



Symphony IPMS v3.6

User Guide - Paralegal

Last Updated: October 2022

ThermoFisher
SCIENTIFIC

About the Document

This is a User Guide that contains all the essential information required for a user to access **Symphony – MaxVal's intellectual property (IP) management application**. The Guide includes a description of the system functions and capabilities, contingencies and alternate modes of operation, and step-by-step procedures for application access and use.

The User Guide enables the Paralegals of an organization to manage the lifecycle of an invention through Symphony. This includes coordinating the workflows for prosecuting a patent; generating forms; handling references, emails, and documents; managing the inventions, patents, trademarks, and other matters; and managing the renewals of a patent.

Note: Terms like IP Paralegal/Paralegal/You/User are used interchangeably to reflect the functions performed by a Paralegal profile.

Revision History

Version	Created/Reviewed By	Purpose	Date
1.0	MaxVal	Updated the document as per the Thermo Fisher phase 2 requirements for Paralegal	Oct 2022

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Introduction

Symphony is a platform that advances the IP management capabilities of an organization. The platform simplifies the execution of complex workflows and enhances all aspects of asset management. It monitors asset prosecution and docketing status and forecasts your expenses.

Symphony allows you to create and manage invention disclosures, patents, and trademarks, access docketing information, assign tasks and generate reports.

To access the system, go to My Idaptive; (<https://thermofisher.my.idaptive.app#/my/MyApps>) Search for Symphony, and log on through SSO.

If you cannot find Symphony in the My Idaptive portal, please create a ticket with the Service desk: <https://thermofisherit.service-now.com/sp>.

Below are some of the modules and pages a Paralegal can access on Symphony. We will discuss them in more detail in the subsequent sections.

- Home
- Search projects
- Proposed Mark
- TM search Instruction
- Mark
- Trademark
- Dispute and Opposition
- Patents
- Reports

The screenshot shows the Thermo Fisher Scientific Symphony Paralegal dashboard. At the top, there's a navigation bar with links for Home, Search Projects, Proposed Marks, TM Search Instruction Ref., Marks, Trademarks, Dispute/Oppositions, Patents, and Reports. A search bar is also present. Below the navigation is a banner with the Symphony logo and a welcome message: "Welcome, Yuvasree Paralegal". To the right of the banner is a circular donut chart titled "Search Projects by Status" showing the distribution of project records: 95% in Process, 2K total, and 1.9k Draft. A legend indicates colors for Draft (blue), Submitted for Review (dark blue), In Process (light blue), Clarification Requested (teal), Resubmitted for Revl... (yellow), and Completed (orange). Below the chart are buttons for "View Report" and "As of Yesterday at 3:18 PM". On the left side, there are two expandable sections: "Confidentiality Notice" and "Privacy Notice". The "Confidentiality Notice" section states that the database contains confidential and proprietary information owned by Thermo Fisher Scientific and is made available for use solely for internal business purposes. It also includes a statement about agreeing to use the information only as authorized by Thermo Fisher Scientific. The "Privacy Notice" section states that personal information will be retained and processed in accordance with Thermo Fisher Scientific's data privacy policy and applicable laws. It also includes a statement about employee privacy notices for inventions and contact information for data privacy.

Home

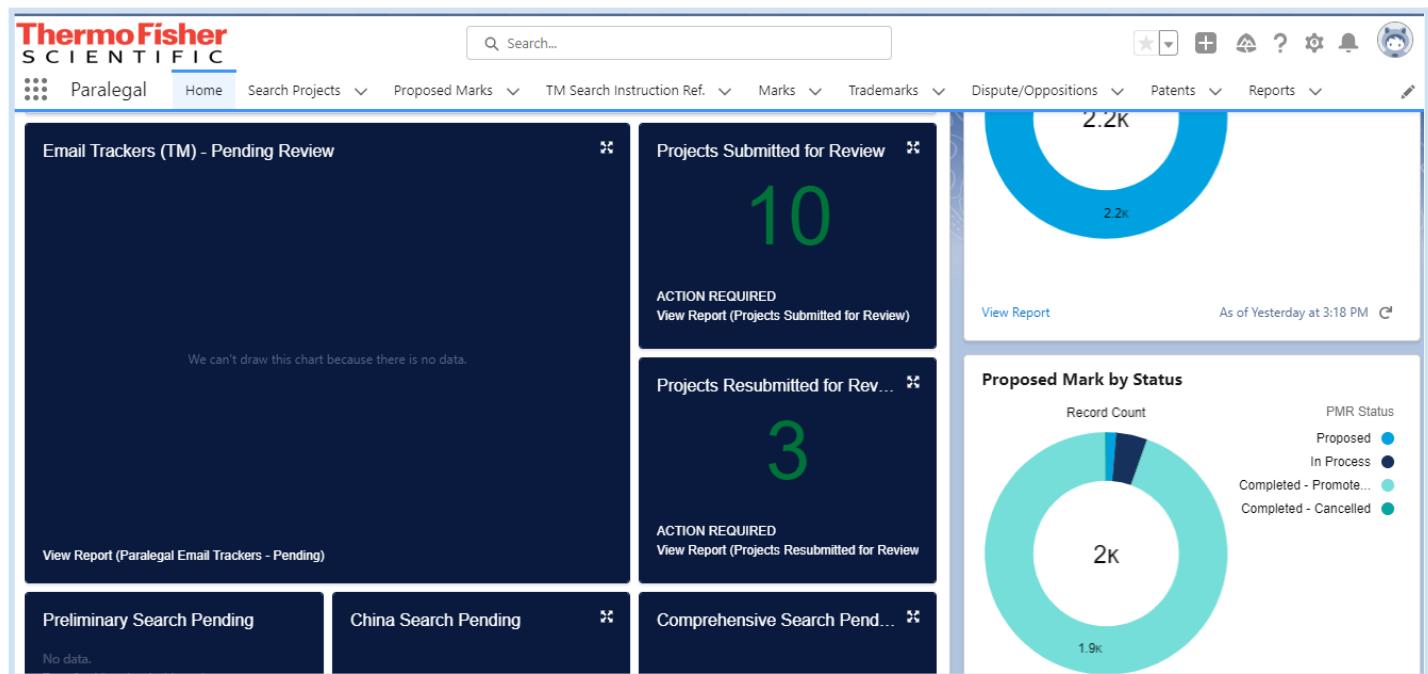
The 'Home' button leads the Paralegal to the homepage that displays a snapshot of all the records within the portfolio. The homepage is set for the organization and cannot be modified by individual users.

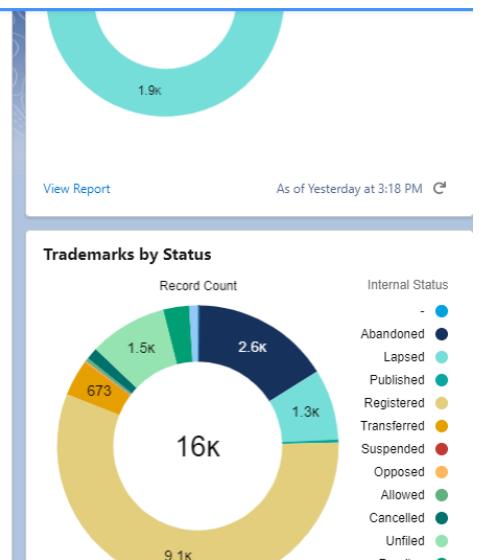
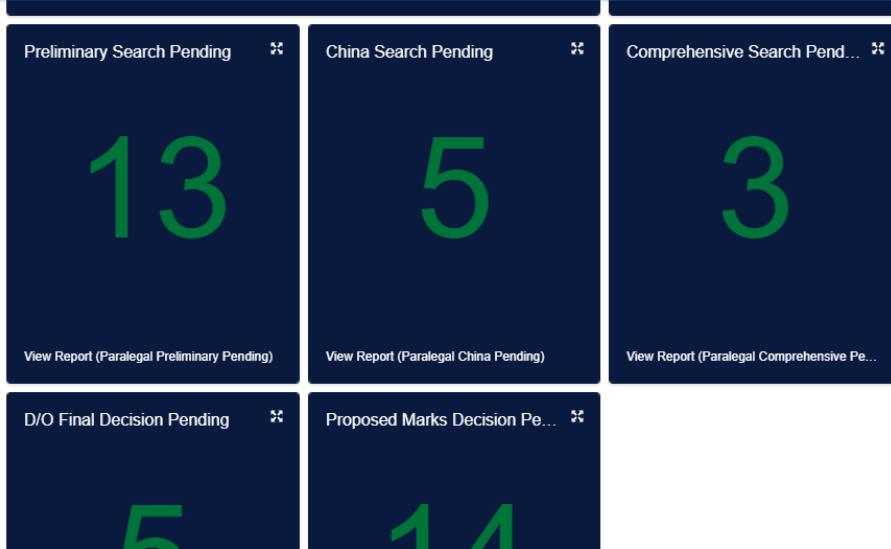
Paralegals can access the following from the homepage:

- a. Dashboards
- b. Reports

A. Dashboards

The Paralegal can access the dashboards on their homepage with different graphs and status updates for email trackers, projects submitted for review, projects resubmitted for review, searches pending reports, Dispute and opposition final decision pending, etc. These dashboards are dynamic and change as per the logged-in user.





B. Reports

Reports are present on the right-hand side of the homepage. If the user clicks on “**View Report**”, he/she can see the details for the entire organization that require urgent attention. Some of the reports that paralegal can access are

1. Search Projects by Status
2. Search Instruction by Search Type
3. Proposed mark by Status
4. Trademarks by status.

****Note:** The paralegal have also access to 15 different type of reports, that can be accessed from the tab of home page itself.

Global Search

Global Search feature allows Paralegals to search the file number/keywords globally. Below are the steps to conduct a global search on Symphony:

1. Provide the File number/keywords in the global search box. Note that the Symphony docket number, the legacy docket number, the Proposed Mark., Trademark No., etc. are all searchable in this search box.

The screenshot shows the Symphony dashboard with a large red '3' indicating pending items. On the left, there's a sidebar with links like 'Paralegal User Dashboard', 'Search Instruction by Search Type Report', 'Trademarks by Status Report', 'Proposed Marks by Status Report', and 'Search Projects by Status Report'. The main area has a search bar at the top with placeholder 'Search...'. Below it is a 'Do more with Search!' section with tips for searching leads and contacts. To the right is a donut chart titled 'by Status' with segments for Draft, In Process, and Completed. At the bottom right, there's a 'View Report' button.

2. If the paralegal does not want to search the entire database, but only wants to search a certain module, the Paralegal may also select a specific object in which he/she wants to conduct the search.

This screenshot shows the same Symphony dashboard as above, but with a purple box highlighting the 'Suggested For You' dropdown in the sidebar. This dropdown lists categories like All, Chatter, Dispute/Oppositions, Marks, Patents, and Proposed Marks. The rest of the interface is identical to the first screenshot, including the search bar, 'Do more with Search!' section, donut chart, and 'View Report' button.

3. Once the input is provided, wait for the search results.

The screenshot shows the Thermo Fisher Scientific Trademark Management System. The top navigation bar includes links for Paralegal, Home, and Search. A sidebar on the left displays a "Trademark Test Trademark" section with application and docket numbers, and a "Matter Info" section with basic information like Trademark Name (Test Trademark), Application # (444343434), and Filing Date (9/27/2022). The main content area features a search bar at the top right. Below it, a sidebar titled "Do more with Search!" provides tips for searching leads and insights. The central panel displays a search result for "Test Trademark" with a publication number of TM178824U. The result includes fields for Publication Number, Internal Status (Proposed), Mark Characteristics, and Registration Type. The bottom right corner shows a "Mark Image" section with a placeholder for the trademark image.

Search Project Review

The Business user fills up the trademark clearance request and submits it for paralegal review. The paralegal receives the email along with the link attached for the trademark clearance request record.

The paralegal clicks on the link and lands on the trademark clearance request record or paralegal can go to the '**Projects submitted for review**' dashlet in the homepage to review the submitted search project by Business user.

The screenshot shows the Thermo Fisher Scientific dashboard for a Paralegal User. The top navigation bar includes links for Paralegal, Home, Search Projects, Proposed Marks, TM Search Instruction Ref., Marks, Trademarks, Dispute/Oppositions, Patents, Reports, and a search bar. A banner at the top states, "reproduce the content of this website without the prior consent of Thermo Fisher Scientific." On the left, there's a sidebar for "Paralegal User" with a "Dashboard" section showing "Paralegal User" and "As of Oct 31, 2022, 4:47 AM Viewing as Yuvasree Paralegal". Below this are sections for "Email Trackers (TM) - Pending Review" (empty), "Projects Submitted for Review" (containing a count of 9, highlighted with a purple box), and "Projects Resubmitted for Rev..." (empty). To the right, there's a "Search Instruction by Search Type" donut chart showing 2.2k records with categories for Preliminary Search (blue), China Search (dark blue), and Comprehensive Search (light blue). Below the chart is another section for "Proposed Mark by Status".

Also paralegal can access the Trademark clearance request record by clicking on the "**Search Projects**" tab, then clicking on the search projects list view to find the Trademark clearance request record.

The screenshot shows the Thermo Fisher Scientific search results page for trademark clearance requests. The top navigation bar is identical to the previous dashboard. The "Search Projects" tab is selected. The main area displays a table of search results with columns: Trademark Search Number, Project Name, Result Needed by, Responsible Paralegal, and Project Status. The first row, which has the search number "TMS-2022/10-1965" highlighted with a purple box, corresponds to the one in the previous screenshot. The table also includes rows for "TMS-2022/10-8", "TMS-2022/10-1838", and "TMS-2022/10-1963". A "Recently Viewed" section is visible on the left, and various search and filter tools are available on the right.

Paralegal can review the trademark clearance request and confirmed the project or can ask for need more

clarification by clicking on the second option, as per the right hand side widget “**Review the project**” in search project record.

Search Project
25 oct 2022

Trademark Search Number TMS-2022/10-1965	Business Unit TM Business Unit Test	Project Status Submitted for Review	Result Needed by 11/9/2022
---	--	--	-------------------------------

Pinned Notes

Created Date	Due Date	Action	Assigned To	Notes
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Matter Info Roles Diary Notes Correspondence Email History Audit Log Next

Project Description

Product or Service type Submission Date

Review the Project

* This search project is submitted for your review. Please take action.

I have reviewed and confirmed the receipt of the project
 I have reviewed and I need clarification from Business User

Files (0)

Page Layout

1.

2.

3.

4.

5.

- i. **Tab View:** In the asset page at the top all the tabs are arranged in the sequence where the Paralegal can access any record from there. It consists of Home, Searches project, Proposed mark, Instructs search, Mark, Trademark, Dispute, and opposition, Patent, and Reports.
- ii. **Compact Layout:** In the top layout Paralegal can see the Project Name, Trademark search number, Business unit, Project status, Brand type, Resulted needed by.
- iii. **Pinned Notes:** This section tells the user about the activity/action performed along with the created and due date with an assigned user.
- iv. **Main Tab View:** This section include Matter info, Roles, Diary Notes, Correspondence, Email History, and Audit Log.
 - **Matter Info:** This section includes matter-related information; tell us about the project description, search details, legacy information, and system information.

Logged in as Yuvasree Paralegal (yuvasree.s@maxval.com.par) Log out as Yuvasree Paralegal

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Paralegal Home Search Projects Proposed Marks TM Search Instruction Ref. Marks Trademarks Dispute/Oppositions Patents Reports

Search Project SCQuant

Trademark Search Number TMS-2022/10-1446 Business Unit AIG-CMD-AAT-Bremen TEA (BU) Project Status Completed Result Needed by

Pinned Notes

Created Date	Due Date	Action	Assigned To	Notes

Matter Info

Roles	Diary Notes	Correspondence	Email History	Audit Log

Project Description

Requester Yuvasree BU	Product Manager Yuvasree BU
Responsible Paralegal Yuvasree Paralegal	Submission Date
Project Launch Date 6/6/2022	Brand Type Thermo Scientific
Product or Service type	Category of Use
Project Overview/Summary	Is Covid Related <input type="checkbox"/>
Project Revenue ?	Country where will be manufactured Germany
Filing Basis Use	Outcome Approved for Registration
Project Name SCQuant	Business Decision
Project Status Completed	CN Grade
Tier	TM Watch <input type="checkbox"/>
Search Type Trademark	Comments
Remarks	

Search Details

1. Use by Competitor or third party? [?](#)
Yes
- 1.1 Type of Use [?](#)
2. NPI related to existing service? [?](#)
Yes
- 2.1 Related trade/service marks [?](#)
3. Common Dictionary Meaning [?](#)
Yes
- 3.1 Meaning [?](#)
4. Existing Foreign Translation [?](#)
Yes
- 4.1 Translation [?](#)
5. Any Acronyms [?](#)
Yes
- 5.1 Acronym Definition [?](#)
6. Terminology used in related industry? [?](#)
Yes
- 6.1 Terminology [?](#)
7. Chinese or other language transcript [?](#)
Yes
- 7.1 Transcript [?](#)

Legacy Information

Legacy Docket No. TFS000249	Legacy Information
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System Information

Created By System Admin TF , 10/14/2022, 11:00 AM	Last Modified By Yuvasree Paralegal , 10/27/2022, 11:55 PM
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TM Search Instruction Ref. (3+)

TMSI1578 Search Type: Preliminary Search Search Status: Completed Primary Jurisidic... United States of America
TMSI1579 Search Type: Preliminary Search Search Status: Completed Primary Jurisidic... China
TMSI2243 Search Type: China Search Search Status: Completed Primary Jurisidic... China

[View All](#)

Proposed Marks (1)

PMR-2022/10-1446-1 Proposed Mark: SCQuant Search Status: Completed PMR Status: Completed - Promoted to Mark
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[View All](#)

Marks (1)

MK5477 Mark Name: SCQuant Business Unit: AIG-CMD-AAT-Bremen TEA (BU) Mark Status: Not Filed/Common Law

[View All](#)

Files (0)

[Upload Files](#)
Or drop files

- **Roles:** Provide the information on the key stakeholder for that matter, and the user can add

a new role for that matter.

The screenshot shows the Thermo Fisher SCQuant software interface. At the top, there is a navigation bar with links for Paralegal, Home, Search Projects, Proposed Marks, TM Search Instruction Ref., Marks, and Trademarks. A search bar is also present. Below the navigation bar, there is a section titled "Search Project SCQuant". The main content area has tabs for Matter Info, Roles (which is highlighted with a blue border), Diary Notes, Correspondence, Email History, and Audit Log. Under the "Roles" tab, there is a section titled "Search Project Roles (3)". It includes a table with columns for Search Project Role Name, Person, Law Firm, and Role. The data in the table is as follows:

Search Project Role Name	Person	Law Firm	Role
SPR202210-876	Katie Horn		TM IP Paralegal
SPR202210-2288	Weihao Gu		TM IP Responsible Manager
SPR202210-2352		Shanghai Patent & Trademark ...	Outside Counsel Firm

At the bottom of this section, there is a "View All" link.

- **Diary Notes:** This section allows the user to capture the notes related to that matter.

The screenshot shows the Thermo Fisher SCQuant software interface. The navigation bar and search bar are identical to the previous screenshot. The main content area has tabs for Matter Info, Roles, Diary Notes (which is highlighted with a blue border), Correspondence, Email History, and Audit Log. Under the "Diary Notes" tab, there is a section titled "Notes". It includes a table with columns for Created Date, Due Date, Action, Assigned To, and Notes. The data in the table is as follows:

Created Date	Due Date	Action	Assigned To	Notes
Oct 14, 2022	Dec 30, 2021	Others		
Oct 14, 2022	Dec 10, 2021	Others		
Oct 14, 2022		Others		

- **Correspondence:** This section allows the user to communicate within and outside the system.

Matter Info	Roles	Diary Notes	Correspondence	Email History	Audit Log
<div style="border: 1px solid #ccc; padding: 10px;"> <p>Email</p> <p style="margin-top: 10px;">Write an email...</p> <p style="text-align: right;">Compose</p> </div>					

- **Email History:** This section allows the user to track all the history of correspondence.

Matter Info	Roles	Diary Notes	Correspondence	Email History	Audit Log
Date Sent	Subject	To	From		
1 10/11/2022, 01:52:43 PM	[TMS-2022/10-2460] - Update post paralegal assignment.	dharini.g@maxval.com;sf...	dharini.g+tfpl@maxval.c...		
2 10/11/2022, 01:47:33 PM	[TMS-2022/10-2460] - Search request form submission.	dharini.g@maxval.com;d...	dharini.g@maxval.com		
3 10/11/2022, 01:28:21 PM	[TMS-2022/10-2460] - Clarification requested to requestor.	sfdev1@maxval.com;dhar...	dharini.g+tfpl@maxval.c...		
4 10/11/2022, 12:50:04 PM	[TMS-2022/10-2460] - Search request form submission.	dharini.g@maxval.com;d...	dharini.g@maxval.com		

- **Audit Log:** This section allows the user to track the entire log that happens in the system for that matter.

Matter Info	Roles	Diary Notes	Correspondence	Email History	Audit Log																																			
<div style="border: 1px solid #ccc; padding: 10px;"> <p> Search Project History (6+)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Date</th> <th>Field</th> <th>User</th> <th>Original Value</th> <th>New Value</th> </tr> </thead> <tbody> <tr> <td>10/11/2022, 1:21 AM</td> <td>Project Status</td> <td>Dharini Paralegal</td> <td>Resubmitted for Review</td> <td>In Process</td> </tr> <tr> <td>10/11/2022, 1:21 AM</td> <td>Responsible Paralegal</td> <td>Dharini Paralegal</td> <td>Alex Paralegal</td> <td>Dharini Paralegal</td> </tr> <tr> <td>10/11/2022, 1:17 AM</td> <td>Project Status</td> <td>Dharini BU</td> <td>Clarification Requested</td> <td>Resubmitted for Review</td> </tr> <tr> <td>10/11/2022, 12:50 AM</td> <td>Project Status</td> <td>Dharini Paralegal</td> <td>Submitted for Review</td> <td>Clarification Requested</td> </tr> <tr> <td>10/11/2022, 12:20 AM</td> <td>Created.</td> <td>Dharini BU</td> <td></td> <td></td> </tr> <tr> <td>10/11/2022, 12:20 AM</td> <td>Trademark Search Number</td> <td>Dharini BU</td> <td></td> <td>TMS-2022/10-2460</td> </tr> </tbody> </table> <p style="text-align: center;">View All</p> </div>						Date	Field	User	Original Value	New Value	10/11/2022, 1:21 AM	Project Status	Dharini Paralegal	Resubmitted for Review	In Process	10/11/2022, 1:21 AM	Responsible Paralegal	Dharini Paralegal	Alex Paralegal	Dharini Paralegal	10/11/2022, 1:17 AM	Project Status	Dharini BU	Clarification Requested	Resubmitted for Review	10/11/2022, 12:50 AM	Project Status	Dharini Paralegal	Submitted for Review	Clarification Requested	10/11/2022, 12:20 AM	Created.	Dharini BU			10/11/2022, 12:20 AM	Trademark Search Number	Dharini BU		TMS-2022/10-2460
Date	Field	User	Original Value	New Value																																				
10/11/2022, 1:21 AM	Project Status	Dharini Paralegal	Resubmitted for Review	In Process																																				
10/11/2022, 1:21 AM	Responsible Paralegal	Dharini Paralegal	Alex Paralegal	Dharini Paralegal																																				
10/11/2022, 1:17 AM	Project Status	Dharini BU	Clarification Requested	Resubmitted for Review																																				
10/11/2022, 12:50 AM	Project Status	Dharini Paralegal	Submitted for Review	Clarification Requested																																				
10/11/2022, 12:20 AM	Created.	Dharini BU																																						
10/11/2022, 12:20 AM	Trademark Search Number	Dharini BU		TMS-2022/10-2460																																				

On the right-hand side of the page layout Paralegal have widgets like: Files, Trademark search instruction Ref., Proposed mark, and Mark, as shown below.

Files (0)

Upload Files
Or drop files

TM Search Instruction Ref. (1)

TMSI2641

Search Type: Preliminary Search
Search Status: In Process
Primary Jurisdic... Worldwide

[View All](#)

Proposed Marks (1)

PMR-2022/10-2460-1

Project Name: 11 Oct 2022
Proposed Mark: Testing
Search Status: Waiting for Report
PMR Status: In-Process

[View All](#)

Marks (0)

Request For More Clarification

Once the paralegal received the trademark clearance request, he/she can review it and take appropriate action on that. The paralegal can review and confirm the project or can request the business user for more clarification.

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Paralegal Home Search Projects Proposed Marks TM Search Instruction Ref. Marks Trademarks Dispute/Oppositions Patents Reports

Search Project **Testing 31 oct**

Trademark Search Number TMS-2022/10-2010 Business Unit [TM Business Unit Test](#) Project Status Submitted for Review Result Needed by 11/15/2022

Pinned Notes

Created Date	Due Date	Action	Assigned To	Notes
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Matter Info

Roles	Diary Notes	Correspondence	Email History	Audit Log
Project Description				
Requester Yuvashree BU	Product Manager Yuvashree BU			
Responsible Paralegal	Submission Date 10/31/2022			

Review the Project

* This search project is submitted for your review. Please take action.

I have reviewed and confirmed the receipt of the project
 I have reviewed and I need clarification from Business User

* Enter your comments
Need more clarification

Due Date (If any)
Nov 23, 2022

[Next](#)

****Note:** An email should be triggered to the Business user and TM IP Responsible manager for asking for more clarification required.

The Business user can update the information and clarification that is needed by the paralegal and submits the trademark clearance request once again for review.

Once the paralegal receives the re-submission of the trademark clearance request, now he/she can proceed with the review and confirm the search project.

TM Search Instructions

Once the Business user re-submits the search request form, the paralegal reviews it and approves it to proceed with instruct search. Paralegal selects the jurisdiction and assign the instruct search either to 'self' or 'other paralegal'.

The screenshot shows the Thermo Fisher Scientific software interface. At the top, there is a navigation bar with links for Paralegal, Home, Search Projects, Proposed Marks, TM Search Instruction Ref., Marks, Trademarks, Dispute/Oppositions, Reports, and Patents. Below the navigation bar, a search bar contains the placeholder "Search...". A message "Search Project 25 oct 2022" is displayed. On the left, there is a "Pinned Notes" section with a table header: "Created Date" (dropdown), "Due Date" (dropdown), "Action" (dropdown), "Assigned To" (dropdown), and "Notes" (dropdown). Below this is a "Matter Info" section with tabs for Roles, Diary Notes, Correspondence, Email History, and Audit Log. Under "Project Description", there are fields for Product or Service type (Consumable), Submission Date (10/25/2022), Is Covid Related (checkbox checked), Category of Use (DX), Project Revenue (\$1-5M), Requestor (Product Manager), and Requestor (Yuvrasree BU). On the right, a large "Instruct Search" dialog box is open, containing sections for "PMR Summary" (with checkboxes for "Proposed..." and "Status" set to "Proposed"), "Search Instructions" (with checkboxes for "Select Jurisdictions" and "Worldwide Search", and radio buttons for "Self" and "Other Paralegal" selected), and "Urgency/Importance" (set to Medium). A purple box highlights the "Instruct the Search to" section.

****Note:** An email should be triggered to the Business user informing about the instruct search.

The screenshot shows the Thermo Fisher Scientific software interface. At the top, there is a navigation bar with links for Paralegal, Home, Search Projects, and a search bar. Below the navigation bar, a message "Search Project 31-10-2022" is displayed. On the left, there is a "Matter Info" section with tabs for Roles, Diary Notes, and a "Project Description" section. Under "Project Description", there are fields for Requester (Yuvrasree BU), Responsible Paralegal (Dharini Paralegal), Project Launch Date (11/15/2022), Product or Service type (Consumable), and Project Overview/Summary. In the center, a "Send Email" dialog box is open, titled "Send Email". It has fields for "To" (Yuvrasree BU) and "Cc" (System Admin, Yuvrasree Paralegal, Dharini Paralegal). The "Subject" field contains "[TMS-2022/10-2002] - Update Post Paralegal Assignment". The "Mail Body" section includes a rich text editor toolbar and a message body that reads: "Dear Yuvrasree BU, This is to inform that Dharini Paralegal has assigned the jurisdiction and paralegal to the Search Request form submitted by you. Please expect the results of the Preliminary Search." On the right, there are sections for "Search Instruction Ref. (0)", "Marks (1)" (with details: ID 0-2002-1, Date 31-10-2022, Status Proposed, Type Proposed), and a "View All" button. A blue box highlights the "Mail Body" area.

The paralegal can click on 'finish' to update the status.

This screenshot shows the Thermo Fisher Scientific software interface. At the top, there's a navigation bar with links like 'Paralegal', 'Home', 'Search Projects', 'Proposed Marks', 'TM Search Instruction Ref.', 'Marks', 'Trademarks', 'Dispute/Oppositions', 'Reports', and 'Patents'. Below the navigation bar, a search project card displays the following information: 'Search Project' icon, '25 oct 2022', 'Trademark Search Number TMS-2022/10-1965', 'Business Unit TM Business Unit Test', 'Project Status Submitted for Review', and 'Result Needed by 11/9/2022'. A 'Pinned Notes' section contains a table with columns: 'Created Date', 'Due Date', 'Action', 'Assigned To', and 'Notes'. In the notes column, it says 'All Done! Search Instructions have been created per your instructions. Click Finish button to update the status.' A blue 'Finish' button is highlighted with a purple border. The overall interface has a light blue and white color scheme.

The search instruction is created, with a reference no. as **TM Search instruction Ref.** [eg: TMS12345.]

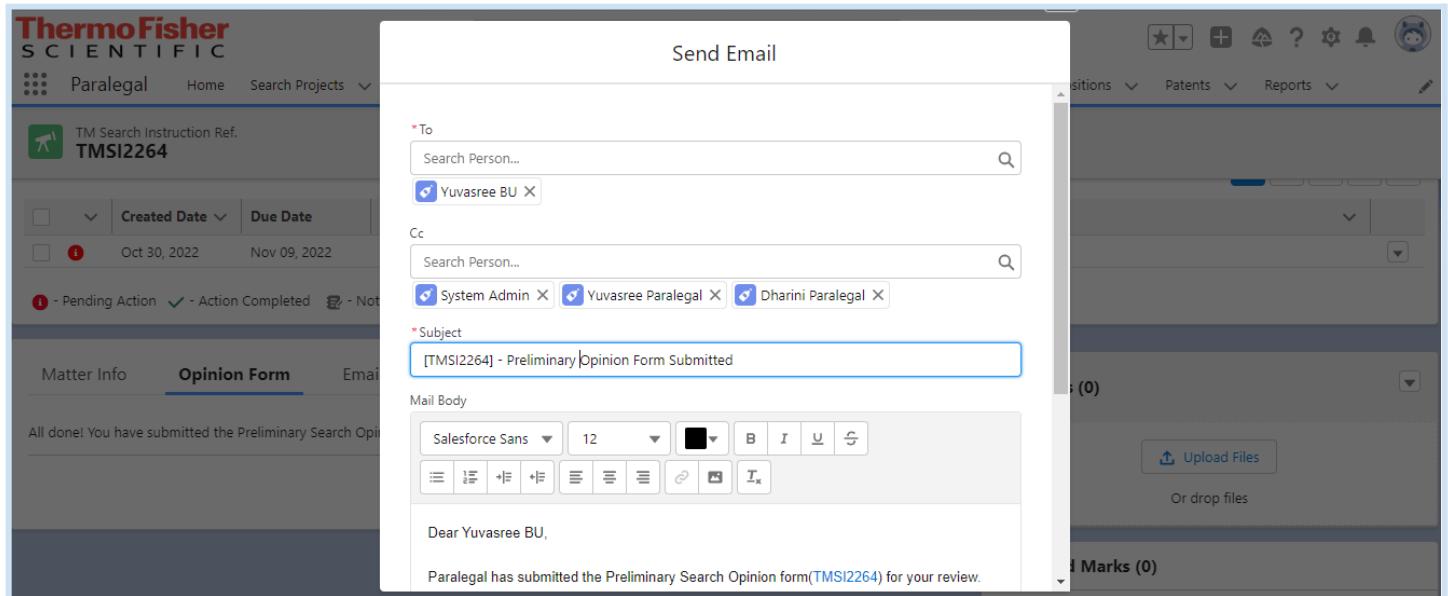
Preliminary Search

The paralegal can fill up the preliminary search opinion form, once the search instruction has been created by him/herself.

This screenshot shows the 'Preliminary Search Opinion Form' section of the Thermo Fisher Scientific software. At the top, there's a header with 'TM Search Instruction Ref.' set to 'TMS12180'. Below the header, a summary table shows 'Project Name' as '25 oct 2022', 'Date Instructed' as '10/25/2022', 'Due Date' as 'Oct 25, 2022', and 'Search Status' as 'In Process'. A 'Pinned Notes' section contains a table with columns: 'Created Date', 'Due Date', 'Action', 'Assigned to', and 'Notes'. It lists one note: 'Oct 25, 2022 Nov 4, 2022 Others Yuvasree Paralegal Preliminary Search Results Due'. Below this, there are status indicators: 'Pending Action' (red), 'Action Completed' (green), and 'Note' (blue). The main form area has tabs: 'Matter Info', 'Opinion Form' (which is selected), 'Email History', and 'Diary Notes'. The 'Opinion Form' tab contains several sections: '1) Preliminary search result' (checkboxes for potential descriptiveness refusal, relative grounds, third-party common law marks, and no obstacles), '2) Based on the result provided, the mark is' (radio buttons for available or not available for use and registration), '3) And consider the mark to be' (radio buttons for Low Risk, Low-Medium Risk, Medium-High Risk, and High Risk), and '4) Details of the Search' (a 'Mark Classes' field containing '001' and a 'Goods and Services description' field). To the right of the form, there are two panels: 'Click on "Opinion Form" section to fill the Preliminary Search Opinion Form.' and a 'Files (0)' panel with an 'Upload Files' button and a 'Proposed Marks (0)' panel with a 'View All' button. The overall interface has a light blue and white color scheme.

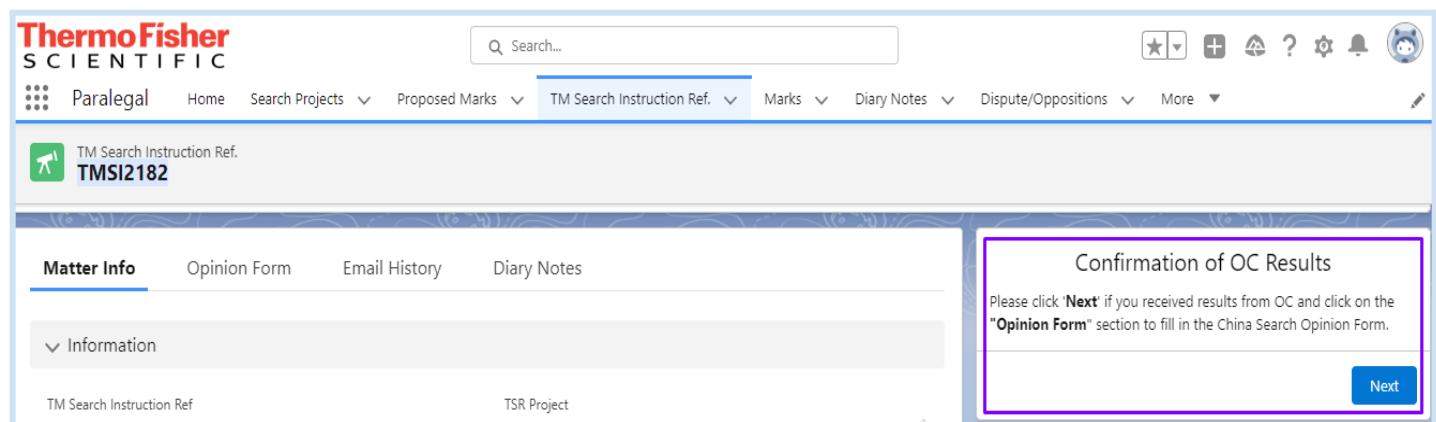
A preliminary search opinion form is submitted by a paralegal and an email is sent to the Business user for approval of the result of the Preliminary search.

****Note:** An email should be triggered to the Business User to review the preliminary search result.



China search

Once the Business user approved the result of the preliminary search, china search instruction record will be created. The Paralegal can open the china search instruction record created and can confirm the Outside Counsel's result on the china search.



The paralegal can fill up the china search opinion form, once received the result from Outside counsel.

China search opinion form is submitted by a paralegal and an email is sent to the Business user for approval of the result of the China search.

The screenshot shows the ThermoFisher Scientific TM Search Instruction Ref. application. At the top, there's a navigation bar with links for Paralegal, Home, Search Projects, Proposed Marks, TM Search Instruction Ref., Marks, Diary Notes, Dispute/Oppositions, and More. A search bar is also present. Below the navigation, a project details section shows 'Project Name' as '25 oct 2022', 'Date Instructed' as '10/25/2022', 'Search Status' as 'In Process', and 'Final Recommendation'. A 'Pinned Notes' section lists a note from 'Oct 25, 2022' to 'Nov 04, 2022' assigned to 'Others' (Yuvasree Paralegal) with the note 'China Search due'. Below this, tabs for Matter Info, Opinion Form (which is selected), Email History, and Diary Notes are visible. The main content area displays the 'China Search Opinion Form' with a section titled '1) China Specific knockout search outcome:' containing three checkboxes: 'Potential descriptiveness refusal (absolute grounds)' (checked), 'Potential likelihood of confusion with third-party registered or pending marks (relative grounds)', and 'Potential likelihood of confusion with third-party common law marks'. To the right, there are sections for 'Files (0)' with an upload button and 'Proposed Marks (0)' with a 'View All' link.

****Note:** An email should trigger to the Business user for the china search opinion form submitted and required review.

This screenshot shows a 'Send Email' dialog box overlaid on the application. The dialog has a 'Mail Body' section with a rich text editor toolbar. The message body reads: 'Dear Yuvasree BU, Paralegal has submitted the China Search Opinion form (TMSI2270) for your review. Please find the attachment below for Opinion Form.' It also includes a signature: 'Regards, Thermo Fisher Trademark Team'. Below the message body, there's an 'Attachment' section with an 'Upload Files' button and a link to an auto-attached PDF file: 'Auto-Attached Files: PMR-2022/10-2002-1_China Opinion Form.pdf'. At the bottom of the dialog are 'Cancel' and 'Send' buttons. The background of the application shows the same 'Opinion Form' screen as the previous screenshot.

Comprehensive search

Once the Business user approved the result for the china search, the Paralegal can instruct the Outside vendor for conducting the comprehensive search and can confirm the Outside vendor's result on the comprehensive search.

The paralegal can fill up the comprehensive search opinion form, once received the result from the Outside vendor.

A comprehensive search opinion form is submitted by a paralegal and an email is sent to the Business user for approval of the result of the comprehensive search.

The screenshot shows the ThermoFisher Scientific Trademark Management System. At the top, there's a navigation bar with links like Paralegal, Home, Search Projects, Proposed Marks, TM Search Instruction Ref., Marks, Trademarks, Dispute/Oppositions, Patents, Reports, and a search bar. Below the navigation is a header with 'TM Search Instruction Ref.' and 'TMSI2271'. The main content area has tabs for Matter Info, Opinion Form (which is selected and highlighted in purple), Email History, and Diary Notes. The 'Opinion Form' tab displays a 'Comprehensive Search Opinion Form' with four sections: 1) Comprehensive search result (checkboxes for potential descriptiveness refusal, likelihood of confusion with registered or pending marks, and likelihood of confusion with common law marks), all of which are checked; 2) Based on the result provided, the mark is (radio buttons for 'Available for use and registration' and 'Not available for use and registration'), where 'Not available' is selected; 3) Therefore the mark is: (radio buttons for 'Approved' and 'Not Approved'), where 'Approved' is selected; 4) Details of the Search. To the right, there's a sidebar with sections for Files (0), Proposed Marks (0), and a button to Upload Files. A 'View All' link is also present under Proposed Marks.

****Note:** An email should trigger to the Business user for the comprehensive search opinion form submitted and required review.

This screenshot shows the 'Send Email' dialog box overlaid on the system interface. The dialog box has fields for To (set to 'Yuvasree BU'), Cc (listing 'System Admin', 'Yuvasree Paralegal', and 'Dharini Paralegal'), Subject ('[TMSI2271] - Opinion Form Submitted'), and Mail Body. The body contains a message to 'Dear Yuvasree BU,' followed by a note from the paralegal about submitting the Comprehensive Search Opinion form and a signature from the 'Thermo Fisher Trademark Team'. The background shows the same ThermoFisher Trademark Management System interface as the previous screenshot, with the 'Opinion Form' tab selected and the status message 'All done! You have submitted the Comprehensive Search'.

Once all the searches are done, the Business user can give the final recommendation on the proposed mark.

Once all searches are conducted and the result is reviewed by the Paralegal, he/she can make a decision on whether to promote a proposed mark to Mark or close the proposed mark based on the search result.

Proposed Mark

Once all the searches are done, the Business user can give the final recommendation on the proposed mark.

The Paralegal can go to the “**Proposed mark**” record from there; he/she can click on the right-hand side widget to promote that Proposed mark to Mark or cancel the proposed mark.

Proposed Mark
25 oct 2022

25 oct 2022	10/25/2022
Search Status	PMR Status
Completed	In-Process
Responsible Attorney	Requestor
System Admin TF	Yuvasree BU
Mark Classes	Product Manager
	Yuvasree BU
Completion Date	Responsible Paralegal
10/25/2022	Yuvasree Paralegal
Filing Basis	Legacy Docket No.

Proposed Mark Decision

* Use the below options to log the decision/next step for the proposed mark

Promote to Mark

Close this proposed Mark

Will be used under Common Law

Submit

Mark

Once the paralegal selects the option and clicks on “**Submit**”, the proposed mark is promoted to mark and Mark record is created.

Mark
25 oct 2022

Mark Type	Mark Status	Mark ID
	Not Filed	MK5476

Matter Info Filing Jurisdictions Correspondence All Documents

Trademarks (0)

Files (0)

Edit Delete

Create Jurisdiction Record

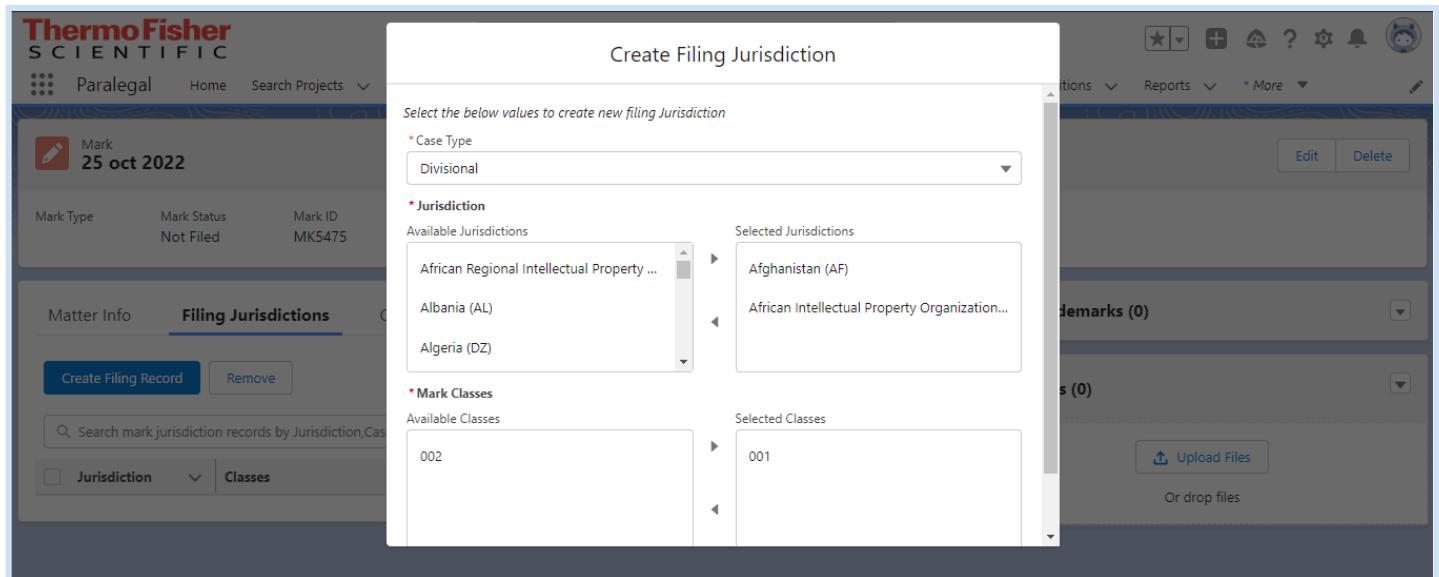
The Paralegal can go to the “**filing Jurisdiction**” tab and click on “**Add New Filing Jurisdiction**” to add the new filing jurisdiction record, from the associated mark record.

This screenshot shows the Thermo Fisher Scientific software interface. At the top, there's a navigation bar with links like 'Paralegal', 'Home', 'Search Projects', 'Proposed Marks', 'TM Search Instruction Ref.', 'Marks', 'Trademarks', 'Dispute/Oppositions', 'Reports', and 'More'. Below the navigation bar, a header displays 'Mark' and the date '25 oct 2022'. On the left, there's a sidebar with sections for 'Matter Info', 'Filing Jurisdictions' (which is highlighted with a purple box), 'Correspondence', and 'All Documents'. In the center, there's a search bar and a button labeled 'Add New Filing Jurisdiction' (also highlighted with a purple box). To the right, there are two expandable sections: 'Trademarks (0)' and 'Files (0)', each with an 'Upload Files' button and a 'Or drop files' placeholder. At the bottom, there are buttons for 'Create Filing Record' and 'Remove'.

Paralegals can go to mark record and edit the mark classes manually, under the matter info tab.

This screenshot shows the Thermo Fisher Scientific software interface with the 'Marks' tab selected (highlighted with a purple box). The main area contains fields for 'Mark Name' (25 oct 2022), 'TSR Project' (TMS-2022/10-1965), 'Proposed Mark' (PMR-2022/10-1965-1), 'Requester' (Yuvashree BU), 'Product Manager' (Yuvashree BU), and 'Responsible Paralegal' (Yuvashree Paralegal). On the left, there's a 'Mark Classes' section with a 'Available' list containing items 003, 004, 005, and 006, and a 'Chosen' list containing item 001. A blue arrow icon indicates a transfer action between these lists. Below this, there's a 'Business Unit' field with the value 'TM Business Unit Test'. At the bottom, there are 'Cancel' and 'Save' buttons, with 'Save' being highlighted with a purple box.

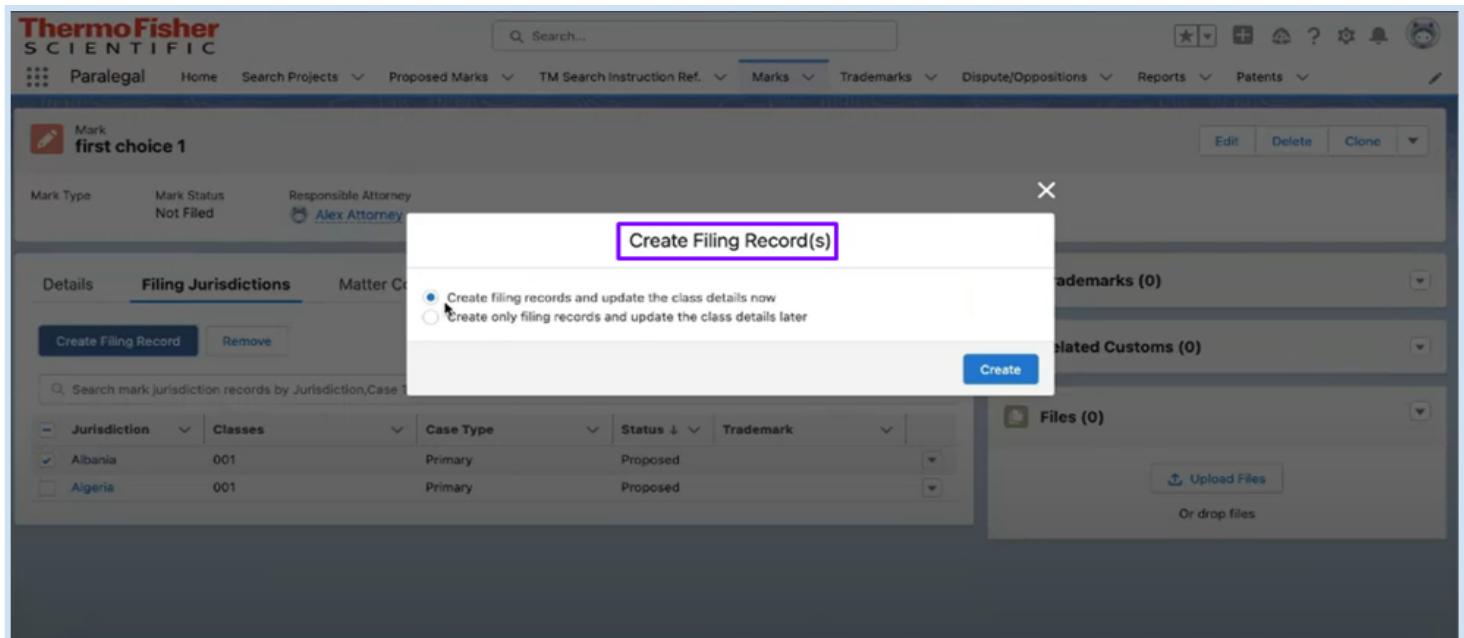
Once the mark classes are updated, click on “**New filing Jurisdiction**” button in filing jurisdiction tab and “**Create filing jurisdiction**” window will pop up, from there the user can fill in the case type, jurisdiction, and available classes and can create a filing jurisdiction.



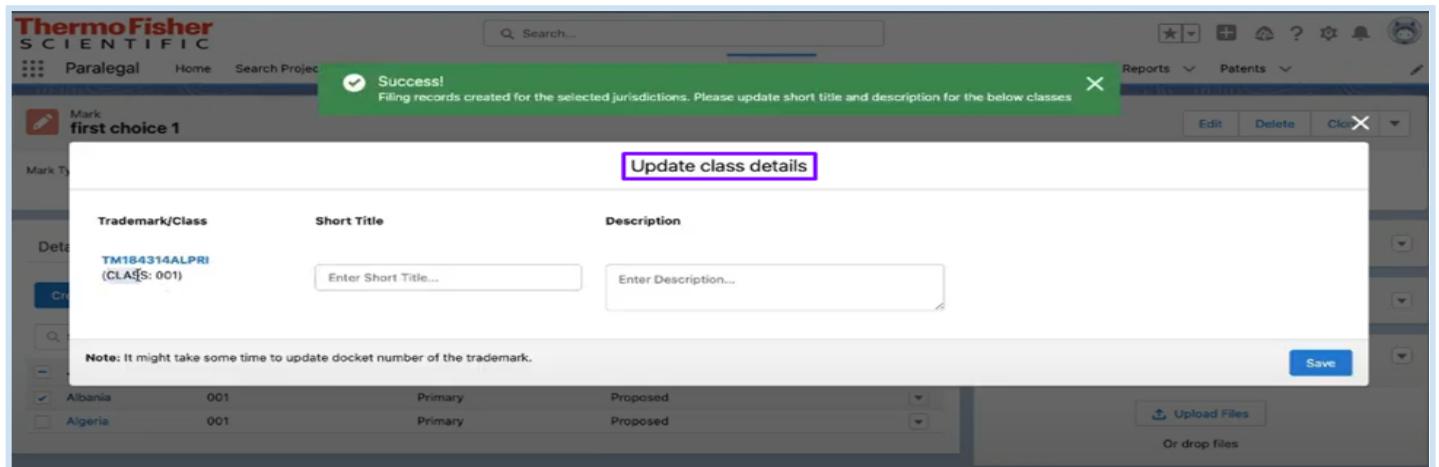
Create Filing Record

The paralegal can select the Jurisdiction and can create a filing record by clicking on the “**Create filing record**” button. Once click on “**create filing record**” a window will pop up asking for:

- (a) Create filing record and update the classes’ details.
- (b) Create a filing record and update the classes’ details later.



The paralegal can click on the **first option** (If they want to update the class details), and then clicks on **Create**. Once it's done, the filing record has been successfully created and the user can update the classes' details from the pop-up window (It's an optional field).



The paralegal clicks on the **Second option** (If they want to create the trademark record and update the class details later), and then clicks on **Create**. Once it's done, the filing record will be successfully created.

Once the filing record is created, the status of the filing jurisdiction record will be changed to **"Executed"** and Trademark docket No. (**TM12345ALPRI-1**) will be generated.

The screenshot shows the ThermoFisher Scientific software interface. A green success message box is prominently displayed in the center, stating "Success! Goods Services record(s) has been created". The interface includes a navigation bar with links like Paralegal, Home, Search Projects, Proposed Marks, Dispute/Oppositions, Reports, and Patents. Below the navigation is a search bar and a toolbar with icons for Edit, Delete, and Clone. The main content area shows a list of marks, with one entry highlighted: "Mark first choice 1". Details for this mark include Mark Type (Not Filed), Responsible Attorney (Alex Attorney), and a table for Filing Jurisdictions. The table lists jurisdiction details such as Algeria (001, Primary, Proposed), Albania (001 (test class), Primary, Executed, TM12345ALPRI). To the right, there are sections for Trademarks (0), Related Customs (0), and Files (0).

Note: **TM12345ALPRI-1 TM = Trademark, 12345 = Family ID, AL = Country code, PRI = Case Type (Primary), 1= Sequence.

Trademark

The Trademarks section allows the paralegal to manage the trademark assets, and create new trademarks. To access this section, select the “Trademark” tab from the home page. The Trademark page displays a list of trademarks that are available in the portfolio.

The screenshot shows the ThermoFisher Scientific software interface with the Trademarks tab selected. The main area displays a list of trademarks, with the first few rows shown in the table below:

	Trademark Na...	Docket Number	Legacy Docket...	Jurisdiction	Filing Date	Registration #	Registrat...	Created Date	Owner First
1	"allergon" (design)	TM147667TWPRI-1	PHAD5555	Taiwan	11/6/1995	TW744038	1/16/1997	10/3/2022, 5:58 ...	System Ad
2	"allergon" (design)	TM147667TWPRI-2	PHAD5556	Taiwan	11/6/1995	TW731276	10/1/1996	10/3/2022, 5:58 ...	System Ad
3	"allergon" (design)	TM147667CNPRI-1	PHAD5557	China	1/24/1996	CN1116814	10/7/1997	10/3/2022, 5:58 ...	System Ad
4	"allergon" (design)	TM147667EMPRI-1	PHAD5558	European Union	2/11/2015	EM013729835	2/11/2015	10/3/2022, 5:58 ...	System Ad
5	"allergon" (design)	TM147667GBPRI-1	PHAD5558BRX	United Kingdom	2/11/2015	GB009013729835	2/11/2015	10/4/2022, 2:14 ...	System Ad

The paralegal can add a new trademark via the new button available in the trademark tab.

	<input type="checkbox"/> Trademark Name... ↑	Docket Number	Legacy Docket	Jurisdiction	Filing Date	Registration #	Registrat...	Created Date	Owner First
1	<input type="checkbox"/> "allergon" (design)	TM147667TWPRI-1	PHAD5555	Taiwan	11/6/1995	TW744038	1/16/1997	10/3/2022, 5:58 ...	System Ad
2	<input type="checkbox"/> "allergon" (design)	TM147667TWPRI-2	PHAD5556	Taiwan	11/6/1995	TW731276	10/1/1996	10/3/2022, 5:58 ...	System Ad
3	<input type="checkbox"/> "allergon" (design)	TM147667CNPRI-1	PHAD5557	China	1/24/1996	CN1116814	10/7/1997	10/3/2022, 5:58 ...	System Ad
4	<input type="checkbox"/> "allergon" (design)	TM147667EMPRI-1	PHAD5558	European Union	2/11/2015	EM013729835	2/11/2015	10/3/2022, 5:58 ...	System Ad
5	<input type="checkbox"/> "allergon" (design)	TM147667GDPRI-1	PHAD5559	United Kingdom	2/11/2015	GB000012720825	2/11/2015	10/3/2022, 5:58 ...	System Ad

Fill out the section listed below from the **New Trademark** pop-up:

- Basic Information like filing date/app #/etc.
- Status
- Personnel
- Examiner Details
- Parent Information

Click 'Save' at the bottom of the pop-up to save the trademark. A successfully saved trademark is displayed on the list.

Also, the Paralegal can create the related trademark from the "**Related tab**" available in the trademark record by clicking the "**Create Related trademark**".

ThermoFisher SCIENTIFIC

Paralegal Home Search Projects Proposed Marks TM Search Instruction Ref. Marks Diary Notes * "allergon" (design) More

Trademark "allergon" (design)

Application # TW84-055124	Docket Number TM147667TWPRI-1	Jurisdiction Taiwan	Case Type Primary	Business Unit	Internal Status Registered
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Matter Info Docket Roles D/O Recommendation Related All Documents More

Remove Create Related Trademark Refresh

Search by Docket No., Jurisdiction, Application No., Title, Case Type

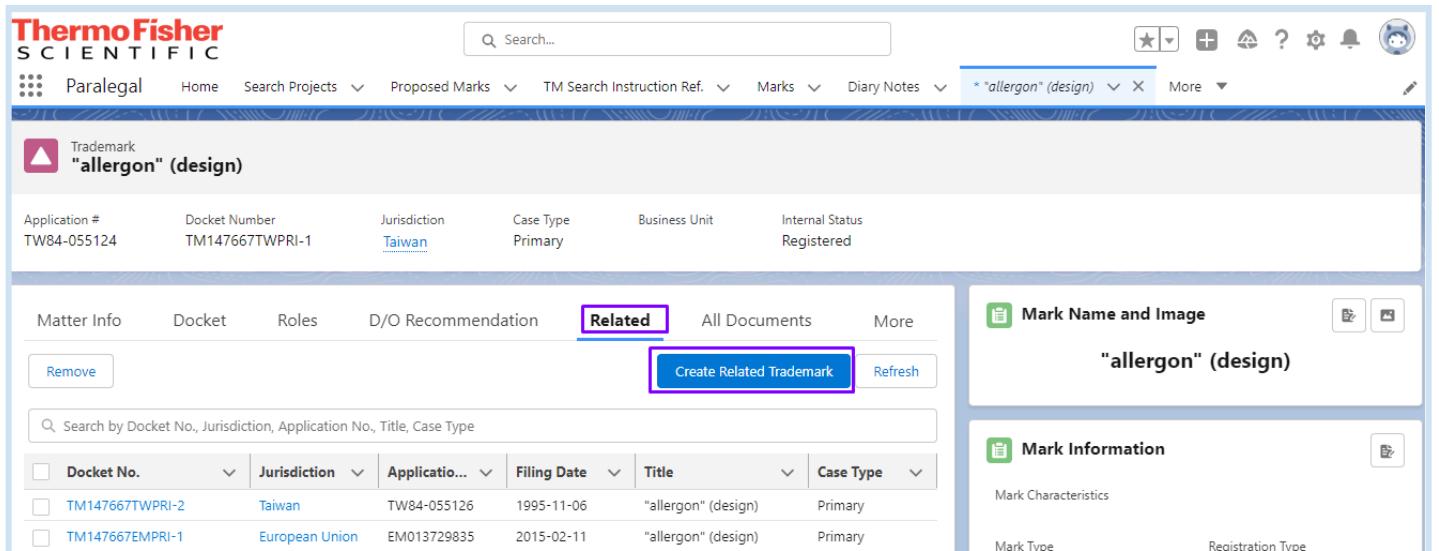
Docket No. TM147667TWPRI-2	Jurisdiction Taiwan	Application No. TW84-055126	Filing Date 1995-11-06	Title "allergon" (design)	Case Type Primary
TM147667EMPRI-1	European Union	EM013729835	2015-02-11	"allergon" (design)	Primary

Mark Name and Image "allergon" (design)

Mark Information

Mark Characteristics

Mark Type Registration Type



ThermoFisher SCIENTIFIC

Paralegal Home Search Projects

Trademark "allergon" (design)

Application # TW84-055124	Docket Number TM147667TWPRI-1
---------------------------	-------------------------------

Matter Info Docket Roles

Remove

Search by Docket No., Jurisdiction, Application No., Title, Case Type

Docket No. TM147667TWPRI-2	Jurisdiction Taiwan	Application No. TW84-055124	Filing Date Nov 6, 1995	Title "allergon" (design)	Case Type Primary
TM147667EMPRI-1	European Union	EM013729835	2015-02-11	"allergon" (design)	Primary

Create New Related Trademark

Name "allergon" (design)

Jurisdiction Iceland

Case Type Divisional Priority Date Nov 6, 1995

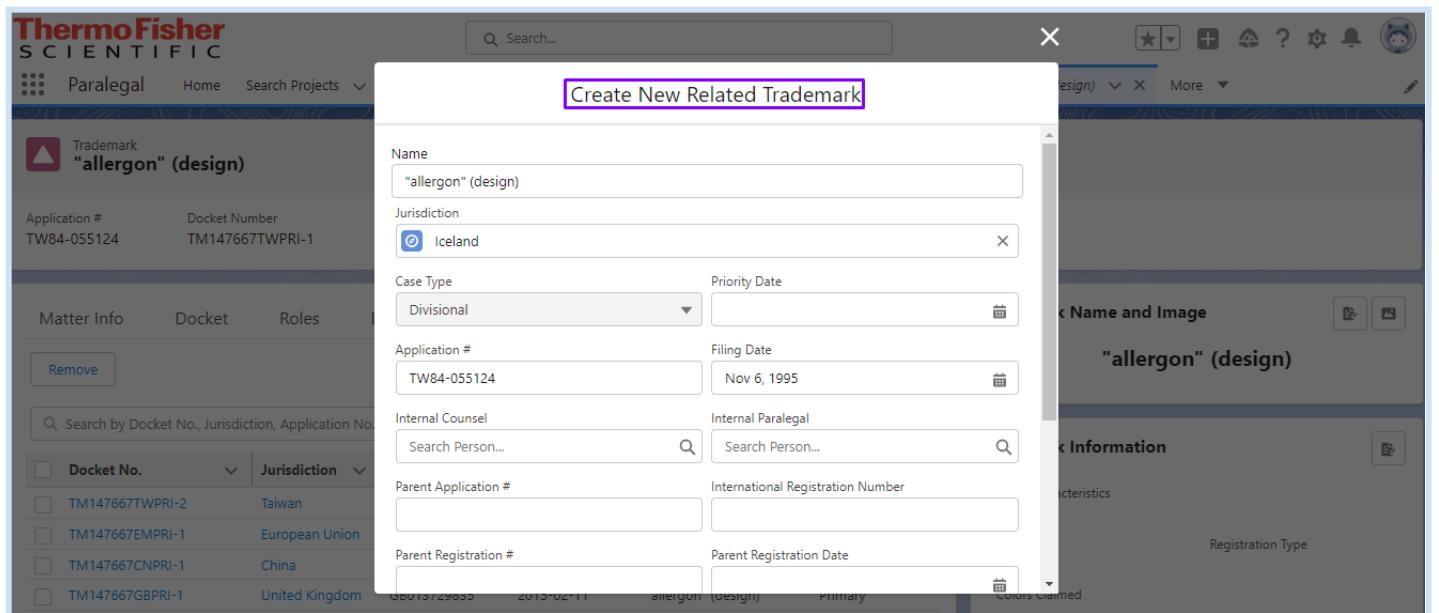
Application # TW84-055124 Filing Date Nov 6, 1995

Internal Counsel Search Person... Internal Paralegal Search Person...

Parent Application # International Registration Number

Parent Registration # Parent Registration Date

Registration Type Colors Claimed



The paralegal can fill up the details and click on save to create the related trademark record successfully.

Email tracker for D/O

External sources (3rd party) communicates with the Thermo Fisher employee about suspicious activities, Watch notices, OC evaluations, and other activities related to opposition and disputes. All communications are forwarded from Thermo Fisher employees to tmdocketing@maxval.com with the appropriate docket number in brackets in the subject line. Emails are stored in the email tracker and the Email tracker can be further checked, categorized, and documents can be uploaded.

All the incoming emails can be tracked in the incoming email dashboard present on the paralegal home page. On selecting the email link the detailed message and attachment to it will display to the paralegal.

The screenshot shows the Thermo Fisher Scientific Paralegal home page. At the top, there's a navigation bar with links for Paralegal, Home, Search Projects, Proposed Marks, TM Search Instruction Ref., Marks, Trademarks, Dispute/Oppositions, and a search bar. Below the navigation is a header for 'Paralegal User' with a timestamp 'As of Oct 26, 2022, 12:16 AM-Viewing as Yuvasree Paralegal'. To the right is a circular progress bar showing '1.8k'. The main content area has three sections: 'Paralegal Email Trackers - Pending Review' (listing EMTK-30029 and EMTK-30037), 'Projects Submitted for Review' (showing a count of 6), and a 'Search Instruction by Search Type' chart.

After clicking '**Email tracker name**' the Paralegal can view the complete content, details, and attachments associated with the email and can process the email from this page itself.

This screenshot shows the detailed view of the email tracker for EMTK-30029. The top navigation bar is identical to the home page. The main content area includes a summary row for Date Received (10/11/2022), Status (Received), Reviewed By (Yuvasree S), and Email Link ([TM178824USPRI/1]test TM2). Below this is a section titled 'Email Message' containing the email body: 'From: Yuvasree S To: inboundtrademarkemails@2g72nvjcibxoyyqf6go2v35mlu5gvbur02wewrq88nxfxe1m9b.4w-48afmuua.na139.apex.salesforce.com' and the signature 'Email message test -- Yuvasree S Tester | Symphony'. To the right is a 'Details' panel with sections for Email Link, Short Subject, Trademark Link, Is Current User, and My Review. The 'My Review' section includes fields for Date Reviewed and To Be Reviewed By (Yuvasree Paralegal).

The paralegal can take action for the received Email as '**No Action Needed**' or '**Save Attachment**'.

If the user selects '**No Action needed**' the status gets changed to 'Reviewed - No Action Needed'.

By selecting '**Save Attachment**' to the matter paralegal can select multiple attachments for that associated email and add the attachment to the trademark record.

The screenshot shows the Thermo Fisher Scientific Email Tracker interface. At the top, there is a navigation bar with links for Paralegal, Home, Search Projects, Proposed Marks, TM Search Instruction Ref., Marks, Trademarks, Dispute/Oppositions, and a search bar. Below the navigation bar, the title 'Email Tracker EMTK-30029' is displayed. A message at the top states: 'The content of this email is confidential and intended for the recipient specified in the message only. It is strictly forbidden to share any part of this message with any third party, without the written consent of the sender. If you received this message by mistake, please reply to this message and follow with its deletion to ensure such a mistake does not occur in the future.' On the left, a 'Process Email' section contains a 'Select Email Action' dropdown where 'Save Attachment' is selected (highlighted with a purple box). Below this is a table with three rows of document information:

	Document Name	Document Date	Comments	Document Type
1	Draft Doc	10/11/2022	Others	
2	Test doc for Testers	10/11/2022	Others	
3	Exported	10/11/2022	Others	

A 'Submit' button is located at the bottom right of the table. To the right of the table, a sidebar displays user information: 'Reviewed By' (Yuvasree Parale), 'Review Comments', 'Created By' (System Admin TF, 10/11/2022, 5:51 AM), 'Last Modified By' (System Admin 1, 10/11/2022, 5:51 AM), 'Status' (Received), and an 'Attachments' section showing a file named 'Draft Doc.pdf'.

Dispute and Opposition recommendations

The paralegal can request D/O recommendations and can select the list of documents attached for that associated trademark record.

The paralegal can go to the '**D/O Recommendation**' tab and click on the '**Request**' button to create a new D/O recommendation.

The screenshot shows the ThermoFisher Scientific software interface. At the top, there is a navigation bar with various tabs: Paralegal, Home, Search Projects, Proposed Marks, TM Search Instruction Ref., Marks, Trademarks, Dispute/Oppositions, Reports, and More. Below the navigation bar, the main content area displays a trademark record for 'Test Trademark'. The record includes fields for Application # (4443434), Docket Number (TM178824USPRI/1), Jurisdiction (United States of America), Case Type (Primary), Internal Paralegal, and Internal Status (Proposed). Below this, there are tabs for Matter Info, Docket, Roles, and D/O Recommendation. The 'D/O Recommendation' tab is selected and highlighted with a purple border. Within this tab, there is a 'Request' button, which is also highlighted with a purple box. To the right of the main content area, there are two side panels: 'Mark Name and Image' (showing 'Test Trademark') and 'Mark Information' (showing 'Mark Characteristics').

After clicking the '**Request**' button a new window pops up for a new D/O recommendation. Paralegals can select which documents are related to the recommendation, select the person from whom the recommendation is required and click on '**Request**' to create a new D/O recommendation record.

The screenshot shows a modal dialog box titled 'Request new D/O Recommendation'. The dialog box contains a section labeled 'Files from All Documents' with a 'Filter By:' dropdown set to 'Doc'. A list of documents is displayed, each with a checkbox, a name, a date, and a status. The documents listed are: 'test doc for testers' (Oct 11, 2022, Others), 'Test Doc 41' (Oct 11, 2022, Firm's Form ...), 'Draft Doc' (Oct 21, 2022, Others), 'Doc sign test' (Oct 24, 2022, test2 by par..., Certificate o...), 'Draft Doc' (Oct 24, 2022, test by par ..., Application ...), and 'New doc' (Nov 1, 2022, Anneal Brief). The background of the dialog box shows a portion of the ThermoFisher software interface, including the 'Trademark' section and the 'D/O Recommendation' tab.

The paralegal can see matter information, correspondence, email history, and a list of recommendation opinions asked from different users. Can also edit the Opinion on behalf of Outside counsel etc...

D/O Recommendation
D/O-0107

Trademark Test Trademark	Jurisdiction India	Status Pending
---	---------------------------------------	-------------------

Matter Info
Correspondence
Email History

Section

Adverse Mark Test	Final Recommendation
Adverse Party Test	Final Comments
Related Classes 001	Status Pending
Deadline 10/31/2022	
Application/ Registration no. 789473	
Comments	

Recommendation Opinion

#1	Person BURZIN BHARUCHA	Final Recommendation Trademark Cancellation	Edit
	Comments	Recommendation Status Completed	Re-send Email
#2	Person Yuvashree BU	Final Recommendation Trademark Cancellation	Edit
	Comments	Recommendation Status Completed	Re-send Email

Proceed with final recommendation.

[Yes](#)

Final Documents (3)

F-0000737774	▼
F-0000737775	▼
F-0000855606	▼

[View All](#)

The paralegal can request the dispute and opposition recommendation opinion from the Business user and Outside counsel for the associated trademark.

****Note:** An email should trigger to the Business user/product manager for requesting a new dispute and opposition recommendation.

The Business user can provide his opinion for dispute and opposition recommendation for the trademark.

If both the recommendation provided by the Business user and Outside counsel are the same, then the paralegal can proceed with the final recommendation. If not the same, then the paralegal can ask the Business user for revisiting his recommendation from resend '**Re-send email**' button.

****Note:** An email should trigger to the Business user to revisit his/her recommendation.

After the Business user provides the final recommendation, the paralegal can click on '**Next**' to proceed with the final recommendation.

****Note:** An email should trigger to the Business user/Product manager for informing about the final recommendation

taken by paralegal.

The screenshot shows the ThermoFisher Scientific Paralegal software interface. At the top, there is a navigation bar with links for Home, Search Projects, Proposed Marks, TM Search Instruction Ref., Marks, Trademarks, Dispute/Oppositions, and a search bar. Below the navigation bar, the main content area displays a "D/O Recommendation" card for "D/O-0037". The card includes fields for Trademark (New Trademark 1), Jurisdiction (United States of America), and Status (Completed). The "Matter Info" tab is selected, showing sections for Adverse Mark, Adverse Party, Related Classes, Deadline, Application/ Registration no., and Comments. The "Recommendation Opinion" section shows a row for Person (Yuvasree BU) with options to Edit or Re-send Email, and a row for Comments with a status of Completed. To the right of the card, there is a large email composition window. The "To" field contains "Yuvasree BU". The "Cc" field lists "System Admin", "Docketer", and "Yuvasree Paralegal". The subject of the email is "[New Trademark 1, D/O-0037] - Final D/O Recommendation". The mail body contains a message to "Dear Yuvasree BU," followed by a thank you note and two options: "Yes: Based on your response(s), we will proceed with filing an opposition. [insert comments or further questions]" and "No: Based on your response(s), we will not proceed with filing an opposition. [insert comments or further questions]". There are buttons for "Upload Files" and "Send", and a link to "Final Documents (0)".

Once the final recommendation is provided, an email should be sent to the docketer for creating the Dispute and opposition for that associated trademark.