Pending	Yes	No	11-Dec-2020 22:31:55	Christine McCabe
9777766667/WO	Patent	Not Yet Filed	Yes	No	09-Feb-2021 07:49:31	SRSC Company
9777766668/WO-2	Patent	Not Yet Filed	Yes	No	09-Feb-2021 18:32:26	Freeline Therapeutics Company
P2008 0047/WO-BG	Patent	Pending	Yes	No	15-Mar-2018 10:16:48	linak.com Company
Hearing Aid and Dual Use Dongle	Patent Profile	Filed	Yes	No	09-Dec-2019 13:14:14	Linda Murray
GTU2	Contact		No	No	15-Jan-2021 11:54:39	Dylan Donat
1000000459/WO-2	Trademark	Not Yet Filed	Yes	No	18-Feb-2021 15:25:17	Linda Murray

To finally delete (purge) records

In the upper left-hand corner, click the box for all records and thereafter the red “Delete” icon  on the top right. Confirm the deletion on the subsequent screen.
To restore deleted records

Check the box of the records to be restored and click the restore icon  (there will be no confirmation dialogue).

Note: You cannot restore records collectively, only individually.

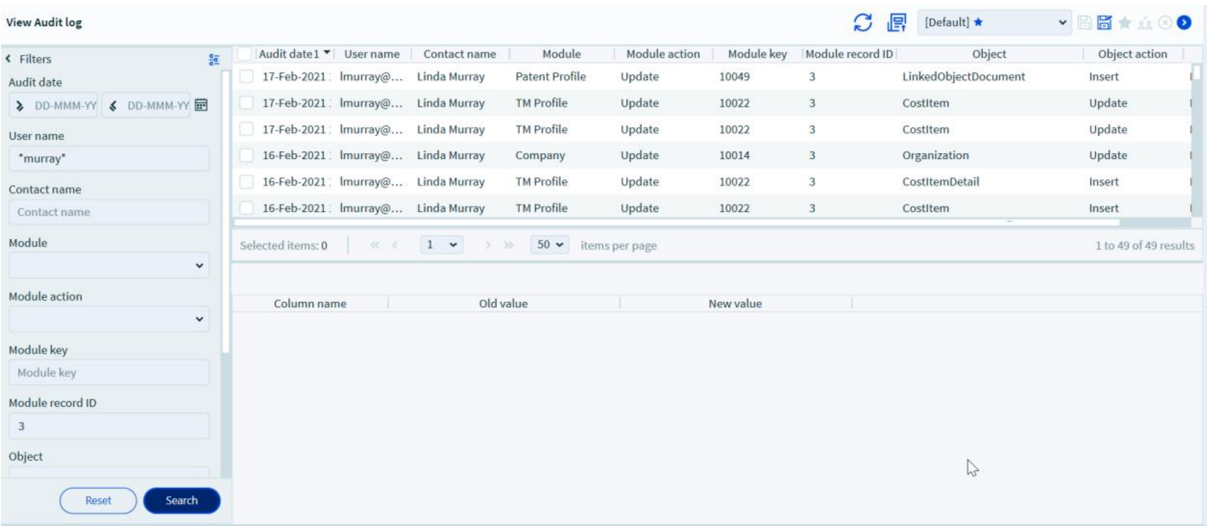
How to view and search the audit log

In the main menu, click **Administration** – (Audit trail) **View Audit log**.-
The **audit search screen** is presented.

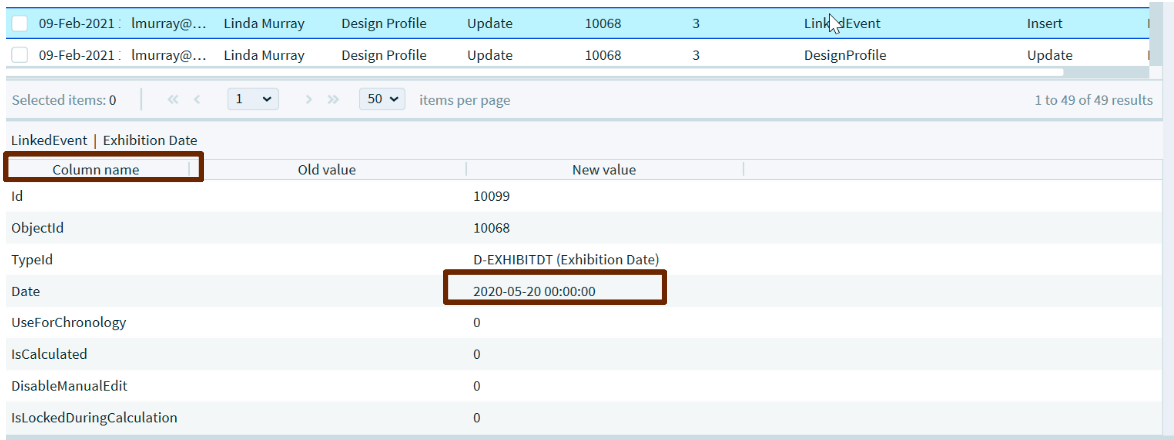
Fill in your search criteria, i.e., by a date range; a user; an operation such as insert, update, delete; module besides other criteria.

As well as searching as described above, a search on a record can be executed, which the example below shows and with a named user, this would list all activity by the user on a particular record.

The results screen of the audit log is divided in two parts; the upper section shows the operation summary of the audit.



When you select an entry in the upper table, the details of the changed field values will be displayed in the bottom section. The example below shows an event that has been added to the record:



09-Feb-2021	lmurray@...	Linda Murray	Design Profile	Update	10068	3	LinkedEvent	Insert
09-Feb-2021	lmurray@...	Linda Murray	Design Profile	Update	10068	3	DesignProfile	Update

Selected items: 0 | 1 | 50 items per page | 1 to 49 of 49 results

LinkedEvent | Exhibition Date

Column name	Old value	New value
Id		10099
ObjectId		10068
TypeId		D-EXHIBITDT (Exhibition Date)
Date		2020-05-20 00:00:00
UseForChronology		0
IsCalculated		0
DisableManualEdit		0
IsLockedDuringCalculation		0

To create an **audit trail report**, click the report icon for an export report which can be generated or attached to an email.

Note: Only users with Admin User rights will be offered this option.

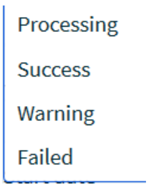
Jobs and how to view the history of jobs

There are many **jobs** that are created in ***DIAMS***, some that are run automatically, others which are created where the user has the relevant permissions. These jobs create a report for the administrator to check for any errors or failures.

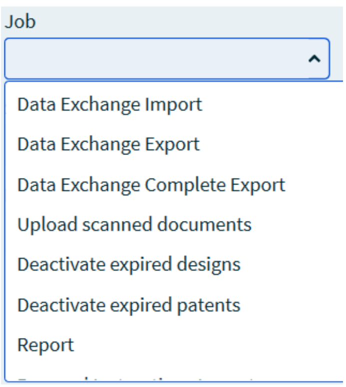
Some examples being:

- Batch Updates
- Scheduled Job Reports (add-on feature)
- Data Exchange with Dennemeyer departments for the import and export of data including payment instructions
- Deactivation of expired Patents and Designs
- Country Law Calculation

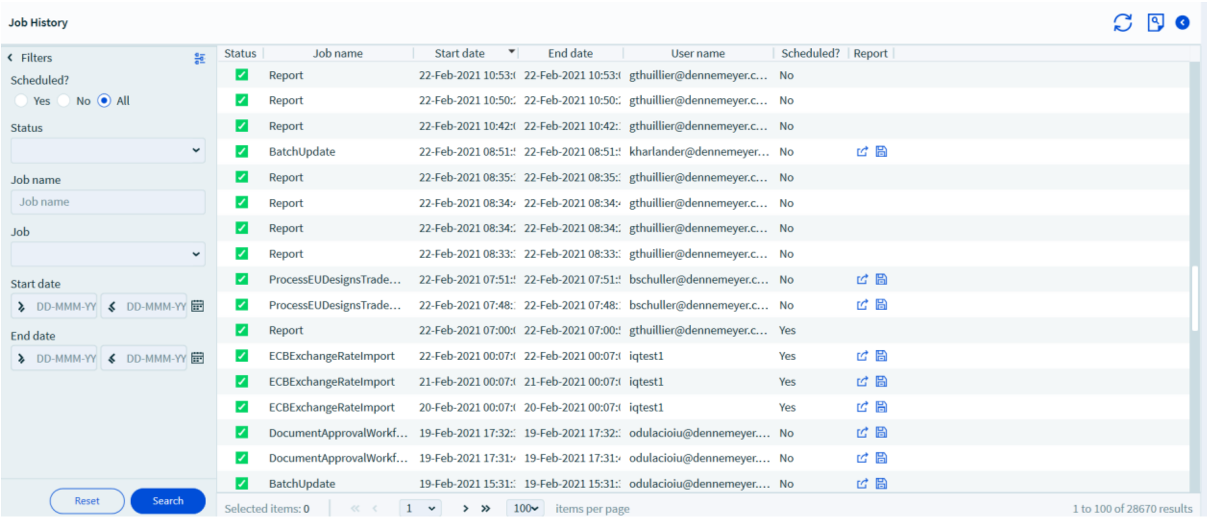
From the window, **Job history** will open and here you can search by status and job types, as well as start and end dates.



By Job:



From the search result, the administrator can open the reports and will be alerted to any failure by a warning sign



Data Exchange job reports improvements

1. New Fields Added to Job Reports

Three new fields have been added to the rtf job reports generated by the following jobs:

Renewal Instructions

The new fields are now displayed for success, warning and error messages.

Asset Name: Displays the asset type and its name (Patent, Trademark, Design).
The values are sourced from DIAMS.

Company Type Name: Displays the company name along with its type. The type can be customized through the Data Exchange configuration menu.
By default, the type is set to "Client."
The values are sourced from DIAMS.

Country: Displays the corresponding country from Main / Basics.
The values are sourced from DIAMS.

e.g. for Success message:

IMPORT PSA RENEWAL INSTRUCTIONS JOB SUMMARY

2 total, 2 processed, 2 succeeded, 0 failed, 0 warning(s), 0 ignored.
Total execution time:

Success : Patent [TestPro], Country [Armenia], Client [AK Automotive]
Record ID = 20180302167539/AM-13 , Database ID = 723114
Message = The renewal instruction was imported. Status is 'NotSent'
14/11/2025 11:57:38

Success : Design [Art1], Country [Brazil], Client [AM Store]
Record ID = 2013212271/BR-14 , Database ID = 723115
Message = The renewal instruction was imported. Status is 'NotSent'
14/11/2025 11:57:39

Import PSA Renewal Instructions job completed.

e.g. for Warning message

IMPORT PSA RENEWAL INSTRUCTIONS JOB SUMMARY

2 total, 2 processed, 0 succeeded, 0 failed, 2 warning(s), 0 ignored.
Total execution time:

These renewal instructions were already imported. Please search for instructions which were received on 25/07/2020 07:19:31.

Warning : Patent [GuidePro], Country [Armenia], Client [Dennemeyer]
Record ID = 20180302167539/AM-12 , Database ID = 723099
Message = Renewal instruction for the due date '10/07/2026 00:00:00' with ID '' has already been imported on this date 25/07/2020 07:19:31.
21/10/2025 16:51:30

Warning : Design [Art3], Country [Brazil], Client [Dennemeyer]
Record ID = 2013212271/BR-3 , Database ID = 723100
Message = Renewal instruction for the due date '11/06/2030 00:00:00' with ID '' has already been imported on this date 25/07/2020 07:19:31.
21/10/2025 16:51:30

Import PSA Renewal Instructions job failed.

2. **Excel Format for Job Reports**

Excel Format for Job Reports has been extended to the following jobs:

Cost Items (Import EPO/USPTO/LEDES Statements)

Documents

Renewal Instructions

Job Reports format can be configured from Administration >> Configuration >> System Configuration >> Data Exchange >> Data Exchange Settings.

e.g. for Success message from Cost items / EPO import

CostItemImport

Importing cost item with Reference Number '0582835'

Timestamp	Info	Module	RecordTitle	RecordID	Client	Country	Message
11/13/2025 1:15:05 PM	Success	Patent	GuidePro	0000001/GR	Denenemeyer	Greece	Imported successfully Cost item: CostItemImportRowId = '5090', RecordId = '0000001/GR', Cost Item Type = 'Official Fees', Supplier = 'Dennemeyer', Debit Type = 'Debit-In', Reference = '0582835', Net Amount = '1000.00'

e.g. for Warning message from Renewal Instructions

Import PSA Renewal Instructions

These renewal instructions were already imported. Please search for instructions which were received on 25/07/2020 07:19:31.

Timestamp	Info	Module	RecordTitle	RecordID	Client	Country	Message
21/10/2025 16:50:01	Warning	Patent	GuidePro	20180302167539/AM-12	Dennemeyer	Armenia	Renewal instruction for the due date '10/07/2026 00:00:00' with ID '' has already been imported on this date 25/07/2020 07:19:31.
21/10/2025 16:50:01	Warning	Design	Art3	2013212271/BR-3	Dennemeyer	Brazil	Renewal instruction for the due date '11/06/2030 00:00:00' with ID '' has already been imported on this date 25/07/2020 07:19:31.

e.g. for Error message from Documents

UploadScannedDocuments

Timestamp	Info	Module	RecordTitle	RecordID	Client	Country	Message
11/18/2025 10:07:00 AM	Error	Design	TestPro	109315/UZ	Dennemeyer	Uzbekistan	Cannot link document 'Opt-Out Form-EP20240924' (C:\StandardiQ\DMS\GenericUpload\Opt-Out Form-EP20240924.pdf);

How to view scheduled jobs

Click Administration >> Jobs >> Manage scheduled jobs. The window “Manage scheduled jobs” opens and gives an overview of all scheduled jobs, regardless of if they are from the application or are custom-specific.

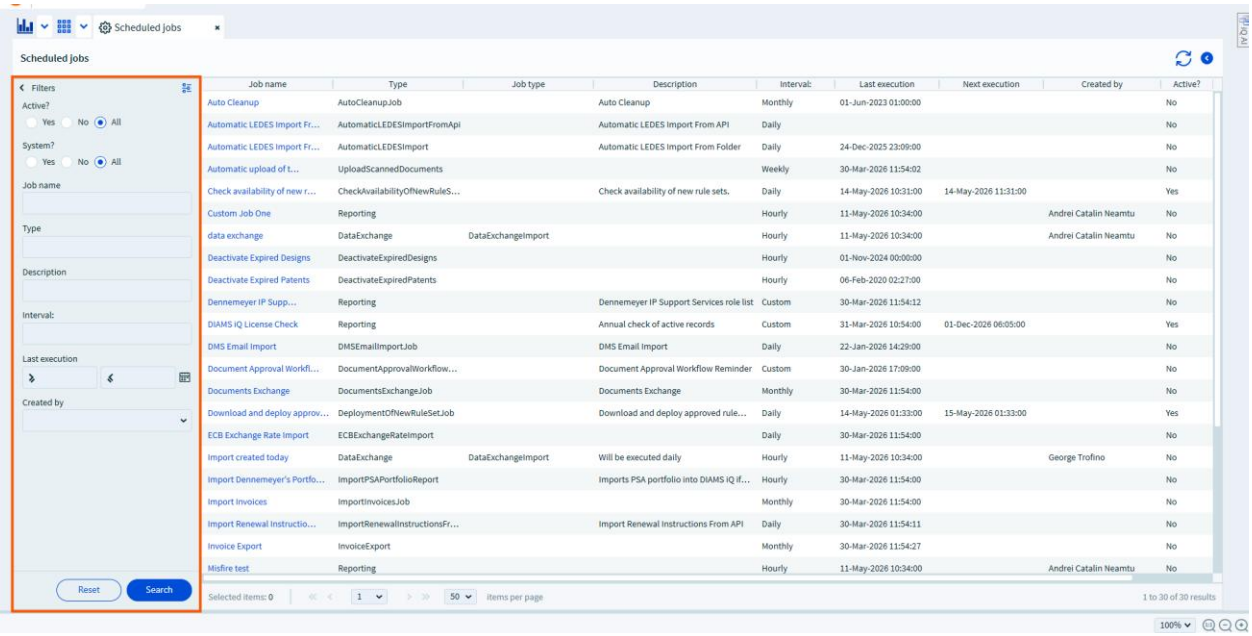
Scheduled jobs

Job name	Type	Job Type	Description	Interval:	Last execution	Next execution	Created by	Active?	System
Deactivate Expired D	DeactivateExpi			Weekly				No	Yes
Deactivate Expired P	DeactivateExpi			Weekly				No	Yes
Documents Exchang	DocumentsExc		Documents Exchange	Monthly				No	Yes
ECB Exchange Rate I	ECBExchangeR			Daily				No	Yes
Import Invoices	ImportInvoices			Monthly				No	Yes
Import Dennemeyer'	ImportPSAPort		Imports PSA portfolio into DIAMS iQ if…	Monthly				No	Yes
Process PSA Renewa	ProcessPSARe		Process PSA Renewal instructions	Hourly				No	Yes
Process PSR Renewa	ProcessPSRRe		Process PSR Renewal instructions	Hourly				No	Yes

By clicking on the Job name will allow for any amendment and by clicking on the blue cross will delete the scheduled job.

Manage scheduled jobs improvements

The “Manage Scheduled Jobs” screen now supports searching, filtering, and sorting, enabling administrators to quickly locate and manage specific jobs more efficiently.



Scheduled Jobs – audit trail

The objective was to generate logs in ***DIAMS*** for the insert, update and delete actions that are performed by users for “scheduled jobs”, as until now, ***DIAMS*** was not covering this functionality in the audit trail.

Previously, the “system and custom” scheduled jobs could be inadvertently turned off, and cause issues such as the loss of rights for IP assets. We are now able to indicate in the audit trail section the reasoning behind any issue related to a process that is based on a scheduled job. Of significant importance are the details regarding the author of the action and the changes related to the active / inactive status of the scheduled job.

In scope are the two types of scheduled jobs: system and custom.

The logs corresponding to an Insert, Update and Delete operation for a scheduled job will include the old and new values for:

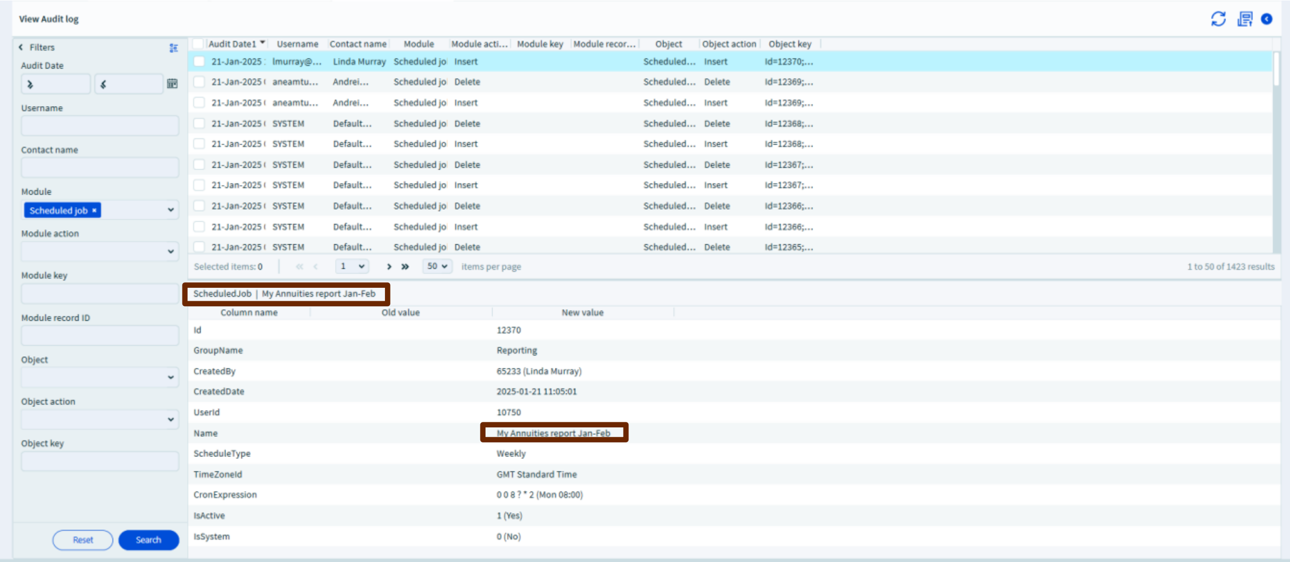
- job name, type, description, and Record ID
- details about the user that created and updated the job
- date of creation
- job execution interval details
- active or inactive status
- system or custom job type
- time zone

Audit trail logs for scheduled jobs: display job name

The name of the scheduled job created, edited, or deleted will be displayed in the audit trail logs, like linked events.

Search on the Module “Scheduled job” and enter your search criteria.

When an item is selected from the list, the full details will be shown in the lower pane.



Data Exchange job reports improvements 9.6

1. **New Fields Added to Job Reports**

Three new fields have been added to the rtf job reports generated by the following jobs:

- Data Exchange > **Import and Export Data** (All Operation Types, All Modules)
- Cost Items **(Import EPO/USPTO/LEDES Statements**)
- Documents (**Upload Scanned Documents**)

These new fields are now displayed for “success”, “warning” and “error messages”.

Asset Name: Displays the asset type and its name (Patent, Trademark, Design).
The values are sourced from ***DIAMS***.

Company Type Name: Displays the company name along with its “type”. The company “type” can be customized through the Data Exchange configuration menu, as detailed in point 3. By default, the type is set to "Client." The values are sourced from ***DIAMS***.

Country: Displays the corresponding country from Main/Basics.
The value is sourced from ***DIAMS***.

e.g. for Data Exchange **Trademark import** job report summary – **success** message:

DATA EXCHANGE IMPORT JOB SUMMARY
2 total, 1 processed, 1 succeeded, 0 failed, 0 ignored.
Total execution time:

Info : Message = Previous import data record id was 96535 9/18/2025 8:08:34 AM
Info : Record ID = 96539 , ImportData [Insert], Message = Start processing file with counter '39' 9/18/2025 8:08:34 AM
Success : Record ID = 777552184/RO , Trademark [GuidePro], Country [Romania], Client [Dennemeyer], Database ID = 71525
Message = Insert 9/18/2025 8:08:34 AM
Info : Record ID = 96539 , ImportData [Insert], Message = File with counter '39' has been processed 9/18/2025 8:08:34 AM

Data exchange import job completed successfully.

e.g. for Data Exchange **Trademark** import job report summary – **error** message:
In cases of error, when there is no data available in ***DIAMS***, the values for the three new fields are sourced from the import file. This fallback mechanism applies exclusively to the Trademark imports.

DATA EXCHANGE IMPORT JOB SUMMARY
1 total, 1 processed, 0 succeeded, 1 failed, 0 ignored.
Total execution time: 2 sec

Info : Message = Previous import data record id was 96112 9/18/2025 7:54:01 AM
Info : Record ID = 96530 , ImportData [Insert], Message = Start processing file with counter '37' 9/18/2025 7:54:01 AM
Error : Record ID = 777552184/DE , Trademark [GuidePro], Country [Germany], Client [Dennemeyer], Database ID = 0
Message = Insert 9/18/2025 7:54:01 AM
Error Message = Cannot find organization with code 448
Info : Record ID = 96530 , ImportData [Insert], Message = File with counter '37' has been processed 9/18/2025 7:54:01 AM

Data exchange import job failed

*e.g. for Data Exchange **All assets** import job report summary - warning message*

DATA EXCHANGE IMPORT JOB SUMMARY
2 total, 2 processed, 1 succeeded, 0 failed, 0 ignored.
There are warnings.
Total execution time:

Info : Message = Previous import data record id was 94079 9/3/2025 4:50:47 PM
Success : Record ID = 1368 , Organization Database ID = 68054
Message = Update 9/3/2025 4:50:47 PM
Warning : Record ID = 398408/BR , Design [GuidePro], Country [Brazil], Client [Dennemeyer], Database ID = 71262
Message = Update
Design "398408/BR" was created.
Application date should not be greater than registration date 9/3/2025 4:50:47 PM
Info : Record ID = 94082 , ImportData [Update], Message = File 'GenericExcelDesign' has been processed 9/3/2025 4:50:47 PM

Data exchange import job completed successfully with warning(s).

*e.g. for **Cost items** import job report "success" summary:*

COSTITEMIMPORT JOB SUMMARY

1 total, 1 processed, 1 succeeded, 0 failed, 0 warning(s), 0 ignored.
Total execution time:

Info :
Message = Importing cost item with Reference Number '0582835' ....
9/12/2025 7:14:34 AM

Success : Patent [Data Processing System], Country [Luxembourg], Client [Dennemeyer]
Record ID = 999004/EP , Database ID = 70892
Message = Imported successfully
Cost item: CostItemImportRowId = '4842', RecordId = '999004/EP', Cost Item Type = 'Official Fees', Supplier = 'Dennemeyer', Debit Type = 'Debit-In', Reference = '0582835', Net Amount = '915.00'
9/12/2025 7:14:34 AM

CostItemImport job completed.

2. Excel Format for Job Reports

Job reports can now be generated in Excel format. These Excel reports include the following fields:

Data exchange import							
Previous import data record id was 96539							
Timestamp	**Info**	**Module**	**RecordTitle**	**RecordID**	**Client**	**Country**	**Message**
9/18/2025 8:57:39 AM	Info	ImportData	Insert	96560			Start processing file with counter '40'
9/18/2025 8:57:40 AM	Success	Trademark	Dell	777552184/FR	Dennemeyer 2	France	Insert
9/18/2025 8:57:40 AM	Info	ImportData	Insert	96560			File with counter '40' has been processed

Currently, this feature is available only for jobs under "Import and Export Data" (All Operation Types, All Modules) and can be enabled through the Data Exchange configuration menu described at point 3.

3. Administration Screen for Managing Job Reports

A new configuration option is available under:
Administration > Configuration > System Configuration > Data Exchange > Data Exchange Settings

This screen allows administrators to specify the default "Company Type" and "File Type" for job reports **where these options have been implemented**.

Changing the default “Company Type” or “File Type” updates **all reports** that support these settings. Reports that are not supported by the default settings change will stay the same.

Please note that any changes made here will **apply globally** to all users across the system.