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# Cautus

## Online Trademark Management System

### How To Guide

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## 1 Pre-Requirements

In order to utilise Cautus online trade mark management system, you will need:

- An active account
- An appropriate level login necessary to complete your tasks

Contact Arepo Solutions to discuss your requirements: Telephone +44 (0)20 7280 4390, or email [support@arepo.com](mailto:support@arepo.com)

The following pages provide a brief overview of the system; its appearance and functions, and include a step-by-step guide of one of the most common processes; adding a new trademark.

## 2 Top menu navigation bar

Upon logging into *Cautus*, the initial home page will display several elements, the top most being the navigation menu bar:



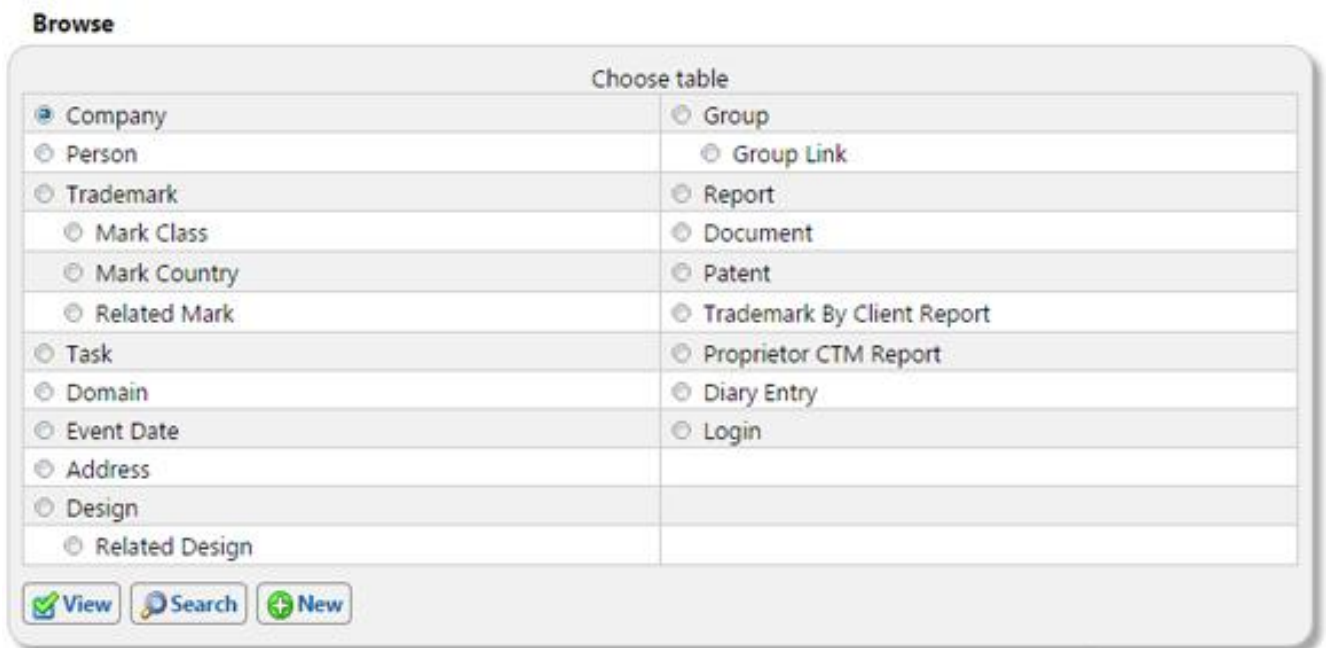
As this navigation bar is present at the top of every page of *Cautus*, you will be able to access the following four functions at any time:

### 2.1 Home

You are able to return to the main home page from anywhere in the system via this button. Further information regarding this page is set out below.

### 2.2 Browse

This main menu page provides quick access to all the tables in the database that your login type has access to. Besides each table name you may see a hyphen ("-") followed by a description; this is purely to help you identify each table as the name itself may not be a sufficient explanation.



- Choose a table, then click view to see all records, search to restrict data or new to add a record.

How to use the browse page:

- Select a table from the list by clicking in the toggle button (the circle to the left)
- Click the [View] button at the bottom of the page to be taken directly to the list of the table you have selected
- Click the [Search] button at the bottom of the page to be taken directly to the simple Search for the table you have selected
- Click the [New] button at the bottom of the page to be taken directly to an insert page for the table you have selected to add a new record

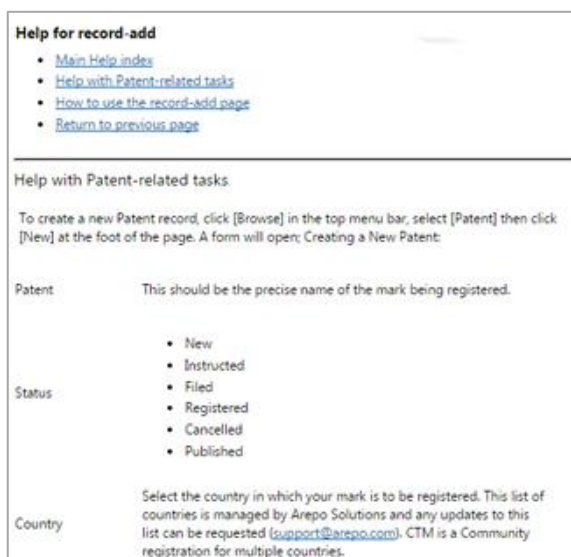
Certain tables may be absent from your main menu, as those displayed are dependent upon your access rights. Furthermore, a table may exist but you may have limited access and the [New] button may be disabled.

### 2.3 Recent

The recent list is a rolling list of the latest pages (up to 15) viewed by login. You cannot manually add or remove entries to this list, as the database manages the list automatically. You can use this function as a shortcut to pages you regularly access rather than creating a new search each time.

### 2.4 Help

There is a detailed online help system to provide how-to guidance for the most common procedures for this system. When you click on the help button a pop-up will provide information relating to the specific page you were working on followed by generic information relating to how to amend the view, edit and save data for that page for example.

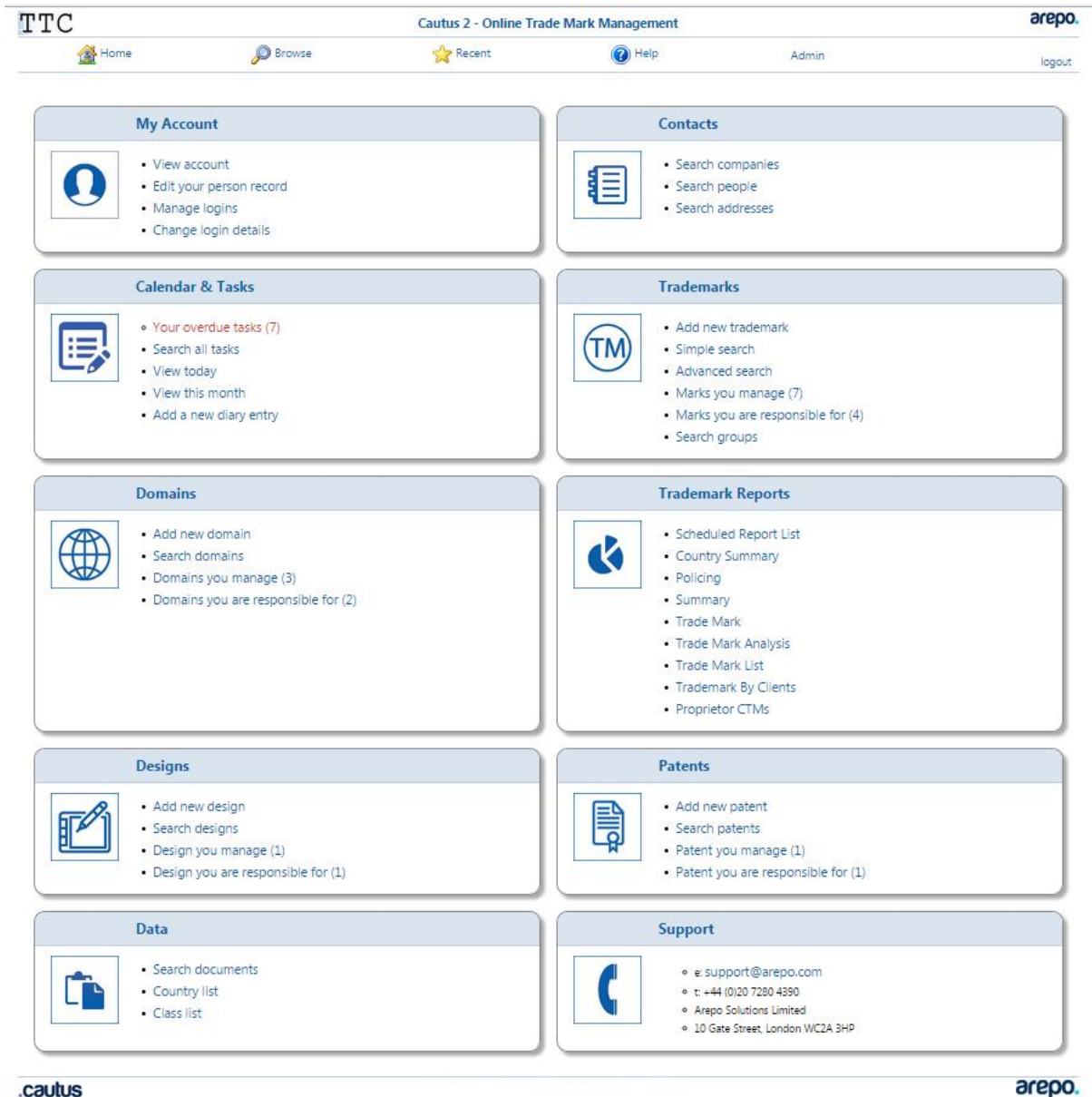


There are four main page types; the home page(s), search page, list page and display page. Following is a brief description of their main elements.

### 3 Home pages and modules

This is the opening page to your system. It is a custom page, the configuration of which is dependent upon your access level and/or department, related to your log-in.

The page is divided by panes within which you will find links to the most common tasks available to you, grouped by any modules within your account configuration.



If you require a function that is not visible on the Home Page, you are able to access further functions via the [Browse] button on the top menu bar above.

#### 4 Search function pages

There is a [Search] button at the foot of most pages. This will bring up a Search page where there are a variety of dropdown fields that can be completed in order to filter the output.

##### 4.1 Simple Search Page (in this example searching for trademarks):

Field	Value
Cautus Ref:	<input type="text"/>
Mark:	<input type="text"/>
Type Of Mark:	[all] ▼
Status:	[all] ▼
Latest Event:	[all] ▼
Country:	[all] ▼
Registered Owner:	<input type="text"/>
Registered Classes:	<input type="text"/>

Search

Enter your criteria into the fields shown, and click on the [Search] button to be directed to your search results.

After performing your search you can use the [Back] button or [Search] button to return to your recent Simple Search.

Leaving the fields blank will bring up all results.

## 4.2 Advanced search page

From the Advanced search tab: -

- Select the first field you wish to search from the drop-down field (i.e. initially showing [unspecified])
- Once you have chosen your field, amend the dropdown field that will appear to the right entitled [Criteria], or simply leave as the default.
- Enter the relevant Value for your search in the final drop down field.

You can continue to add as many search parameters as required to narrow down the results, using the subsequent [unspecified] field.

Field	Criteria	Value
Status	not equal to	Filed
[unspecified]	<- Use the drop-down to select additional search fields	

Add fields using the last drop-down list under the field column above, remove fields by choosing [unspecified] from the relevant field column drop-down.  
 Only records that match \*all\* the criteria you have entered will be shown.

**Recent searches :** [unspecified]

Once you have completed defining your search:

- Click on the [Search] button to be directed to the results page. The [Reset] button will clear all the fields.
- After performing your search you can use the [Back] button or [Search] button to return to your recent Advanced Search.

From the Simple or Advanced search pages you can access any Recent Search you have performed.

Locate the Recent Searches drop down at the lower half of the search page, found underneath the Search button.

- Use the drop down to select the search you want from the drop down of recent searches.
- Click the [GO] button to perform your search.

Please note, if the Recent Searches drop down is empty, the database has not recorded or saved any search for your login for this table.



## 5 List page

This is an example list page, where you will see rows of records that match the search criteria you have entered.

Page:  Showing Trademarks 1 to 5 of 14 Pagesize:

		Mark					Owner		Registered With	Audit
	<a href="#">Cautus Ref</a>	<a href="#">Mark</a>	<a href="#">Type Of Mark</a>	<a href="#">Status</a>	<a href="#">Latest Event</a>	<a href="#">Country</a>	<a href="#">Registered Owner</a>	<a href="#">Registered Classes</a>	<a href="#">Registrar/Agent (Person)</a>	<a href="#">Created At</a>
select <input checked="" type="radio"/> <a href="#">view</a>	T.TTC.000001.uk	Sports Mark	Word & Device	Registered	Renewed	United Kingdom	Owner A	3,41		21 Mar 2002
select <input type="radio"/> <a href="#">view</a>	T.TTC.000003.uk	Music Station	Device	Registered	Renewed	United Kingdom	Owner A		<a href="#">Zhaviev &amp; Assc.</a>	27 Mar 2002
select <input type="radio"/> <a href="#">view</a>	T.TTC.000005.uk	Opera Song	Word & Device	Filed	Instructed	United Kingdom				27 Sep 2002
select <input type="radio"/> <a href="#">view</a>	T.TTC.000006.uk	Interbrand	Word & Device	Cancelled	Cancelled	United Kingdom				09 Dec 2002
select <input type="radio"/> <a href="#">view</a>	T.TTC.000009.uk	Building Offices	Word	New		United Kingdom				19 Aug 2006

[View](#) [New](#) [Edit](#) [Copy](#) [Search](#) [Download](#)

There are several actions available:

- Select and edit a single record
- Select and edit multiple records
- Change columns shown
- Change sort order
- Adjust the number of records viewed per page

There are detailed instructions regarding how to carry out these processes within the online How To guide.

## 6 Display page

Your data is displayed in the standard read only display format. The single record is presented from the top of the page down, with any related child data (e.g. one-to-many) displayed underneath on tabs towards the bottom of the page. Furthermore, you may also see tabs alongside the top of the page, and these will relate to other data stored in separate tables (e.g. one-to-one relationship).

### 6.1 Top Tabs

For example, if you were viewing a company record, the tabs at the top might display a single address associated with that company (e.g. the registered address). The tabs at the bottom of the page might show multiple associated records, such as contacts or notes.




### 6.2 Child Tabs

The page may be split into an upper half containing the parent record, and then the lower half containing any related records. If there are any child tabs underneath this single record, one tab will be pre-selected and any records for the table shown below in a list. When choosing a button to perform a specific action, please be careful to select the relevant button pertaining to either the parent record (i.e. above the tabs) or the child record(s) at the bottom of the page.

Page: ⏪ ⏩ 5 ▶ ⏪ ⏩ Showing Trademark 5 of 14

Mark	Owner
<b>Cautus Ref:</b> T.TTC.000009.uk	<b>Owner (Company):</b> <a href="#">Zhariev &amp; Assc.</a>
<b>Mark:</b> Testing	<b>Client</b>
<b>Mark Type:</b> Trademark	<b>Client (Company):</b> <a href="#">C. Richardson Trading</a>
<b>Type Of Mark:</b> Word	
<b>Status:</b> New	
<b>Country:</b> United Kingdom	
<b>Managed By:</b> <a href="#">John GMaw (The Test Company (TTC))</a>	

Mark Details	Registered With
<b>Image:</b> 	<b>Registrar/Agent (Company):</b> <a href="#">OHIM</a>

**Audit**

**Created At:** 19 Aug 2006  
**Created By:** [John GMaw \(The Test Company \(TTC\)\)](#)

[New](#) [Edit](#) [Copy](#) [Search](#) [Print](#) [Manage Registration and Expiry](#)

**Task** [Event Date](#) [Document](#) [Add Group Link](#) [Add Related Mark](#)

Reminder		Task		
	Due	Priority	Assigned To	Name
select <a href="#">view</a>	19 Aug 2014 22:46	Deadline	<a href="#">John GMaw (The Test Company (TTC))</a>	Default Reminder

[View](#) [New](#) [Edit](#) [Delete](#) [Copy](#) [Search](#) [Download](#)

From this page you will see buttons towards the bottom of the single record display, and above any child data tabs. The following buttons may or may not appear (or be enabled or disabled) depending on your access rights:

- **New** Add a new record
- **Edit** Edit this current record
- **Copy** Creates a duplicate of this record
- **Delete** Removes this current record from the system
- **Search** Search for records pertaining to the same table as this record
- **Print** Creates a PDF file to save or print
- **Manage Registration and Expiry** Opens a new form from where you are able to amend further details related to renewal dates and expiry deadlines

## 7 Setting up a new record

The procedure for creating a new record generally follows the same path for different kinds of data; from person to company, from trade mark to diary entry. You are able to create a record in a variety of ways, as follows.

- Use any 'Add New' home page links if they exist
- Use any 'Search' home page links if they exist and, after searching for the record you want (assuming no results are returned), then simply add the record by clicking the Add button.
- Alternatively, if you cannot find a home page 'Add New' or 'Search' link then you can use the [Browse] button on the top menu bar and select the type of record you want to create before then clicking on the [New] button at the foot of the page. This will open a blank 'Creating a new record' page.

### 7.1 Adding a new trade mark – a step-by-step guide:

<p><b>Mark</b></p> <p>Mark: <input type="text"/> *</p> <p><small>The name of the trade mark. (Specify each series on a separate line.) must be entered</small></p> <p>Mark Type: <input type="text" value="Trademark"/></p> <p>Type Of Mark: <input type="text" value="Please select..."/> *</p> <p>Status: <input type="text" value="New"/></p> <p>Country: <input type="text" value="United Kingdom"/></p> <p>Classes: <input type="text"/></p> <p><small>The list of International classes the for which mark is registered. (Separated by commas)</small></p> <p>Local Classes: <input type="text"/></p> <p><small>The list of local classes for which the mark is registered. (Separated by commas)</small></p> <p>Managed By: <input type="text" value="Varina Delrieu (Arepo Solutions Limited)"/></p> <p><small>This is the user responsible for managing the trade mark on a day-to-day basis. They will receive any email reminders.</small></p> <p>Overall Responsibility: <input type="text" value="[unspecified]"/></p> <p><small>This is the person with overall responsibility for the trade mark, but who will not be managing it on a day-to-day basis. (ie Fee-earner) It may be left blank if the same person is in the managed by field.</small></p>		<p><b>Owner</b></p> <p>Owner (Company): <input type="text" value="[unspecified]"/></p> <p><small>The company that owns the trade mark. If the owner is a person this field should be blank.</small></p> <p>Owner (Person): <input type="text" value="[unspecified]"/></p> <p><small>The person that owns the trade mark. If the owner is a company this field should be blank.</small></p>	
<p><b>References</b></p> <p>Application No: <input type="text"/></p> <p>Registration No: <input type="text"/></p> <p>Journal: <input type="text"/></p> <p>OHIM Auth. Type: <input type="text" value="[unspecified]"/></p> <p>OHIM Auth. No.: <input type="text"/></p> <p><small>Enter the individual OHIM authorisation number.</small></p>		<p><b>Client</b></p> <p>Client Reference: <input type="text"/></p> <p>Client (Company): <input type="text" value="[unspecified]"/></p> <p><small>The client company. This is only used if the owner and client are different. (i.e. you are not being instructed by the owner directly).</small></p> <p>Client (Person): <input type="text" value="[unspecified]"/></p> <p><small>The client contact. This is only used if the owner and client are different (i.e. you are not being instructed by the owner directly).</small></p>	
<p><b>Mark Details</b></p> <p>TM Description: <input type="text"/></p> <p>TM Colour: <input type="text"/></p> <p>Series Count: <input type="text"/></p> <p>Image: <input type="text"/></p> <p><small>Please combine multiple series together into a single image.</small></p>		<p><b>Registered With</b></p> <p>Agent Reference: <input type="text"/></p> <p>Registrar/Agent (Company): <input type="text" value="[unspecified]"/></p> <p><small>The registrar that the trade mark has been filed with. If filed with an individual agent with no company, then this field should be [unspecified].</small></p> <p>Registrar/Agent (Person): <input type="text" value="[unspecified]"/></p> <p><small>This is the agent (if the registrar is unspecified) or the contact name for the registrar.</small></p>	
<p><b>Notes</b></p> <p>Notes: <input type="text"/></p>			

As an example of creating a new record, inputting a new trade mark is demonstrated, as this is the most common procedure for *Cautus* users. See the illustrations above and below.


More detailed information regarding individual fields is provided with the online How To guide, which can be accessed by clicking on the [Help] button located on the top menu bar whilst creating or editing a trade mark record.

You are able to edit the information in a drop down field if there is a blue circle pencil icon, or create a new value if there is a green plus icon alongside the dropdown field.

Once all the relevant fields have been completed, click [Save] to create the new record, or click [Cancel] if you are unable to complete the record at this time.

Once the trade mark record has been created, you will be able to view it after saving it, or at a later time via Simple Search (see above) and entering the Mark details in the search form.

Page: 16 Showing Trademark 16 of 16

<p><b>Mark</b></p> <p><b>Cautus Ref:</b> T.TTC.000030.uk</p> <p><b>Mark:</b> Arepo Logo</p> <p><b>Mark Type:</b> Trademark</p> <p><b>Type Of Mark:</b> Word &amp; Device</p> <p><b>Status:</b> New</p> <p><b>Country:</b> United Kingdom</p> <p><b>Classes:</b> 1,5,6,9</p> <p><b>Managed By:</b> <a href="#">John Graham-Maw (Arepo Solutions Limited)</a></p> <p><b>Overall Responsibility:</b> <a href="#">Varina Delrieu (Arepo Solutions Limited)</a></p>	<p><b>Owner</b></p> <p><b>Owner (Company):</b> <a href="#">Owner A</a></p>
<p><b>References</b></p> <p><b>Application No:</b> 567567567</p> <p><b>Registration No:</b> 978987978</p> <p><b>OHIM Auth. Type:</b> General</p>	<p><b>Client</b></p> <p><b>Client Reference:</b> 534534JGJ</p> <p><b>Client (Company):</b> <a href="#">Owner A</a></p>
<p><b>Mark Details</b></p> <p><b>TM Description:</b> Logo of Arepo Solutions - Font and Colour</p> <p><b>Image:</b> </p>	<p><b>Registered With</b></p> <p><b>Agent Reference:</b> SDFDS567567</p> <p><b>Registrar/Agent (Company):</b> <a href="#">The Trademark Office (TMO)</a></p>
<p><b>Notes</b></p> <p><b>Notes:</b> Used for all stationary headed paper and business cards</p>	
<p><b>Audit</b></p> <p><b>Created At:</b> 15 Jan 2015 10:41:50</p> <p><b>Created By:</b> <a href="#">Varina Delrieu (Arepo Solutions Limited)</a></p>	

New Edit Copy Search Print Manage Registration and Expiry

<b>Task</b>	<a href="#">Event Date</a>	<a href="#">Mark Classes</a>	<a href="#">Add Document</a>	<a href="#">Add Group Link</a>	<a href="#">Add Related Mark</a>
-------------	----------------------------	------------------------------	------------------------------	--------------------------------	----------------------------------

	Reminder	Priority	Task	Assigned To	Name
	Due				
select <a href="#">view</a>	15 Feb 2015 10:55	Deadline		<a href="#">John Graham-Maw (Arepo Solutions Limited)</a>	Confirmation of filing received?

View New Copy Search Download

The previous example illustrates the number of possible actions that can now take place, associated with managing this mark. In the lower section of the page, there is a second form with grey tabs.

#### 7.1.1 Tasks

These are future actions that you may be expected to take. All active registrations have at least one task that requires future action, and as you process each task, a new Task will be automatically generated. Ensuring each mark has one future event is how Cautus ensures no mark is forgotten about or left to lapse. Enter any other tasks for which you need to be reminded, by clicking on the [New] button. More detailed help is provided in the online How To guide.

Daily emails are sent to Managers with a snapshot of upcoming (and overdue) task reminders (see section 9 below).

#### 7.1.2 Event Date

This shows the full lifecycle of a registration, e.g. filed, registered, opposed, examined, registered, renewed etc; a history of formal actions. The creation of some Events will trigger the creation of new associated Tasks, for example 'Opposed'.

#### 7.1.3 Mark Classes

Click on this tab if you wish to edit the class descriptions of the classes, automatically entered (International only) when the registration was initially made.

Each mark has a separate row for each class to be registered and, once registered/renewed, a duplicate row will be generated (not linked to an event) to allow future changes to the specific class description.

#### 7.1.4 Documents

All documents associated with the registration are listed and managed here, and can be added through the simple upload function. Automatically generated forms can also be created; tick the box and select the relevant template, and a PDF will become available for saving or printing.

#### 7.1.5 Group Links

This tab allows the connection of this trademark with other marks for grouping and reporting purposes.

#### 7.1.6 Related Marks

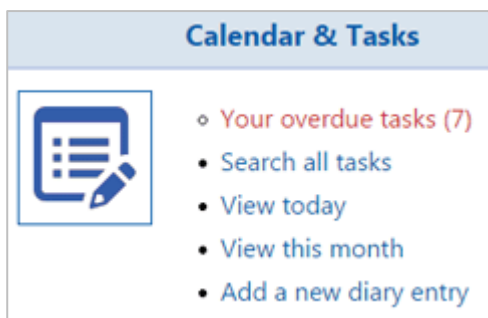
This refers to any other marks which you are claiming either seniority or priority from.

You are also able to carry out the above six tasks via the [Browse] button located in the top menu bar and selecting the appropriate task and clicking [New].

## 8 New diary entry

There is a diary function that allows you to view all task deadlines and event dates in a daily, weekly or monthly format.

Furthermore, you can also use the Calendar to add holidays, schedule meetings and generate email reminders. The home page also displays a highlighted link of any overdue tasks that require attention.



Adding a new diary entry for holidays and meetings can be done either from the home page, or via the [Browse] button in the top menu bar.

For Tasks and Event dates, these are created by generating a new, or editing an existing entry.

You can switch between the day, week and monthly views by clicking on the buttons at the foot of the page.

Diary alert emails can be configured for any diary entry which has a specific time.

## 9 Event Reminder emails

Cautus is configured to send a daily reminder emails to each person managing marks (recorded in the 'Managed By' field in the mark's record). These emails contain events related to all types of marks, including trademarks, designs, domains and partents.

Below is an example of a Cautus Event Reminder email.

**From:** Cautus [<mailto:automailer@cautus.co.uk>]  
**Sent:** 27 January 2015 00:12  
**To:** [customer2@arepo.com](mailto:customer2@arepo.com)  
**Subject:** Cautus Event Reminder

---

TTC
event reminder

---

Message for Mr John Gmaw

You have requested advanced email notification for the following events :-

Priority : **Deadline** (top 15 only)

Reference	Description
<a href="#">View</a> T.TTC.000009.uk	Default Reminder was due on 19-Aug-2006, 3082 days ago
<a href="#">View</a> T.TTC.000003.uk	Registration expires was due on 01-Jan-2012, 1122 days ago
<a href="#">View</a> T.TTC.000003.uk	Renewal Due was due on 01-Jan-2012, 1122 days ago

Priority : **Reminder/Review** (top 5 only) :-

Reference	Description
<a href="#">View</a> T.TTC.000003.uk	Has the mark been registered? was due on 01-Oct-2010, 1579 days ago

The emails display up to 15 of the most overdue or pressing tasks and deadlines with links to take you directly to those tasks within Cautus. Furthermore, the email also provides a snapshot of a small list of any reminders (5 maximum).

These daily reminder emails are intended as prompts to encourage the recipient to log into Cautus and check all outstanding and overdue tasks. The email reminders do not display a comprehensive summary of all the tasks that may require your attention.



## **10 Arepo Solutions**

### 10.1 Contact Details

If you require any further assistance please contact:-

Arepo Solutions Ltd

5<sup>th</sup> Floor

10 Gate Street

London WC2A 3HP

Tel: 020 7280 4390

Fax: 0870 460 1844

Email: [support@arepo.com](mailto:support@arepo.com)

### 10.2 Terms & Conditions of Business

Arepo's Terms & Conditions of Business can be downloaded from [www.arepo.com](http://www.arepo.com), and are also available upon request.