

# Cardinal IP provides companies with a SaaS solution to manage Intellectual Property Assets secured by DIGIPASS and VACMAN Middleware

Multi-million and even multi-billion dollar patent settlements regularly splash across news headlines. These dramatic financial implications of intellectual property (IP) rights make effective IP management more important than ever. Companies everywhere face growing pressure to protect intellectual property and safeguard their technology assets. Cardinal Intellectual Property, the global leader in patent research, offers companies a SaaS solution to manage their intellectual property assets and to provide valuable decision-influencing information. To meet US federal government requirements and satisfy their customers' needs, Cardinal IP implemented DIGIPASS strong 2-factor authentication together with VACMAN Middleware to secure access to the company's flagship product, IP Dashboard.

## INTELLECTUAL PROPERTY MANAGEMENT: PROCESSES AND RULES ARE ALWAYS CHANGING

Intellectual property management is a crucial element of the business operations and strategy of any company. However, IP management is a painstaking and time consuming process that requires a combined in-depth knowledge of science, engineering, patent law and project management. Furthermore, aspects of patent law, the procedures for prosecuting patents, and other requirements placed on the patentee are in constant flux.

The complexity and dynamic quality of the IP field means that companies must often rely on software products and service providers to assist in their portfolio management needs.

To meet their customers' needs, Cardinal Intellectual Property developed "IP Dashboard", offering their customers a transparent full-lifecycle IP asset management system. IP Dashboard's business model is based on the software-as-a-service (SaaS) model, offering fast setup, excellent technical support, and the ability for the client to collaborate on projects with Cardinal IP's employees.

"Our continuing goal is to improve our customers' intellectual property processes," says Ian Carswell, Executive Vice President for Cardinal IP. "In order to accomplish this, we developed a SaaS offering that allows our researchers, analysts and consultants to securely collaborate with our customers." The solution provides companies with a comprehensive IP management solution, with a minimal initial investment, by eliminating the need to install and run the application on the customer's own computer. "It alleviates the customer's encumbrance of soft- and hardware maintenance, updates, patches and support," Carswell continues.

## TRACK PATENT PROCESS FROM DISCLOSURE TO ISSUANCE WITH IP DASHBOARD

Developed by intellectual property professionals, IP Dashboard is a web-based application that allows customers to track their patent process 24/7 anywhere, from disclosure and search, through preparation and filing, issuance, maintenance, and assertion. The offering ensures that Cardinal IP's customers receive detailed, real-time information necessary to effectively manage their projects and assets. It provides both Cardinal IP's employees and customers with access to current and past projects, patent search reports, file histories, competitive analyses, and personalized action items as well as administrative alerts and prompts for efficient project management. IP Dashboard provides the company with a competitive edge that helped them grow from a small

20-employee consulting firm to a thriving business with over 1000 clients and 300 employees.

Prior to committing resources of time and money to preparation and filing of a patent application, it makes good sense to first obtain a patentability search. If a customer wants to find out if something is patentable, they submit a disclosure form that is loaded into IP Dashboard. Cardinal IP then conducts a thorough search and presents the results in a web-based search report. The report includes a search history detailing databases, classes, and keywords used in the search. Cardinal IP's patentability search includes US and foreign patents and publications as well as non-patent literature.

IP Dashboard also contains a document management system with customizable workflow that allows customers to match their existing processes with the web application. The centralized information repository reduces problems related to redundant information, multiple document versions, and remote information access, and it clearly presents all available information pertaining to the company's IP assets. By employing these tools, companies are able to make informed decisions on maintenance and commercialization of their IP assets.

## SECURE 24/7 ACCESS TO YOUR IP ASSET MANAGEMENT SYSTEM

IP Dashboard can be accessed from any web browser. This is very useful for remote or travelling employees, and eliminates the need for software installation, but because the information contained in the application is highly confidential and business critical, it was of the utmost importance that Cardinal IP incorporate strong security mechanisms to protect customers' intellectual property data and research. Cardinal IP's clients include the U.S. federal government, law firms, and corporate legal departments, and therefore the security and integrity of the data network must meet their standards. "We wanted to complement our SaaS offering with the best-of-breed authentication solution. This provides our customers' ease of mind that we are protecting their intellectual property assets from unauthorized access or theft," notes Chad Flahive, Director of Information Security at Cardinal IP. "We needed to develop a secure and scalable technology that was cost-conscious as well".

"Because we work on projects for the US Patent and Trademark Office, we needed to implement a strong 2-factor authentication solution to meet FISMA requirements," Carswell tells us. FISMA stands for Federal Information Security Management



Act and imposes a mandatory set of security standards and guidelines that must be followed for all information systems used or operated by a U.S. federal government agency or other organization on behalf of a federal agency. The act is meant to reinforce computer and network security within the federal government and affiliated parties.

Cardinal IP also has undergone SAS 70 Type II audits and certification. SAS 70 defines the professional standards used to assess the internal controls of a service organization. "When discussing security issues with VASCO, we soon realized that their 2-factor authentication solutions met our scalability and cost-effectiveness goals and would provide us with a level of security that meets our federal government FISMA and SAS 70 requirements, and more than satisfies our customers' needs", says Flahive.

### DIGIPASS AND VACMAN MIDDLEWARE LEAVE NOTHING TO CHANCE WHEN SECURING IP ASSETS

In order to access IP Dashboard, customers and employees log on to the application using their branded DIGIPASS. DIGIPASS generates dynamic passwords with the touch of a button. The authentication request is then verified by the authentication software that will grant access only to authorized persons. Cardinal IP used VACMAN® Middleware authentication software, an out-of-the-box suite to integrate strong two-factor authentication into its custom-built web-based applications and secure its Extranet.

In a first phase they implemented VASCO's authentication solution into their Extranet/VPN, guaranteeing secure remote access for all their employees. To accomplish this, VACMAN Middleware was integrated into the company's firewall, establishing a high security level at the entry point for all employees. As this proved to be a success, the company chose to do custom VASCO integration with other web applications utilizing ASP.NET, SQL server and other tools to implement the two-factor authentication solution enterprise wide. In the customer facing application, IP Dashboard, the company built a .NET security provider that ties into VASCO's RADIUS-based authentication. This allowed Cardinal IP to ensure that all customers who access the applications are authenticated with proper credentials that verify their identity. Because no software needs to be installed on end users' computers, administrative costs for integration and rollout are greatly reduced.

### VASCO'S STRONG AUTHENTICATION AS A DEAL CLOSER

Cardinal IP needed a 2-factor authentication solution to meet governmental requirements. They were on the lookout for a scalable and cost-efficient

authentication solution that was at the same time user-friendly, guaranteeing a high user acceptance. "An innovative product offering, no matter how promising and efficient, will only be successful if it is effectively used", says Carswell.

"VASCO met our requirements as they have a proven reputation when it comes to 2-factor authentication. Furthermore, their DIGIPASS solution is very easy to use, requiring no extensive training at all. As the devices have an expected battery life of 7 to 10 years and no additional hardware or software needs to be installed on the end user's side, their solution was very cost-conscious." VASCO was and is flexible in its pricing and licensing models, allowing Cardinal IP to expand the number of DIGIPASS devices a few at a time, accommodating the company's growing needs without a substantial investment. "The robustness of the security and data protection in the IP Dashboard solution regularly exceeds customers' expectations. Our use of VASCO's 2-factor authentication solution is often a deal closer", Carswell claims.



#### Objective

Confidentiality and security are extremely important when protecting customers' intellectual property data and research. Cardinal IP needed to implement a cost-effective and scalable technology to secure access to the company's Extranet and its SaaS solution "IP Dashboard" with a security level compliant with the FISMA requirements.

#### Challenge

The security solution had to be fully integrated into Cardinal IP's custom-built web-based applications and the company's Extranet and yet had to remain manageable and ensure a high level of user acceptance.

#### Solution

VACMAN Middleware together with DIGIPASS technology were integrated into Cardinal IP's web applications and Extranet utilizing among others ASP.NET and SQL Server tool. This ensures that all employees and customers accessing the company's network and applications are properly authenticated. Because no additional software needs to be installed on the end users' computer, VASCO's authentication solution was very cost-effective and readily accepted by Cardinal IP's employees and customers alike.

## About Cardinal Intellectual Property

Cardinal IP is the global leader in patent research. With over 300 patent research analysts, Cardinal IP performs patent research across all subject matters. Cardinal IP is not a law firm and does not practice law but maintains confidentiality using the same procedures and diligence as a law firm. In addition, Cardinal IP maintains rigorous data-protection standards.

## About VASCO

VASCO designs, develops, markets and supports patented DIGIPASS®, DIGIPASS PLUS®, VACMAN®, IDENTIKEY® and aXsGUARD® authentication products for the financial world, remote access, e-business and e-commerce. VASCO has established itself as the world's leading software company specialized in Internet Security, with a customer base in the financial sector, enterprise security, e-commerce and e-government.

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