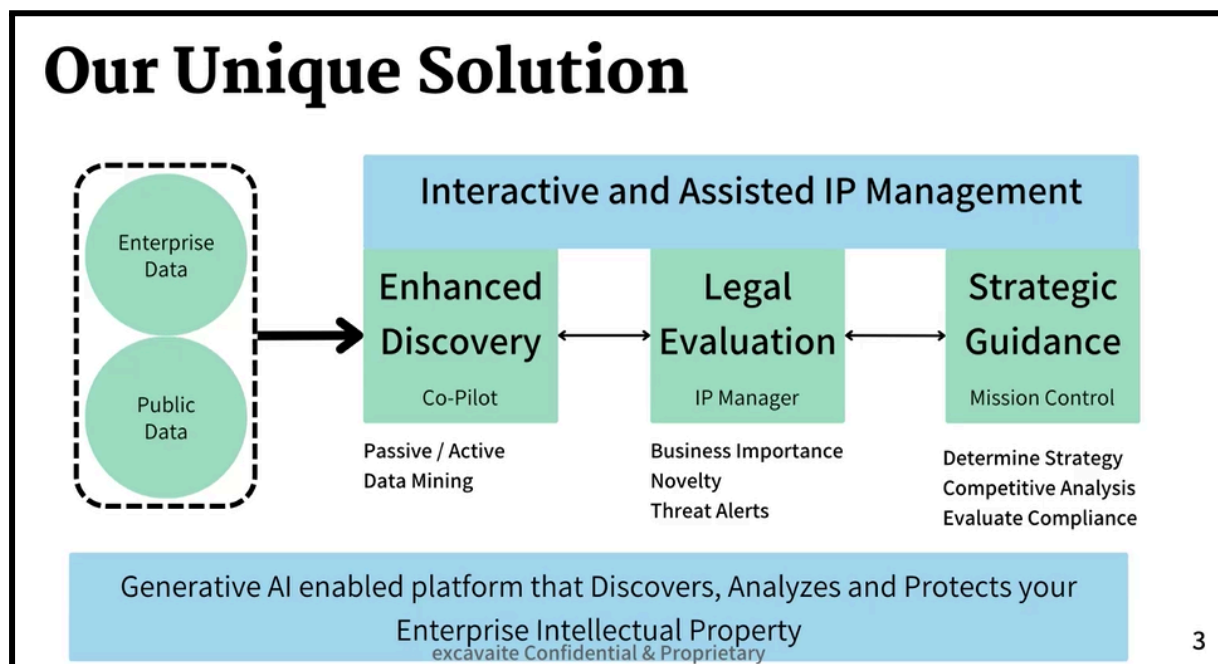


# ExcavAite Product Requirements

The product is a comprehensive web application for **Intellectual Property (IP) Management System** designed to streamline various aspects of IP management for different stakeholders within an organization. Here's a breakdown of the product and how it works.

## Overall Product Vision

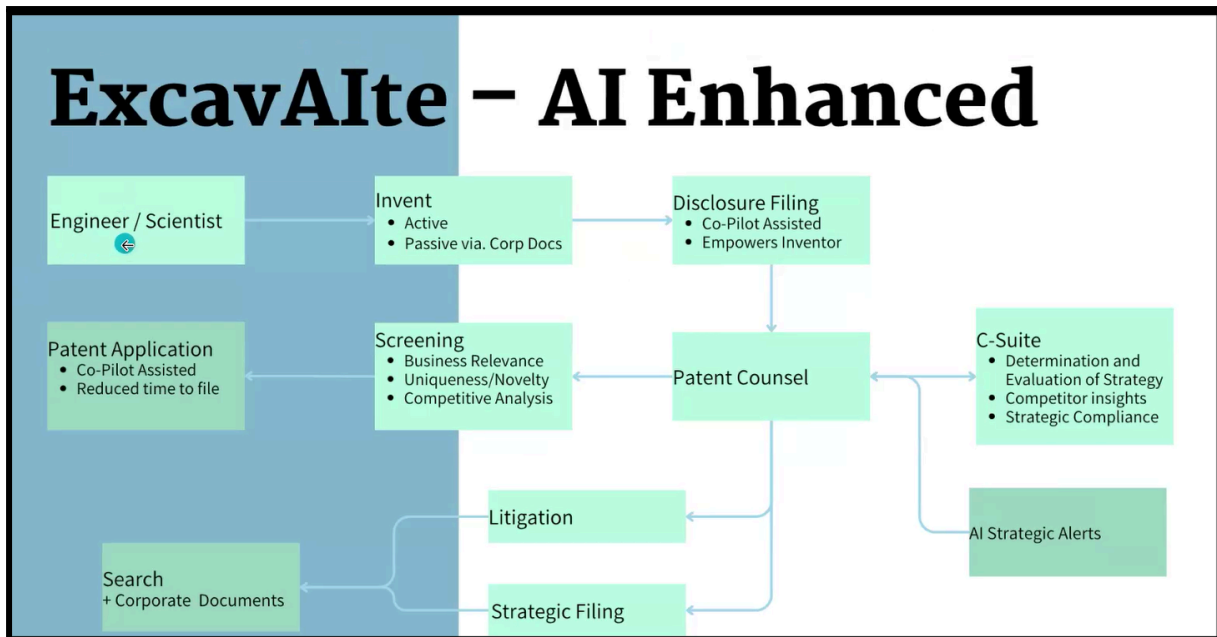
The product aims to provide an integrated solution for managing intellectual property from invention disclosure to patent application and internal review. The system is designed to cater to different roles within an organization, including inventors, IP managers, and the C-suite, by offering tailored tools for each.



## High level Summary:

This IP management software aims to provide a unified platform that simplifies and enhances the entire IP lifecycle, from invention to patent management, ensuring that companies can protect and leverage their intellectual assets effectively. Here's the flow -

# ExcavAlte – AI Enhanced



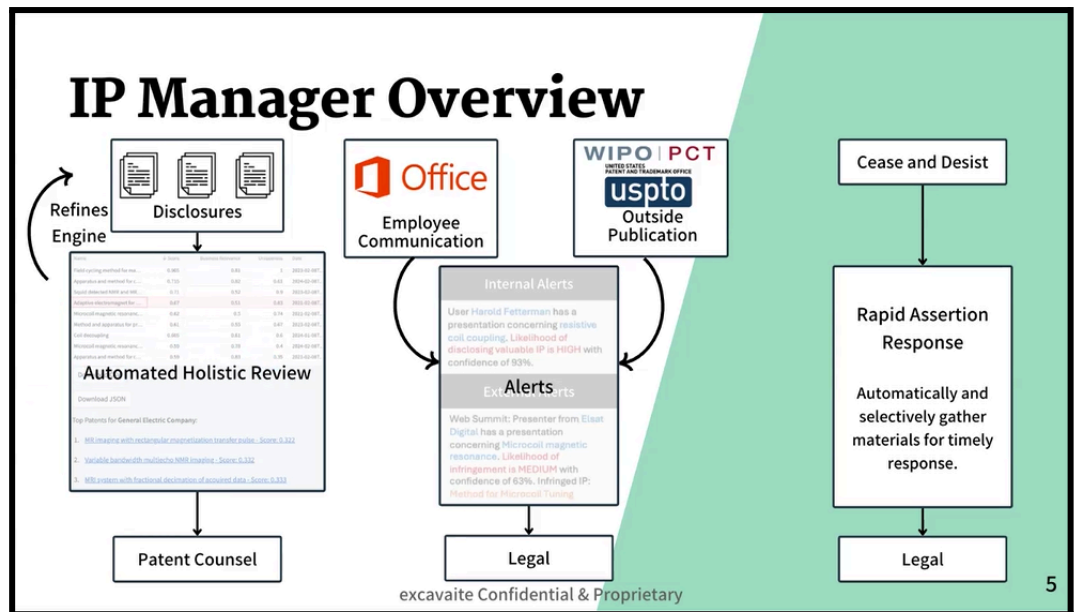
## Key Components of the Product:

### 1. Copilot for Inventors:

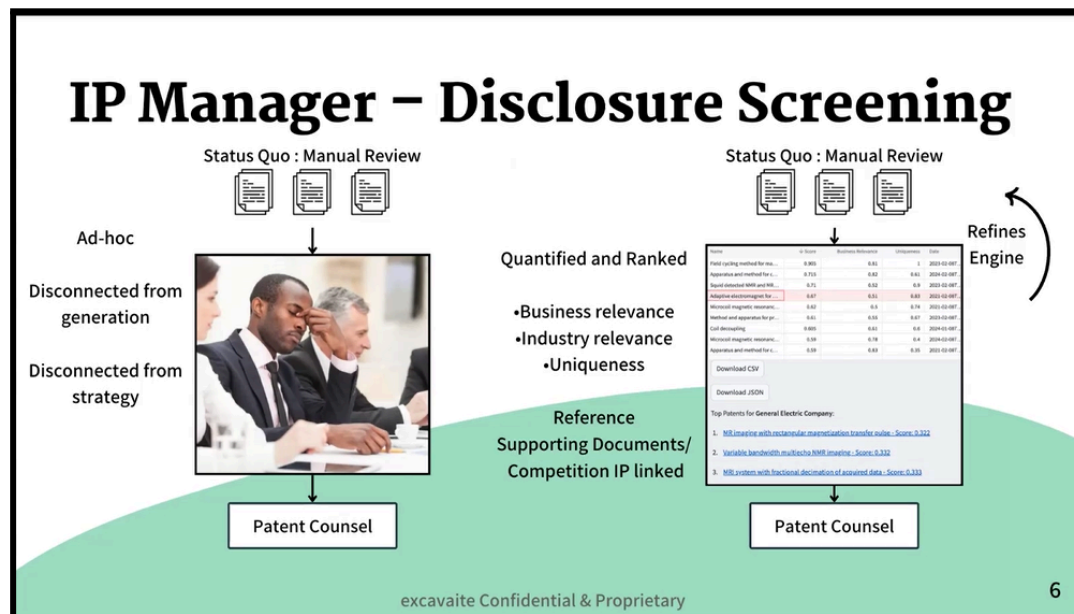
- **Purpose:** This component is designed to assist inventors in documenting their inventions and preparing them for patent applications. It acts as a guide, helping inventors capture all necessary details and ensuring that the invention is ready for review by legal teams.
- **Functionality:** The Copilot may include features like prompts for required information, templates, and integration with relevant databases to check for prior or existing patents. It helps streamline the initial stages of IP creation.

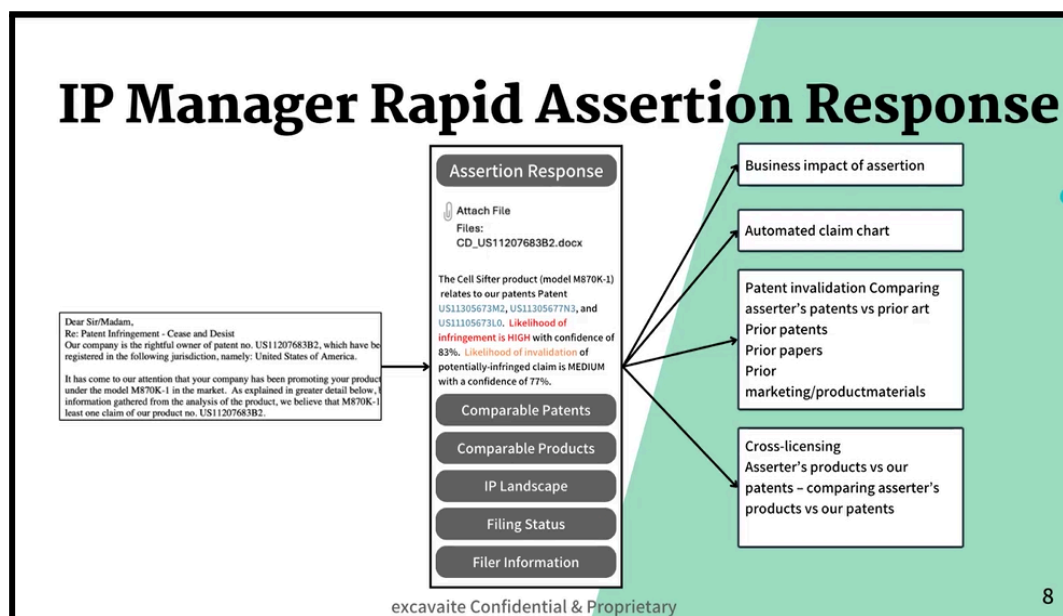
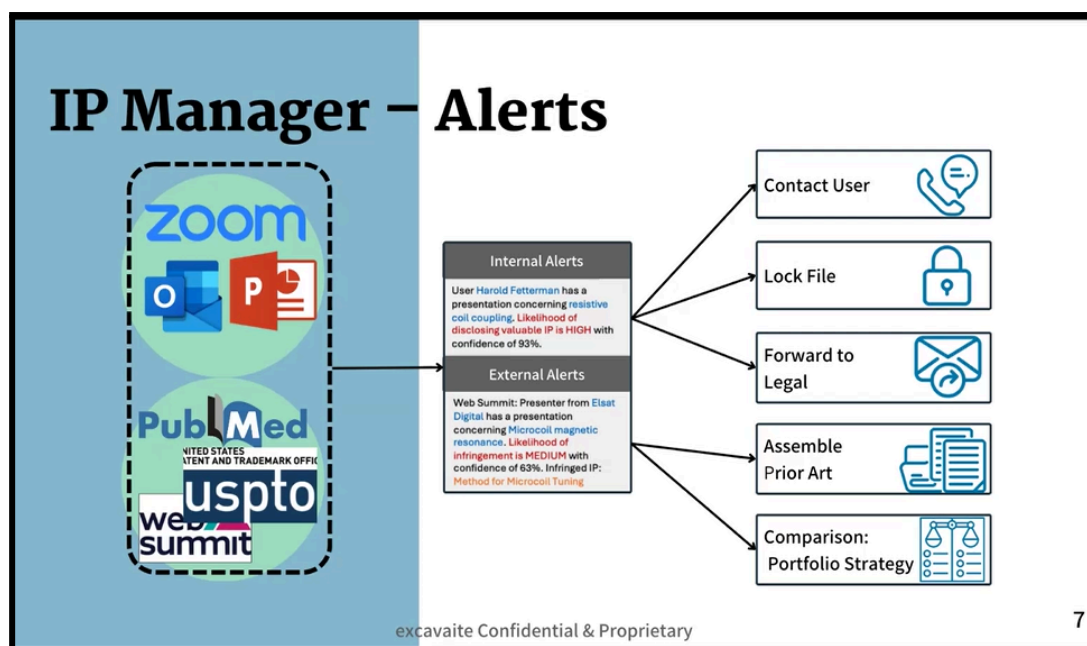
### 2. IP Manager for Internal Counsel:

- **Purpose:** This tool is intended for the internal legal teams who manage the patenting process within the company. It helps with the review of invention disclosures, the preparation and filing of patent applications, and the management of the patent portfolio.



- **Functionality:** The IP Manager likely includes features for ranking disclosures based on their potential value, generating alerts for external publications, and assisting with legal responses (e.g., cease and desist letters). It also supports decision-making through data-driven insights and helps track the status of various IP assets. It supports collaboration between inventors and legal teams.





### 3. Mission Control for Executives (Head of IP or C-Suite):

- **Purpose:** This component provides high-level oversight and strategic management of the company's IP portfolio. It is designed for senior executives to monitor and make strategic decisions regarding the company's IP assets.
- **Functionality:** Mission Control offers a dashboard view of the company's IP status, highlighting potential risks, strategic opportunities, and the overall health of the IP portfolio. It helps executives align IP strategy with broader business goals.

## **How It Works:**

### **1. Invention Disclosure and Documentation:**

- Inventors use the Copilot to document their ideas, ensuring all necessary details are captured. The Copilot might suggest improvements or highlight areas needing more detail.

### **2. Legal Review and Patent Filing:**

- The documented inventions are passed to the IP Manager, where internal counsel reviews them. The tool helps prioritize disclosures based on business relevance and uniqueness, assists in preparing patent applications, and manages interactions with patent offices.

### **3. Portfolio Management and Strategy:**

- The Mission Control component allows executives to monitor the entire IP process, from disclosures to granted patents. It helps in assessing the strategic value of IP assets, identifying potential risks (such as exposure from external publications), and making informed decisions on IP investments.

### **4. Data Integration and AI Assistance:**

- The software integrates with existing systems (e.g., cloud databases) and uses AI-driven features like image embeddings and vector-indexed search to enhance its capabilities. This allows for better matching of inventions to existing patents, automated analysis of disclosure quality, and improved search functionalities.

## **Strategic Focus:**

- The product is designed to improve the disclosure generation process, a critical yet underserved area, and to augment the capabilities of legal teams. While the long-term goal is full automation, the current focus is on enhancing human expertise at various stages of the IP management process.

**Scope:**

<b>Key Goals</b>	<ul style="list-style-type: none"><li>- Refine and develop the IP Manager system for internal counsels.</li><li>- Design and develop a system for reviewing invention disclosures.</li><li>- Design and develop a system to support assertion letter responses, with capabilities including the following:<ul style="list-style-type: none"><li>- Determining if a company is a non-practicing entity or an industry competitor.</li><li>- Determining if a company has filed a suit involving a particular patent.</li><li>- Comparing the claims of the allegedly-infringed patent with the allegedly-infringing product of interest.</li></ul></li><li>- Design and develop a system to identify if a document contains unpublished intellectual property with capabilities including the following:<ul style="list-style-type: none"><li>- Tunable sensitivity</li></ul></li><li>- Enhance capabilities with image embeddings and API integration.</li></ul>
<b>Web Application</b>	<ul style="list-style-type: none"><li>- Branding (Craft brand logo (3 options will be provided), colors, typography, icons and compile the brand assets in a Brand book(upto 10 pages)</li><li>- Web App Design &amp; Development</li></ul>
<b>Recommended Tech-stack</b>	<ul style="list-style-type: none"><li>- Frontend - Next Js</li><li>- Backend - Python</li><li>- Cloud Services - AWS</li></ul>

**Notes:**

- The IP Manager will serve as the primary feature to get started with, along with Branding also being a key focus.
- The overarching product vision has been outlined above. Priorities and workflows will be refined through a discovery workshop.