



Symphony IPM

Invention Disclosure Flow

(for IP Coordinator)



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- ❑ Actions-
 1. Confirm Group, Division and Business Unit (Optional)
 2. Assign Patent Review Board
 3. Completeness Check
- ❑ Appendix



Actions to be Performed by the IP Coordinator

Sl. No	Action Items	Slide No.	Related Docket Activity	Slide No.
	Confirm Group, Division and Business Unit	Slide 20	N/A	N/A
2.	Assign Patent Review Board	Slide 23	N/A	N/A
3.	Completeness Check	Slide 21	Notice of defect IDF deemed complete - Due	Slide 22

Index



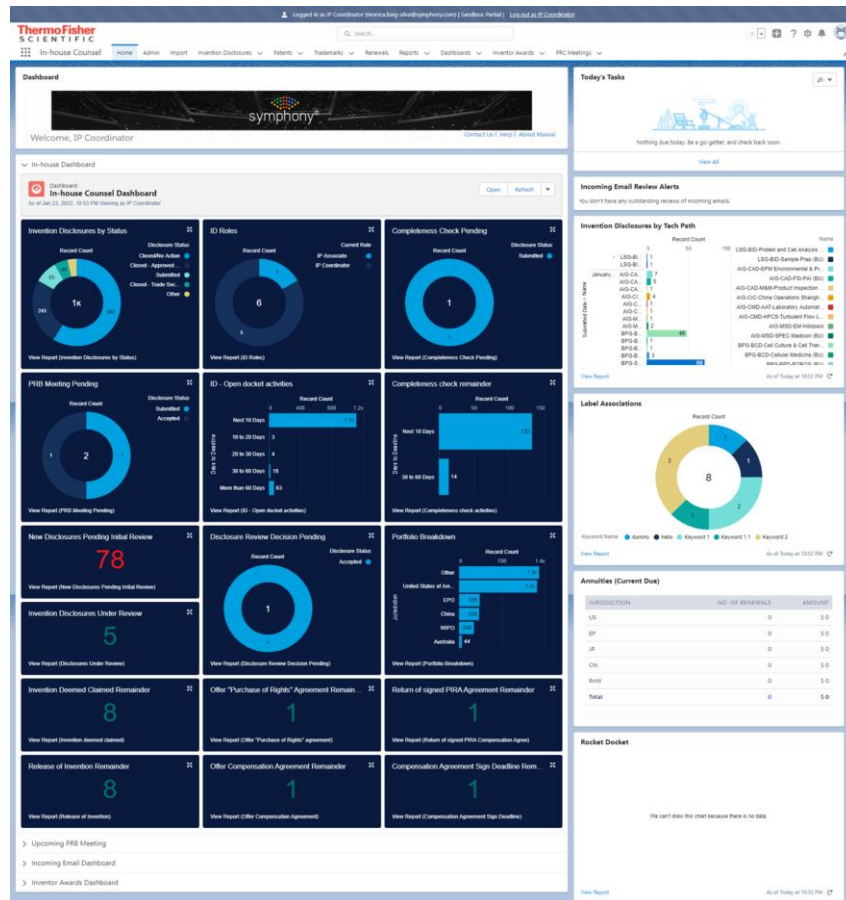
- ☐ **Inventor Home Page- Dashboard**
- ☐ **Creating and Submitting Invention Disclosure Form**
- ☐ **Post Submission Detailed View of the Submitted Invention Disclosure**
- ☐ **List of Email Triggers to be Expected**



Home

Dashboard

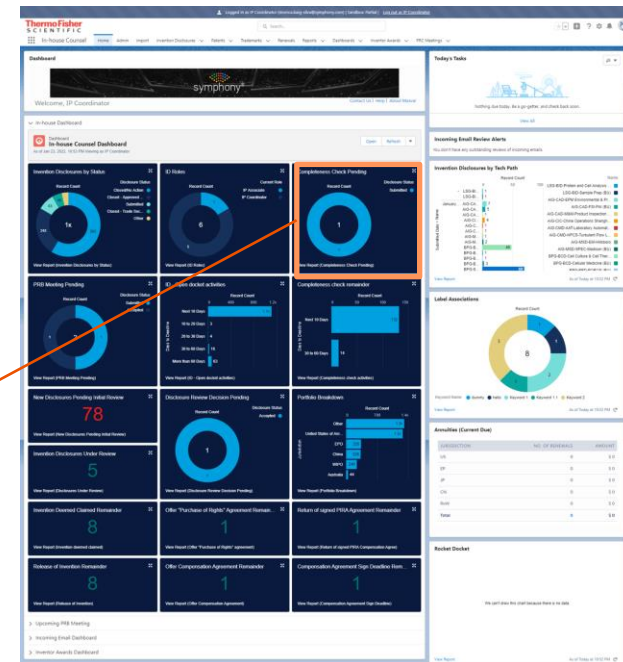
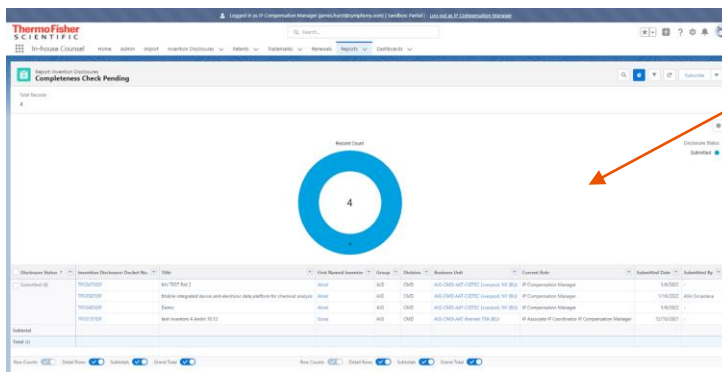
The IP Coordinator will be able to access the dashboard in their home page with different graphs and status updates of various submitted IDFs related to the respective Business Unit of the Manager.



Using Dashboard

The user can navigate the dashboard by clicking on the graph related to the action item status.

They can access the records related the status directly from the dashboard.



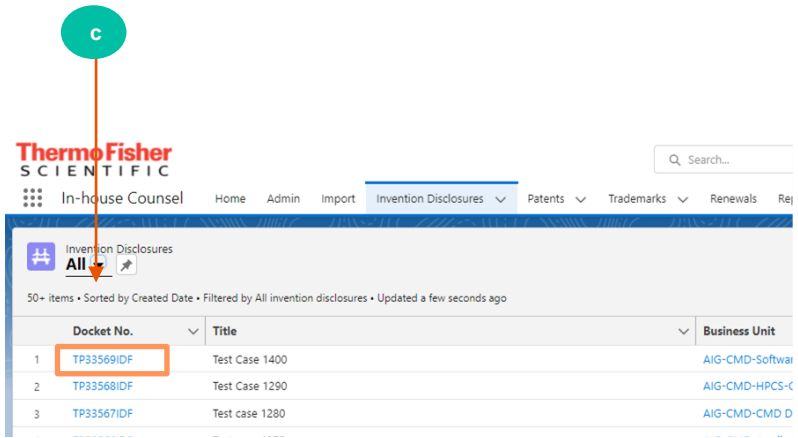
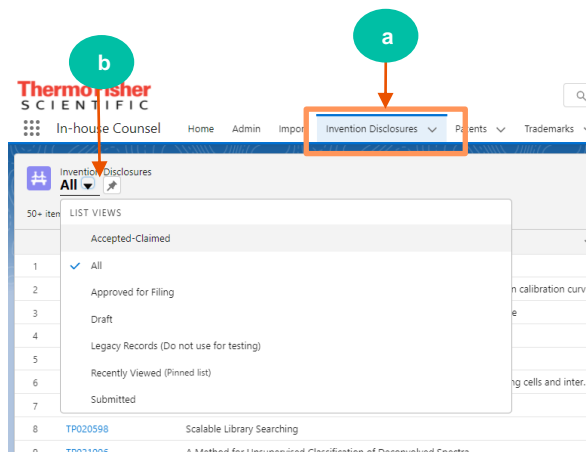
Invention Disclosure- List View

a. If the user wants to see all the disclosures, he/she can select the **Invention Disclosure** tab from the homepage to view ID records.

The **Invention Disclosure** page displays important asset information such as **Docket Number**, **Title**, **First Named Inventor**, **Disclosure Status**, **Business Unit**, **Created Date** and more., in a tabular format.

b. The listed records can be filtered based on the status by clicking on the dropdown icon as shown here

c. The user can click on the docket number of the particular record to view its details.

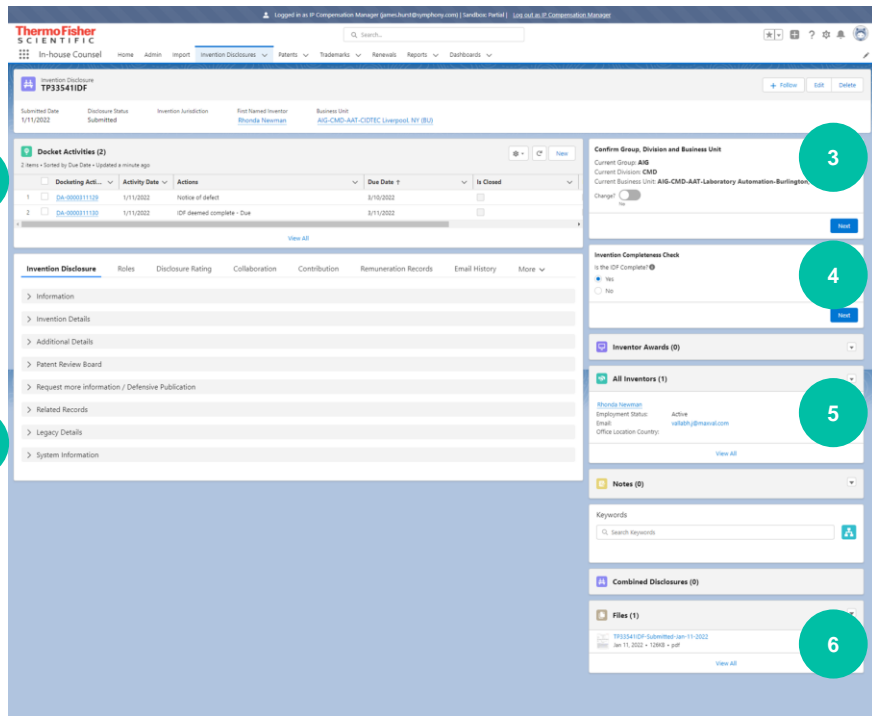


Invention Disclosure - Detailed View

On clicking the docket number of a particular record, user can see the details of invention as submitted by Inventor including the following:

1. [Docket Activities](#)
2. [Disclosure Related Information](#)
3. [Change Group, Division and Business Unit](#)
4. [Completeness Check](#)
5. [ID Inventors Details](#)
6. [Files](#)

Additionally, Inventor Awards, Keywords and Combined Disclosure.



The screenshot displays the 'View Invention Disclosure' interface for record TP33541IDF. The interface is divided into a sidebar and a main content area.

Sidebar (Left):

- 1. Docket Activities (2):** A table showing docket activities with columns for Docketing Act., Activity Date, Actions, Due Date, and Is Closed. It lists two items: 'Notice of defect' and 'ID deemed complete - Due'.
- 2. Disclosure Related Information:** A list of tabs including Information, Invention Details, Additional Details, Patent Review Board, Request more information / Defensive Publication, Related Records, Legacy Details, and System Information.
- 3. Change Group, Division and Business Unit:** A section for updating the current group, division, and business unit.
- 4. Completeness Check:** A section for checking if the disclosure is complete.
- 5. ID Inventors Details:** A section for viewing inventor details, including name, employment status, email, and office location.
- 6. Files:** A section for viewing files associated with the disclosure.

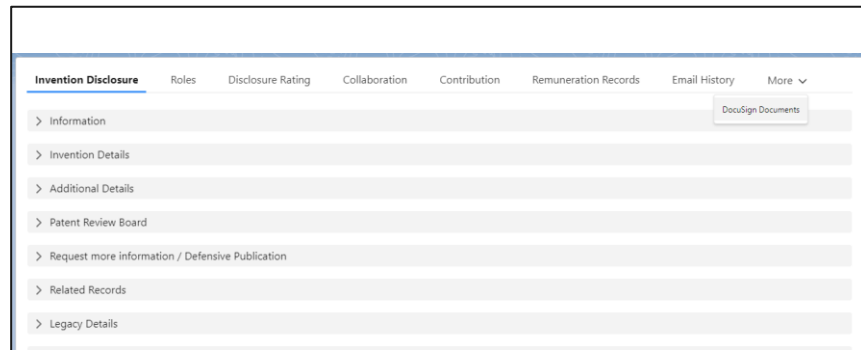
Main Content Area (Right):

- Confirm Group, Division and Business Unit:** A section for confirming the current group, division, and business unit.
- Invention Completeness Check:** A section for checking if the disclosure is complete.
- Inventor Awards (0):** A section for viewing inventor awards.
- Keywords:** A section for viewing keywords.
- Combined Disclosures (0):** A section for viewing combined disclosures.
- Files (1):** A section for viewing files, including a PDF file named 'TP33541IDF-Submitted-Jan-11-2022'.

Invention Disclosure Information

The user can view following details related to Invention:


- Invention Disclosure: Provides details as submitted by Inventor
- Roles: Provides information on key stakeholders of the invention
- Disclosure Rating (Optional): The user can provide a rating to invention
- Collaboration :User can create tasks for the stakeholders
- Email History: Contains the record of communication between the IP Compensation manager and the inventors
- Contribution: Remuneration related tab not visible for IP Coordinator
- Remuneration Record: Remuneration related tab not visible for IP Coordinator
- DocuSign Documents: Remuneration related tab not visible for IP Coordinator



Invention Disclosure - Detailed View

Invention Disclosure contains the following details:

1. Information - Contains the bibliographic details about the submitted record including docket number, title and business Unit
2. Invention Details - Detailed description as provided by the inventor during submission
3. Additional Details - Information Regarding external collaboration, publication and other third party details
4. Patent Review Board - Details regarding the assigned patent review board
5. Request Patentability Search /Defensive Publication - Details of further information if the record is decided needs external patentability search or defensive publication.

Invention Disclosure	Roles	Disclosure Rating	Collaboration	Contribution	Remuneration Records	Email History	More 
> Information							
> Invention Details							
> Additional Details							
> Patent Review Board							
> Request Patentability Search / Defensive Publication							
> Related Records							
> Legacy Details							
> System Information							

6. Related Records - List of any ID/ Patents which are related to the submitted ID.

7. Legacy Details - List of of any legacy records related to the submitted ID

8. System Information - Date and Role assigned to the ID

Disclosure Rating

All reviewers have access to the disclosure rating which is optional.

Each rating that needs to be allocated is between 1- 5 , where 1 specifies the minimum value to be assigned to the question, while 5 specifies the maximum value.

Invention Disclosure
Roles
Disclosure Rating
Collaboration
Contribution
Remuneration Records
Email History
More

Please provide your rating and recommendation below Inventiveness

How novel is the invention in comparison to the known prior art?

Select an Option

Does the invention solve a long-standing problem in its technical field?

Select an Option

Does the invention achieve unexpected favorable results?

Select an Option

Does the invention represent a technology differentiator that gives us a competitive advantage in the market?

Select an Option

Is it likely that one or more of our competitors will practice the invention?

Select an Option

Does the invention have significant applicability outside of our core business?

Select an Option

Based on the foregoing, what is the business value of the invention to us?

Select an Option

How difficult will it be for others to design around the invention if it is patented?

Select an Option

How difficult will it be to detect use of the invention by others without extensive reverse-engineering?

Select an Option

What is the likelihood that invention can be implemented as a product, in view of technical challenges?

Select an Option

Review comments

Go back Submit

Correspondence

The user can collaborate with the inventor(s) to communicate regarding any information related to the particular ID record.

Invention Disclosure
Roles
Disclosure Rating
Collaboration
Contribution
Remuneration Records
Email History
More

New Task

Email

From

IP Compensation Manager <james.hurst@symphony.com>

To

Cc

Bcc

james.hurst@symphony.com X

Subject

Enter Subject...

Font

Size

B

I

U

A

Related To

TP31541/DF X

Send

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

All the correspondence between the user (IP Compensation Manager) and the inventors will be recorded in the Email History tab.

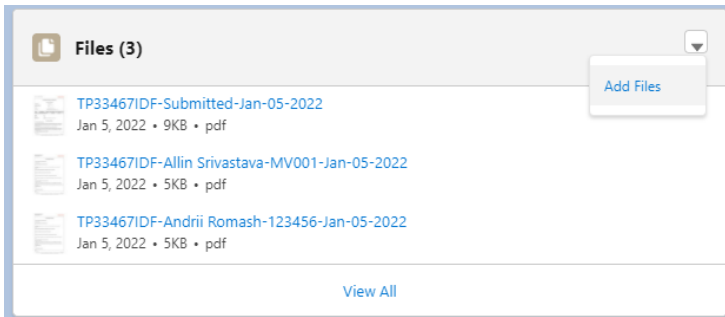
Invention Disclosure	Roles	Disclosure Rating	Collaboration	Contribution	Remuneration Records	<u>Email History</u>	More ▾
----------------------	-------	-------------------	---------------	--------------	----------------------	----------------------	--------




	Date Sent ▾	Subject ▾	To ▾	From ▾
1	Jan 13, 2022, 01:08:15 PM	Confirmation of receipt of invention disclosure TP33571IDF	✉ alind.s@maxval.com;sfdev3@maxval.com;	✉ alind.s@maxval.com
2	Jan 13, 2022, 01:13:10 PM	Invention disclosure was accepted.	✉ alind.s@maxval.com;sfdev3@maxval.com;	✉ guna.av@maxval.com
3	Jan 13, 2022, 01:13:11 PM	Invention disclosure was accepted.	✉ alind.s@maxval.com;sfdev3@maxval.com;	✉ guna.av@maxval.com

Files and ID Inventors

Files

This section includes the auto generated PDF copy of the submitted IDF and also if there are any attached documents or images related to the invention. It also allows you to add new files to the asset by selecting **Add Files** from the down-arrow on the top-right corner.



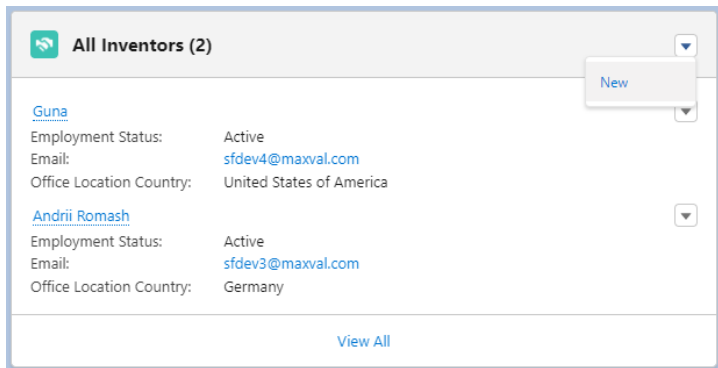
Files (3)	
	TP33467IDF-Submitted-Jan-05-2022 Jan 5, 2022 • 9KB • pdf
	TP33467IDF-Allin Srivastava-MV001-Jan-05-2022 Jan 5, 2022 • 5KB • pdf
	TP33467IDF-Andrii Romash-123456-Jan-05-2022 Jan 5, 2022 • 5KB • pdf

[View All](#)

ID Inventors

This section displays all the additional inventors that were provided while submitting the Invention Disclosure.

The Inventor can add additional Inventor names by clicking the down arrow on the right corner, and selecting the **New** option.





All Inventors (2)	
Guna	Employment Status: Active Email: sfdev4@maxval.com Office Location Country: United States of America
Andrii Romash	Employment Status: Active Email: sfdev3@maxval.com Office Location Country: Germany

[View All](#)

Notes

This section allows you to add a note for this invention disclosure that will be available for counsel members and the reviewers. Similarly, the mentors, reviewer or counsel members can also add notes for a disclosure. Apart from the general notes for the disclosure, this section also displays the disclosure action and responses from respective parties.

You can add a note by clicking the down arrow, and selecting the **New** option. This allows the user to add title and relevant content to it.


Notes (1)



[New Details](#)

1/4/2022, 3:42 AM by [System Admin TF](#)

Retrieves the specified document from the envelope. If the account has the Highlight Data Changes feature enabled, set the show_changes query...

[View All](#)


New Details


 Visibility Set by Record


B


I


U














Retrieves the specified document from the envelope. If the account has the **Highlight Data Changes** feature enabled, set the show_changes query parameter to **true** highlight the changes. The response body of this method is the PDF file as a byte stream. You can get the file name and document ID from the response's Content-Disposition header|

Related to  **TP33455IDF**

Delete

Share

Add to Records

Done

Invention Completeness Check

Is the iDP Complete?

☒ Yes
☐ No

[Next](#)

Patent Review Board

* Select Patent Review Board

--None--

[Next](#)

Inventor Awards (0)

All Inventors (2)

Guna	
Employment Status:	Active
Email:	sdev-4@maxval.com
Office Location Country:	United States of America
Andri Romash	
Employment Status:	Active
Email:	sdev3@maxval.com
Office Location Country:	Germany

[View All](#)

Notes (0)

Keywords

Combined Disclosures (0)

Files (1)

TP3157DF-Submitted-Dec-10-2021
Dec 17, 2021 • 8KB • pdf

[View All](#)

Each action that needs to be undertaken will have associated docket activities based on the decision of the IP Compensation Manager.

1. Docket ID - unique ID given to the docket action, User can view the docket record by clicking on the ID
2. Activity Date - Date when the docket action was created
3. Action - Action associated with the created docket record.
4. Due Date - Deadline before which the action assigned to the docket record.
5. Closed - The docket action will be checked as closed if no action is taken on the docket.
6. Completed- The docket action will be checked if the docket action has been successfully completed.

Invention Disclosure

TP33526IDF

Submitted Date

1/11/2022

Disclosure Status

Submitted

Invention Jurisdiction

[United States of America](#)

First Named Inventor

[Charita Krishna](#)

Business Unit

[AIG-CMD-AAT-CIDTEC Liverpool, NY \(BU\)](#)

Docket Activities (2)

2 items • Updated a few seconds ago

	<div><div></div><div></div></div> Docketing Acti...	<div><div></div><div></div></div> Activity Date	<div><div></div><div></div></div> Actions	<div><div></div><div></div></div> Due Date	<div><div></div><div></div></div> Is Closed	<div><div></div><div></div></div> Is Complet...	
1	<div><div></div><div>DA-0000311029</div></div>	1/11/2022	Notice of defect	3/10/2022	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>
2	<div><div></div><div>DA-0000311030</div></div>	1/11/2022	IDF deemed complete - Due	3/11/2022	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>

View All

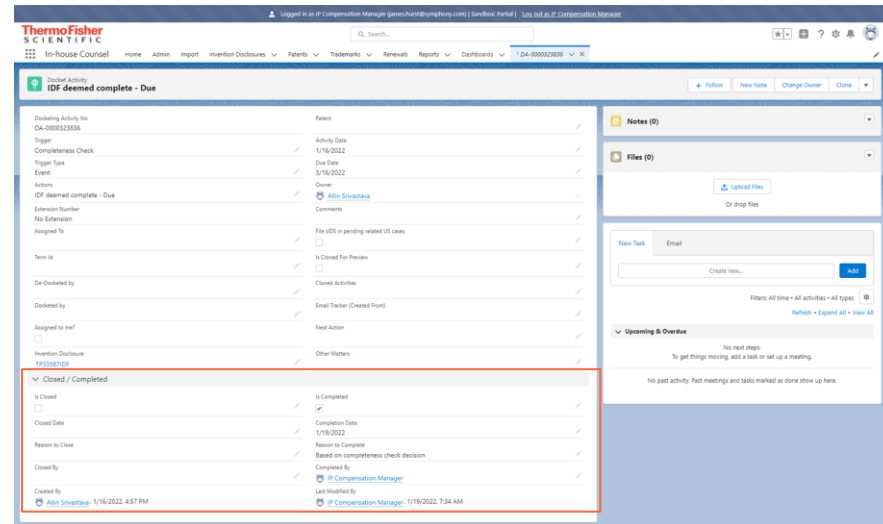
Sample Docket Record

All docket records have either two status

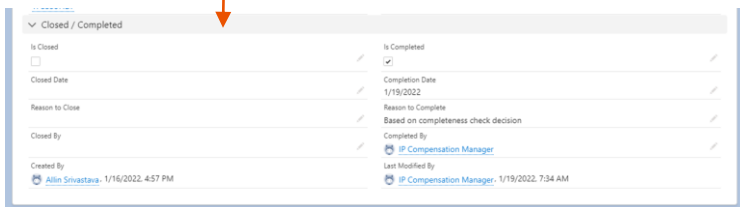
1. Closed - If no action is being taken for the docket record, the docket is checked as closed
2. Complete - when the action assigned to the docket activity is finished and moved to the next process, it is checked as completed.

All docket activities, either closed or completed have the reason mentioned in the docket record as shown below.

In case of auto-closure of docket record based on completeness check, the reason is auto-populated by system.



Closed / Completed	
<input type="checkbox"/> Is Closed	<input checked="" type="checkbox"/> Is Completed
Closed Date	Completion Date
Reason to Close	Reason to Complete
Closed By	Completed By
Created By	Last Modified By



Closed / Completed	
<input type="checkbox"/> Is Closed	<input checked="" type="checkbox"/> Is Completed
Closed Date	Completion Date
Reason to Close	Reason to Complete
Closed By	Completed By
Created By	Last Modified By



Action

- **Confirm Group, Division and Business Unit**
- **Assign Patent Review Board**
- **Completeness Check**



Change Assigned Business Unit (Optional)

The user can change the assigned Group, Division and Business Unit that was previously selected by the Primary inventor at the time of ID submission.

This action is not a mandatory requirement,

Confirm Group, Division and Business Unit.

Click on "Finish" to update the following details:

IDF Docket Number: **TP33526IDF**

Group: **AIG**

Division: **CMD**

Business Unit: **AIG-CMD-AAT-GC/GCMS Milan (BU)**

[Previous](#) [Finish](#)

1

Confirm Group, Division and Business Unit

Current Group: **AIG**

Current Division: **CMD**

Current Business Unit: **AIG-CMD-AAT-CIDTEC Liverpool, NY (BU)**

Change? ☐ No

[Next](#)

2

Current Group: **AIG**

Current Division: **CMD**

Current Business Unit: **AIG-CMD-AAT-CIDTEC Liverpool, NY (BU)**

Change? ☒ Yes

Edit/Enter new values below.

* New Group

AIG

* New Division

CMD

* New Business Unit

AIG-CMD-AAT-CIDTEC Liverpool, NY (BU)

--None--

AIG-CMD-CMD Division Office

AIG-CMD-Applied Technologies (BU)

✓ AIG-CMD-AAT-CIDTEC Liverpool, NY (BU)

AIG-CMD-AAT-GC/GCMS Austin (BU)

AIG-CMD-AAT-GC/GCMS Milan (BU)

AIG-CMD-AAT-Micro GC Enschede (BU)

AIG-CMD-AAT-Bremen IOMS (BU)

AIG-CMD-AAT-Laboratory Automation-Burlington, ON (BU)

AIG-CMD-AAT-Automated Incubators Langensbold (BU)

AIG-CMD-AAT-Bremen TEA (BU)

Completeness Check

The submitted IDF can be reviewed for completeness of the submitted details. If selected Yes (1a and 1b), then the IDF is deemed complete and moved to next action.

If selected No (2a and 2b), then the IDF is returned to the inventor(s) where they can add the details as requested by the reviewer.

2b

Invention Completeness Check
Please provide comments for the specific information you are expecting from the inventor(s).
* Comments

Complete this field.

Previous
Next

1a

Invention Completeness Check
* Is the IDF Complete?
☒ Yes
☐ No

Next

1b

The Invention Disclosure was successfully accepted

Finish

2a

Invention Completeness Check
* Is the IDF Complete?
☐ Yes
☒ No

Next

Docket Activity - Completeness Check

- (1) If the completeness check is selected as Yes,
 - the Notice of Defect is Closed since no revision has been requested.
 - IDF deemed complete-Due is completed since completeness check has been completed.
- (1) If the completeness check is selected as No
 - A new docket activity will be created as IDF revision due to track the revision request to the inventors.
 - the notice of defect is completed because the revision has been requested and,
 - IDF deemed compete-Due is closed since the completeness check has failed.

1

Docketing Activi...	Activity Date	Actions	Due Date ↑	Is Closed	Is Completed	
DA-0000311728	1/12/2022	Notice of defect	3/11/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
DA-0000311729	1/12/2022	IDF deemed complete - Due	3/12/2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	▼

2

Docket Activities (3)							⚙	🔍	New
3 items • Sorted by Due Date • Updated a few seconds ago									
<input type="checkbox"/>	Docketing ...	Activity Date	Actions	Due Date ↑	Is Closed	Is Completed			
1	<input type="checkbox"/> DA-0000323834	1/16/2022	IDF revision due	2/13/2022	<input type="checkbox"/>	<input type="checkbox"/>	▼		
2	<input type="checkbox"/> DA-0000311190	1/11/2022	Notice of defect	3/10/2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	▼		
3	<input type="checkbox"/> DA-0000311191	1/11/2022	IDF deemed complete - Due	3/11/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼		
View All									

Note: The revision request for the ID can happen in multiple iterations and associated docket activities will be created multiple times to track the changes

Review Board

* Select Review Board

--None--

--None--
HPLC - Germering IP Committee
ICSP - Synnyvale IP Committee
CCS - Sunnyvale
IOMS - Bremen IP Committee
LSMS - Bremen IP Committee
TEA - Bremen IP Committee
San Jose and Austin IP Committee
CMD Software IP Committe
AIG - MSG -S spectroscopy
AIG - MSD US - IPRB
AIG - MSD EU - IPRB
AIG - MSD Global - IPRB
[Test Inventor](#)

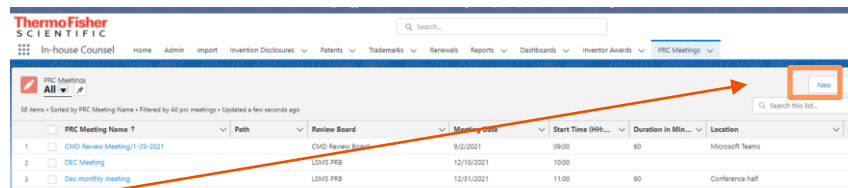
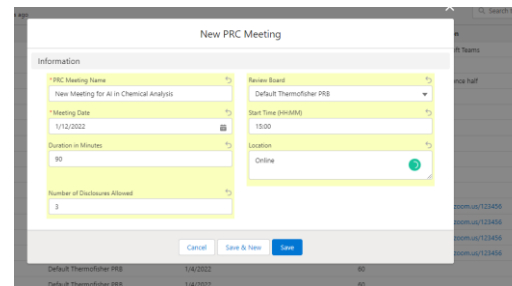
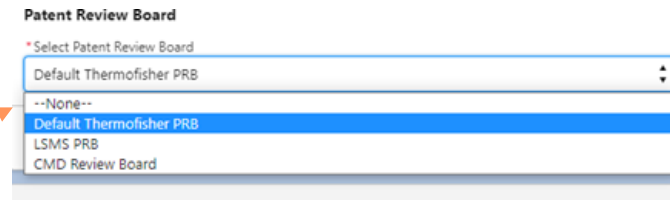
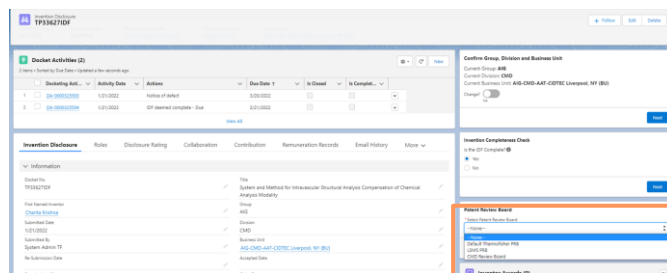
Employment Status:


Schedule PRC Meeting

The user can create a new meeting by clicking on PRC Meeting tab and clicking on the New button.

Post which they can add the details as requested and schedule the meeting to discuss the submitted IDF .

Once scheduled the user can the select the Patent Board who will be leading the meeting.






 PRC Meeting



IOMS - Bremen IP Committee

Details

Invention Disclosure Queue

 Invention Disclosure Queue (2)

New

Invention Disclosure	Invention Title	Submitted Date	Status
TP304906IDF	Test ID Actions 5	3/11/2022	Closed - Application Approved for Filing 
TP304910IDF	Test run 1	3/11/2022	Closed - Application Approved for Filing 
View All			

 No

Activi

[Ema](#)



 Upo



Patent Actions

- Patent Documents



3.2.5. Documents (cont.)

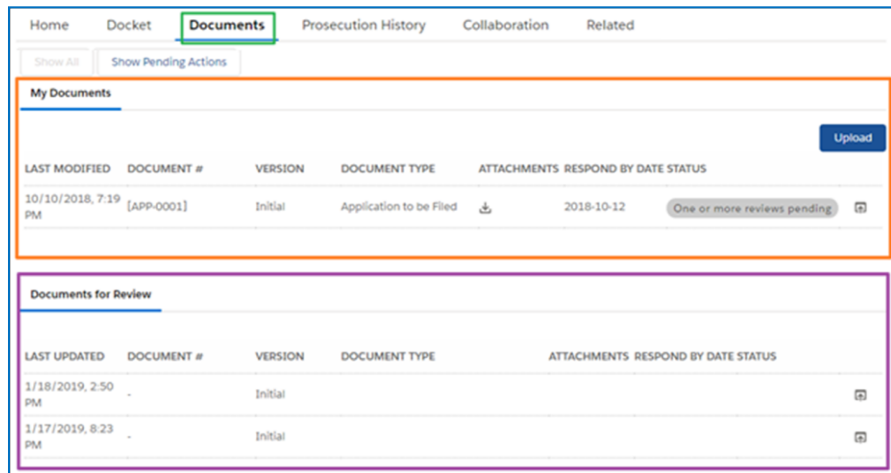
The **Documents** tab displays all the documents sent for review under the two categories listed below:





- **My Documents**

This section displays the list of document that you have uploaded from your end as a response for the review request.

- **Documents for Review**

This section displays the list of document review requests that you have received from the Outside Counsel,



Home	Docket	Documents	Prosecution History	Collaboration	Related
Show All	Show Pending Actions				
My Documents					
LAST MODIFIED	DOCUMENT #	VERSION	DOCUMENT TYPE	ATTACHMENTS	RESPOND BY DATE STATUS
10/10/2018, 7:19 PM	[APP-0001]	Initial	Application to be Filed		2018-10-12 One or more reviews pending 
Documents for Review					
LAST UPDATED	DOCUMENT #	VERSION	DOCUMENT TYPE	ATTACHMENTS	RESPOND BY DATE STATUS
1/18/2019, 2:50 PM	-	Initial			
1/17/2019, 8:23 PM	-	Initial			

This tab also takes you to the detailed document view where you can see the list of documents uploaded by outside counsel, or you have uploaded for review.

You can access the document history by using the version history icon.

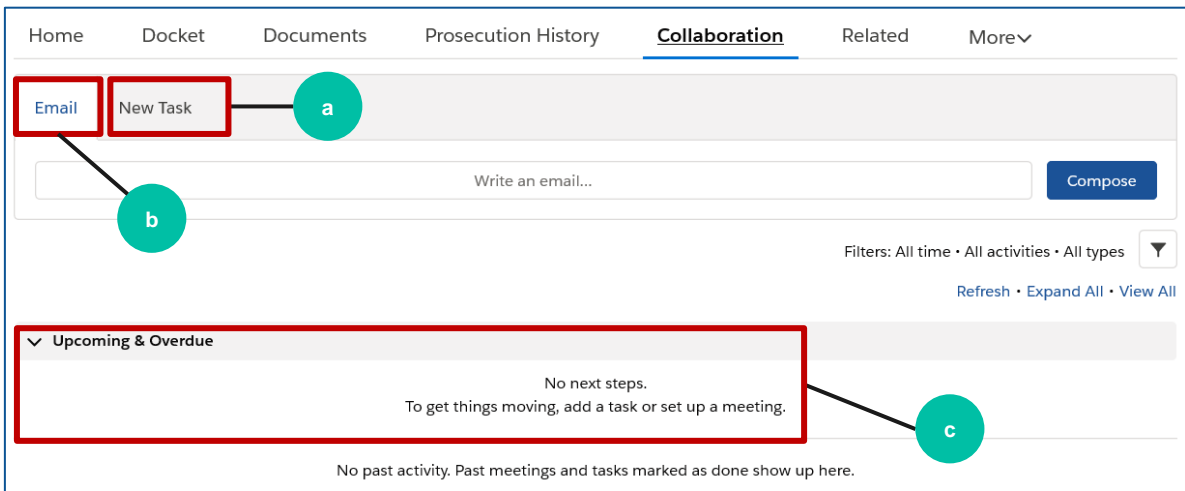
In version history you can see :

- Basic details about the review
- Reviewer's response
- Document details
- Review history along with timestamps
- Notes and attachments section for any other communication.

3.2.6. Collaboration

The **Collaboration** tab allows you to send out email, create new task and see upcoming tasks for a record.

Select the **Collaboration** tab next to **Disclosure Review** to access tasks and send emails. See the screenshot below for an overview of this tab.



a **New Task** tab allows you to create new task and assign it to relevant person.

b **Email** tab allows you to the compose and send emails.

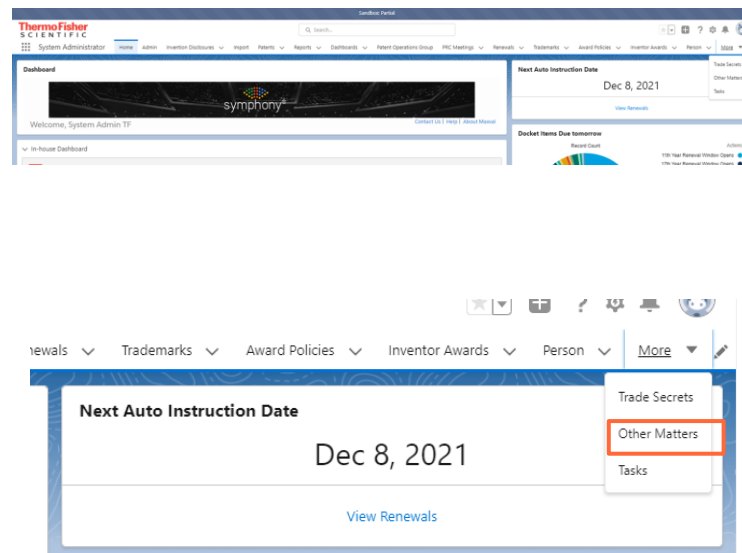
c **Upcoming & Overdue** displays list of upcoming and tasks that are overdue



Other Matters

Other Matter Record

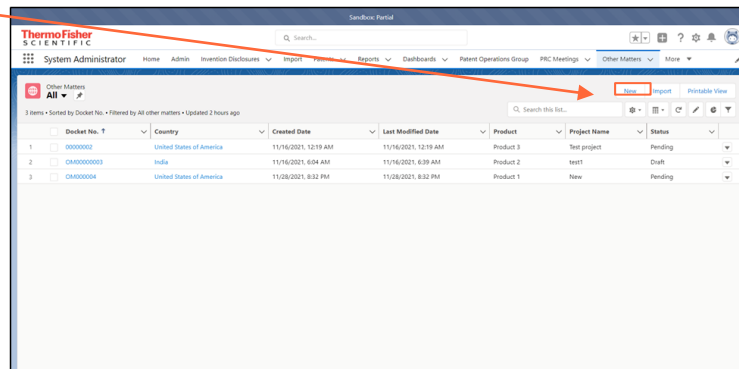
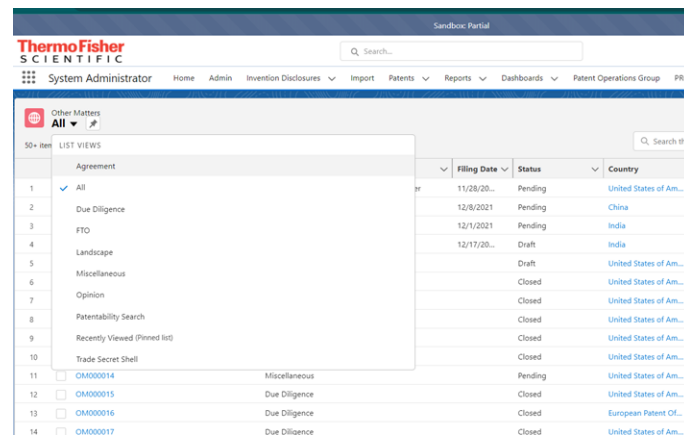
User can navigate to Other Matters module from the dropdown menu under More.



List View

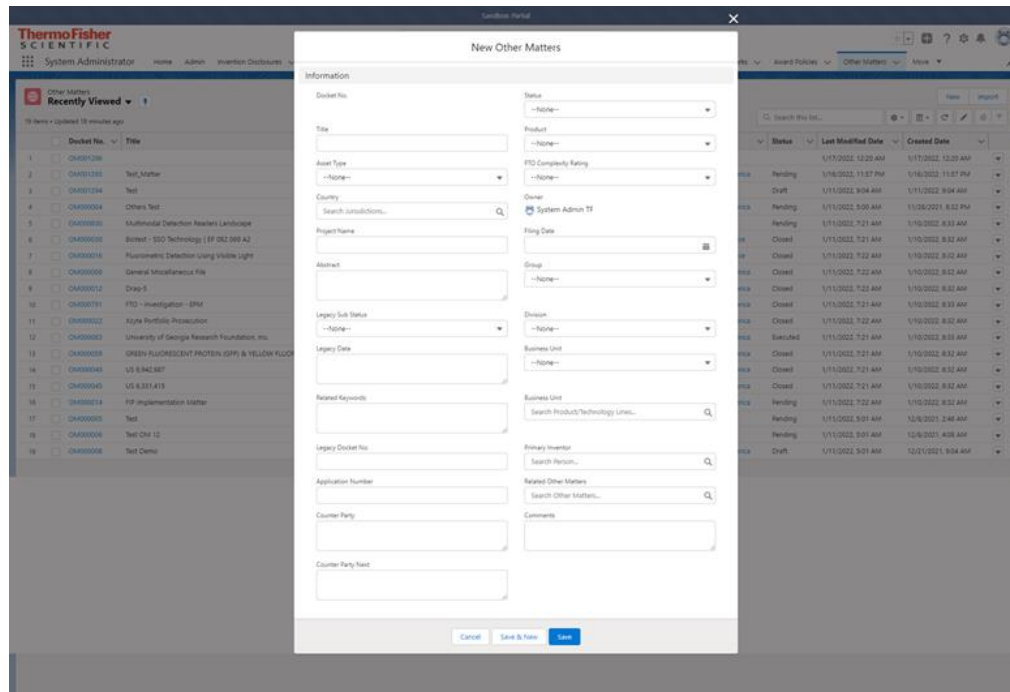
The drop down menu contains the **List view** of the other matters record. It can be filtered by different Asset Value types.

The user can create new other matter record by clicking on New on the right corner as shown here



Create a New Other Matter Record

The user can create a new record by adding all the necessary information as specified.



The screenshot displays the 'New Other Matters' form within the ThermoFisher Scientific System Administrator interface. The form is divided into two main sections: 'Information' and 'Legacy Sub Status'.

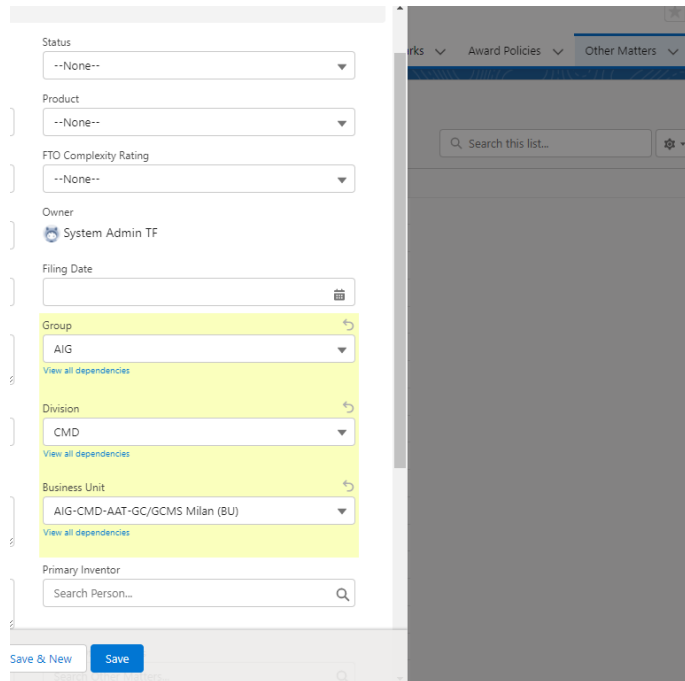
Information Section:

- Docket No.:** A dropdown menu with the value '--None--' selected.
- Title:** A text input field.
- Asset Type:** A dropdown menu with the value '--None--' selected.
- Country:** A dropdown menu with the value '--None--' selected.
- Project Name:** A text input field.
- Abstract:** A text input field.
- Legacy Sub Status:** A dropdown menu with the value '--None--' selected.
- Legacy Date:** A text input field.
- Related Keywords:** A text input field.
- Legacy Docket No.:** A text input field.
- Application Number:** A text input field.
- Counter Party:** A text input field.
- Counter Party Name:** A text input field.
- Status:** A dropdown menu with the value '--None--' selected.
- Product:** A dropdown menu with the value '--None--' selected.
- FTD Complexity Rating:** A dropdown menu with the value '--None--' selected.
- Owner:** A dropdown menu with the value 'System Admin TF' selected.
- Filing Date:** A text input field.
- Group:** A dropdown menu with the value '--None--' selected.
- Division:** A dropdown menu with the value '--None--' selected.
- Business Unit:** A dropdown menu with the value '--None--' selected.
- Business Unit:** A text input field.
- Primary Inventor:** A text input field.
- Related Other Matters:** A text input field.
- Comments:** A text input field.

Buttons: At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

Background Interface: The background shows the 'System Administrator' interface with a sidebar containing a 'Recently Viewed' list of records. The main area displays a table of records with columns for 'Status', 'Last Modified Date', and 'Created Date'.

Add Group, Division and Business Unit in Other Matter



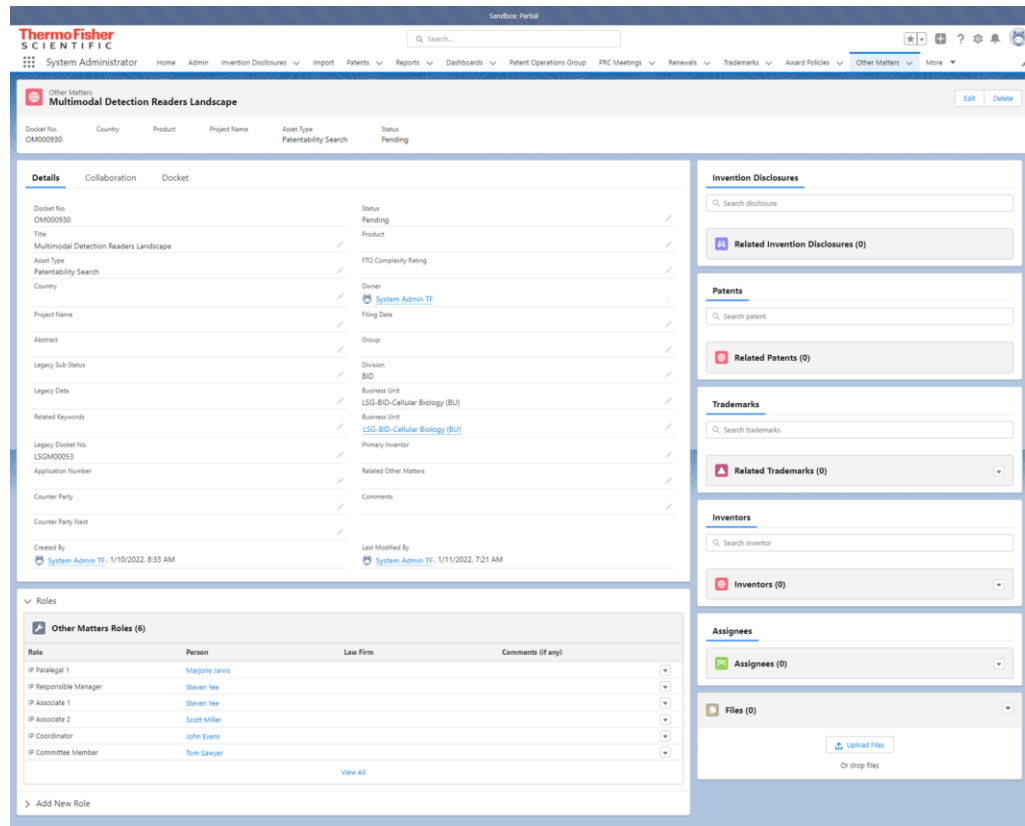
The screenshot displays the 'Other Matters' form in the Symphony IPM 3.6 application. The form is divided into several sections, each with a dropdown menu for selection and a 'View all dependencies' link. The sections are:

- Status:** A dropdown menu with '--None--' selected.
- Product:** A dropdown menu with '--None--' selected.
- FTO Complexity Rating:** A dropdown menu with '--None--' selected.
- Owner:** A dropdown menu with 'System Admin TF' selected.
- Filing Date:** A date picker field.
- Group:** A dropdown menu with 'AIG' selected. Below it is a link 'View all dependencies'.
- Division:** A dropdown menu with 'CMD' selected. Below it is a link 'View all dependencies'.
- Business Unit:** A dropdown menu with 'AIG-CMD-AAT-GC/GCMS Milan (BU)' selected. Below it is a link 'View all dependencies'.
- Primary Inventor:** A search field with the placeholder text 'Search Person...' and a magnifying glass icon.

At the bottom of the form, there are two buttons: 'Save & New' and 'Save'.

Detailed View

Post creating new other matter record, the user can view created record by clicking on the docket number.



The screenshot displays the 'Multimodal Detection Readers Landscape' record in the ThermoFisher Scientific System Administrator. The interface is divided into several sections:

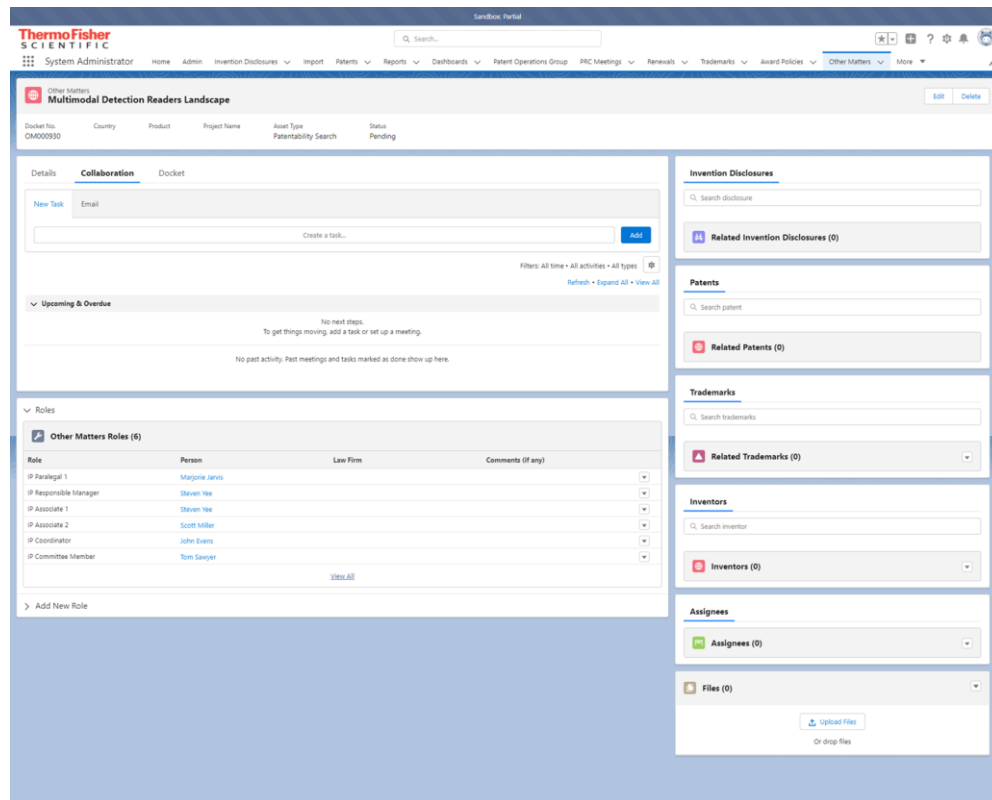
- Header:** Includes the ThermoFisher Scientific logo, a search bar, and a navigation menu with options like Home, Admin, Invention Disclosures, Import, Patents, Reports, Dashboards, Patent Operations Group, PRC Meetings, Renewals, Trademarks, Award Policies, Other Matters, and More.
- Record Overview:** Shows the Docket No. (OM000930), Country, Product, Project Name, Asset Type (Patentability Search), and Status (Pending).
- Details Tab:** A table listing various fields and their values:

Field	Value
Docket No.	OM000930
Title	Multimodal Detection Readers Landscape
Asset Type	Patentability Search
Country	
Project Name	
Abstract	
Legacy Sub Status	
Legacy Date	
Related Keywords	
Legacy Docket No.	LSGM00053
Application Number	
Counter Party	
Counter Party Next	
Created By	System Admin TF, 1/10/2022, 8:33 AM
Last Modified By	System Admin TF, 1/11/2022, 7:21 AM
- Roles Section:** A table listing roles and their assignees:

Role	Person	Law Firm	Comments (if any)
IP Paralegal 1	Marjorie Jarvis		
IP Responsible Manager	Steven Yee		
IP Associate 1	Steven Yee		
IP Associate 2	Scott Miller		
IP Coordinator	John Evans		
IP Committee Member	Tom Sawyer		
- Right Sidebar:** Contains sections for Invention Disclosures, Patents, Trademarks, Inventors, and Assignees, each with a search bar and a list of related items.

Collaboration

Use can collaborate to communicated other users and track the corresponding email history.



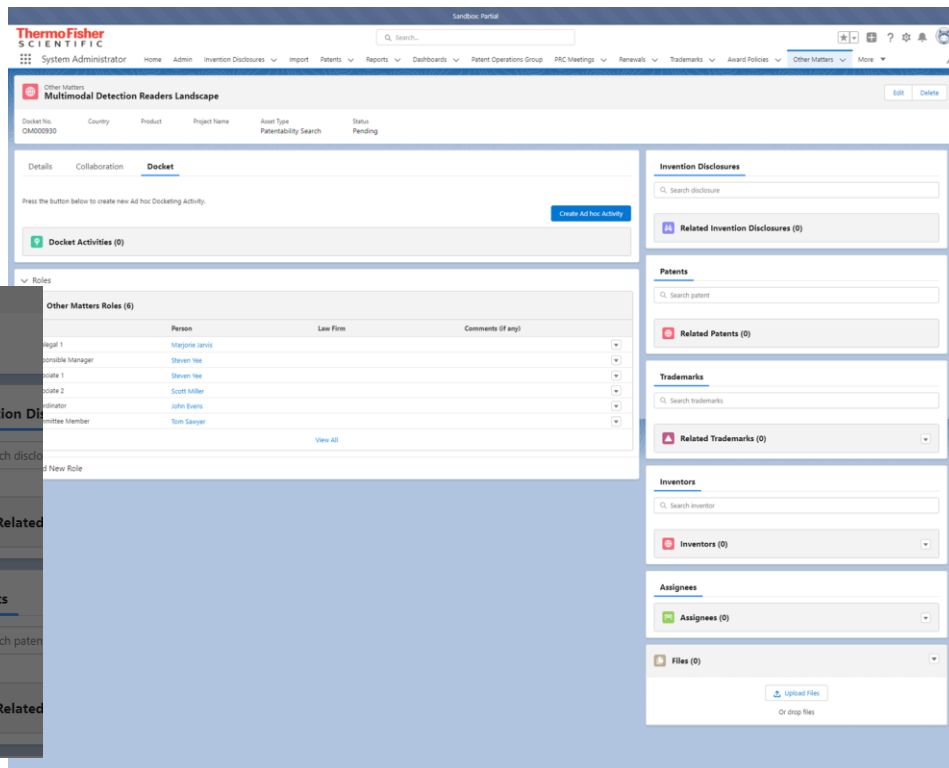
The screenshot displays the ThermoFisher Scientific System Administrator interface. The main section is titled "Multimodal Detection Readers Landscape" and shows a "Collaboration" tab. The interface includes a search bar, a list of roles, and a table of roles. The roles table lists the following roles and their associated users:

Role	Person	Law Firm	Comments (if any)
IP Paralegal 1	Margie Jarvis		
IP Responsible Manager	Steven Yee		
IP Associate 1	Steven Yee		
IP Associate 2	Scott Miller		
IP Coordinator	John Evans		
IP Committee Member	Tom Sawyer		

The interface also includes sections for "Invention Disclosures", "Patents", "Trademarks", "Inventors", "Assignees", and "Files". Each section has a search bar and a list of related items. The "Collaboration" section also includes a "New Task" form and a "Docket" section.

Docket Activity

User can create Ad hoc docket activity to track any actions related to other matter record.



The screenshot displays the ThermoFisher Scientific System Administrator interface. The main page is titled 'Multimodal Detection Readers Landscape' and features a search bar and navigation tabs. The 'Docket' tab is active, showing a 'Docket Activities' section with a 'Create Ad hoc Activity' button. A modal window titled 'Add Ad hoc activity' is open, allowing users to create new docketing activities. The modal includes fields for 'Docketing activity', 'Event date', 'Due date', and 'Comments'. The background also shows a table of 'Other Matters Roles' with columns for Person, Law Firm, and Comments.

Other Matters Roles (6)	Person	Law Firm	Comments (if any)
Legal 1	Maggie Jarvis		
Portfolio Manager	Steven Yee		
Patent 1	Steven Yee		
Patent 2	Scott Miller		
Coordinator	John Evans		
Committee Member	Tom Sawyer		

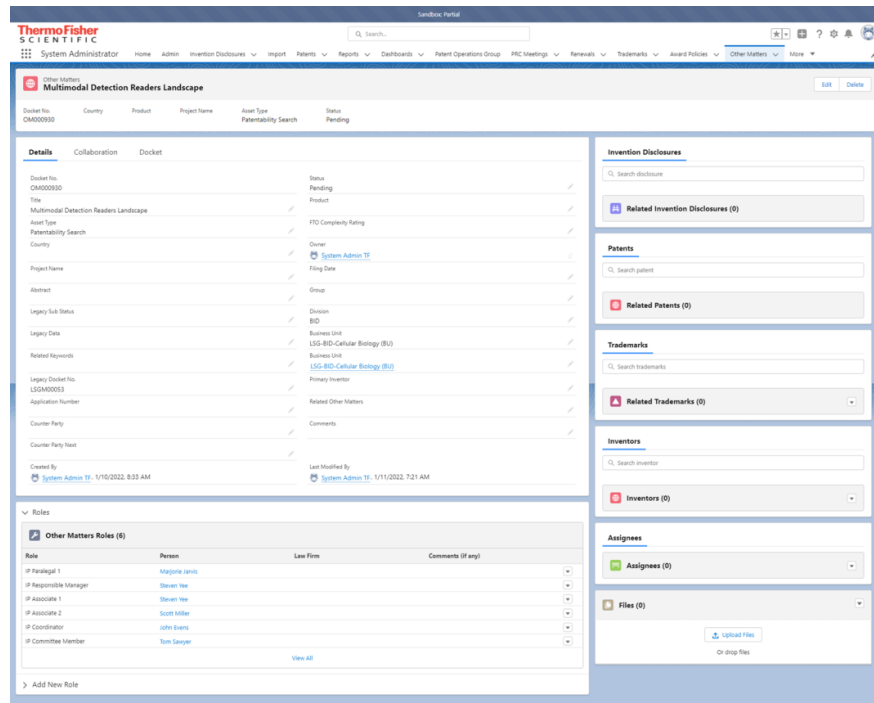
Add Associated Records and Users

The user can add the following records to the Other Matter record:

1. Invention Disclosure
2. Patent
3. Trademark

They can also add users who are :

1. Inventors
2. Assignees



The screenshot displays the 'ThermoFisher Scientific System Administrator' interface. The main section is titled 'Multimodal Detection Readers Landscape'. It includes a search bar and a table with columns: Docket No., Country, Product, Project Name, Asset Type, and Status. The table shows a single record with Docket No. OM000030, Country, Product, Project Name, Asset Type (Patentability Search), and Status (Pending).

Below the table, there are several sections for adding associated records:

- Invention Disclosures:** Includes a search bar and a list of related invention disclosures (0).
- Patents:** Includes a search bar and a list of related patents (0).
- Trademarks:** Includes a search bar and a list of related trademarks (0).
- Inventors:** Includes a search bar and a list of inventors (0).
- Assignees:** Includes a search bar and a list of assignees (0).
- Files:** Includes an 'Upload Files' button and a note 'Or drag files'.

At the bottom, there is a section for 'Roles' with a table titled 'Other Matters Roles (6)'. The table has columns: Role, Person, Law Firm, and Comments (if any). The roles listed are:

Role	Person	Law Firm	Comments (if any)
IP Paralegal 1	Maggie Jarvis	Law Firm	
IP Responsible Manager	Steven Yee		
IP Associate 1	Steven Yee		
IP Associate 2	Scott Miller		
IP Coordinator	John Evans		
IP Committee Member	Tom Sawyer		

There is a 'View all' link below the table. At the bottom left, there is a link to 'Add New Role'.

1

2

3

4

5

Roles

User can assign new roles to the Other Matters record by clicking on Add New Role (1).

They can select the list of roles as shown (2) and add the select the person they want to add by name (3) and view the updated person in Roles (4).

Roles				
Other Matters Roles (5)				
	Person	Law Firm	Comments (if any)	
IP Traveling 1	Margene Jarvis			
IP Responsible Manager	Steven Hie			
IP Associate 1	Steven Hie			
IP Associate 2	Scott Miller			
IP Coordinator	John Evans			
View All				
Add New Role				

Add New Role

Add Other Matter Role

Select the new role to create (only one).

Note: If you don't see the role here, it already exists and you need to edit the existing role to change the assigned person.

☐ PeerEngage 2

☐ Partner

☐ IP Director

☐ ICEx Partner

☐ IP Associate

☐ Previous Internal IP Contact

☐ IC

☐ IP Compensation Manager

☒ IP Committee Member

☐ IP Associate 3

☐ Consulting


☐ Agent

☐ OC Support Firm

☐ Outside Counsel Firm

☐ Other

Rules			
Other Matters Roles (6)			
Rule	Person	Law Firm	Comments (if any)
IP Paralegal 1	Margate Jarvis		
IP Responsible Manager	Steven Lee		
IP Associate 1	Steven Lee		
IP Associate 2	Scott Miller		
IP Coordinator	John Evans		
IP Committee Member	Tom Sawyer		





Appendix

1. ID status
2. ID Workflow



Appendix

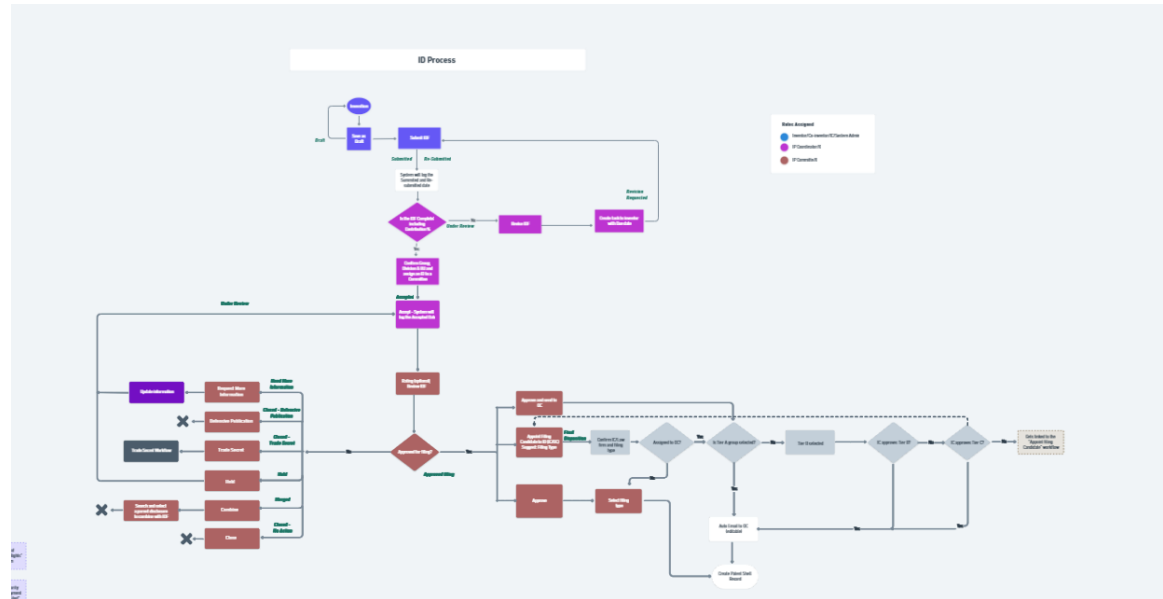
Invention Disclosure – Status

The adjacent image is the list of Status and their meaning associated with the ID process

SI No	Status	Action
1	Draft	Status indicating that the IDF is in the draft stage (yet to be submitted)
2	Submitted	Status to indicate that the invention is submitted in the system.
3	Revision requested	The status shows that the IP Co-Ordinator has requested a revision in the IDF.
4	Re-submitted	The status shows that the particular IDF has been re-submitted for review and approval.
5	Accepted	Status shows that the invention has been accepted for filing decisions.
6	Submitted -Claimed	The status specifies that the invention has been claimed by the employer from the inventor
7	Closed Released	The status specifies that the invention has been released to the inventor(s)
8	Need More Information	Status shows that the invention has been approved for filing decisions.
9	Closed-Defensive Publication	Status shows a shell record is created in place of the defensive publication
10	Closed Trade Secret	The status shows that the IDF has been closed for patent filing and is further processed under Trade Secret
11	Hold	The status shows if the IDF is put on hold by the review committee
12	Merged	The status shows that the IDF is merged with another existing IDF application
13	Closed - No Action	The status shows that the submitted IDF has been closed needing no further action on the same.
14	Approved Filing	The status shows if the filing process has been approved for further actions i.e through an In house Counsel
15	Final Dispositon	The final disposition is a status change to show that the invention is on hold before it moves to filing candidate

ID Process

The adjacent image is the workflow designed for the ID process.



Patent Access for IP Coordinator

Sl No	Action	Access
1.	Patents	Read
2.	Patents - Docketing	Read
3.	Patents - Documents	Write
4.	Patents - Related Patents	Read
5.	Patents - NOA Checklist	Read
6.	Patents - Rating	Read
7.	Patents - Email to Docketing	Read

Roles and Permissions Matrix

FIP Matter Role	Hierarchy	Symphony Profile	Invention Disclosure [Read/Write/No Access]	PRC Meeting	Patents [Read/Write/No Access]	Patents - Docketing [Read/Write/No Access]	Patents - Documents [Read/Write/No Access]	Patents - Related Patents [Read/Write/No Access]	Patents - NOA Checklist [Read/Write/No Access]	Patents - Rating [Read/Write/No Access]	Patents - Email to Docketing [Read/Write/No Access]	Awards [Read/Write/No Access]	Renewals [Read/Write/No Access]	Other Matters [Read/Write/No Access]	Trademarks [Read/Write/No Access]
System Admin	1	Admin (All access)	Full access	Full access	Full access	Full access	Full access	Full access	Full access	Full access	Full access	Full access	Full access	Full access	Full access
IP Associate 1, IP Associate 2 and IP Associate 3	8	IC	Write	Read	Read	Read	Write	Read	Read	Read	No access				
IP Coordinator	6	IC	Write	Write	Read	Read	Write	Read	Read	Write	No access				
IP Partner	7	IC	Write	Read	Read	Read	Write	Read	Read	Read	Write (restrict "Docket" action)				
IP Responsible Manager	5	IC	Write	Write	Read	Read	Write	Read	Write	Write	Write (restrict "Docket" action)				
XDiv Partner	7	IC	Write	Read	Read	Read	Write	Read	Read	Read	Write (restrict "Docket" action)				
Docketing	2	IC	Write	Write	Write	Write	Write	Write	Write	Write	Write				
IP Comp Manager	3	IC	Write	Write	Write	Write	Write	Read	Read	Read	Write (restrict "Docket" action)				
IP Paralegal 1 and IP Paralegal 2	4	IC	Write	Write	Write	Write	Write	Read	Write	Write	Write (restrict "Docket" action)				
Previous Internal IP Contact	9	IC	Read	Read	Read	Read	Write	Read	Read	Read	No access				
IP Committee Member		Reviewer	Read (Write access for Rating)	Read	No access	No access	No access	No access	No access	No access	No access				
Inventor		Inventor	Write access only for "Draft" and "Revision Requested" disclosures	Read No access	No access	No access	No access	No access	No access	No access	No access				



Thank you.

