Symphony IPMS v3.6

User Guide – IP Coordinator

Last Updated: June 2022

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 IP Coordinator 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 Coordinator/Coordinator/You/User are used interchangeably to reflect the functions performed by the IP Coordinator profile.

Revision History

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

Table of Contents

Introduction

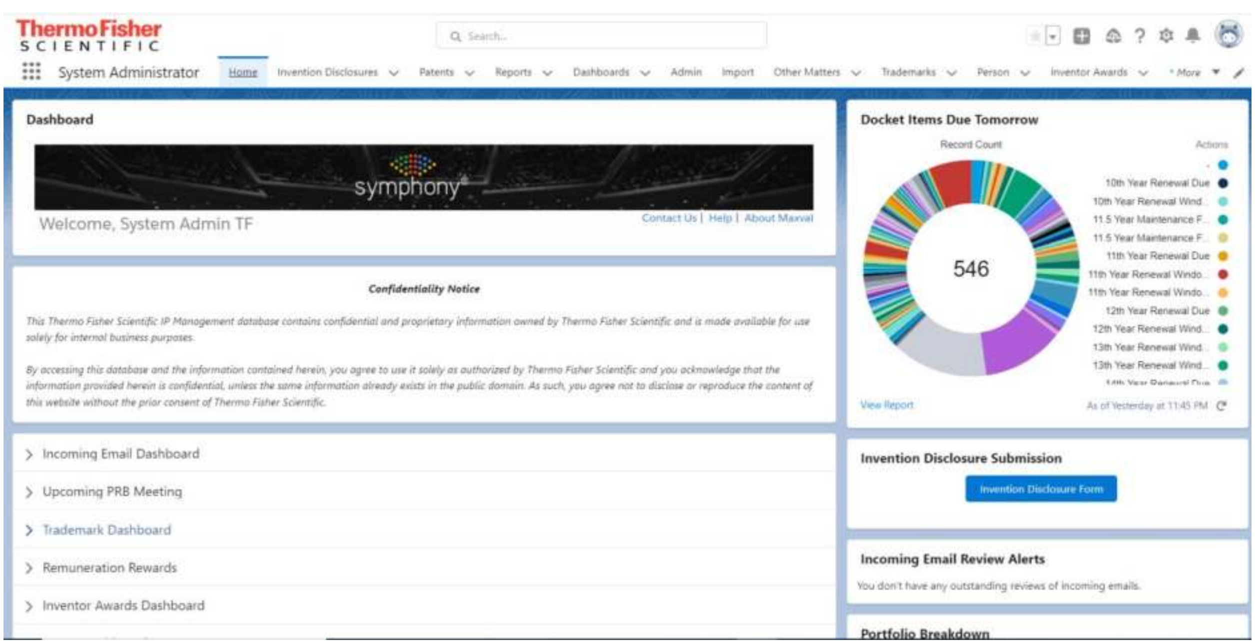
Symphony is a platform that advances the IP management capabilities of an organization. The platform simplifies the execution of complex workflows and enhances all aspects of asset management. It monitors asset prosecution and docketing status and forecasts your expenses.

Symphony also provides you options to create and manage invention disclosures, patents, 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 logon 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 you can access on Symphony. We will discuss them in more detail in the subsequent sections.

- Home
- Invention Disclosures
- Patents
- Trademarks
- Reports
- Dashboards
- Other Matters
- Inventor Awards



Home

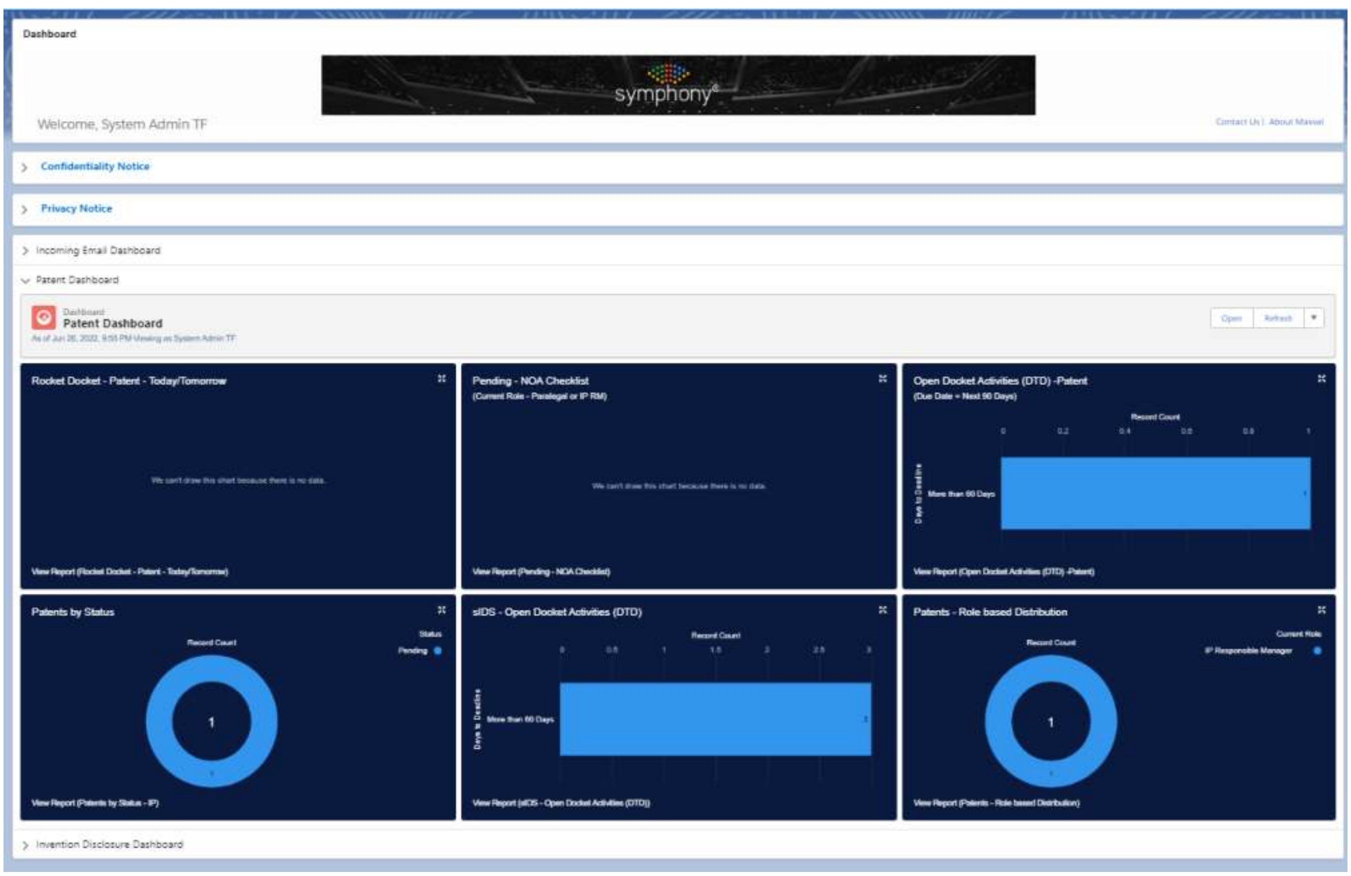
The ‘Home’ button leads you to the homepage that displays a snapshot of all the records within the portfolio. The homepage is set for the organization and cannot be modified by individual users.

You can access the following modules from the homepage:

a. Dashboards
b. Rocket Docket (Patent/ID)
c. Dashboard Reports

a. Dashboards

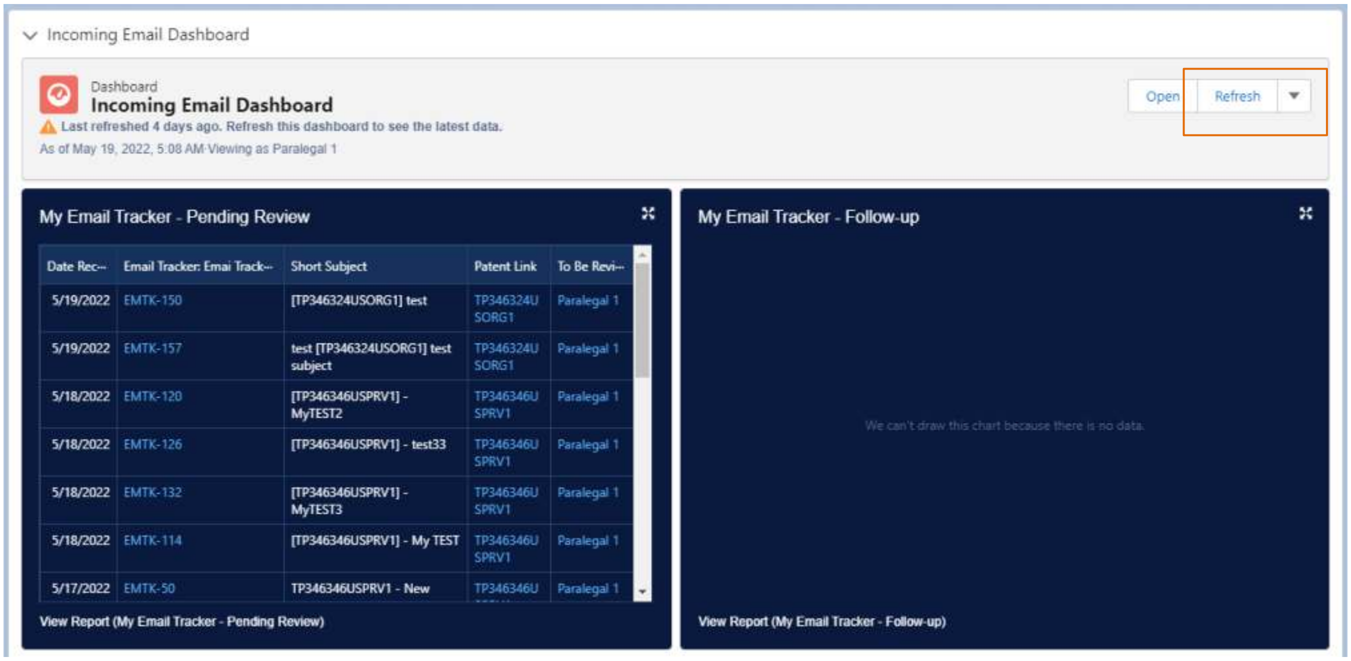
The IP Coordinator can access the dashboards on their homepage with different graphs and status updates for Invention Disclosures, Patents, Trademarks, Inventor awards, Patent Review Committee (PRC) meetings, Incoming emails, etc. These dashboards are dynamic and change as per the logged-in user.



Note: Do not forget to click ‘Refresh’ to see the latest data.

Following dashboards are available for an IP Coordinator view:

i. Incoming Email Dashboard



IP Coordinator can view the incoming emails that require review under the Incoming Email Dashboard.

ii. Patent Dashboard

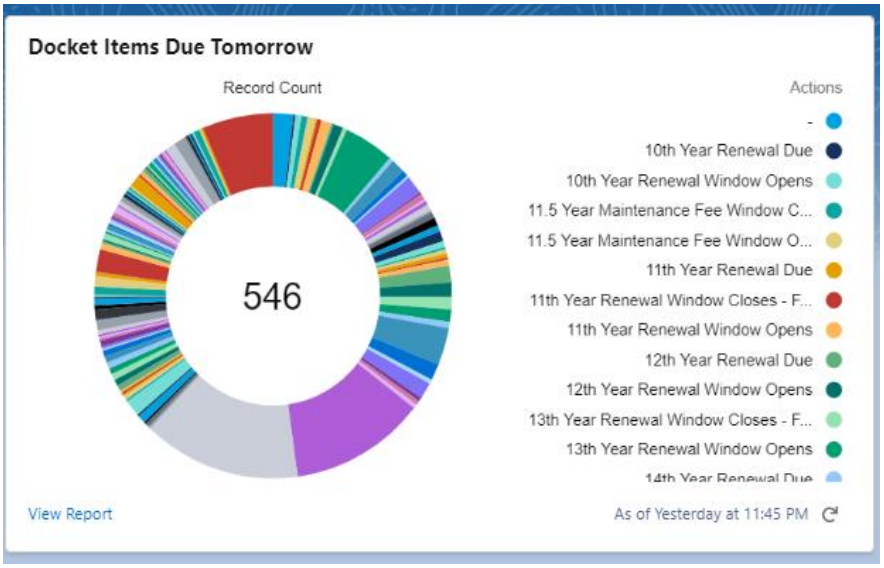
Patent Dashboard provides a quick view of the critical upcoming actions and updates on the patents that may require the IP Coordinator's attention.

iii. Invention Disclosure Dashboard

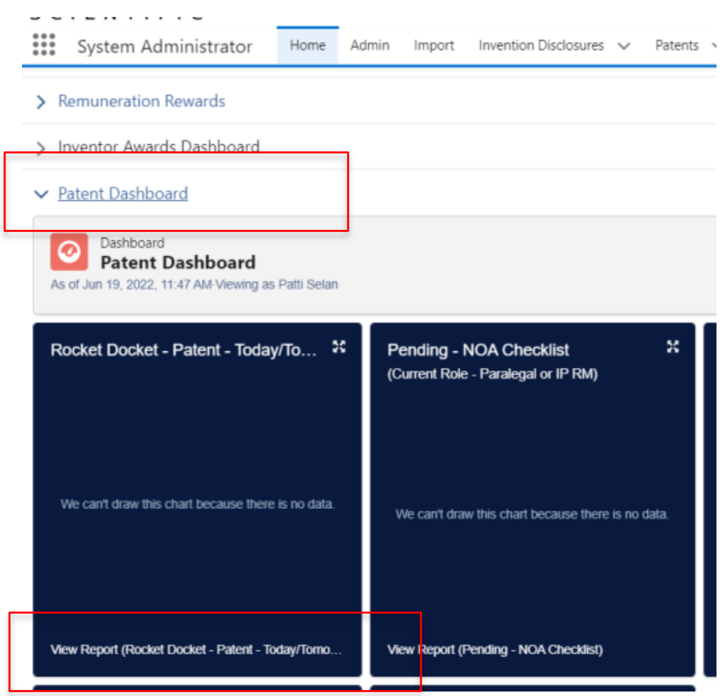
All the details related to the Invention Disclosures, their upcoming actions, etc., are provided under the Invention Disclosure Dashboard.

b. Rocket Docket

Rocket Docket report (on the right-hand side of the home page) is for the entire IP Department. It shows the actions with a due date of today's date and tomorrow or next business day date.

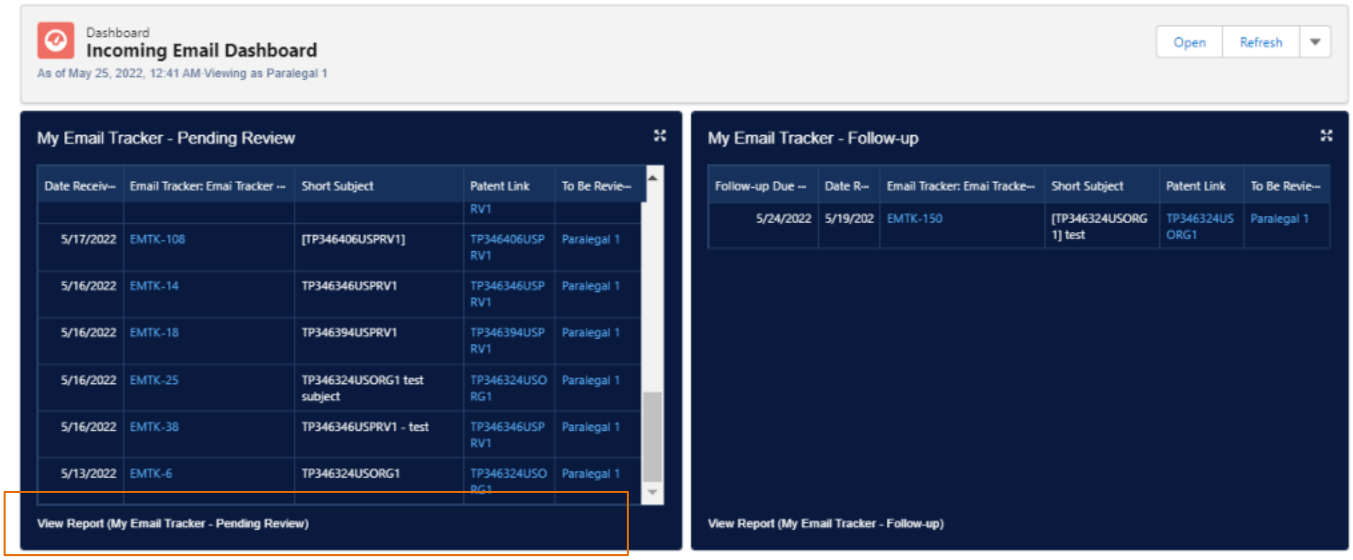


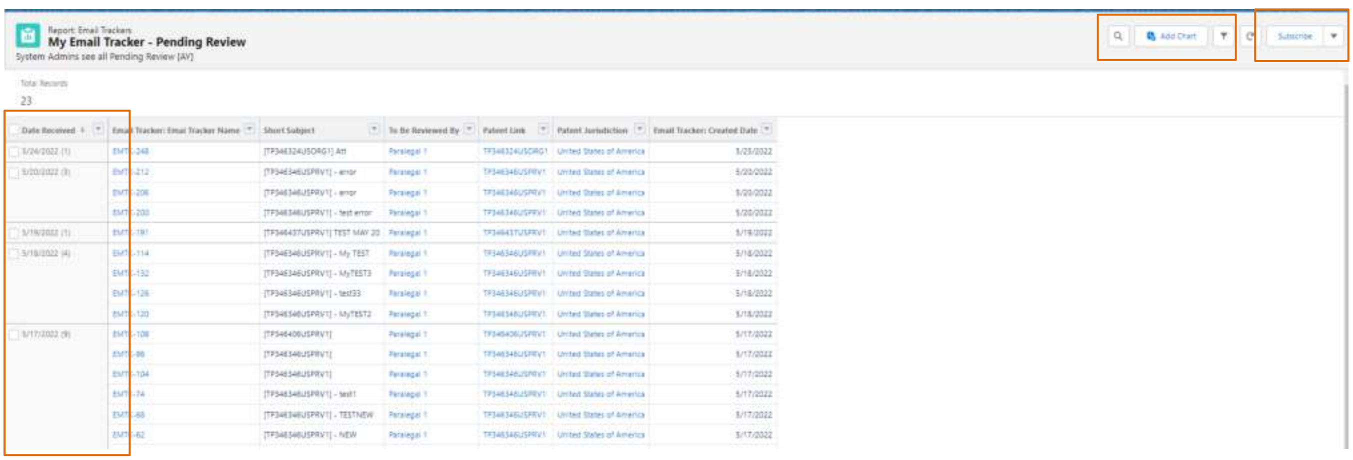
If you want to see the Rocket Docket for ***your cases only***, please expand the Patent Tab in the accordion, and click on the Rocket Docket dashlet, then click View Report.



c. Dashboard Reports

IP Coordinators can access detailed information on each dashboard by clicking the 'View Report' option at the bottom of each dashlet widget. For more information, please see **Reports**.





The following functions can customize the report's view:

- **Search**: Search any record/data that is part of the report.
- **Add Chart**: Add a chart to see the data pictorially.
- **Filter**: Filter the conditions based on which you want the current report to be shown.

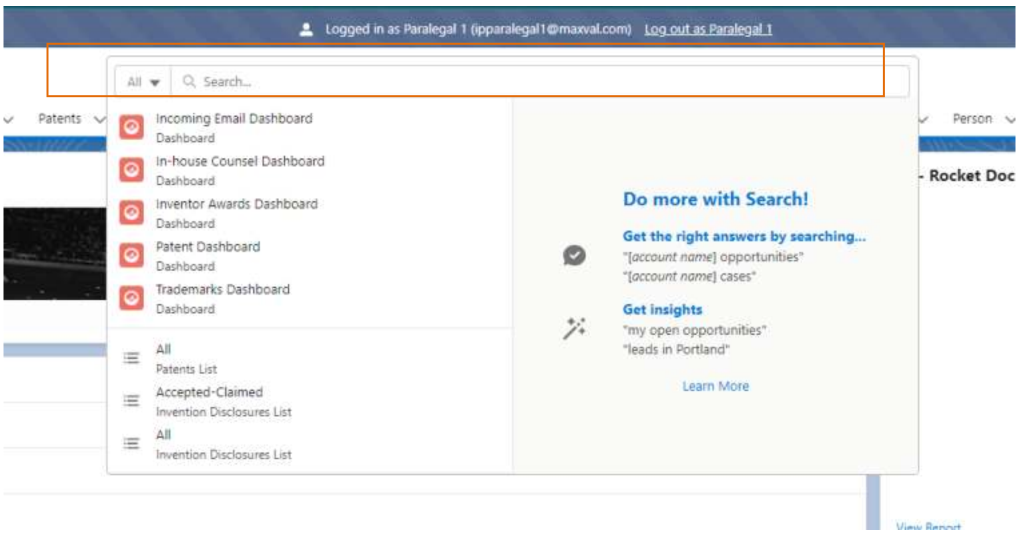
In addition to this, you can also perform the following functions on the report:

- **Subscribe** - Receive updates and notifications based on the customized frequency as selected.
- **Export** - Export the current report in excel to store in the local drive.
- **Add to Dashboard** - Create a separate dashboard by cloning the current data.

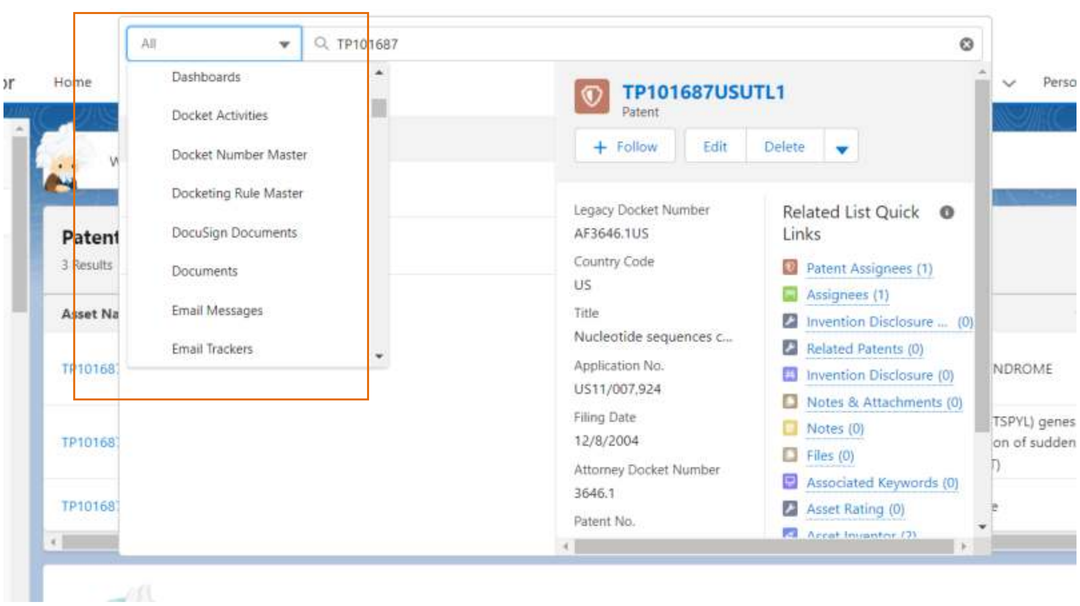
Global Search

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

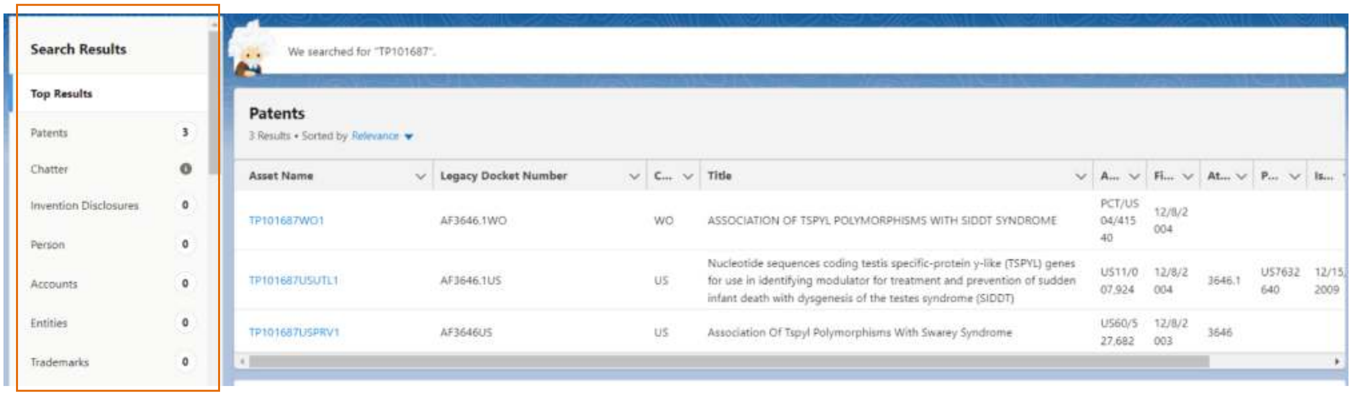
1. Provide the File number/keywords in the global search box. Note that the Symphony docket number, the legacy docket number, Application No., Patent No., etc. are all searchable in this search box.



2. If you do not want to search the entire database, but only want to search a certain module, you may also select a specific object in which you want to conduct the search.

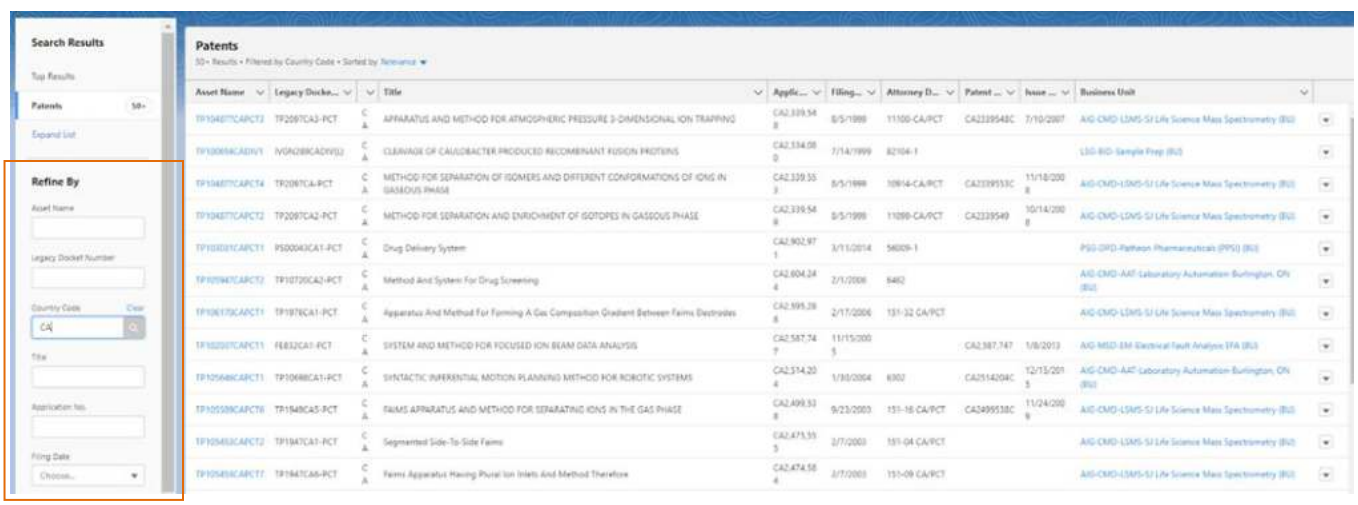


3. Once the input is provided, wait for the search results.
4. The search results will retrieve data from different objects where the given file number/keyword is present.



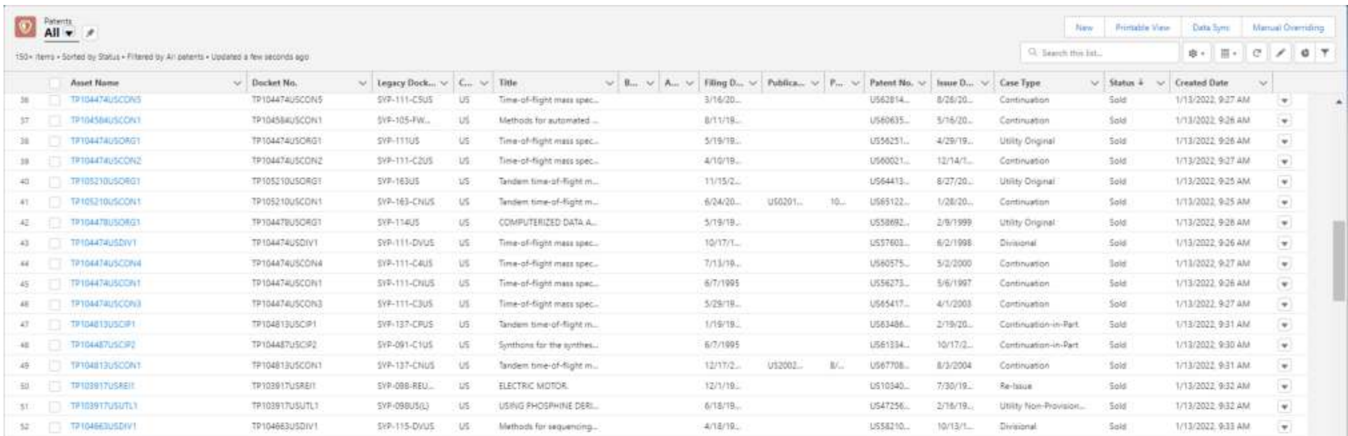
5. Click on the blue link under Asset Name column to navigate to the record.

6. You may refine the search further by selecting a particular object from the **Search Results** on the left such as Patents, Invention Disclosures, Person etc. In the search results of the selected object (Patents in the below screen), provide specific keywords in **Refine By**.



List View

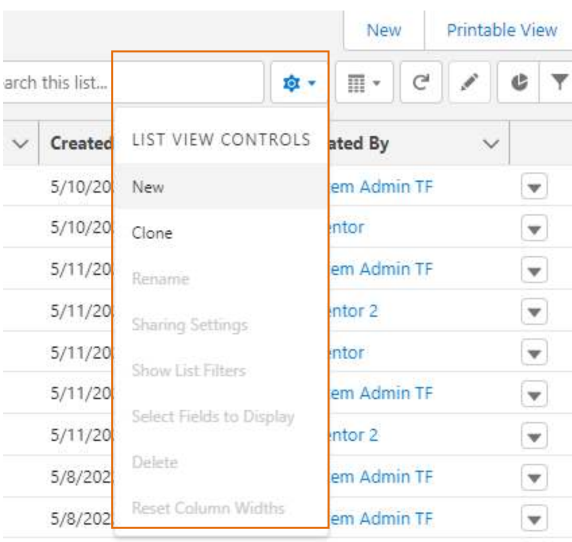
All the modules in Symphony have a list view that displays columns specific to a particular module. IP Coordinators can perform following functions to customize the list view.



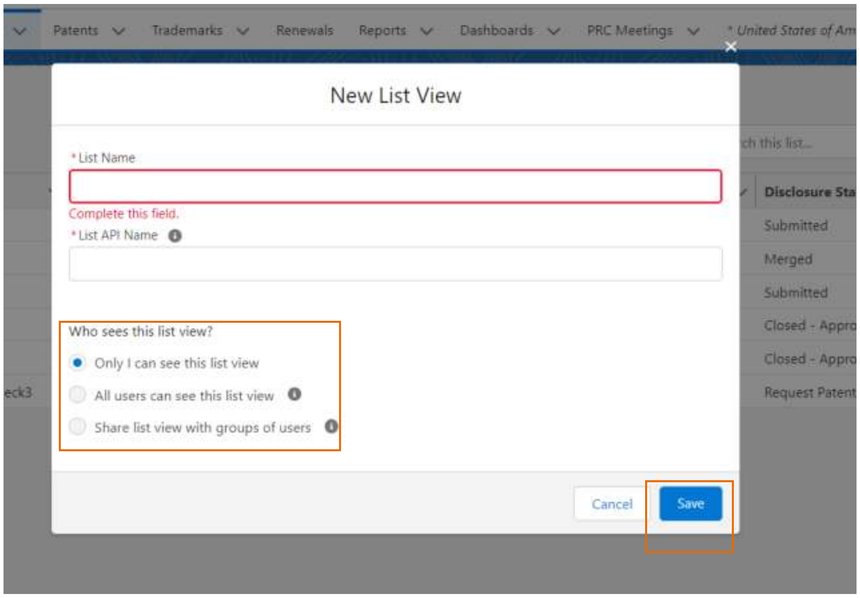
a. Create a New List

IP Coordinator can create a new list view that can only be viewed on their Symphony screen. To create a new List view, IP Coordinators need to perform the following steps:

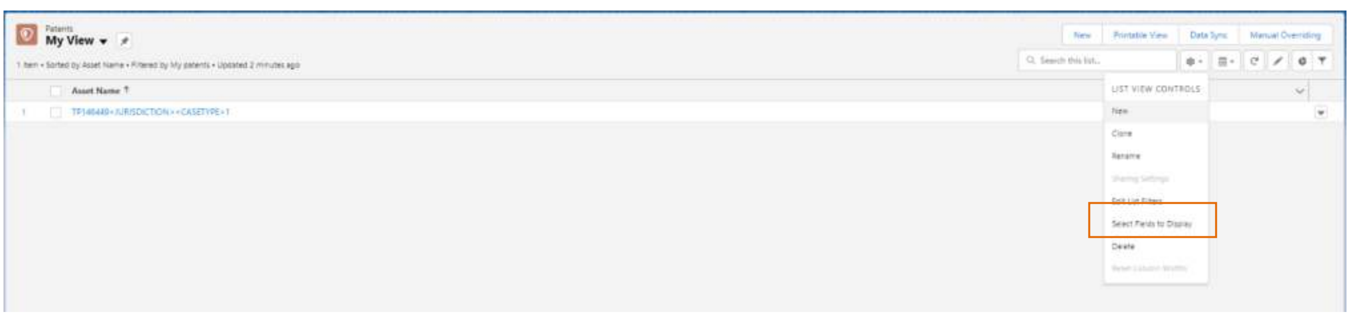
1. Click on List View Controls and select **New**.

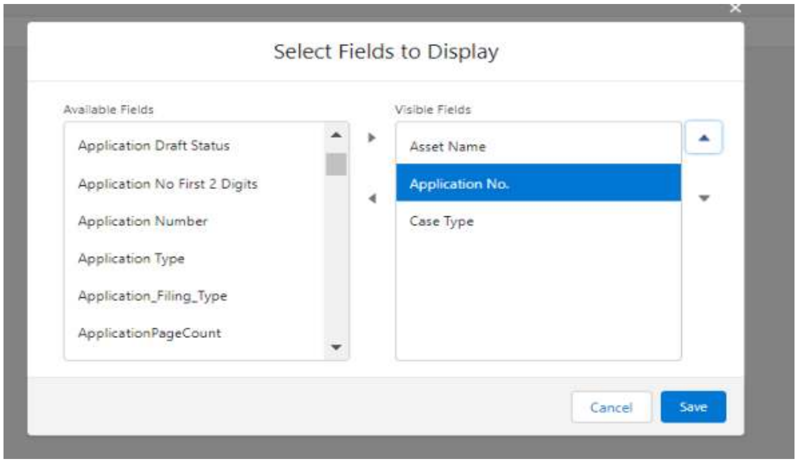


2. Add a **List Name**. List API Name gets auto populated.
3. Select permissions for the list view and click **Save**.

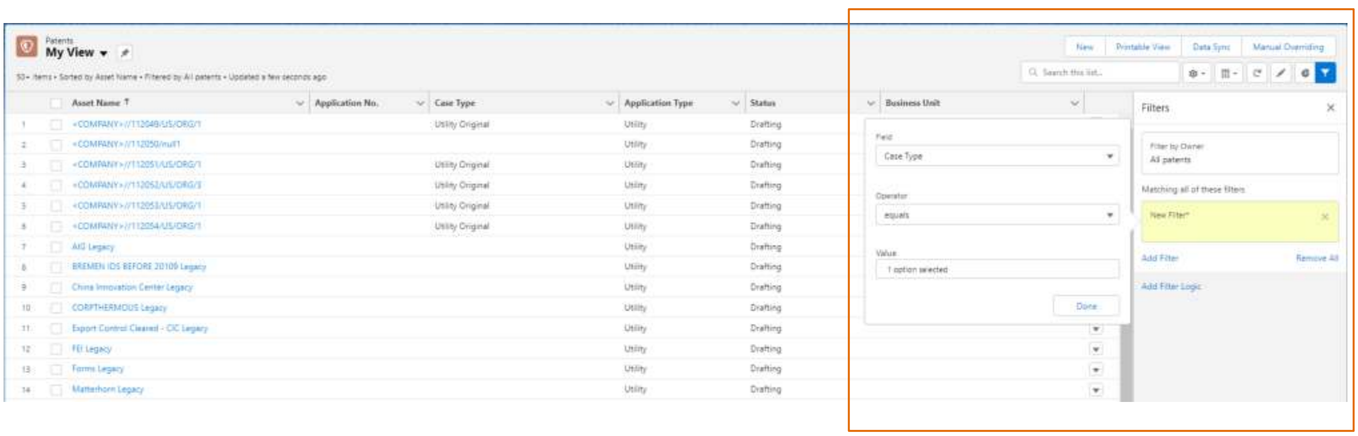


4. Once the view is created, select **Fields to Display**.



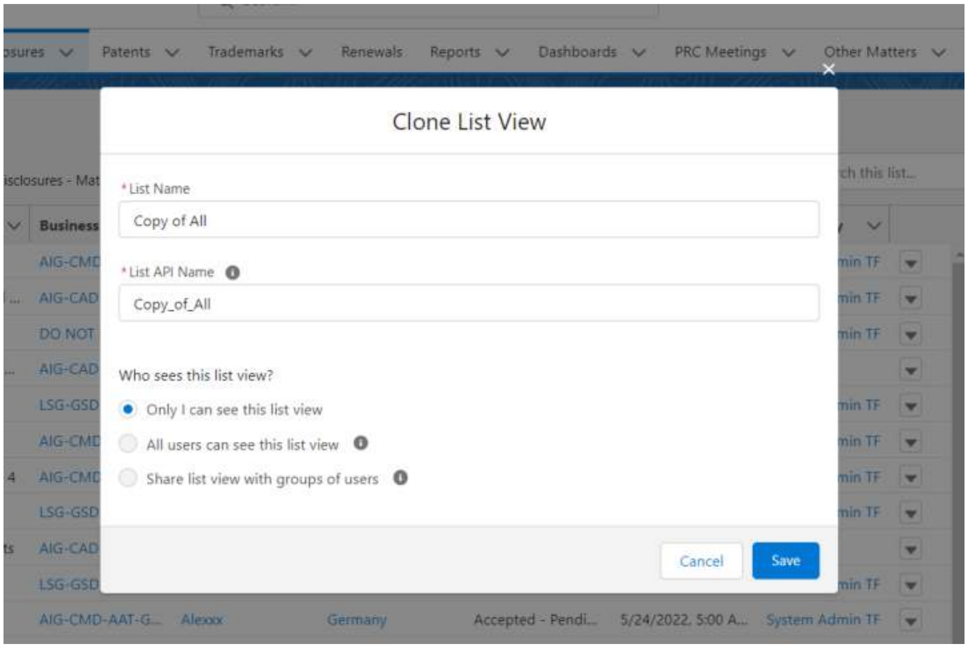


5. Once the fields are selected, apply filter conditions as required and **Save**.

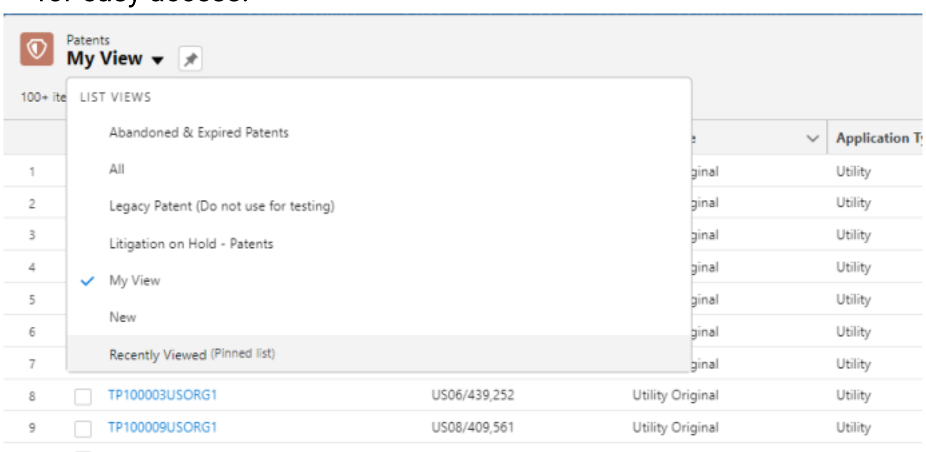


Note: Do not forget to keep **Filter by Owner** filter to **All patents**.

6. You may also create a replica of the displayed view and create your own copy. To do that, click on **Clone** from **List View Controls,** provide **List Name**, define view permissions, and select **Save**.



7. Once the **New** or **Clone** view is saved, you may be able to see it in the List View drop down for easy access.

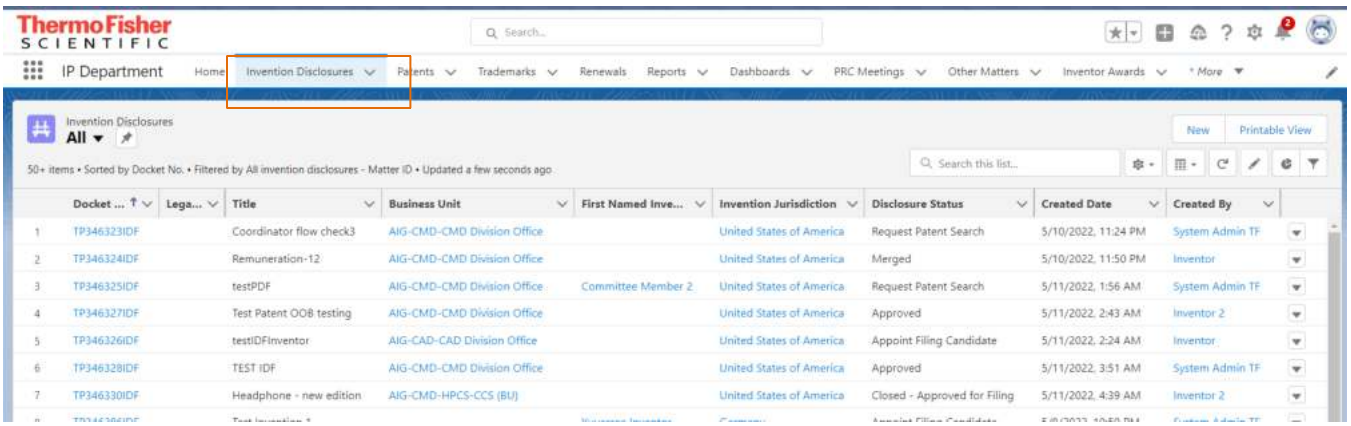


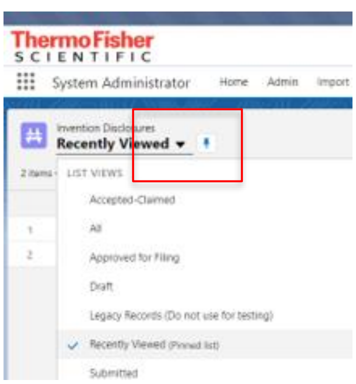
Invention Disclosure

The Invention Disclosure section allows you to view and manage the complete list of invention disclosures submitted by the inventors. The IP Coordinator can create, view, sort, and filter the list of records.

To reach this section, select the '**Invention Disclosure'** tab from the main menu. The **Invention Disclosure** page displays important asset information in a tabular format, such as Docket Number, Title, Business Unit, and more. Refer to the Asset List Table – IDF for the list of fields available.

Note: *You can view 'All' or 'Recently Viewed' patents and pin it as a default landing view by clicking on the dropdown beside 'All'*





Asset List Table - IDF

FIELD	DESCRIPTION
Docket Number	Unique identifier created automatically for the new disclosure record
Legacy Docket Number	Docket number used in the legacy patent management system
Title	Title of the Invention Disclosure Record
Business Unit	Assigned Business Unit of the Invention Disclosure Record
First Named Inventor	Displays the primary inventor of the Invention Disclosure record
Invention Jurisdiction	Displays the jurisdiction for a record
Disclosure Status	Displays the current status of the record

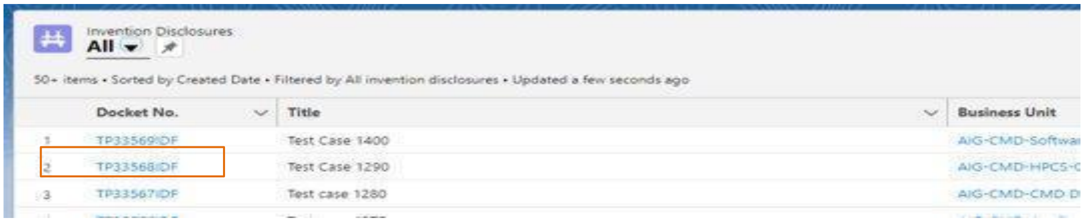
1. Submit Disclosure

This feature allows the inventor to submit an invention disclosure and track the application. The inventor can view and edit the disclosure before submitting it for review. For more details on Invention Submission, please refer to Inventor user guide.

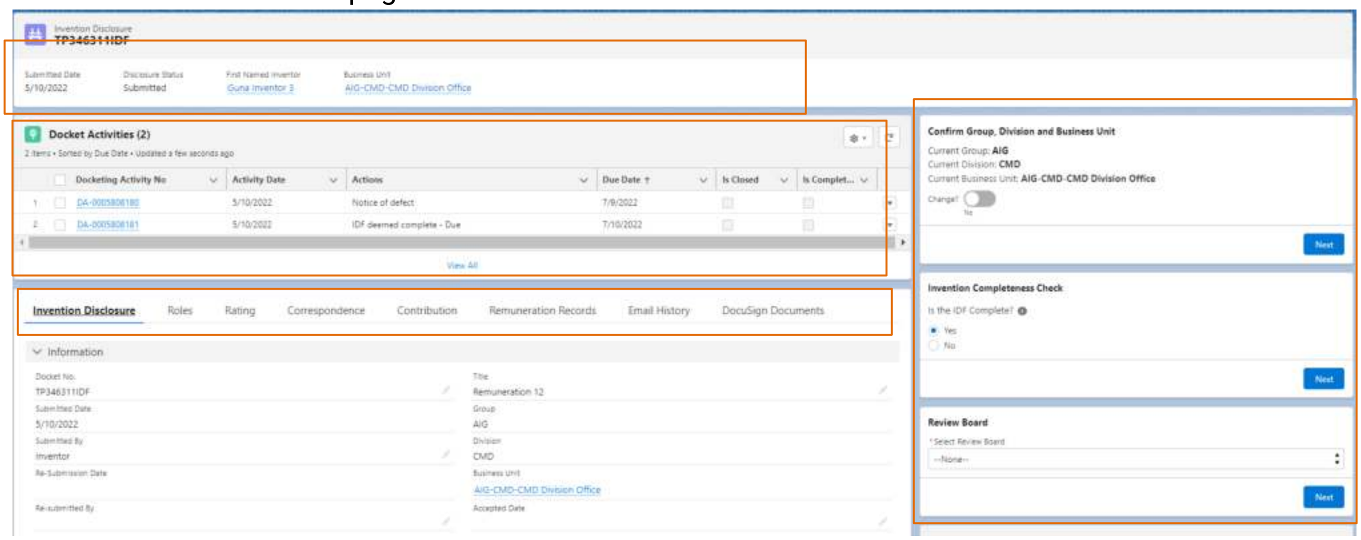
Note: After an invention disclosure is reviewed and approved, a patent shell record is created. It will be displayed in the Related Patent section (refer to the **Invention Disclosure** for more information).

2. View Disclosure (Asset Detailed View)

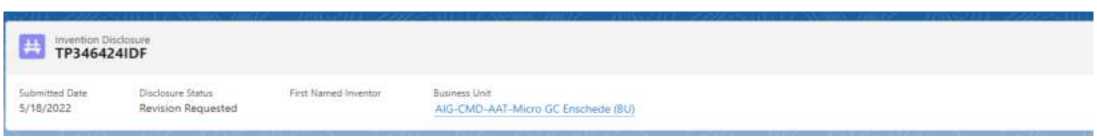
To view the Invention Disclosure assets present in the portfolio, click the **Invention Disclosure** tab and click the **Docket Number** that you want to view.



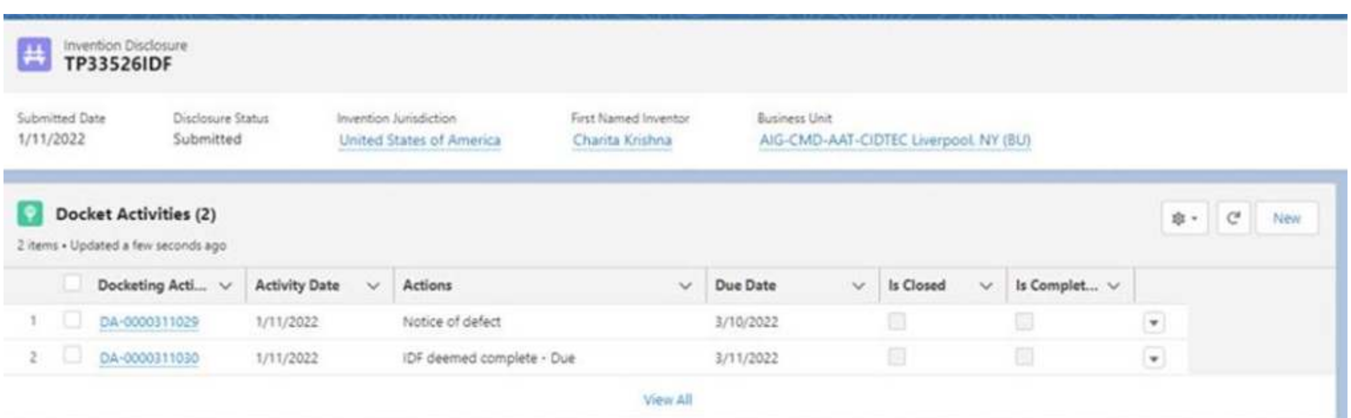
The Invention Disclosure page is divided into four sections:



Top ribbon includes basic bibliographic information related to the asset, such as Docket Number, Submitted Date, Disclosure Status, Primary/First Names Inventor, Business Unit, etc.



Below top ribbon, you may see **Docket Activities** created by Symphony related to the submitted disclosure.



Docket activities represent the actions that need to be performed by either the IP Coordinator or, if there is no IP Coordinator assigned to the business unit, then the IPResponsible Manager.

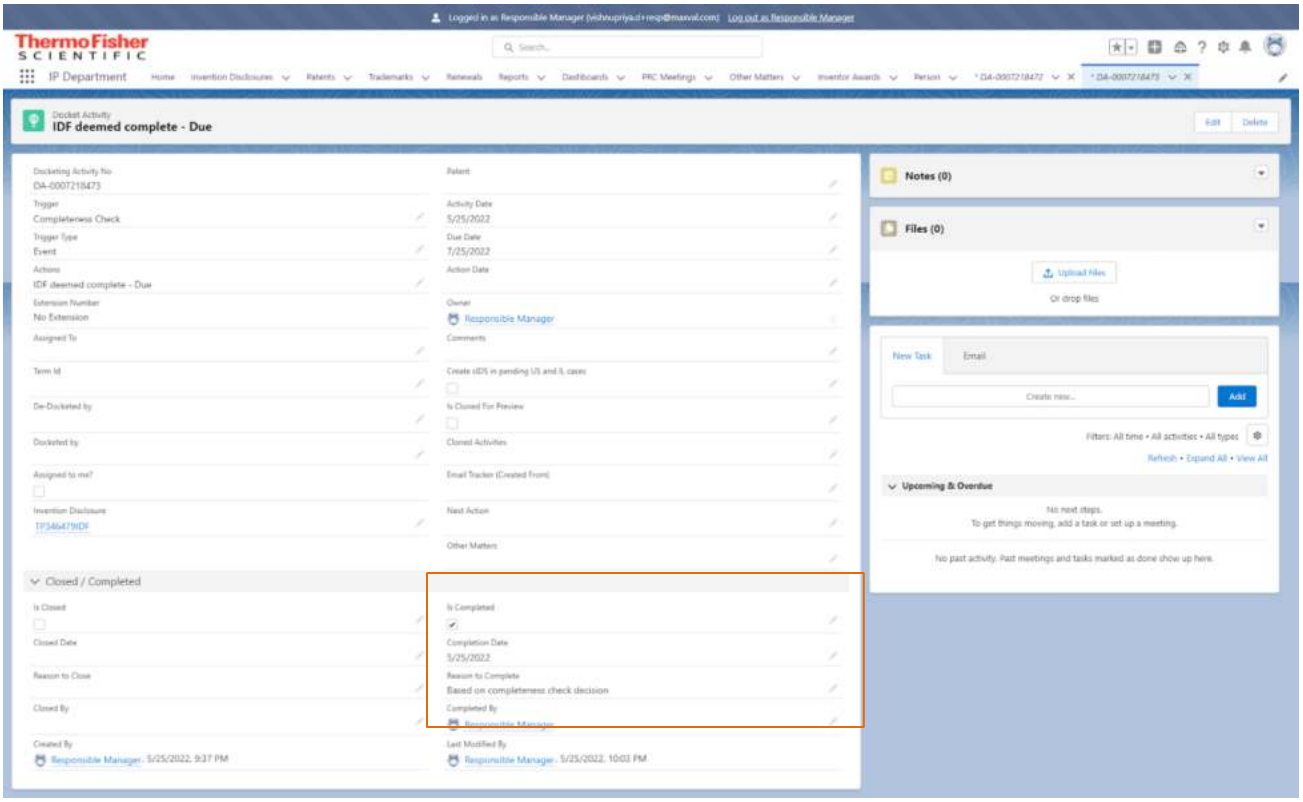
Every docket action will contain the following features:

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

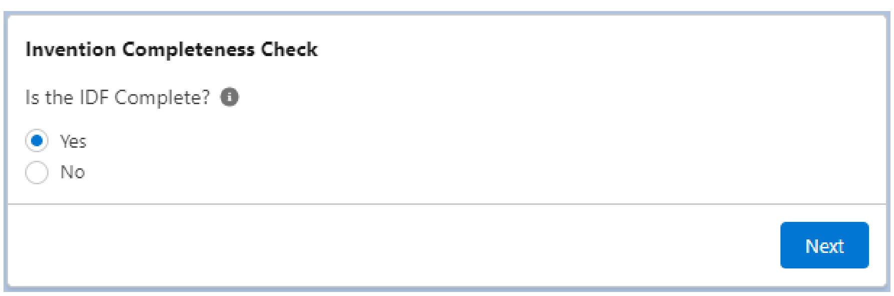
All docket records have either two statuses:

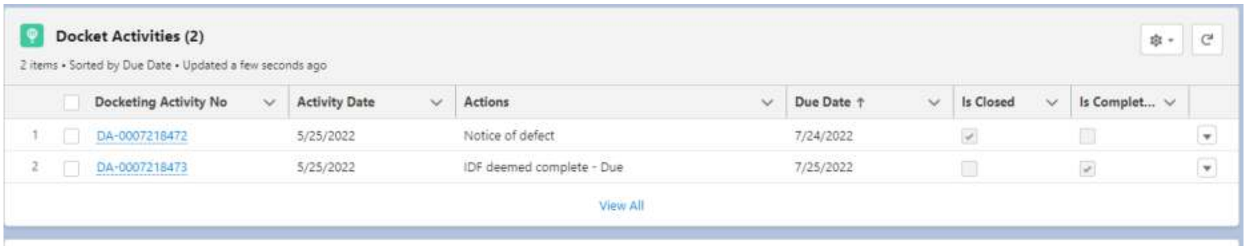
- **Closed** - If no action is being taken for the docket record, the docket is checked as closed.
- **Complete** - when the action assigned to the docket activity is finished and moved to the next process, it is checked as completed.

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



With each disclosure submission, Symphony creates 2 docket activities:
Notice of Defect – due 2 months – 1 day from the acceptance date; and
IDF deemed complete – due 2 months from the acceptance date. If the IDF is complete, then the IP Coordinator or the IP Responsible Manager can indicate it is complete and the two activities will get completed by the system.





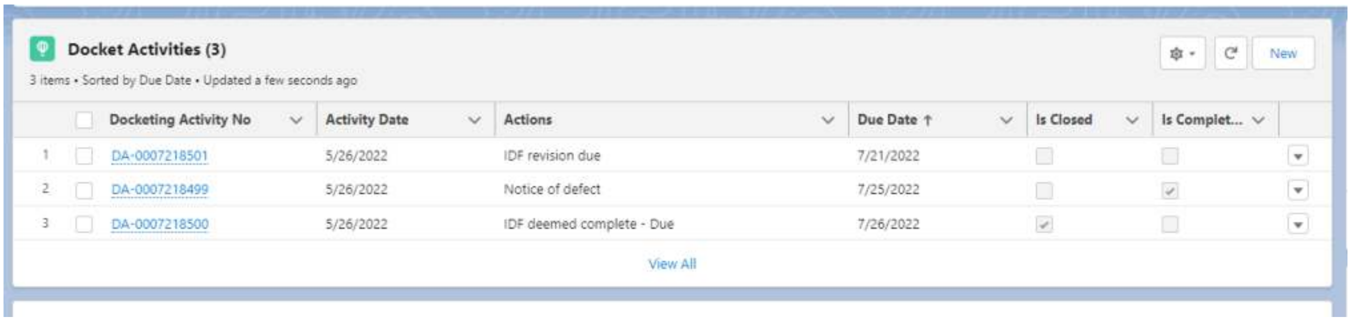
Docket Activities (2)

2 items • Sorted by Due Date • Updated a few seconds ago

	Docketing Activity No	Activity Date	Actions	Due Date ↑	Is Closed	Is Complet...
1	DA-0007218472	5/25/2022	Notice of defect	7/24/2022	✓	
2	DA-0007218473	5/25/2022	IDF deemed complete - Due	7/25/2022		✓

View All

If the disclosure requires changes or additional information, then the IP Coordinator or the IP Responsible Manager can indicate it is not complete, and then a new action of **IDF Revision Due** is auto created to track the due date for resubmission.



Docket Activities (3)

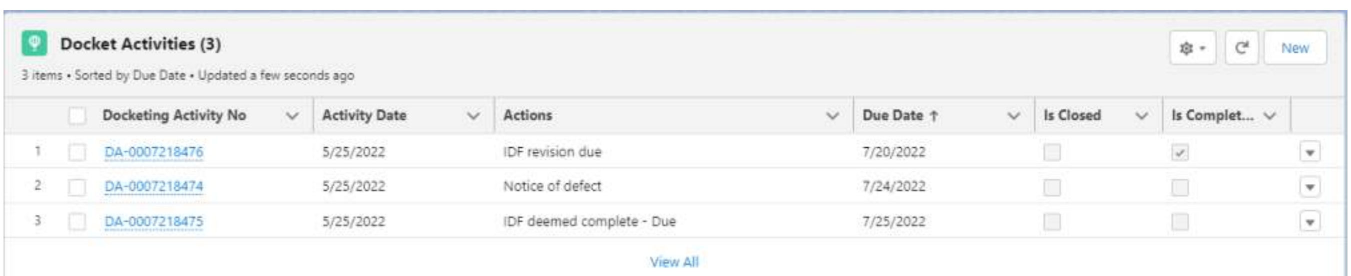
3 items • Sorted by Due Date • Updated a few seconds ago

New

	Docketing Activity No	Activity Date	Actions	Due Date ↑	Is Closed	Is Complet...
1	DA-0007218501	5/26/2022	IDF revision due	7/21/2022		
2	DA-0007218499	5/26/2022	Notice of defect	7/25/2022		✓
3	DA-0007218500	5/26/2022	IDF deemed complete - Due	7/26/2022	✓	

View All

Once the **Inventor completes the IDF,** the previous docket actions which were closed and completed (**IDF deemed complete** and **Notice of defect** respectively) will be reopened and the **IDF revision due** will be completed since the invention has been resubmitted.



Docket Activities (3)

3 items • Sorted by Due Date • Updated a few seconds ago

New

	Docketing Activity No	Activity Date	Actions	Due Date ↑	Is Closed	Is Complet...
1	DA-0007218476	5/25/2022	IDF revision due	7/20/2022		✓
2	DA-0007218474	5/25/2022	Notice of defect	7/24/2022		
3	DA-0007218475	5/25/2022	IDF deemed complete - Due	7/25/2022		

View All

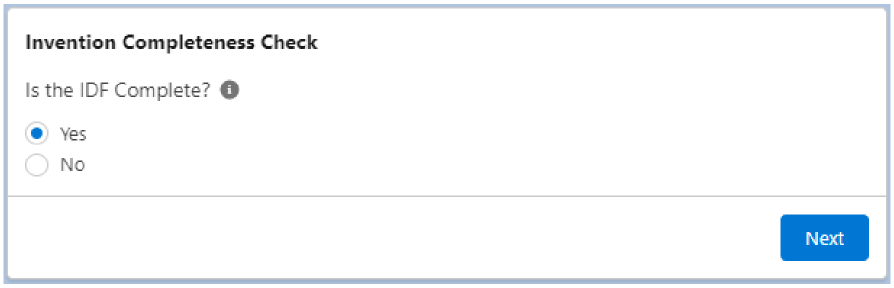
Post resubmission, the IP Coordinator or IP Responsible Manager should take the completeness check decision again to verify the updated information is accurate.

Note: There is no limitation on the number of times and IDF can be sent back for revisions.

Right-hand side widgets display other relevant information about the asset. A detailed description is given below.

- **Completeness Check**

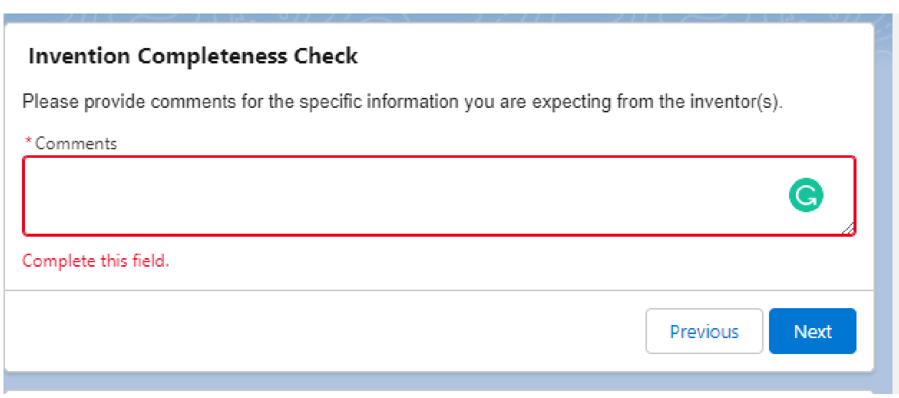
Once submitted, the Invention Disclosure will be open for review by the IP Coordinator or IP Responsible Manager to verify whether the submitted details are accurate and are aligning to the questions asked in the disclosure form.



If the submitted record has all the required information in the right order, the IP Coordinator or IP Responsible Manager can select the **Yes** in the invention completeness check widget. After making the decision, there are two major changes that takes place in the selected record:

- <u>Change in invention disclosure status</u>: Status changes from **Submitted** to **Accepted**
- <u>Change in the associated docket action</u>: Since there were no defects found, the **Notice of Defect** docket action will be closed and submitted IDF is complete, the **IDF Deemed Complete- Due** is marked as completed.

If the submitted IDF needs any change in the information added in the IDF form, the IP Coordinator or IP Responsible Manager can add the comments after selecting No in the completeness check widget which opens a comment box to add details of necessary corrections required by the inventor(s).

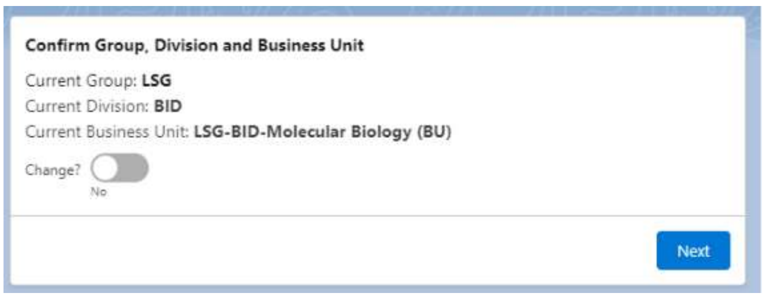


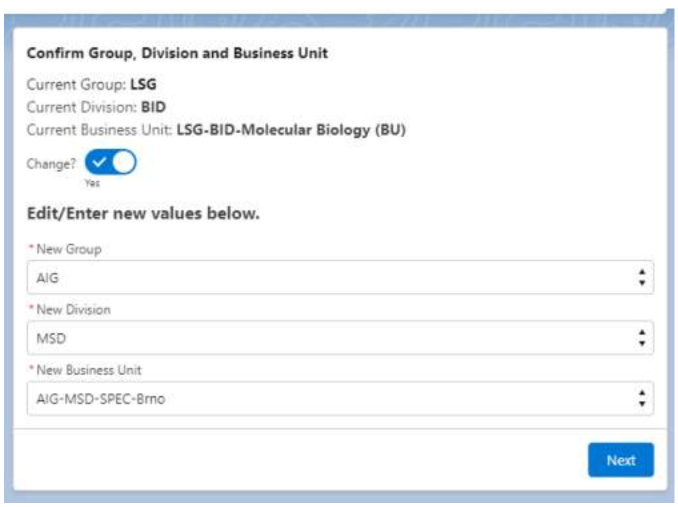
After making the decision, there are two major changes that takes place in the selected record:

1. Change in invention disclosure status: Status changes from **Submitted** to **Revision Requested**
2. Change in the associated docket action: Since there were defects found and the submitted IDF is incomplete, the **Notice of Defect** docket action will be completed and **IDF Deemed Complete- Due** is marked as closed. A new docket action gets created to track the status of IDF resubmission.

- **Change Group, Division and Business Unit**

For the submitted disclosure, the IP Coordinator or IP Responsible Manager has the permission to change the Group, Division and Business Unit that were assigned at the time of submission.

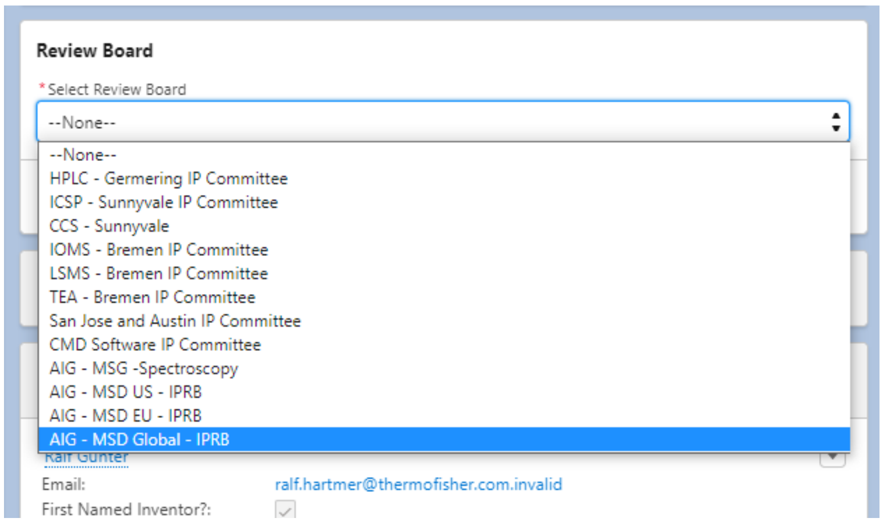




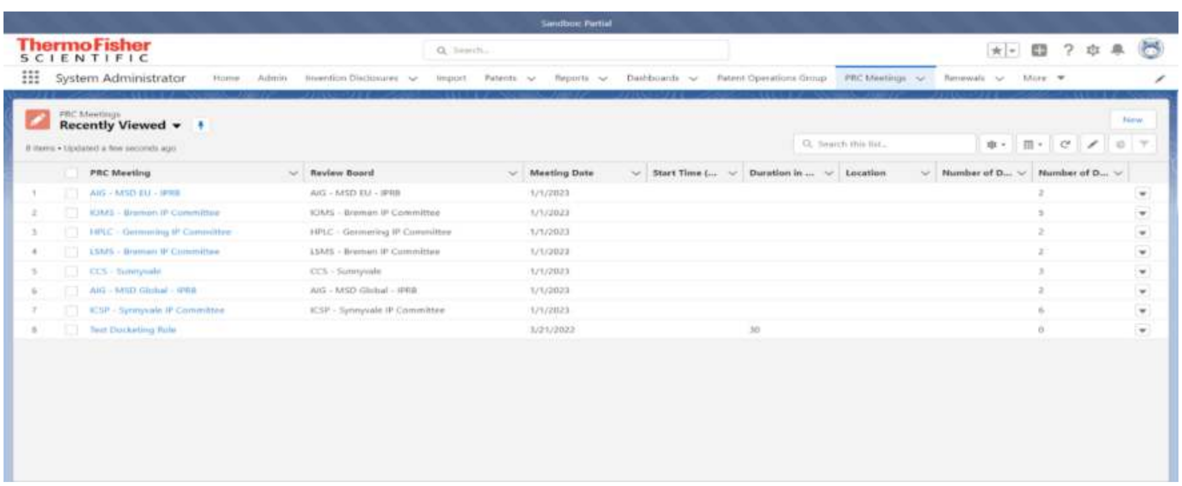
Note : Since all the roles associated with an IDF record are assigned based on the submitted Business Unit, making any changes in the Business Unit of the selected record, the IP Coordinator or IP Responsible Manager risks losing write permissions to that record; the IP Coordinator or IP Responsible Manager assigned to the new Business Unit will then take over.

- **Review Board**

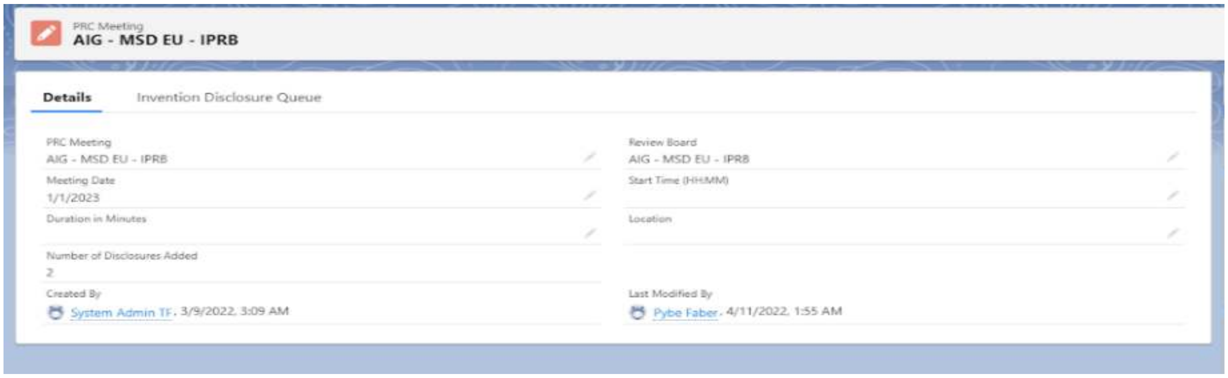
IP Coordinators or IP Responsible Managers who support a Business Unit that has a patent review board or patent review committee can select the appropriate committee that will review the invention disclosure. The user can see the list of Patent Boards assigned for the IDF record.



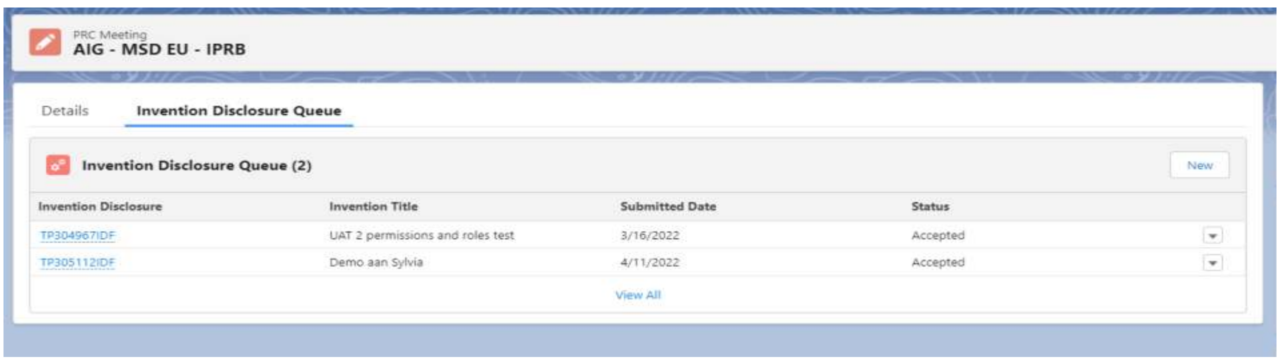
After selecting the review board, the IP Coordinator or IP Responsible Manager can navigate to the **PRC Meeting** tab, where the list of review boards is available.



By selecting a particular review board, the IP Coordinator or IP Responsible Manager can check the number of disclosures assigned and the meeting date (editable).

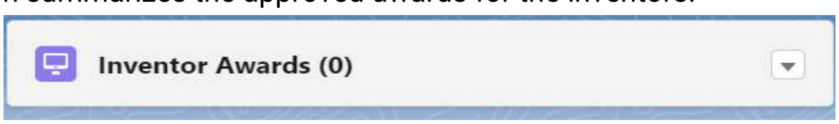


By clicking the **Invention Disclosure Queue**, the user can view the Invention Docket Number, Invention Title, Submitted Date, and the Status of the Invention Disclosure.



- **Inventor Awards**

This section summarizes the approved awards for the inventors.

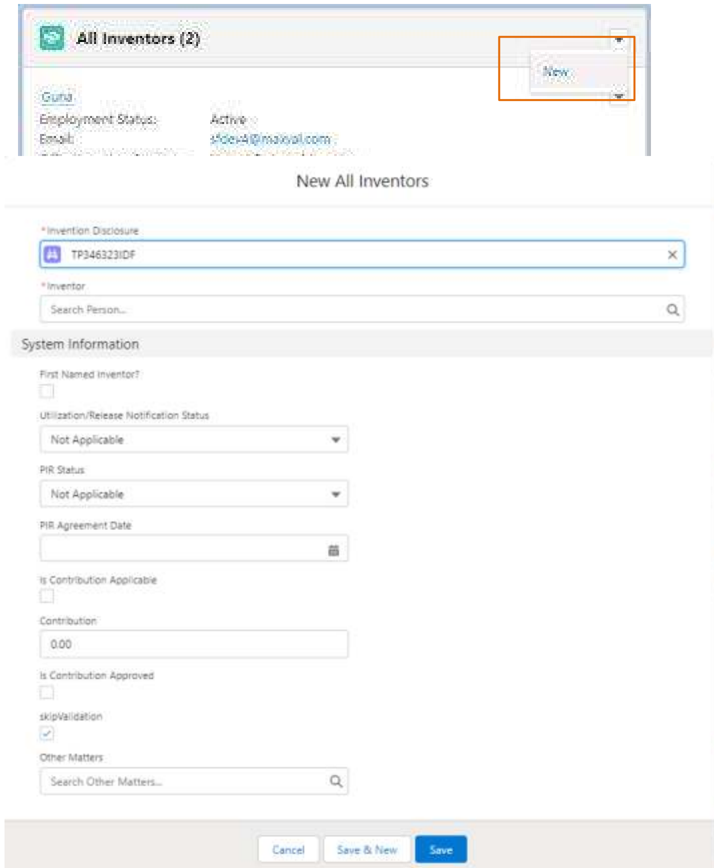


- **Files**

This section includes the auto-generated PDF copy of the submitted IDF, and the attached documents or images related to the invention. You can add new files to the asset by selecting **Add Files** from the down-arrow on the top-right corner. You may also drag and drop the files into this section for upload.

- **IDF Inventors**

This section displays the details of all the inventors provided while submitting the Invention Disclosure.



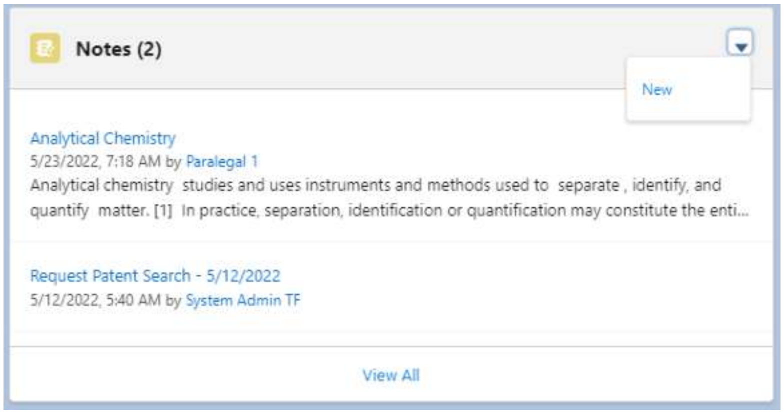
If necessary, additional Inventor names can be added by the IP Coordinator or IP Responsible Manager by clicking the down arrow on the right corner and selecting the **New** option. They can also search for the new inventor in the **Inventor** field within the **New Inventor** pop-up. The user may also provide additional details for the Inventor that may be required for remuneration calculations.

- **Diary Notes**

This feature allows the user to capture Notes related to the case.

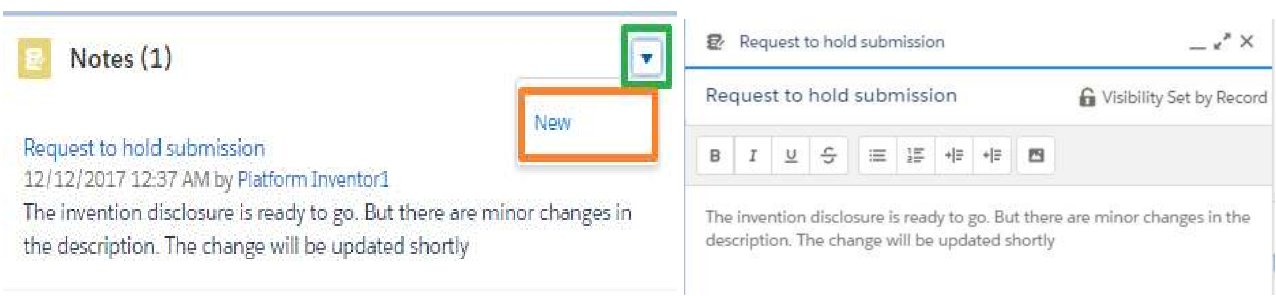
Note: This is similar to the Matter Management Activity in the legacy system.

- **Notes**

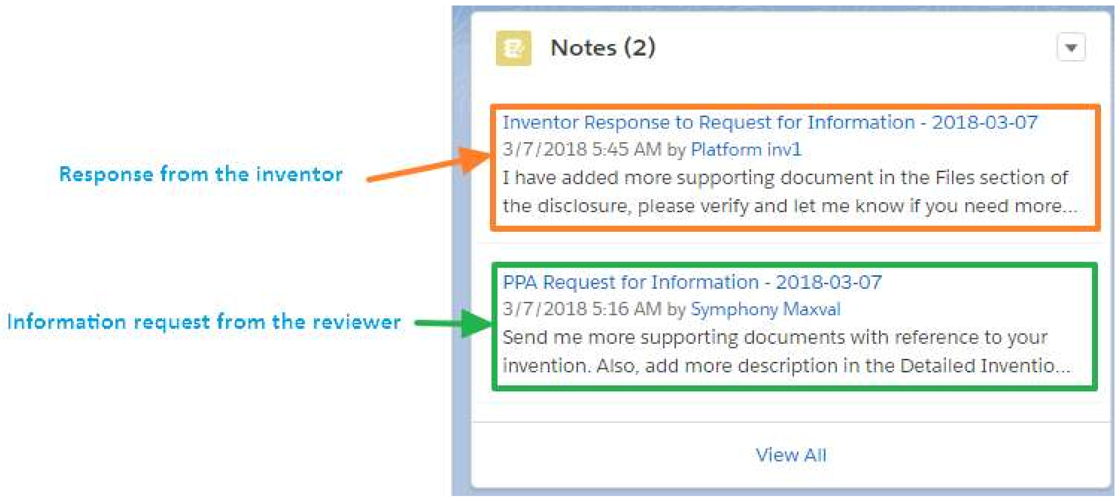


Notes section allows you to add a note for the given invention disclosure that will be available for other members and the reviewers. Similarly, others on the record can add notes.

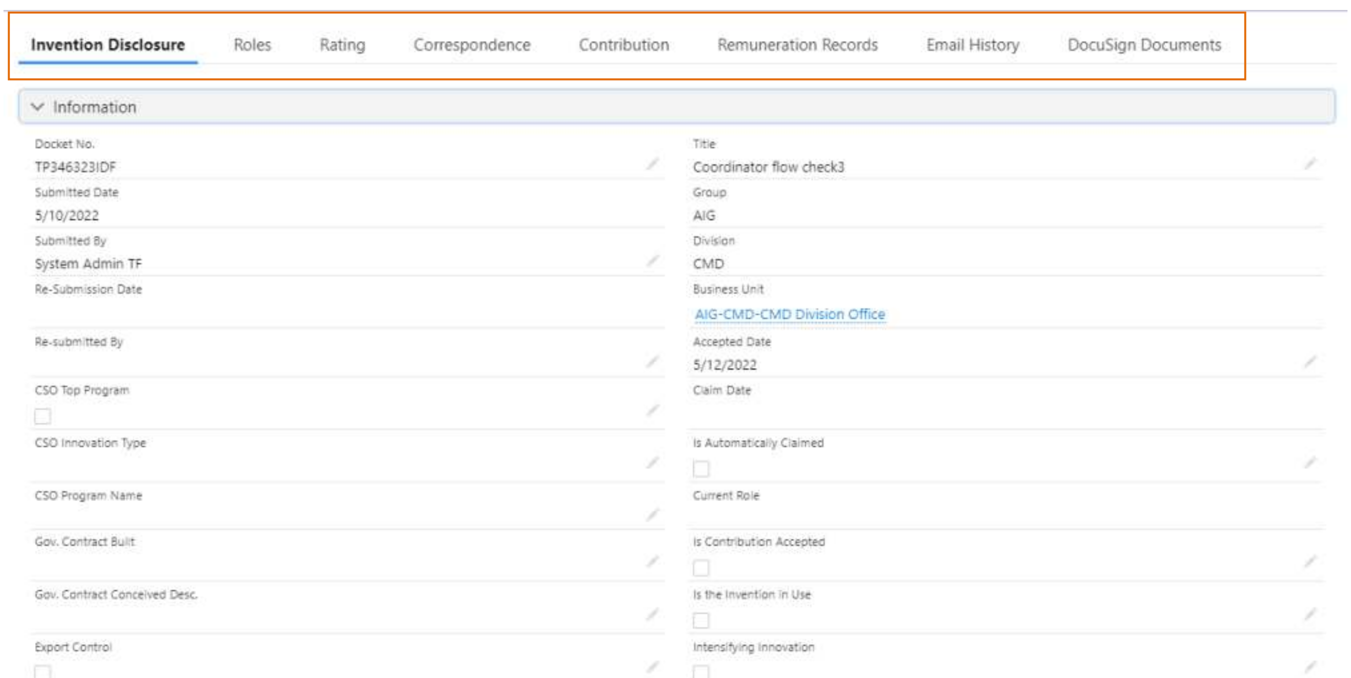
You can add a note by clicking the down arrow and selecting the **New** option. You may add the title and relevant content to it.



Apart from the general notes for the disclosure, this section also displays the disclosure action and responses from respective stakeholders.



The **left-hand side** of the asset page includes all matter-related information. Details are provided below:



a. **Invention Disclosure**: Provides details submitted by the inventor.

b. **Roles:** Provides information on key stakeholders of the invention.

c. **Disclosure Rating (Optional):** This is for the user to provide a rating to the invention.

d. **Correspondence**: communication exchange related to the invention is stored here.

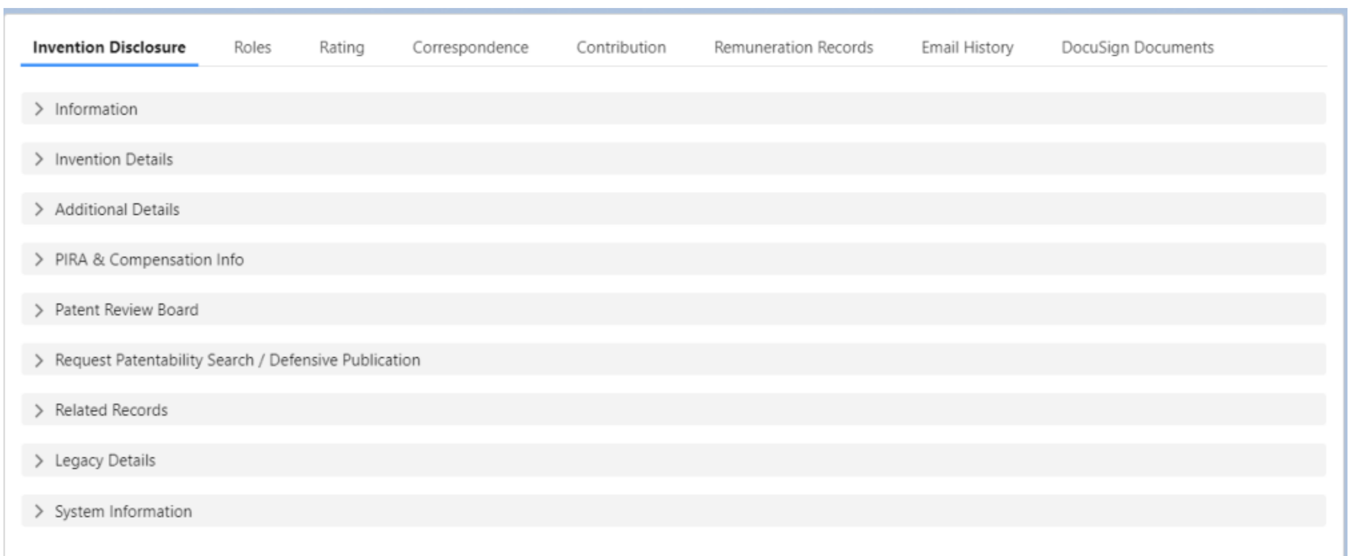
e. **Contribution**: This is the Remuneration related tab, which will be visible only if the record is eligible for remuneration. Only the related business unit IP Compensation Manager has access to view the details.

f. **Remuneration Record**: This is the Remuneration related tab to store reward-related information. The details in this tab will be visible only for related business unit IP Compensation Manager.

g. **Email History**: Contains the record of communication between the IP Coordinator and/or IP Coordinator and the inventor(s).

h. **DocuSign Documents**: In this section, IP Compensation Managers and/or IP Coordinators can keep a track of status of invention related agreements such as remuneration agreements that are shared with the inventors using DocuSign.

a. Invention Disclosure



Invention Disclosure section contains the following details:

1. **Information**: Contains the bibliographic details on the submitted record, including docket number, title, and business unit
2. **Invention Details**: Detailed description provided by the inventor during submission
3. **Additional Details**: Information regarding external collaboration, publication, and other third-party details
4. **PIRA & Compensation Info**: Contains information regarding remuneration for German Inventors if applicable
5. **Patent Review Board**: Details regarding the assigned patent review board if applicable

6. **Request Patentability Search /Defensive Publication**: Contains additional details if the record needs external patentability search or defensive publication
7. **Related Records**: List of IDF or Patents related to the submitted IDF
8. **Legacy Details**: List of legacy records related to the submitted IDF
9. **System Information**: Date and Role assigned to the IDF

b. Email History

All the correspondence between the user (IP Coordinator) and the inventor is recorded in the Email History tab.

c. Roles

This section provides information to IP Coordinators on key stakeholders associated with the given disclosure and their respective roles.

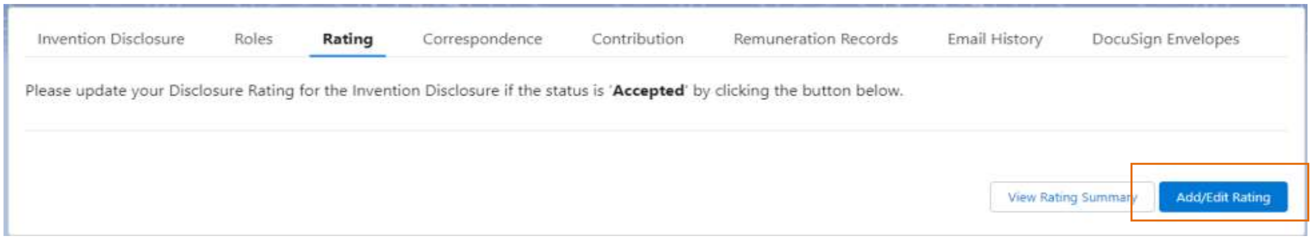
Note: IP Coordinators should email Docketing (tfdocketing@maxval.com) if they want to add individuals with Roles to a record. Emails to Docketing should include the Symphony Docket No. in brackets in the subject line.

d. Disclosure Rating

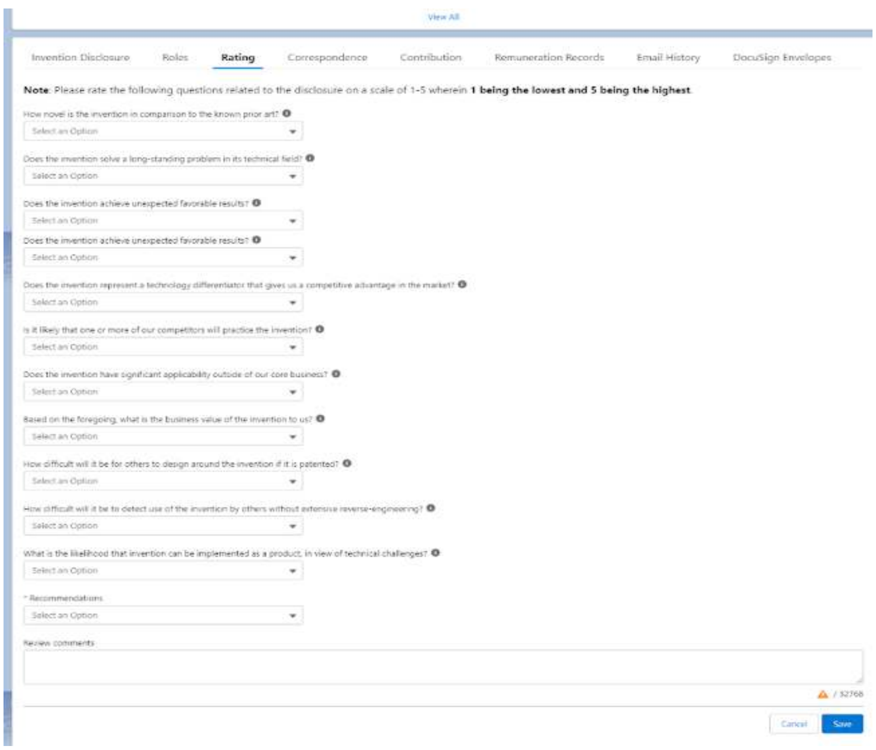
This section allows the IP Coordinator or IP Responsible Manager to rate the invention disclosure under different dimensions. The rating and the instructions will help the team learn more about the disclosure in terms of effective filing and patentability. This section also provides instructions to the IP Coordinator to consider before reviewing and drafting/filing the disclosure.

User can add a new rating or edit the existing rating for the invention disclosure by choosing the **Add/Re-enter Rating** option.

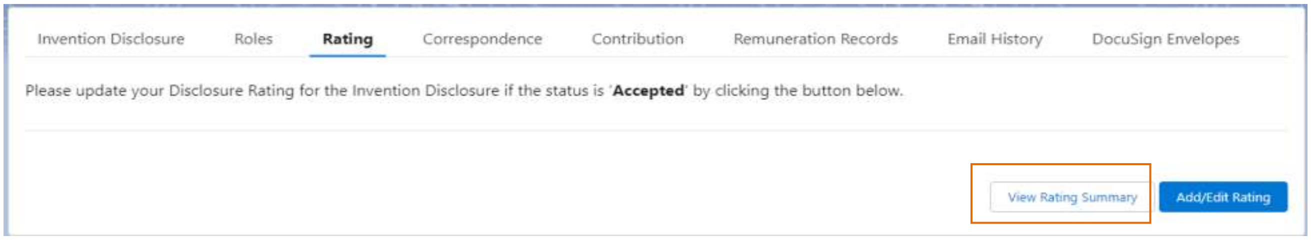
Note: As of June, 2022, Thermo Fisher does not have a defined rating system for all IDF's in all Business Units. Accordingly, the rating is optional and can be a rating specific to one Business Unit.



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.



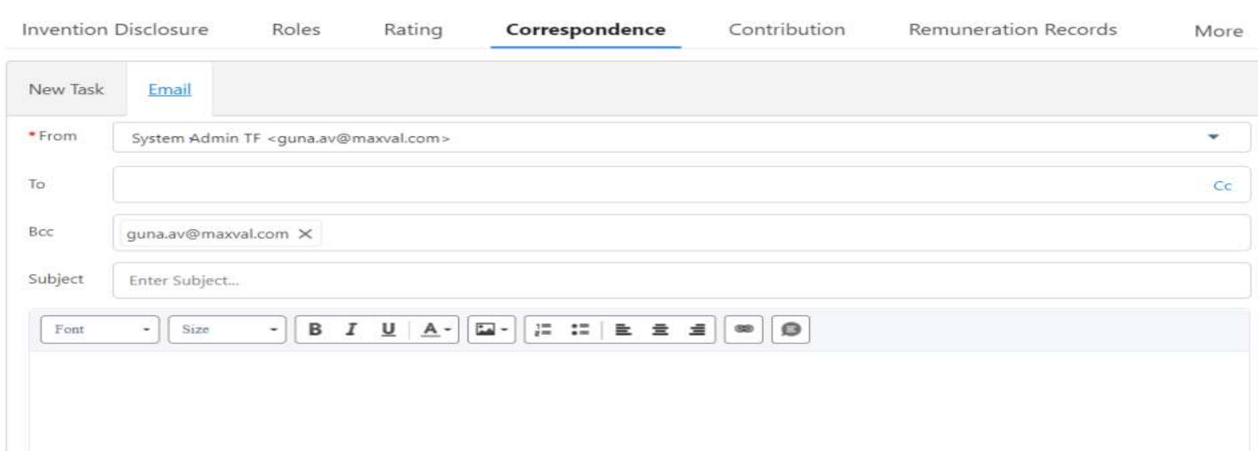
If the IDF is assigned to a business unit with a Review Committee, and if the Reviewers key in their ratings, then the IP Coordinator and IP Responsible Manager may view the ratings provided by other users by choosing **View Rating Summary** Option. This section also displays the **Recommendations** for the invention disclosure and the relevant **Comment** for the rating.



e. Correspondence

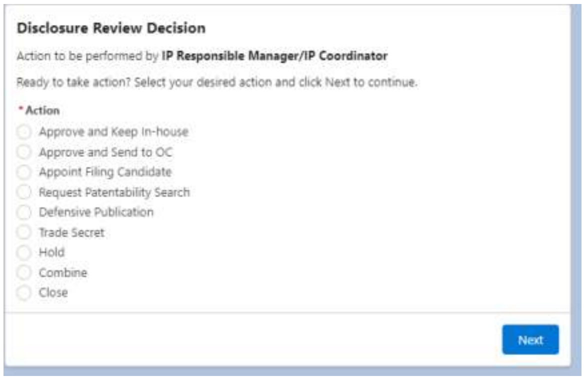
The **Correspondence** tab displays emails to and from the respective stakeholders.

Anyone can compose and send out emails from the **Email** tab under **Correspondence**.



3. Disclosure Review Decision

The IP Coordinator or IP Responsible Manager may review the invention disclosures submitted by the inventors and can take the following actions while reviewing.



During the review process, the user can also schedule review meetings that help in collaborating with stakeholders to complete the review. Refer to PRC Meetings for more information.

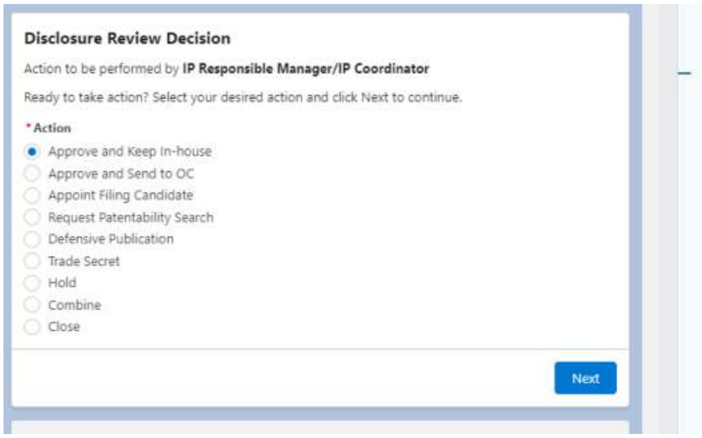
Below is the Invention disclosure review workflow running in Symphony:

- The inventor submits the invention disclosure, which is reviewed by the reviewer (IP Coordinator or IP Responsible Manager)
- During the review process, the reviewer coordinates with the inventor if the disclosure needs more information or additional supporting files
- The reviewer can send back the disclosure until it is ready for filing
- The approved disclosure is then ready for in-house counsel or Outside Counsel to prepare a draft application

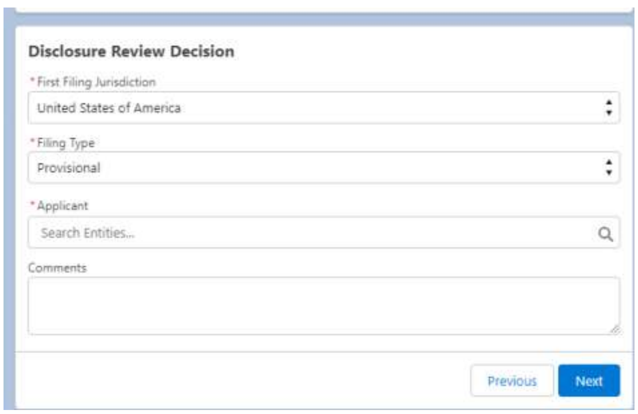
The review process differs based on the disclosure review decision you choose. Refer to the topics listed below for choosing the relevant process for an action.

a. Approve and Keep In-house

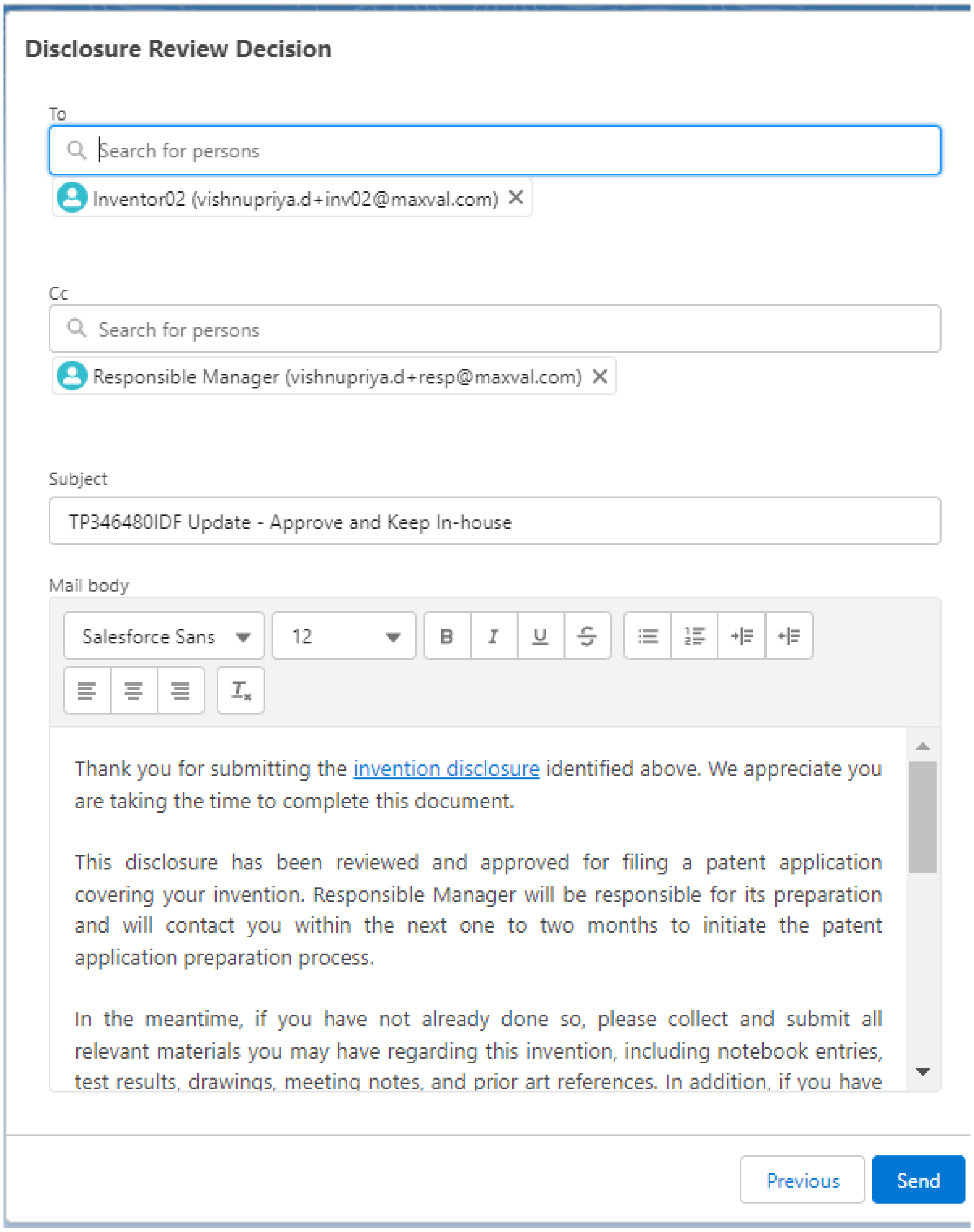
If the application will be drafted by an internal practitioner, select the **Approve and Keep In house** option under the **Disclosure Review Decision** to approve the reviewed disclosure and save it in the application. Click **Next** to continue.



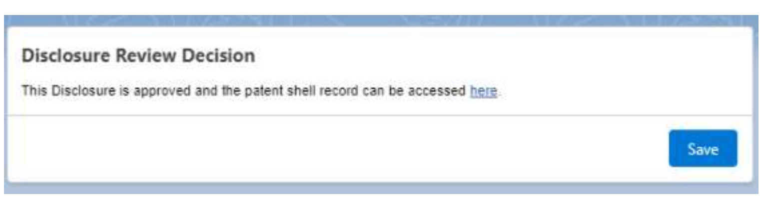
Fill out the necessary fields available under each topic in the next step:



System will send an email notification to the inventors informing about the review decision:

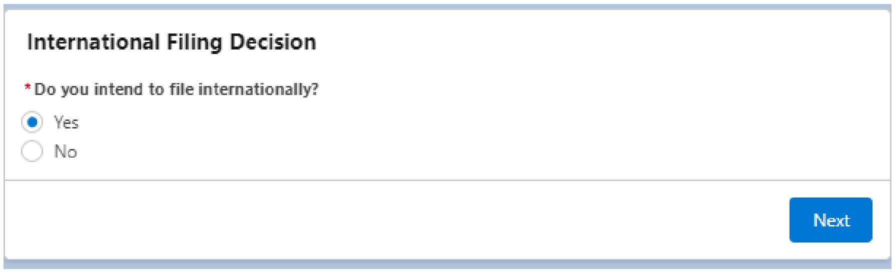


On sending the notification, the status of Invention Disclosure changes to **Closed – Approved for Filing**. This action also creates a patent shell record and can be accessed by clicking on the “here” link.

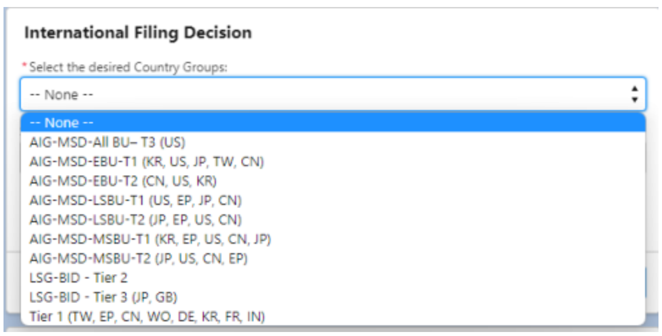


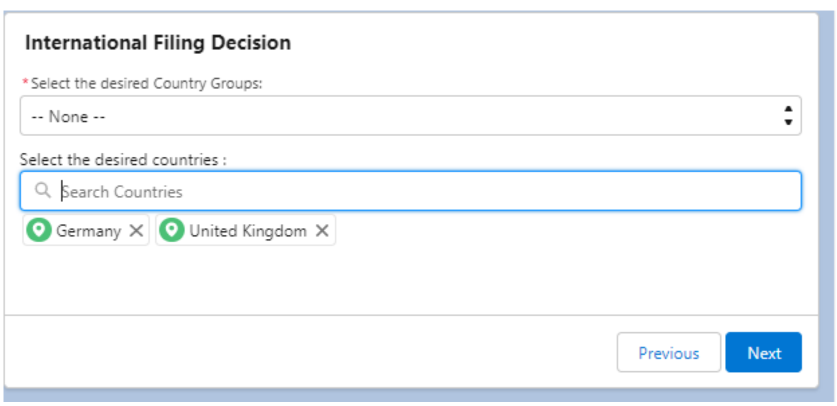
International Filing Decision

The International Filing Decision Card displays the question “Do you intend to file internationally?” and gives options Yes/No.

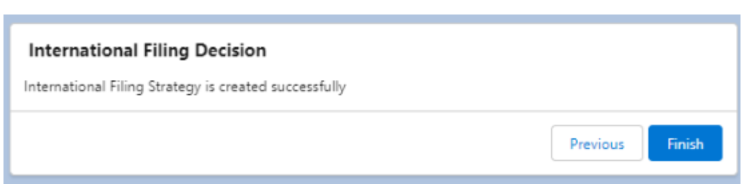


This decision can be postponed until a later date. However, if you already know the filing strategy, you may select the desired country groups from the drop-down list OR select the desired countries from the search box and click **Next** to create the International Filing Strategy.



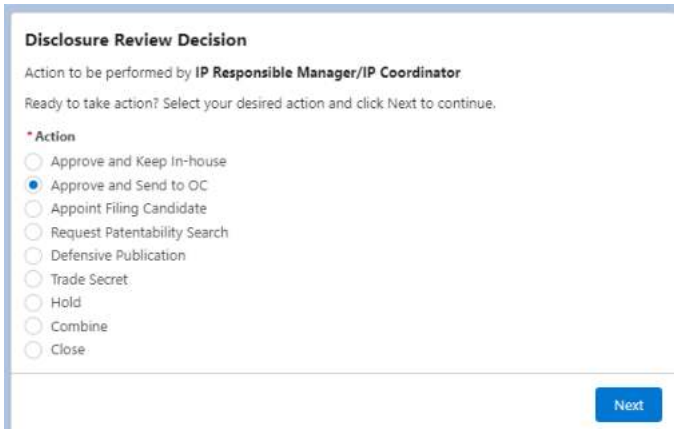


Click **Finish** to complete the process.



b. Approve and Send to OC

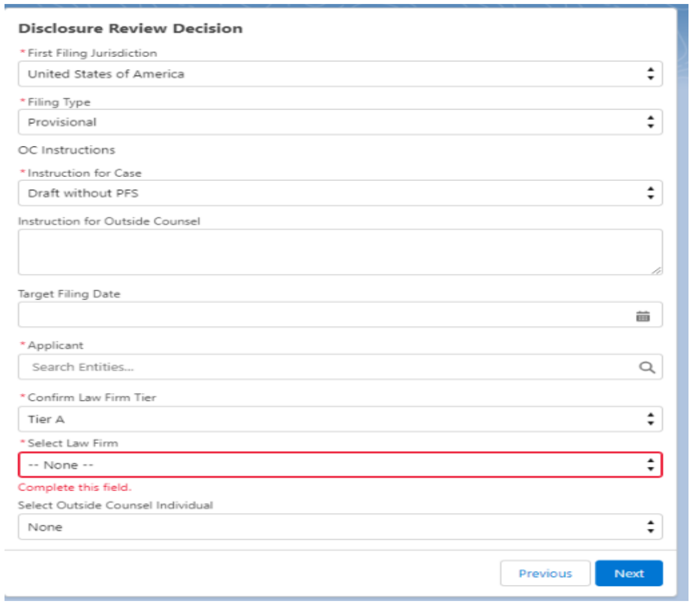
If the application will be drafted by Outside Counsel, then select **Approve and Send to OC.** The IDF will be approved for further patent filing process and an Outside Counsel (OC) will be selected to draft the application. The status of the IDF changes to **Closed – Approved for Filing**.



IP Coordinator OR IP Responsible Manager must provide the following instructions for the OC:

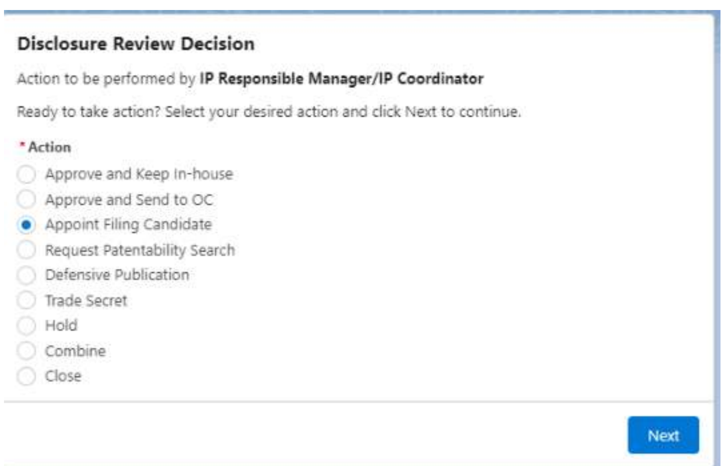
- First Filing Jurisdiction/Country
- Filing Type
- Instruction for Case
- Instruction for Outside Counsel
- Target Filing date
- Applicant

Click **Next** to complete the process. The status change of the invention disclosure will be reflected in the **Disclosure Status** section.



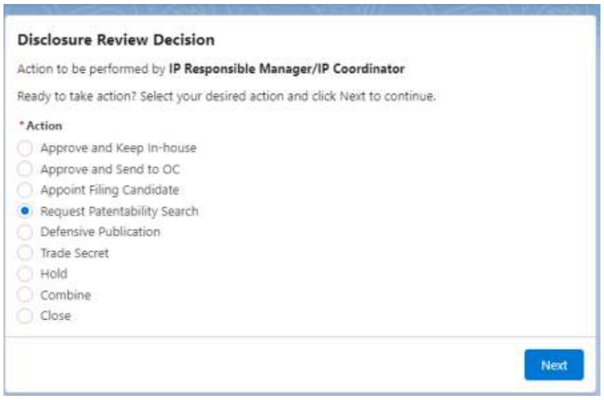
c. Appoint Filing Candidate

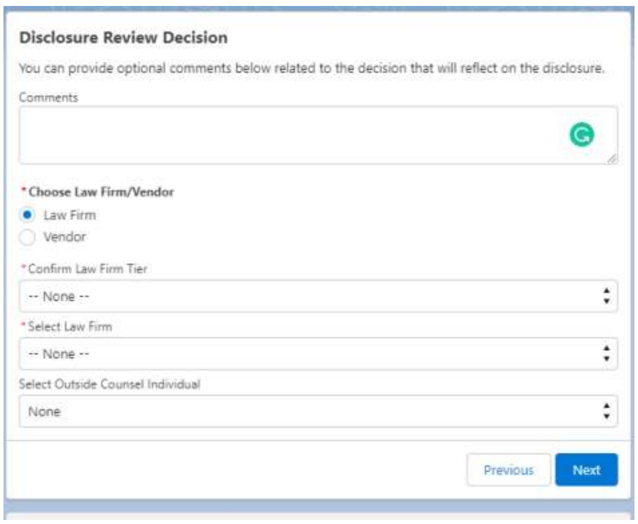
On selecting the Appoint Filing Candidate option, the IP Coordinator can make a decision to put the patent filing process on Hold and also write any additional comments until the filing candidate can take further action. Status of Invention Disclosure changes to **Approve Filing Candidate**.



d. Request Patentability Search

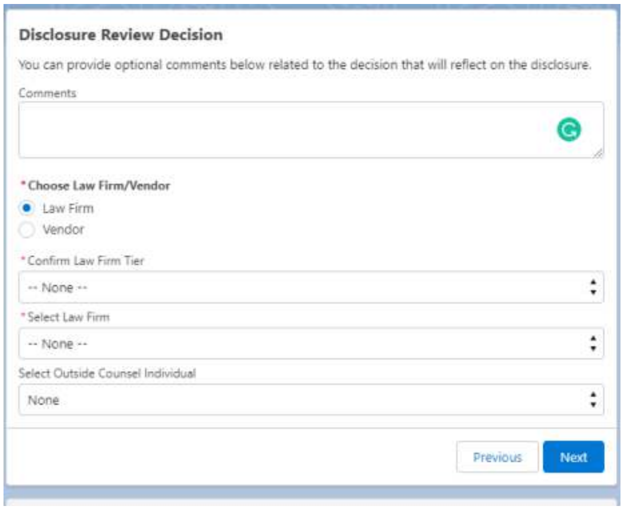
By selecting Request Patentability Search, the IP Coordinator can assign either a law firm or a vendor to carry out the search.





When selecting the Law Firm, the IP Coordinator can select the following details:

- Confirm Law Firm Tier
- Select Law Firm
- Select Outside Counsel



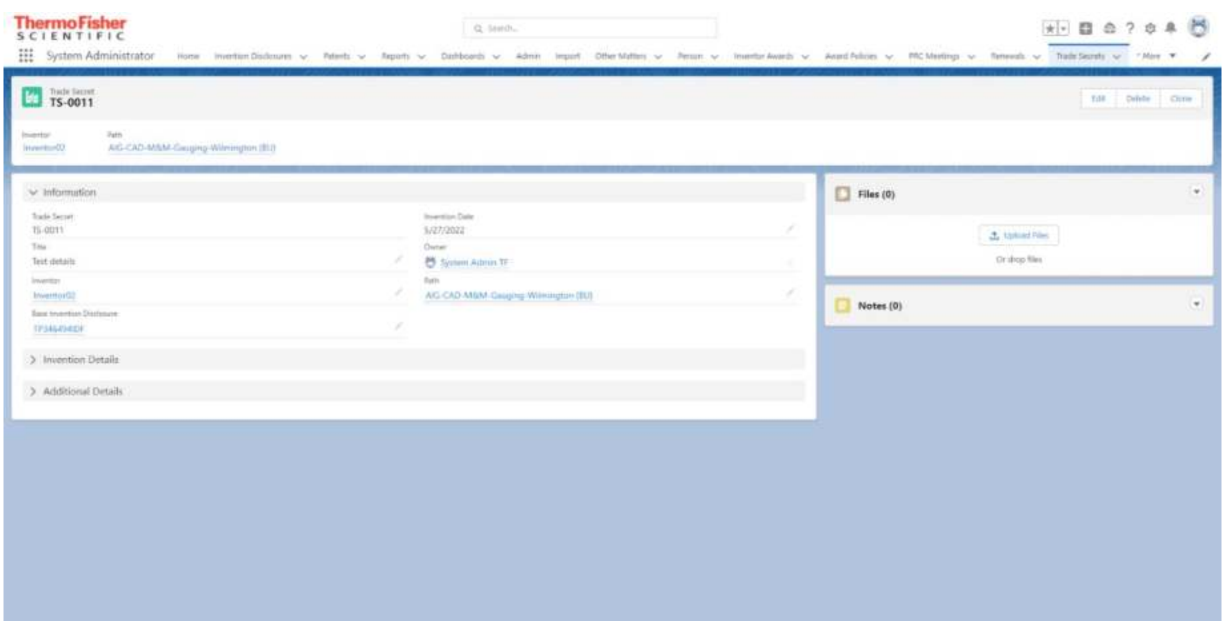
On selecting the Vendor, the IP Coordinator can select any of the vendors from the drop-down list as shown below.

e. Defensive Publication

By selecting the defensive publication option, the IP Coordinator should select the vendor who will carry out the publication action on behalf of the organization. Add any additional comments if required.

f. Trade Secret

On selecting Trade Secret as disclosure review decision, a new record gets created in the Trade Secret module. The previously added comments get updated in the Notes widget. The trade secret record will contain IDF information and a new record number as a unique identifier.



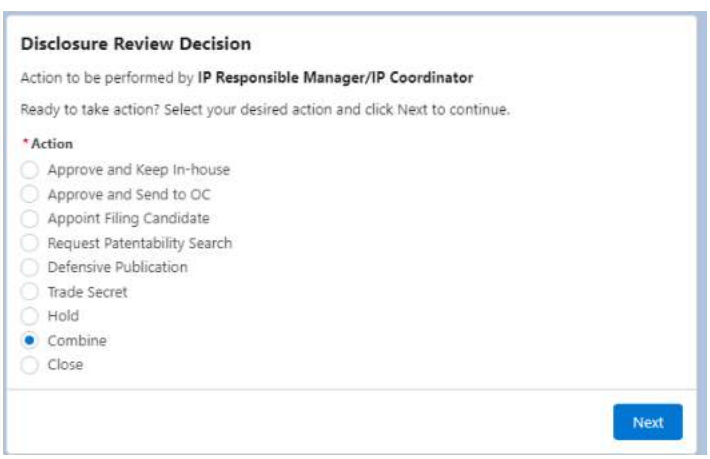
.

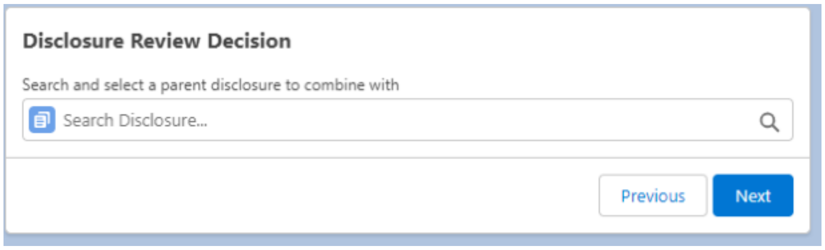
g. Hold

On selecting Hold, the IP Coordinator can put the IDF record on hold until a decision has been taken to take further review.

h. Combine

IP Coordinator can combine the current record to an existing record with help of the search option as shown below.

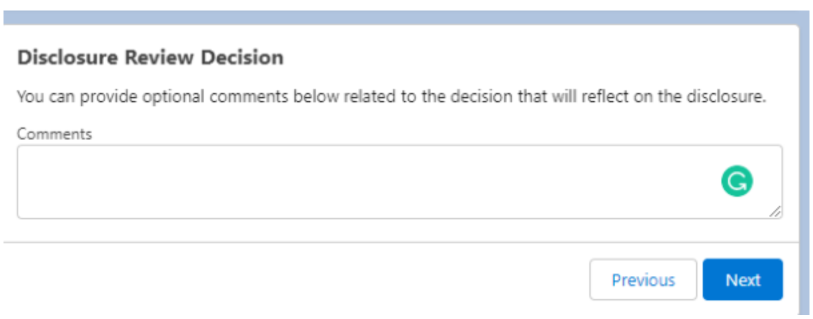




Note: IP Coordinator can only combine records with IDF which belong to the same business unit.

i. Close

On selecting close, the IDF record will be closed, and no application will be filed. Any comments added in the following widget will be visible under Notes.



Patent

Selection of Patent from the tabs at the top allows you to manage the complete list of patent assets of your organization. The IP Coordinator can view, sort, and filter the list of records.

A patent asset can be any of the following:

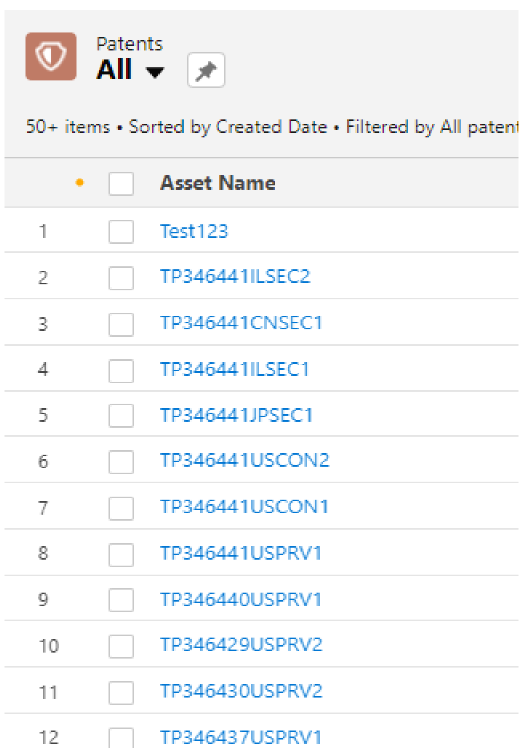
- Application
- Publication
- Patent

- Opposition

Note: *Once the In-House Counsel approves the disclosure for filing (Status: Closed-Approved for Filing), a patent shell record is created to track the status of the record.*

To reach this section, select the **Patents** tab from the main menu. The **Patents** page displays important asset information in a tabular format, such as Docket Number, Application Number, Publication Number, and more. Refer to the Asset List Table - Patents for the list of fields available.

Note: *You can view 'All' or 'Recently Viewed' patents and pin it as a default landing view by clicking on the dropdown beside 'All'*

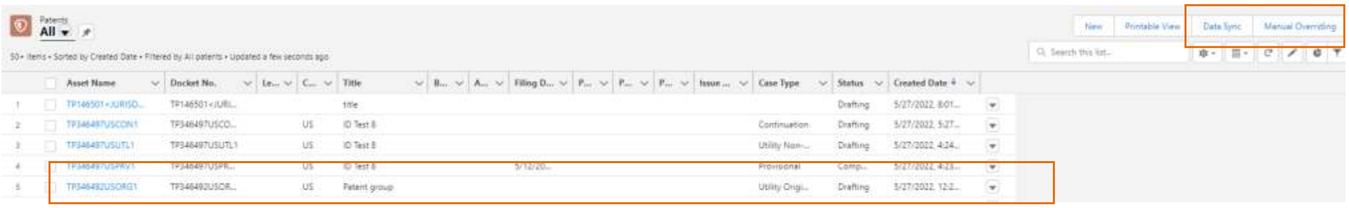


Asset List Table - Patents

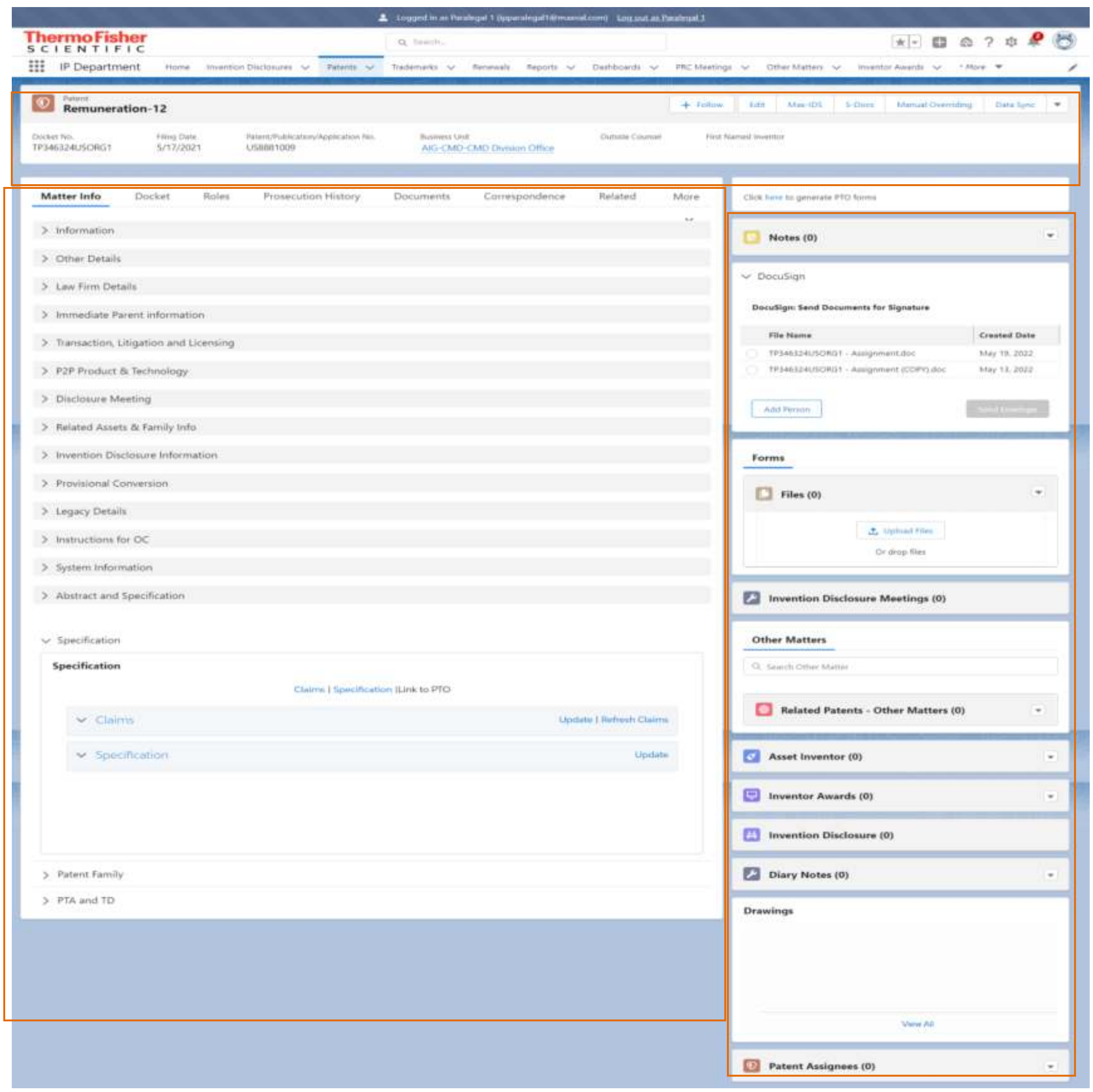
FIELD	DESCRIPTION
Asset Name	Displays the reference number given by the company to identify a patent application
Docket Number	Unique identifier created automatically for the new patent record
Legacy Docket Number	Docket number used in the legacy patent management system
Country Code	Displays the jurisdiction for a record
Title	Title of the Patent Record
Business Unit	Assigned Business Unit of the Patent Record
Application No.	Displays the reference number assigned by the PTO to a patent application after it is filed
Filing Date	Displays the date of filing of the application in the PTO
Publication No.	Displays the reference number assigned by the PTO to a patent application when it was published
Publication Date	Displays the publication date for a record
Patent No.	Displays the reference number assigned by the PTO when the patent is granted
Issue Date	Displays the reference number used by the Outside Counsel to identify a patent application
Case Type	Case type of the created patent record
Patent Status	Displays the patent status of the record

1. View Patent (Asset Detailed View)

To view the assets present in the portfolio, click the **Patents** tab and click the **Asset Name** (Docket Number) that you want to view.

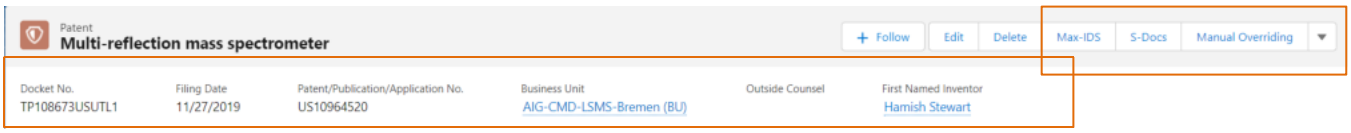


To view the details of the asset, select a patent from the **Asset List Table**.



The patent page is divided into three sections:

Top ribbon includes basic bibliographic information related to the asset, such as Docket Number, Filing Date, Patent/Publication/Application No., Business Unit, First Named Inventor, Outside Counsel etc.



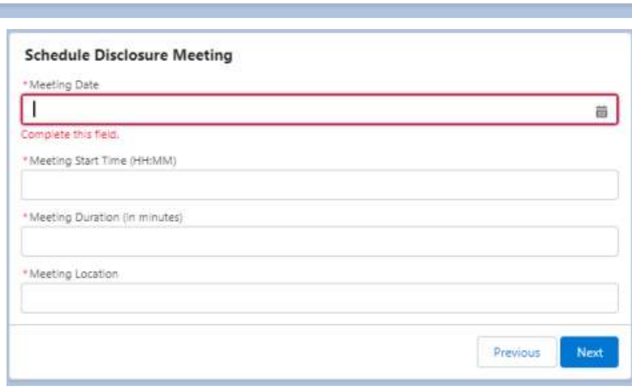
In addition to this, you can also perform the following functions at the asset level by clicking on the required button:

- Generate pre-populated templates and checklists using **S-Docs.**
  - ***Note:*** *S-Docs forms will be heavily used by the paralegals, but IP Coordinators have access and will be able to generate forms*
- Directly navigate to **Max-IDS** for managing references and IDS forms for a given asset.
- Select the fields to be **manually overridden**.

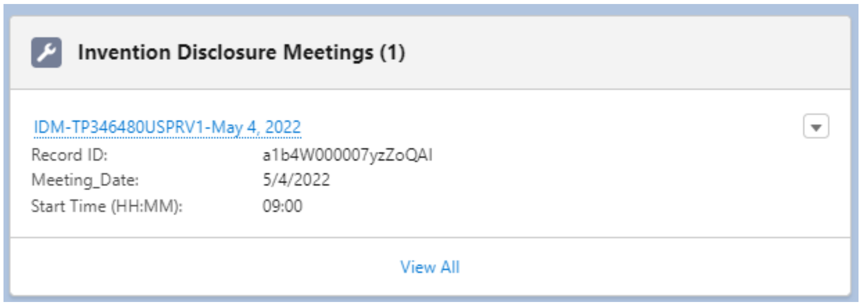
Right-hand side widgets display other relevant information about the asset. A detailed description is given below.

- **Schedule Disclosure Meeting**

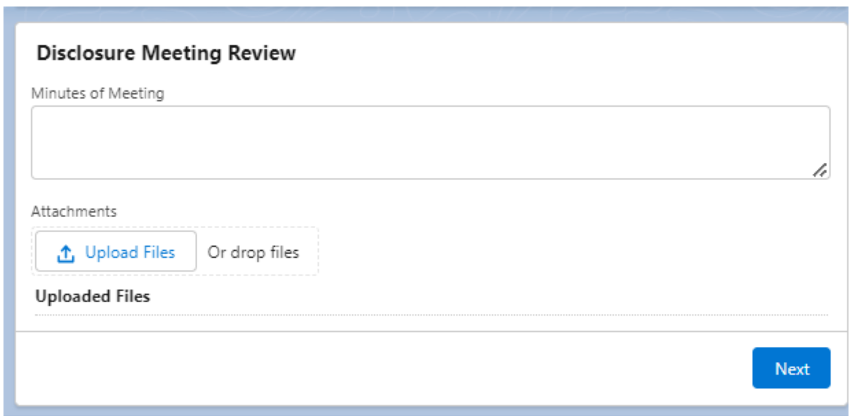
This section allows IP Coordinator to schedule a review meeting for the given disclosure. The widget is present when the patent is in the Drafting stage. If you do not see this widget, it means that the patent application is filed, and the status is moved from Drafting to Pending.
Note: Not all IP Coordinators conduct review meetings, but if you support a Business Unit that does this, the features are available and shown in more detail below:



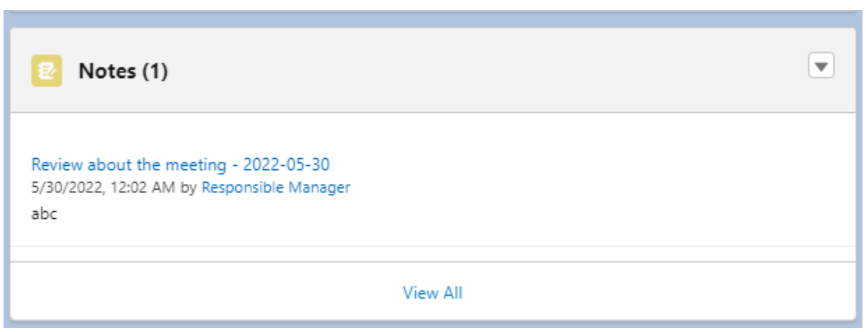
Once the meeting is scheduled, the IP Coordinator can review the upcoming meeting details in the below widget.



You may directly update your meeting minutes in the below widget:

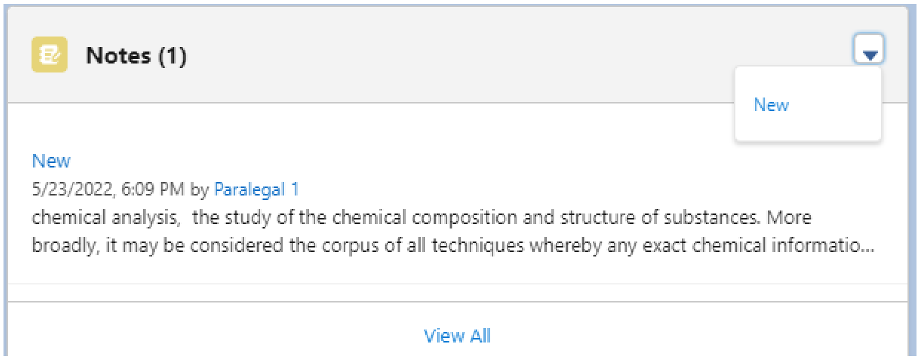


The updated minutes get added to **Notes**.



- **Notes**

This section displays the notes and other information related to the asset. It also allows you to add new notes to the asset by selecting the down-arrow on the top-right corner.

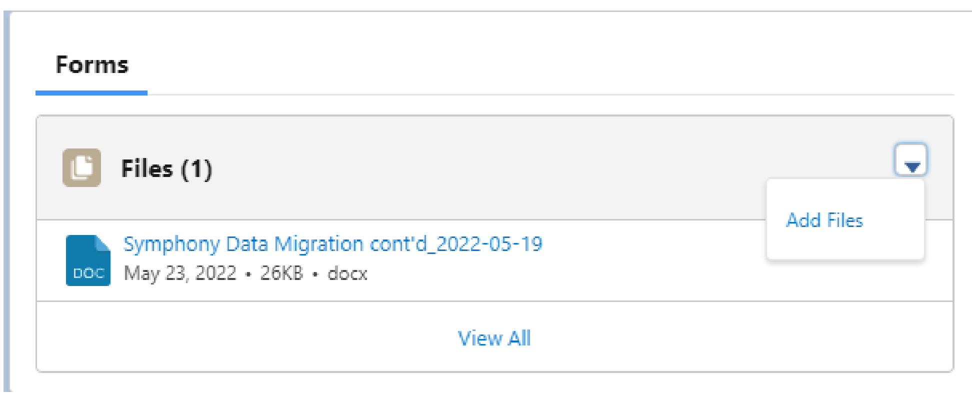


- **DocuSign**

This includes files or forms generated through S-Docs that need to be sent to stakeholders.

- **Forms**

This section displays the pre-uploaded forms/templates to be used by the IP Paralegal, IP Responsible Manager, IP Partner and/or IP Coordinator for signature and other purposes. You may also add new form/templates by selecting **Add Files**.

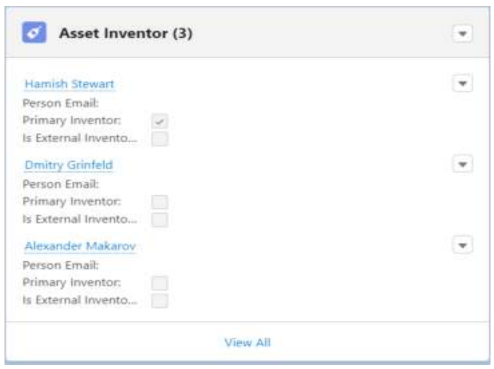


- **Other Matters**

Other Matters widget allows the user to search for Other Matter records that belong to the Business Unit.

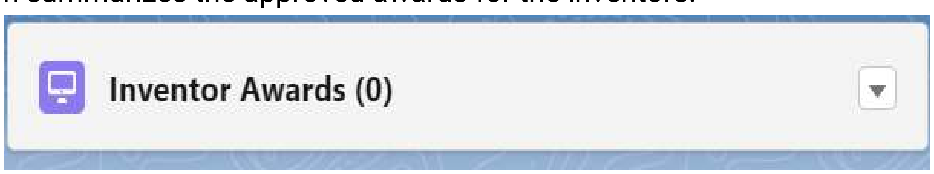
- **Asset Inventor**

This section displays the name of the inventor(s) for the asset.



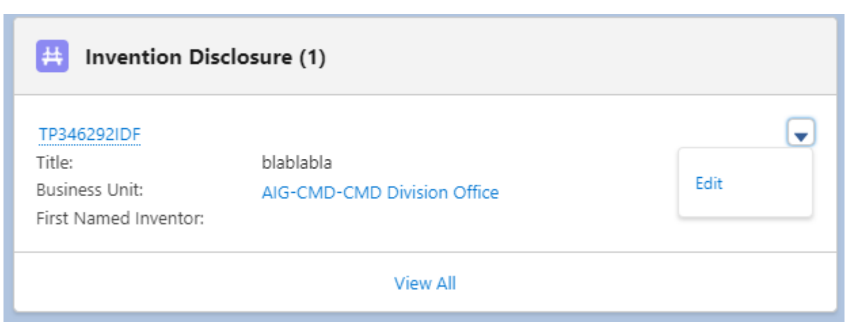
- **Inventor Awards**

This section summarizes the approved awards for the inventors.



- **Invention Disclosure**

This section displays the related invention disclosure.

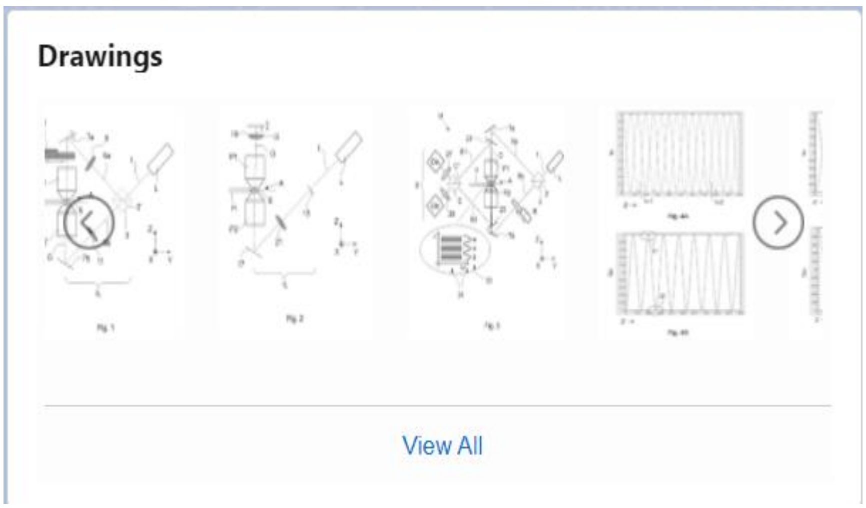


- **Diary Notes**

This feature allows the user to capture Notes related to the case. This is similar to the Matter Management Activity in the legacy system.

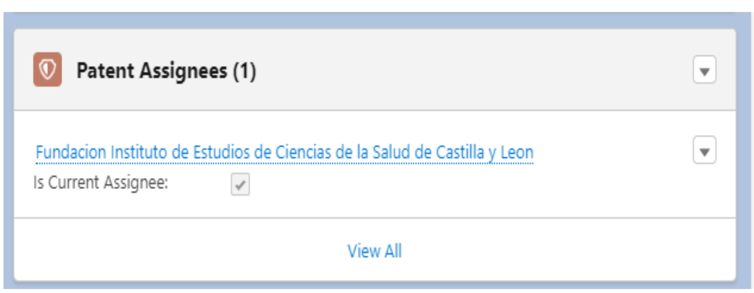
- **Drawings**

This contains the drawings and illustrations applicable to the invention.



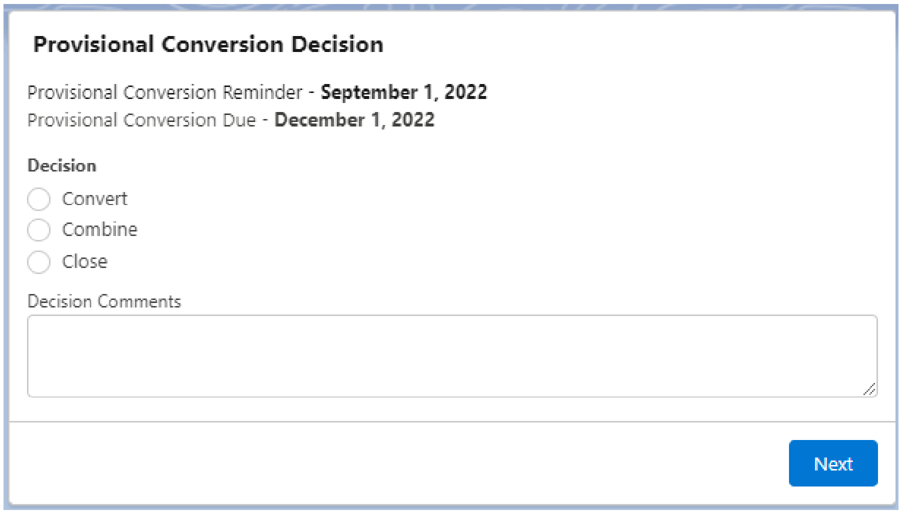
- **Patent Assignees**

This section displays the name of the patent owner and the current owner if the patent ownership is changed.



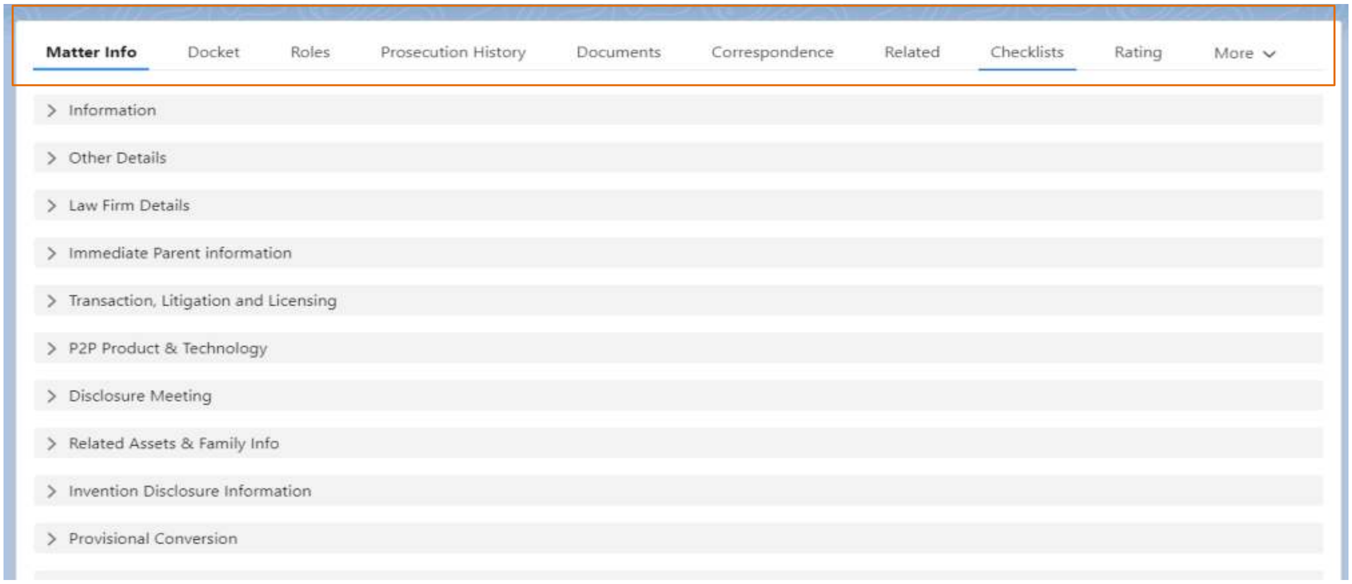
- **Provisional Conversion**

The IP Coordinator will be able to see the Patent Provisional Conversion widget on the right-hand side if the selected patent has a Case type: Provisional and the Status: Pending. The IP Coordinator can take any one of the following three decisions on the Provisional application:



- **Convert**: By selecting convert, they can convert the selected provisional patent to another type of patent application such as non-provisional, etc.
- **Combine**: The IP Coordinator can combine the selected patent with a pre-existing patent by selecting the Combine option. Post selecting combine, they can search for related patents to be combined with the present provisional application.
- **Close**: If they want to close the filed provisional conversion, they can select Close and add additional comments for reference.

The **left-hand side** of the asset page includes all matter-related information. Details are provided below:

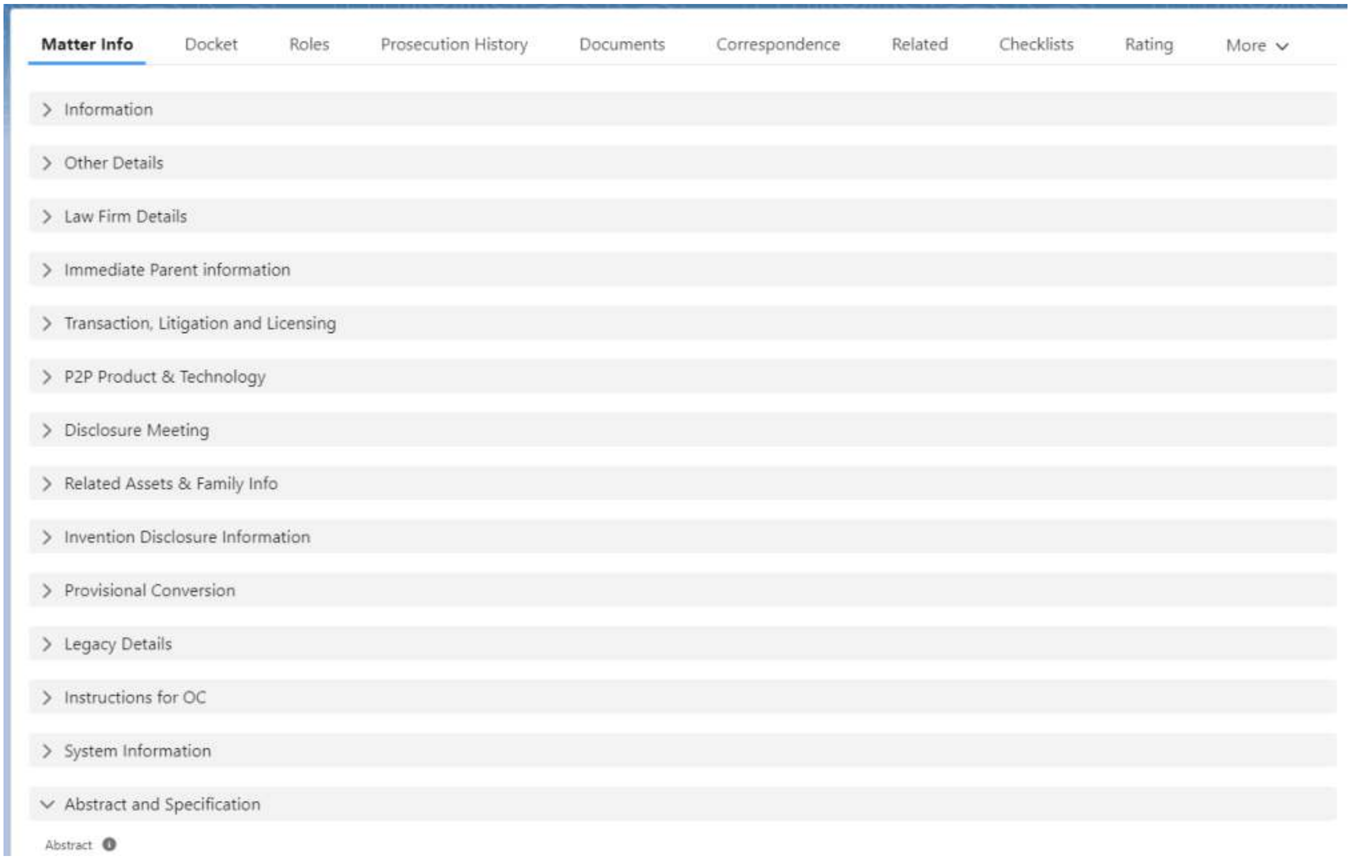


- Matter Info
- Docket
- Roles
- Prosecution History
- Documents
- Correspondence
- Related
- Checklist
- Rating
- Group, Division and BU

a. Matter Info

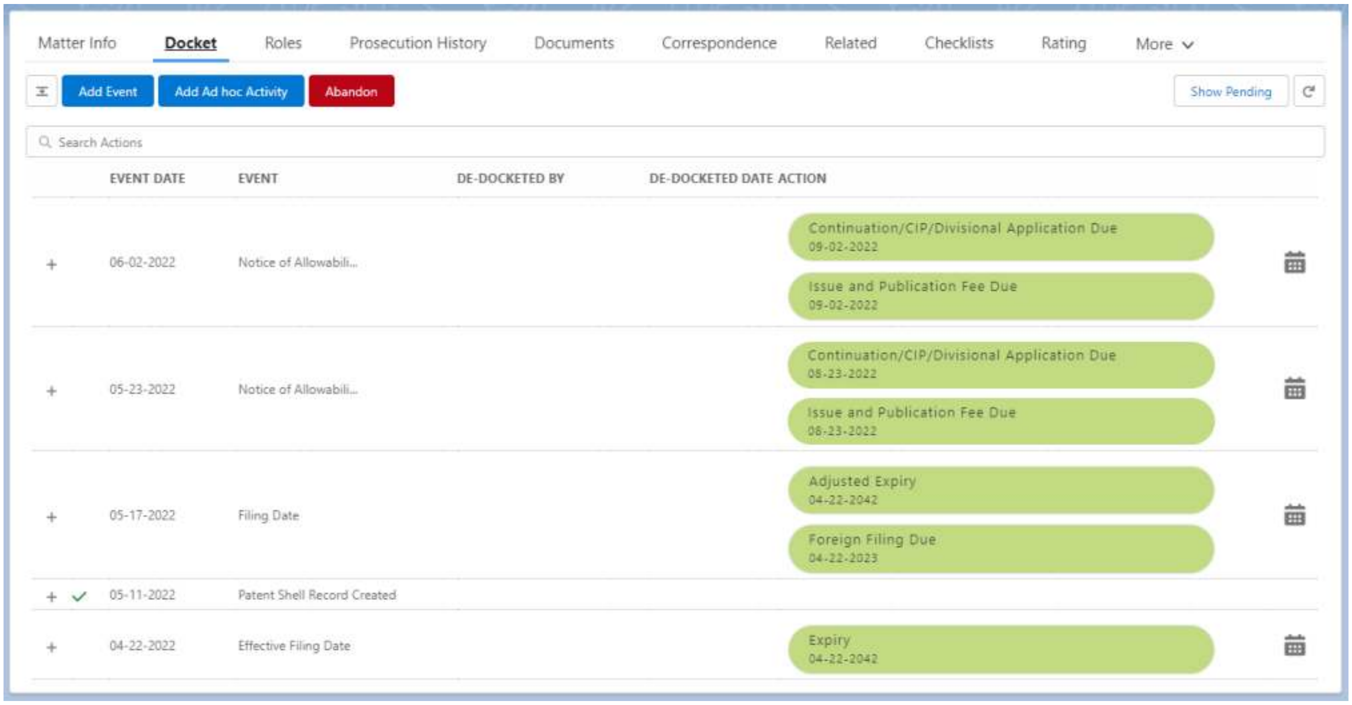
It displays the basic details of the asset such as Application/ Publication/Patent Number, Filing Country, Inventor, and more.

The **Matter Info** tab is divided into the following sections:



b. Docket

This section displays all the docketing activities created in the record based on the PTO events. Symphony will sync all US patent applications tied to one of the Thermo Fisher customer numbers. If the application is associated with a customer number, then Symphony sync's with the USPTO each night and uses the document codes from the USPTO and the relevant docketing rules to automatically create a docketing activity for US applications. The **Docket** tab also automatically de-dockets an existing event based on a filing, so long as the document code associated with that filing is correct.



Each docket is created as an event with following information:

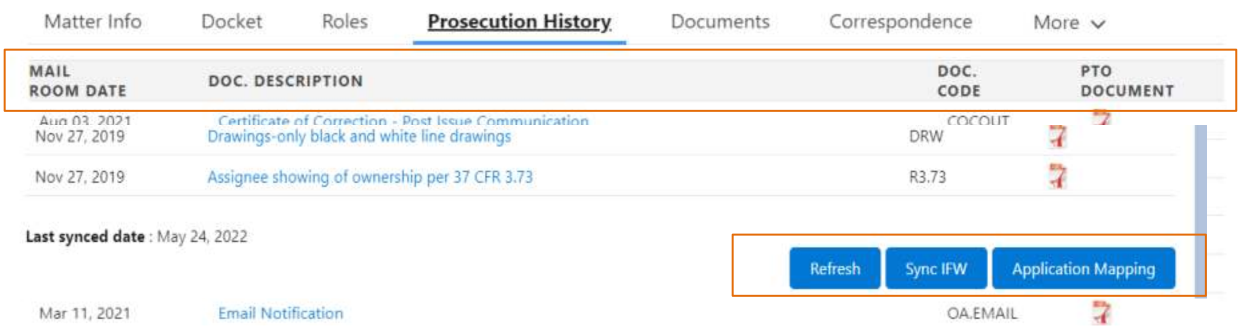
- Event Name
- Event Date
- De-Docketed Date
- De-Docketed By
- Office Action for the Event

For all other countries, and for USPTO applications not associated with a Customer Number, the docketing team will add and close/complete docketing events manually based on the document code and country law docketing rules.

c. Prosecution History

The **Prosecution History** tab displays the entire history and the related prosecution information of an asset in a tabular format. The Prosecution History tab should contain the file history only, and not any drafts or other miscellaneous documents. The table contains the following information:

- Mailroom Date
- Document Description
- Document Code
- PTO Document



i. Refresh

Using this button, you can refresh the page to display the updated post IFW Sync.

ii. Sync IFW

This feature fetches IFW data related to a particular patent and updates Symphony with bibliographic data from the PTO and/or third-party data sources.

iii. Application Mapping

This feature allows mapping an individual record from Symphony and the MaxVal service to fetch IFW (Image File Wrapper) and bibliographic data from the PTO and/or third-party data sources.

***Notes**: Symphony automatically syncs documents from the file wrappers from select Global Dossier countries: Australia, China, EPO, Japan, South Korea, and WIPO. Symphony does not sync deadlines associated with these countries, only documents. Also, due to delays with the Global Dossier database, documents might take up to one week to appear in Symphony.*

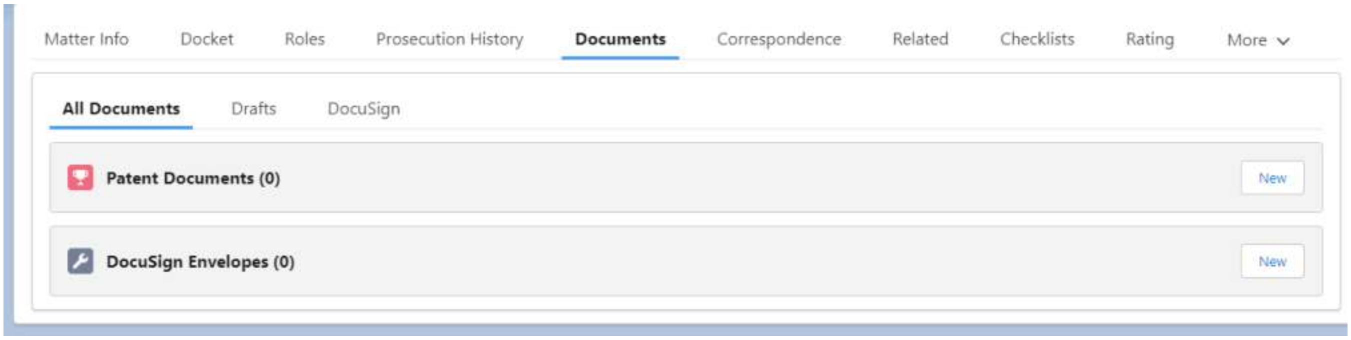
d. Documents

The **Documents** section is for drafts, documents for signature, and other transactions between the responsible individuals on the matter. It should not contain file history documents (those belong in Prosecution History).

The **Documents** tab displays all the documents under the three categories listed below:

i. All Documents

This section displays the list of all final documents uploaded/received in Symphony against the provided asset.



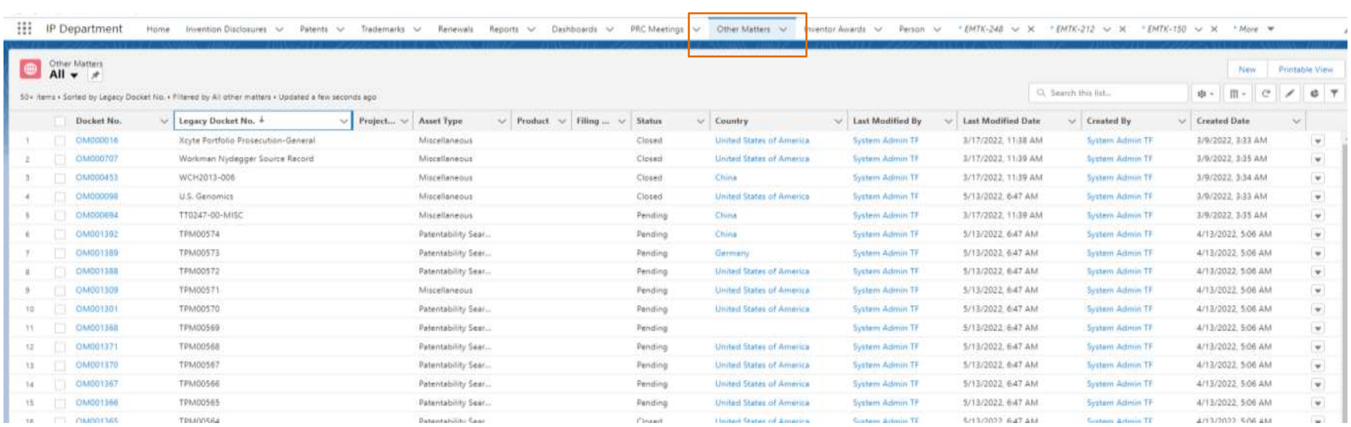
Following are some examples of what is in **All Documents**:

- Documents received through emails (details provided below under [Email to Docketing])
- Documents manually uploaded by the user (non-US/non-IP5 file wrappers/internal communications, etc.) (details provided below under [Manual Document Upload])
- Documents from the legacy system (details provided below)
- Final version of the drafts exchanged by the in-house counsel/outside counsel
- Templates and forms generated using S-Docs
- Signed DocuSign Envelopes

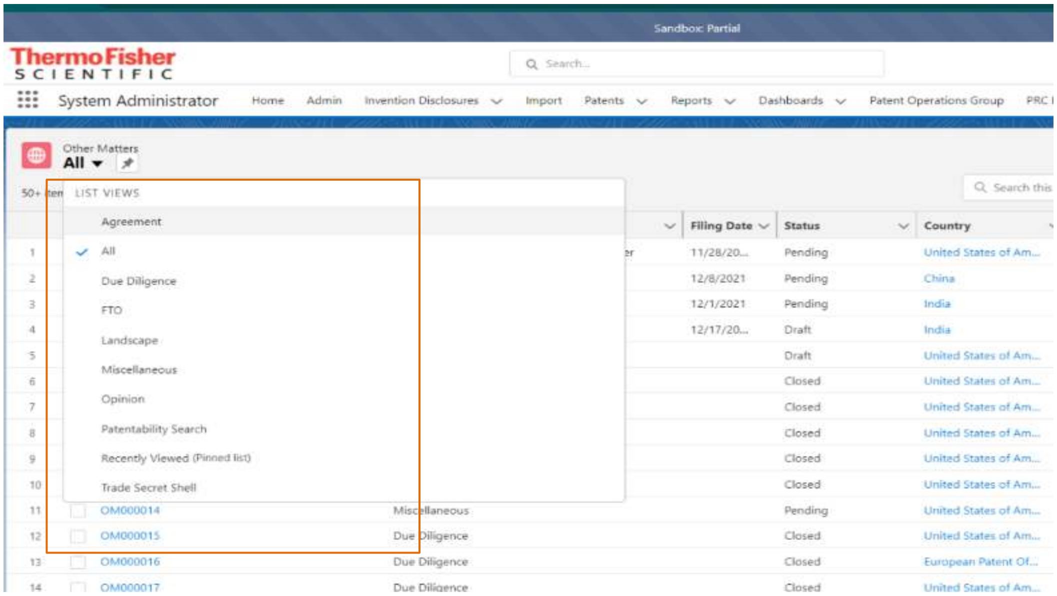
Other Matters

The **Other Matters** section allows you to view and manage the complete list of matters such as Due Diligence, Agreements, FTOs, landscapes, Opinions, Patentability Searches, Trade Secret Shells, etc.

Select the **Other Matters** tab from the home page to reach this section.



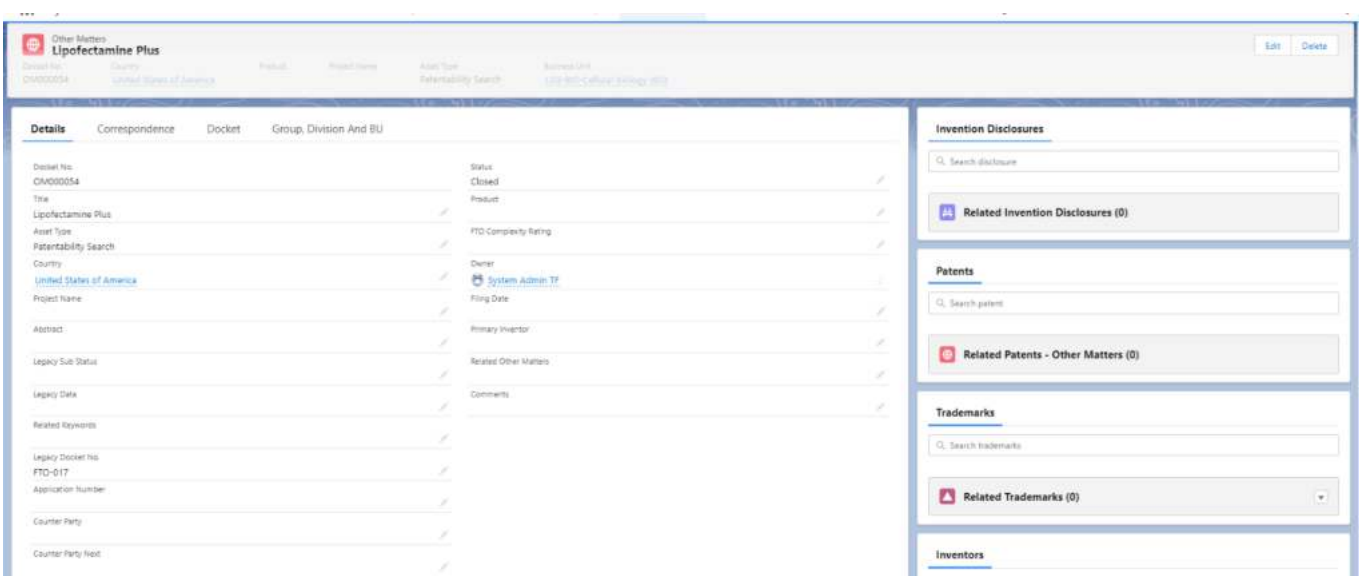
The listed records can be filtered based on the status by clicking the dropdown icon as shown below:



a. Other Matters Synopsis

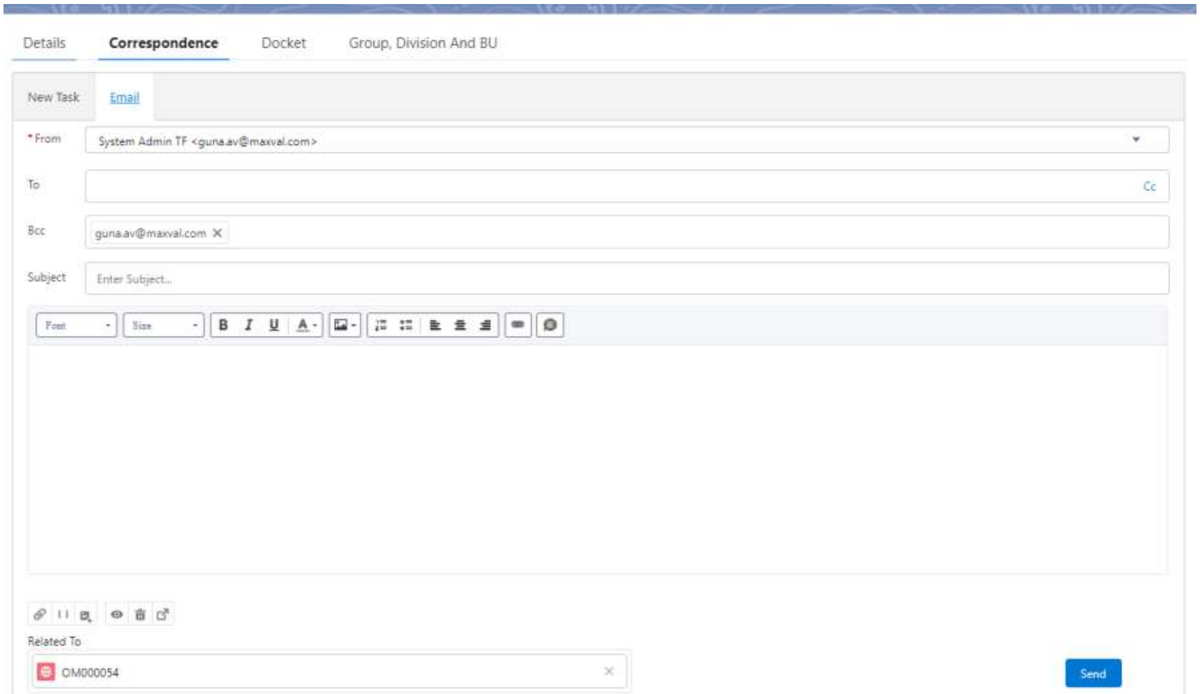
i. Details

Detailed view contains the list of all the details added while adding the new record and widgets to other modules such as Invention Disclosure, Patents, and Trademarks.



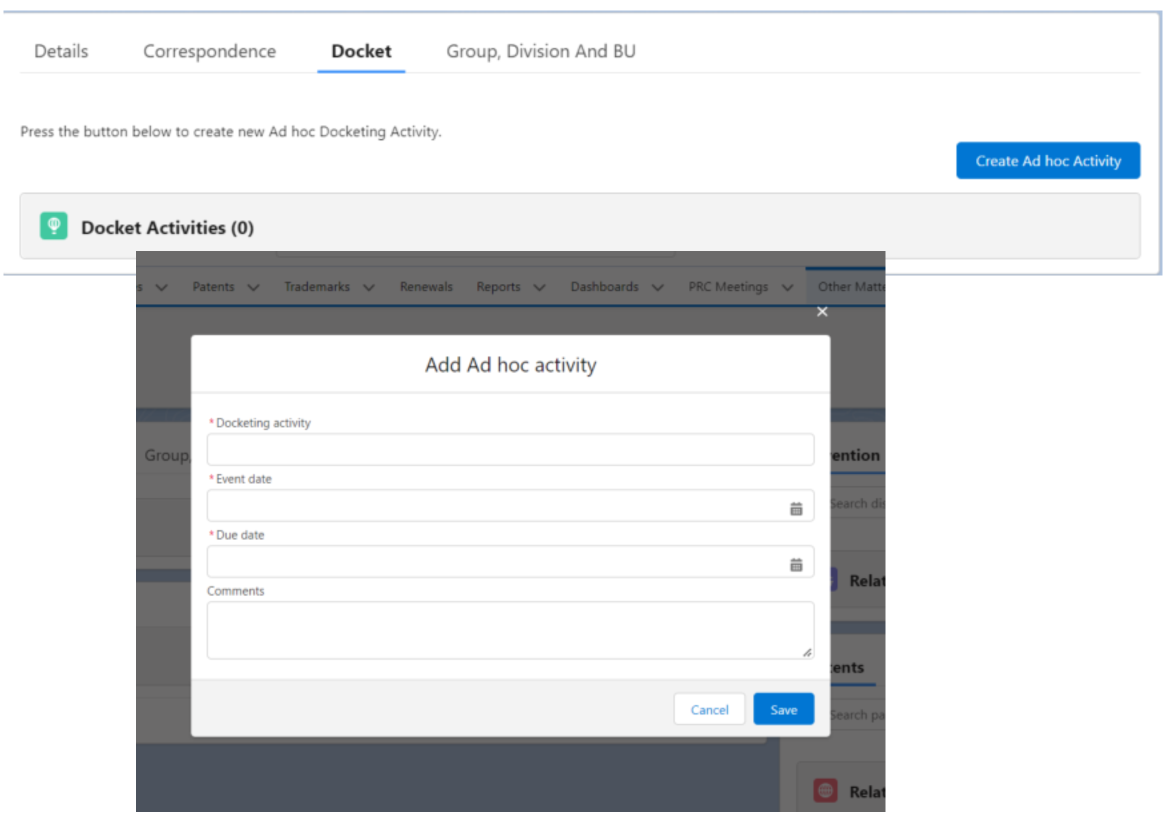
ii. Correspondence

The **Correspondence** tab allows you to send out an email to the respective stakeholders.



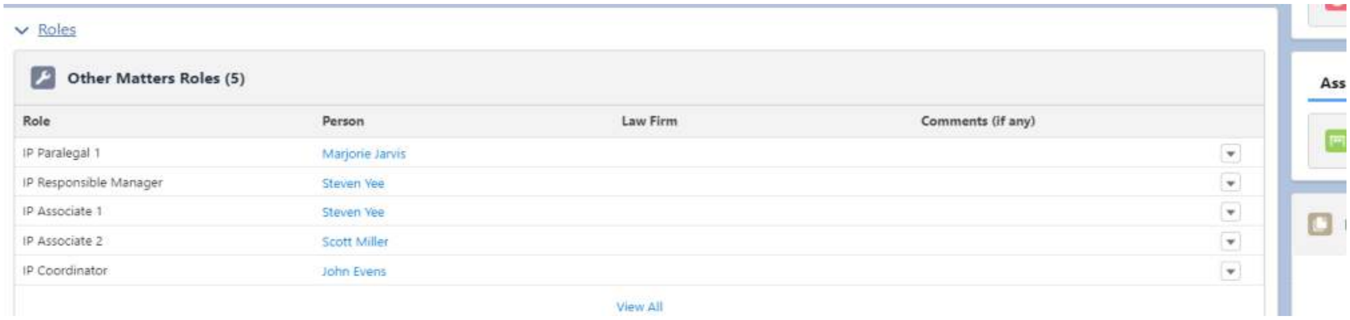
iii. Docket

This feature allows Docketing to add a new docket activity, event or an alert manually.



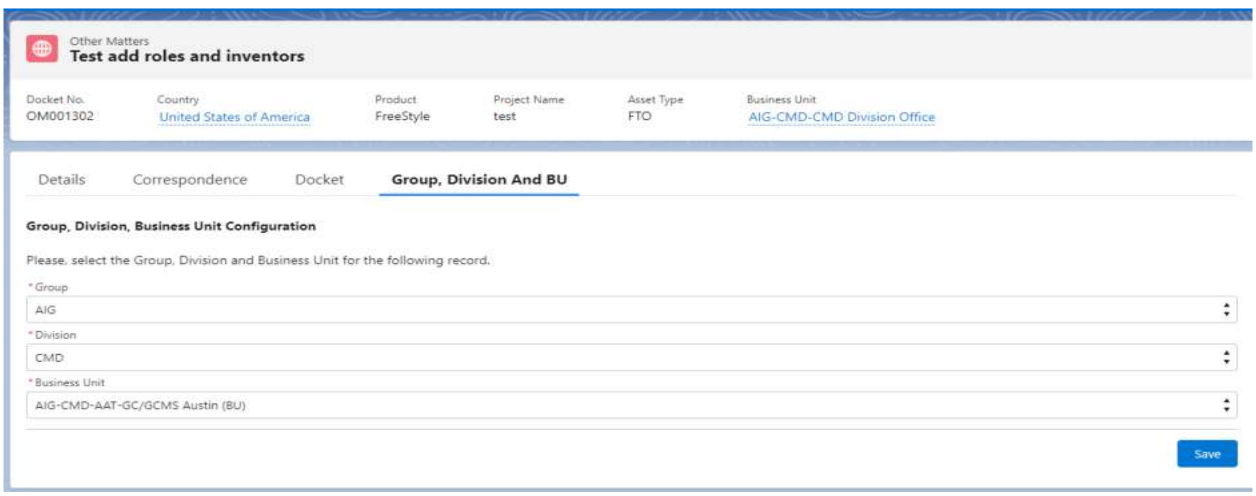
- **Roles**

All the other matter records have roles auto-populated based on the Business Unit selected for the record. You may see these roles under the Docket section.



iv. Group, Division, and BU

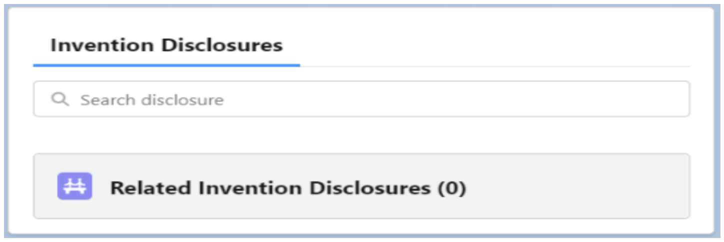
If necessary, Docketing can change the associated Business Unit of the selected record.



On the **Right-Hand** side of the screen, you would be seeing following details:

i. Invention Disclosure

Docketing can add any associated Invention Disclosure record to the pre-existing other matter record.



ii. Inventors

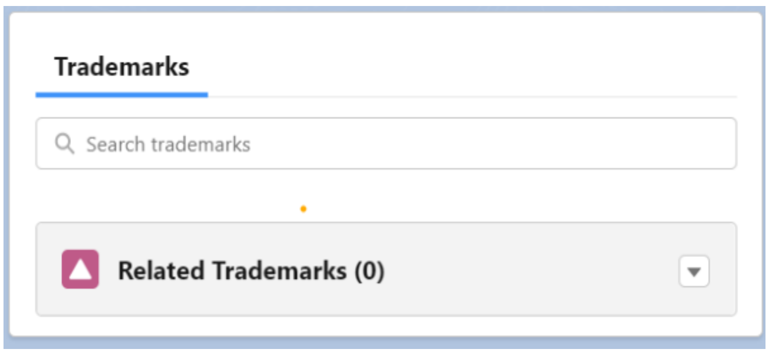
Docketing can add any associated Inventor person record to the pre-existing other matter record.

iii. Patents

Docketing can add any associated patent record to the pre-existing other matter record.

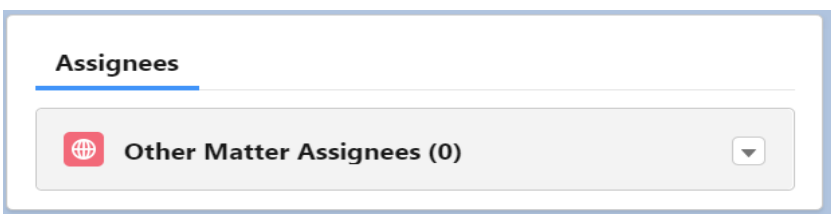
iv. Trademarks

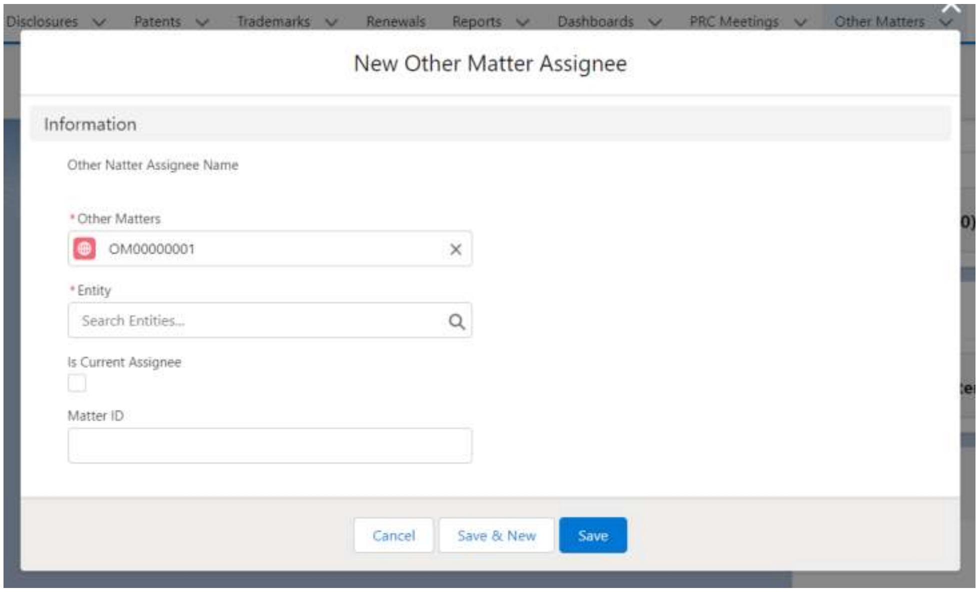
Docketing can add any associated Invention Disclosure record to the pre-existing other matter record.



v. Assignees

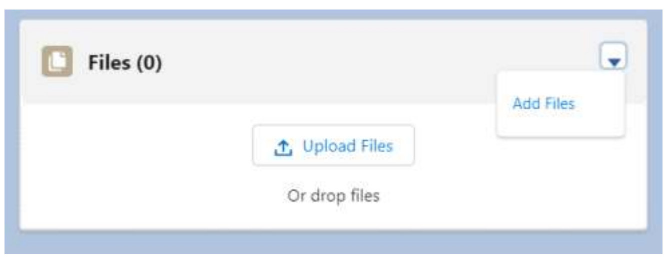
Docketing can assign any associated assignee by selecting the entity and matter IDF associated with the other record.





vi. Files

Files widget allows you to add new files to the asset by selecting Add Files from the down-arrow on the top-right corner. You may also drag and drop the files into this section for upload. An example of a file you might wish to upload includes patent search results or due diligence schedules.



Email to Docketing

The Email to Docketing functionality of Symphony allows users to keep track of all the incoming emails and docket actions directly through emails and upload the documents/attachments from emails to the respective asset. Please refer to the User Guide for Docketers for details on direct docketing through emails.

As shown below, all the emails with the subject format **[Symphony Docket Number]** and sent to tfdocketing@maxval.com are tracked in the **Incoming Email Dashboard** present on the **Homepage**.

Note: The following roles receive copies of emails in patent records: IP Responsible Manager; IP Partner; Xdiv Partner; IP Paralegal. IP Coordinators do not receive copies of emails in patent records; they only receive emails related to invention disclosure records.

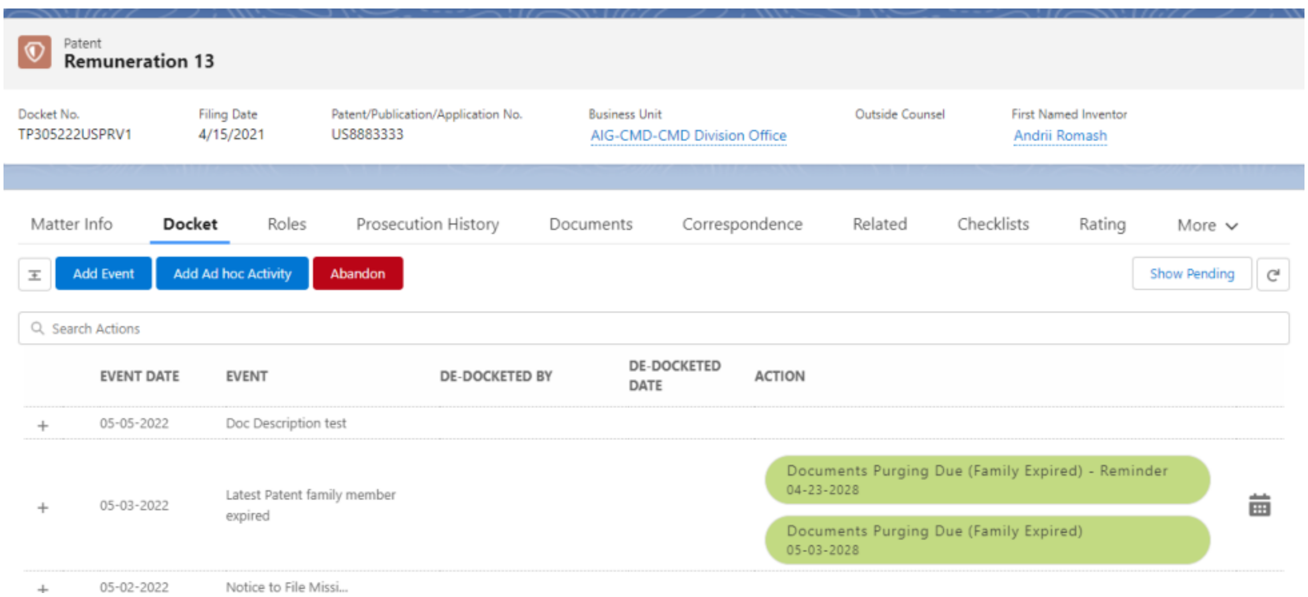
e-Signatures using DocuSign

The DocuSign integration with Symphony enables the IP Paralegal to get e-signatures from multiple parties in the same document and allows to track the status of signatures by each party. For more information, please see the IP Paralegal Guide.

Purging

All the documents that are stored in the Documents tab are scheduled to be purged automatically in accordance with the Thermo Fisher Records Retention Policy. The schedule states that, unless subject to Legal Hold, patent documents shall be purged Life plus 6 years. In Symphony, the setting will be **6 years plus 90 days from the date when the youngest family member of the patent has expired or lapsed.**

Only the final version of the documents will be retained along with the bibliographic data of the previous documents.



All the stakeholders of the documents will be notified 10 days before the actual document purging through an additional docket activity. This will allow them to make a local copy of the documents if there is a business reason for doing so.

Following gets deleted after 90 days from the 6 years post family expiry date:

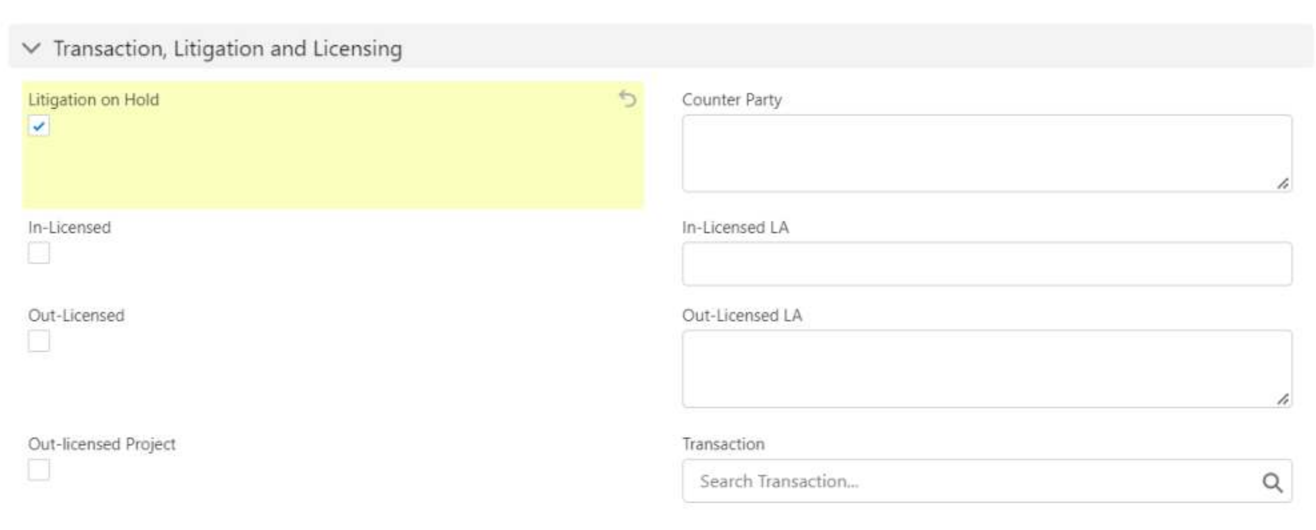
i. All documents in the Documents tab
ii. All emails in the Collaboration tab
iii. All documents in Files object

iv. All documents in IFW tab (optional)
v. All comments in Rating object
vi. All Notes

Only bibliographic detail of the patent record remains. All records subject to a litigation hold will be excluded from this purging activity through an automated process that the IP Paralegals will manage (as of June, 2022, managed by Cheri Gomez and Carina Frazer).

Litigation on Hold

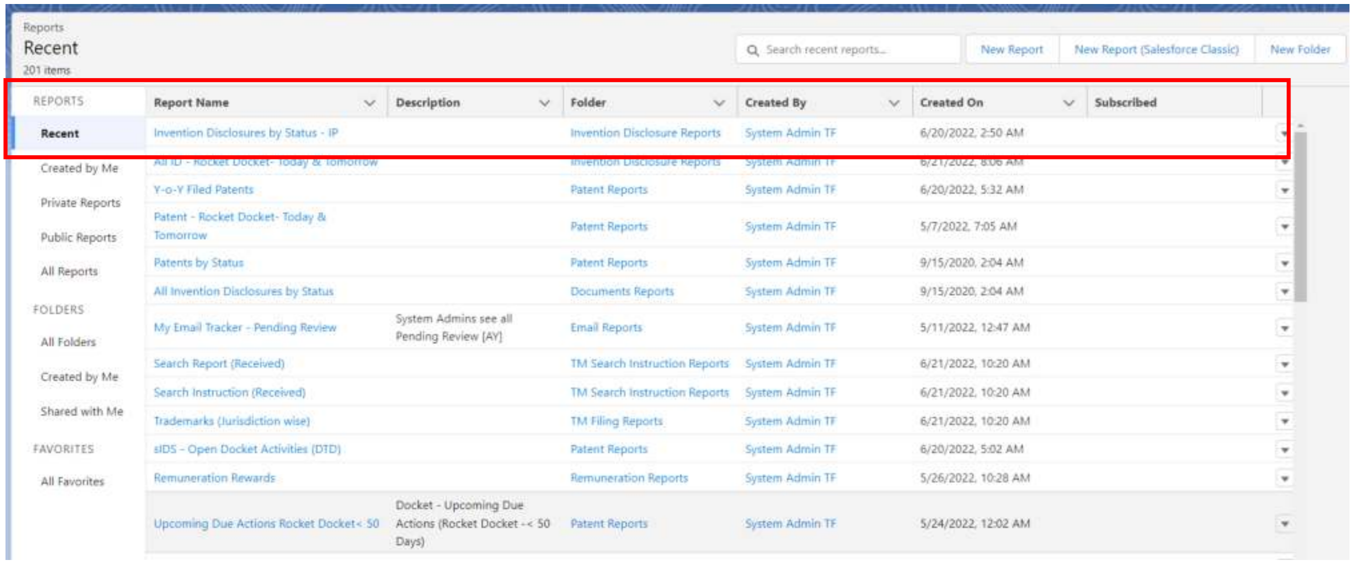
The IP Paralegals managing records retention can check the box **Litigation on Hold** to prevent documents from being purged. The documents will not be deleted until the IP Paralegals uncheck the Litigation on Hold box in the detailed view of the patent.



***Note**: If the Litigation on hold is selected for one patent, then the hold applies to the entire family*

Reports

The Reports section allows you to generate pre-configured reports or customized reports for the records in your portfolio.



This section displays the list of existing reports in a tabular format. See the list below for information on the fields displayed in the table:

- **Report Name**

Displays the name of the report

- **Description**

Displays a brief description of the report

- **Folder**

Displays the folder where the report is located

- **Created By**

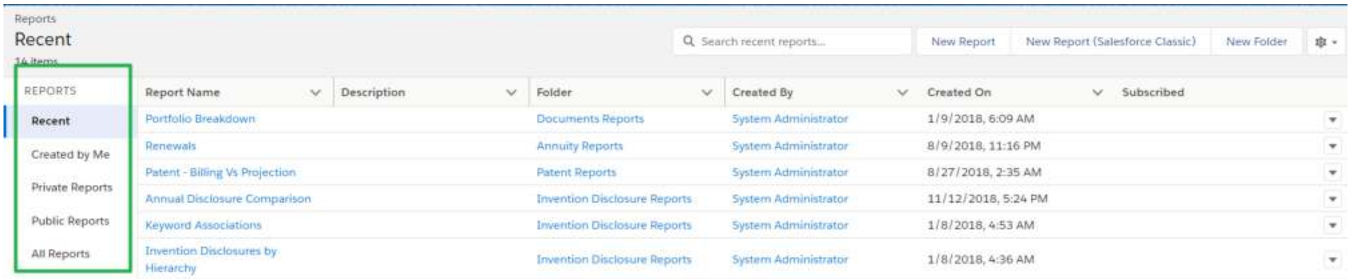
Displays the report creator's username

- **Created On**

Displays the report creation date

- **Subscribed**

Displays a checkmark if you have currently subscribed to this report



From this page, you can also view the list of reports using the category filters on the left side of the navigation panel under **REPORTS.** The different category filters are described below:

- **Recent**

Sorts the list of reports based on the last modified date

- **Created by Me**

Lists all the reports that were created by you

- **Private Reports**

Displays only the reports that are marked as ‘private’ when created

- **Public Reports**

Retrieves all the reports except those marked as private

- **All Reports**

Lists all the available reports

From this page, you can also view all the reports categorized by folders using the options on the left side of the navigation panel under **FOLDERS.** The different category filters are described below:

- **Folders**

When creating new reports, you can choose to add the reports to certain folders. You can also list reports available in specific folders by using its predefined filter.

- **Created by Me**

Displays the list of folders created by you

- **Shared with Me**

Lists all folders that are shared by other users

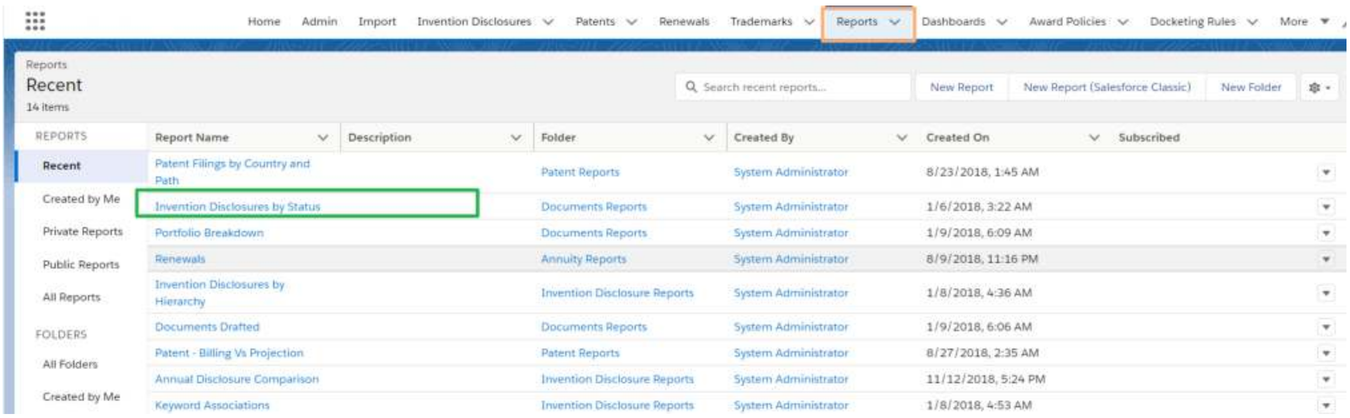
- **All Folders**

Lists all folders that you have access to, both created by and shared with you

a. View a Report

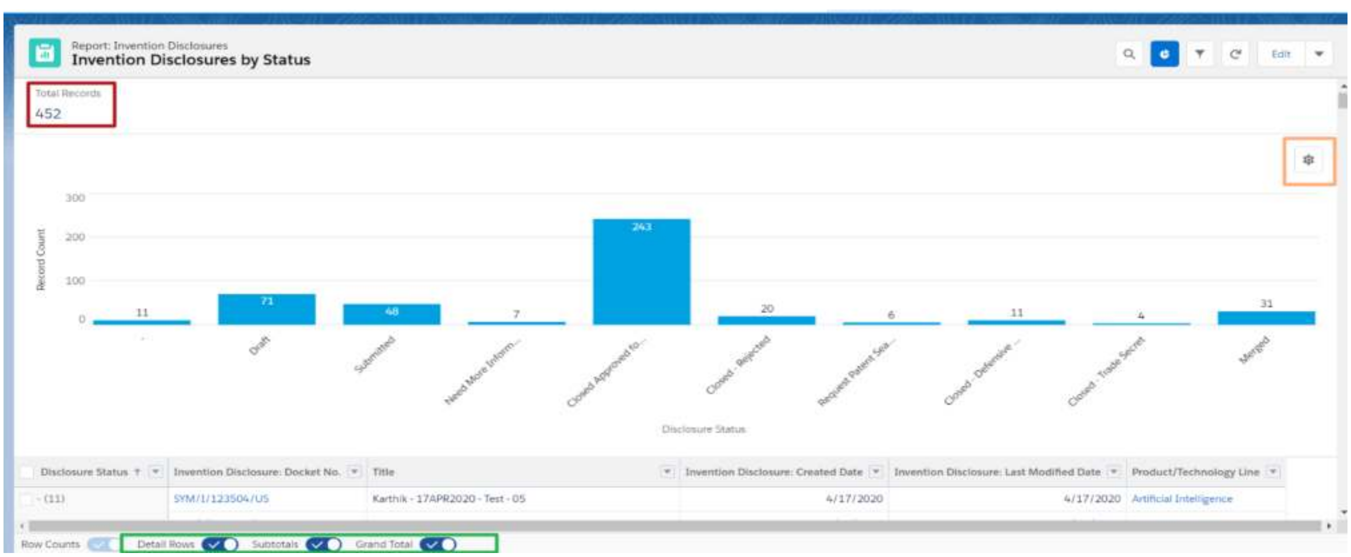
The information displayed on each report page will vary significantly for each report and can be modified by changing the report parameters. Refer to **Edit Report** for more information. Follow the procedure below to access a report:

1. Click the **Reports** tab and select a report from the reports list. The report page will display the following information:



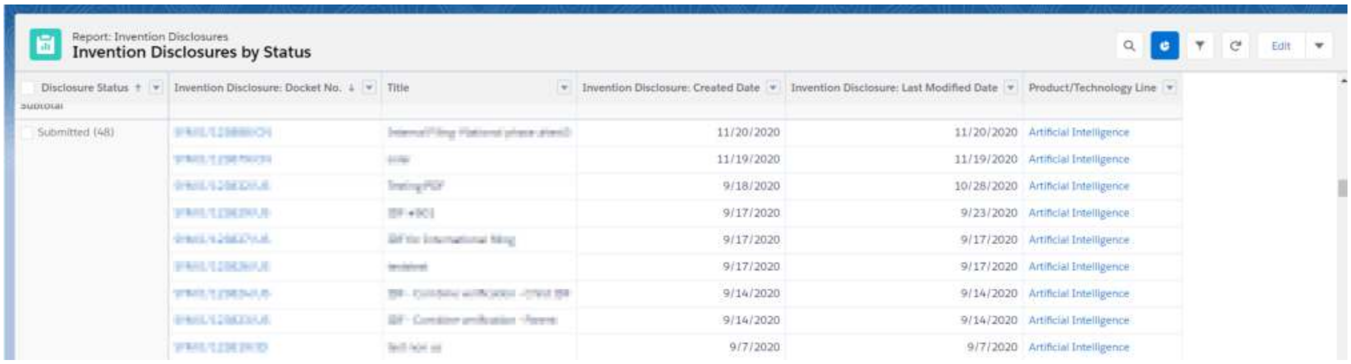
- **Chart**

The chart synthesizes the data (total number of records are shown at the top left corner) from the report and displays it in a graphical format. There are several chart types to choose from (column chart, bar chart, stacked bar chart, pie chart, etc.). You can change the chart type by clicking on the **Gear** icon on the right of the screen. You can also set the level of granularity of the report by choosing one or a combination of **Details, Subtotals,** and **Grand total** (shown at the bottom of the image).



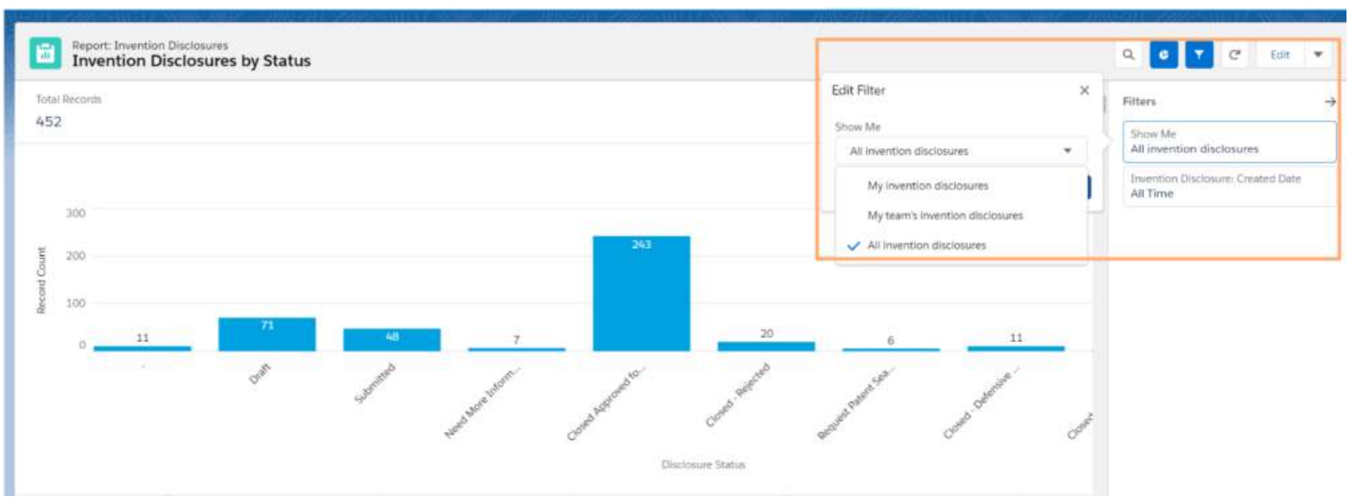
- **Record Table**

The record table section of the report displays the data in detail. The number and content of the columns are customizable and vary by report.



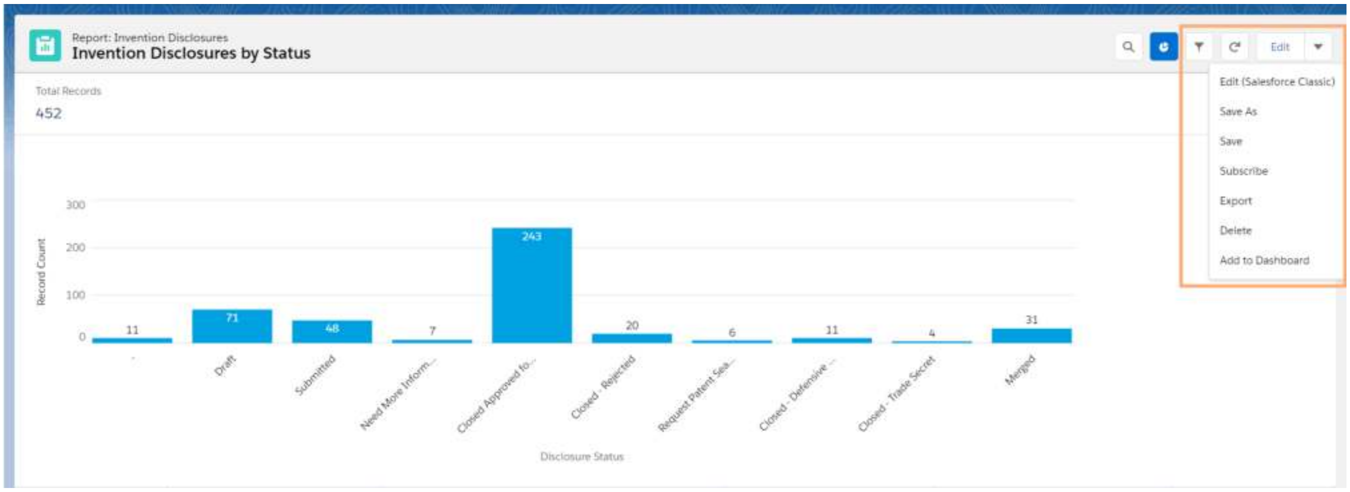
- **Filter Option**

Selecting the filter icon will bring up the filter settings. The filter options vary by report. Some filters are locked and can only be changed by editing the report.



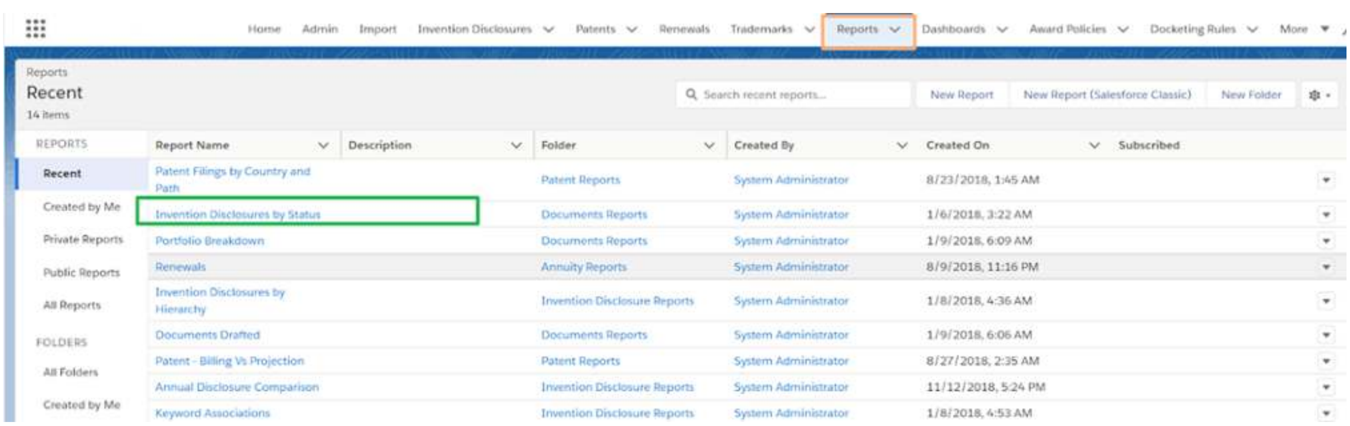
b. Run Report

This option allows you to edit and run an already created report. For instance, you can add a filter or add more fields to the report based on your requirement. The small drop-down arrow next to the **Edit** button will allow you to Clone, Delete, Export, Save, and Subscribe to the report.

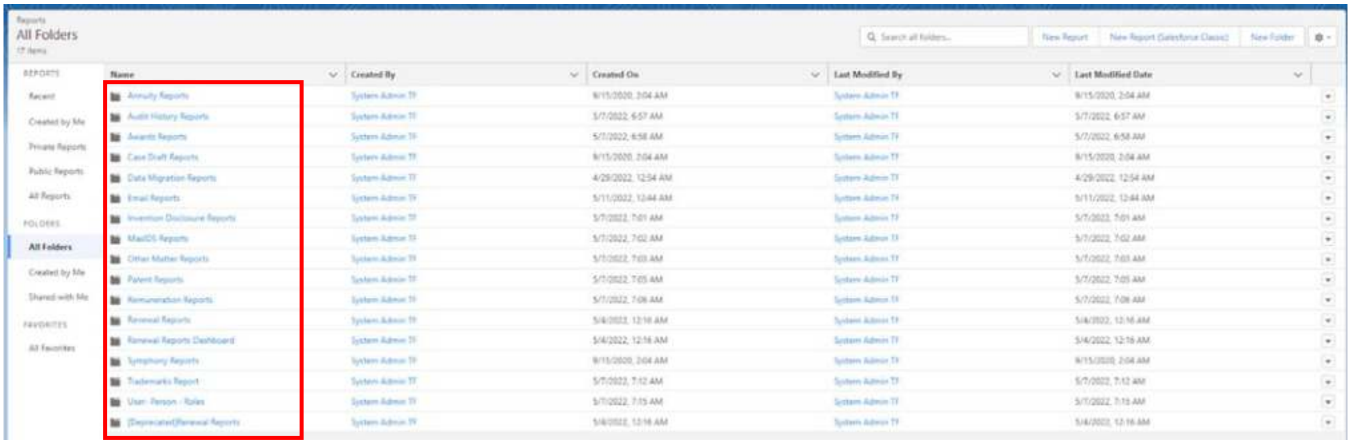


To run a report, follow the below steps:

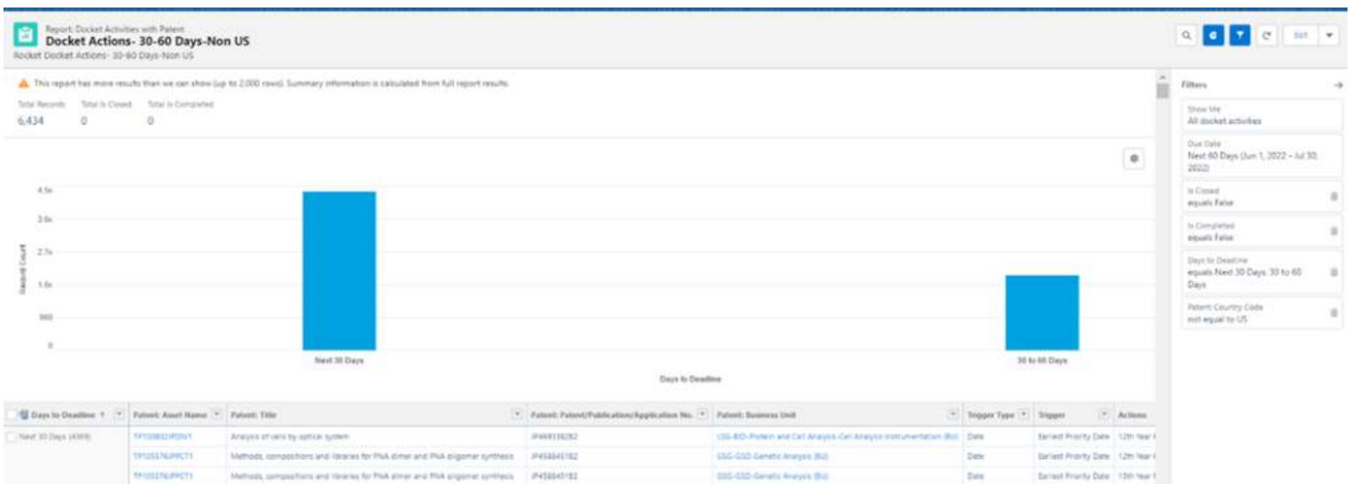
1. Click the **Reports** tab and select a report from the reports list. The report page will display the following information:



Alternatively, for quick access, you may move your regular reports to a folder.

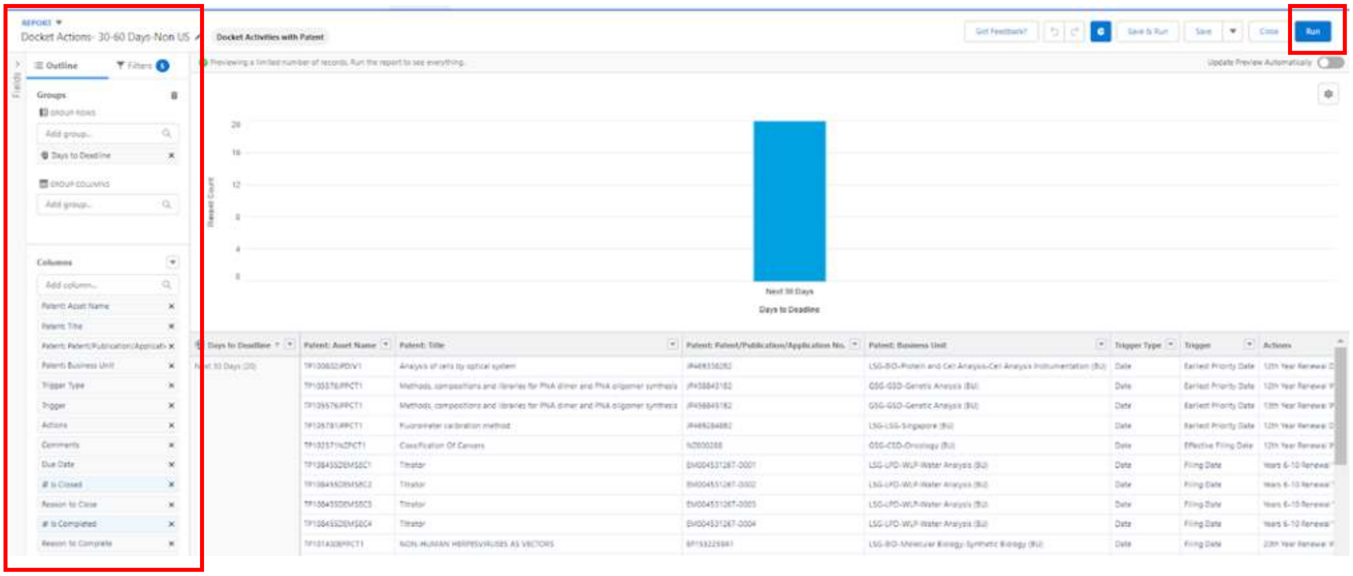


2. Select the report that you want to run.
3. Click on **Edit** if you want to make changes to the report OR want to apply filters to the data set**.**



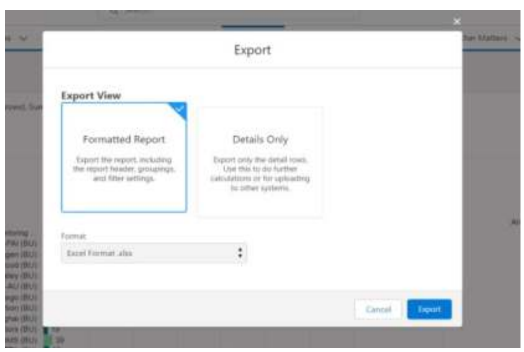
4. To group records in your report, choose a column from the **Add group**... picklist under GROUP ROWS. After grouping a row, you can group a column by choosing a column from the Add group... picklist under GROUP COLUMNS. Group up to 2 rows and 2 columns.

   Alternatively, expand the Fields pane, drag a column from the Columns list or from the preview pane onto the GROUP ROWS or GROUP COLUMNS list.



5. To add a column to your report, choose a field from the **Add column**... picklist. Alternatively, expand the Fields pane, then drag a field onto the Columns list or directly onto the report preview. To select multiple fields, press Ctrl (Windows), Cmd (Mac), or Shift when you click.
6. To filter records from your report, click FILTERS. To add a field filter, choose a field from the **Add filter**... picklist.
7. After editing the fields and filters, click **Run Report** to generate the entire document.

- **Export Report**



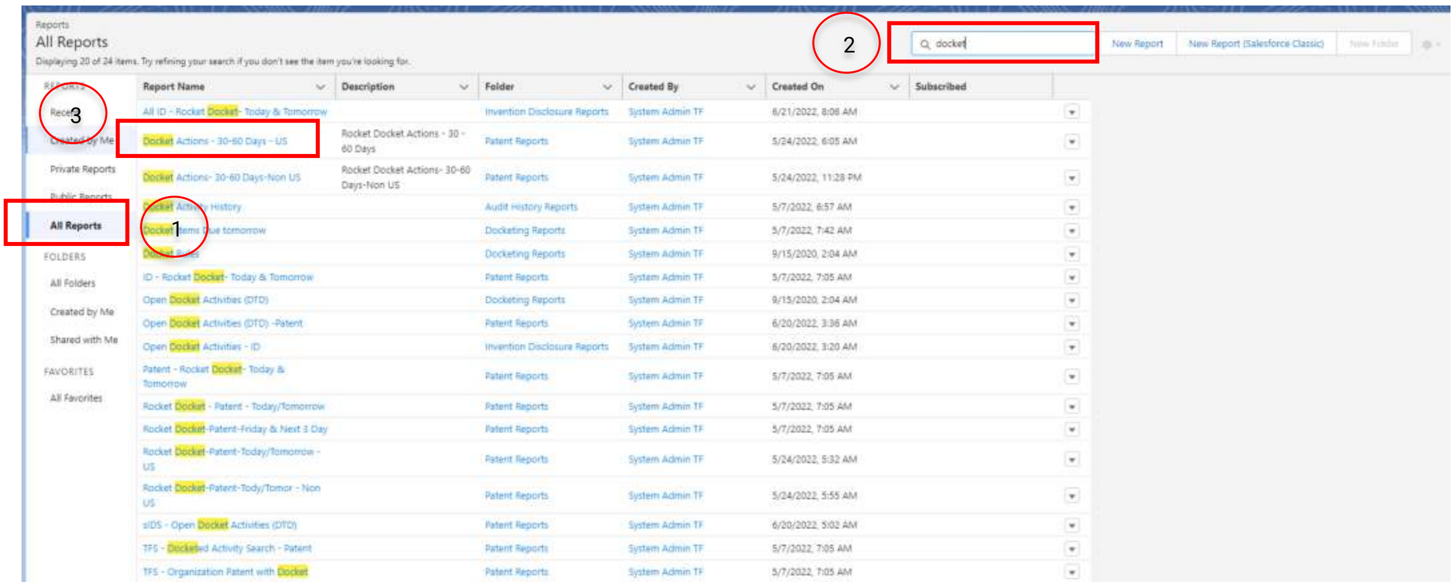
The 'Export' option allows the user to download the current report in the following ways:

- **Formatted Report**: The report includes the header, groupings, and filter setting.
- **Details Only**: This option only exports the rows of data without any additional settings.

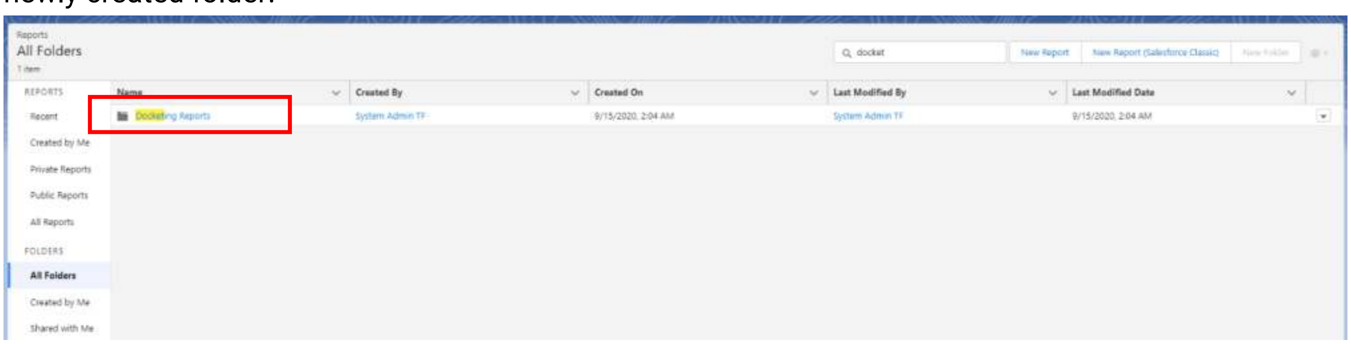
Step-by-Step Guide on 'How to Run' most frequently used reports in Symphony:

- **Docket Report:**

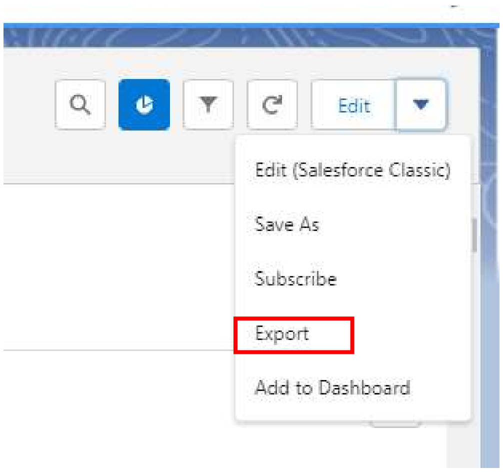
1. Click the **Reports** tab and click on **All Reports.**
2. Search for the report in the **Search** bar.
3. Click on the report that you want to run. In this example we are selecting **Docket Actions – 30-60 Days – US.**



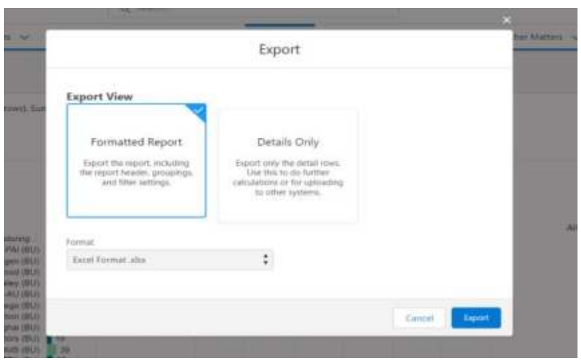
Alternatively, for quick access, you may create a folder and move all frequently used reports in the newly created folder.



4. If you want to download the report as it is, click on the drop-down on top and select **Export**.

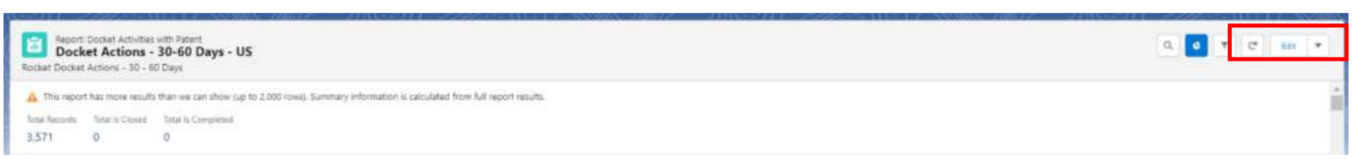


The ‘Export’ option allows the user to download the report as Formatted Report or as Details only.

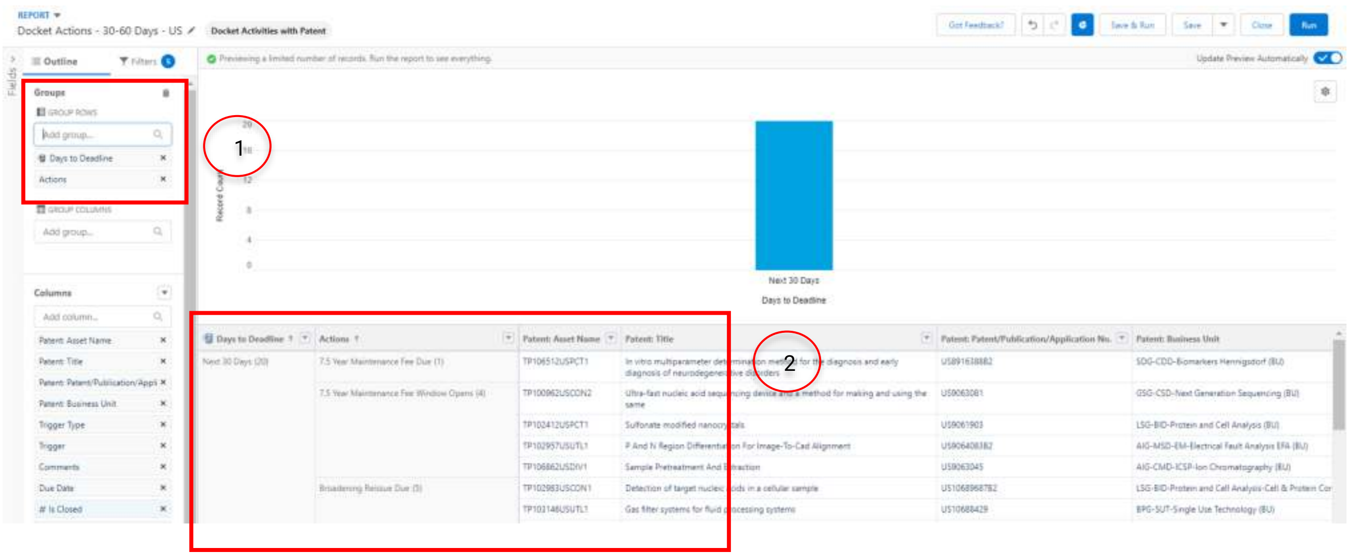


Select the option as per requirement, click on **Export** and save the report to your local drive.

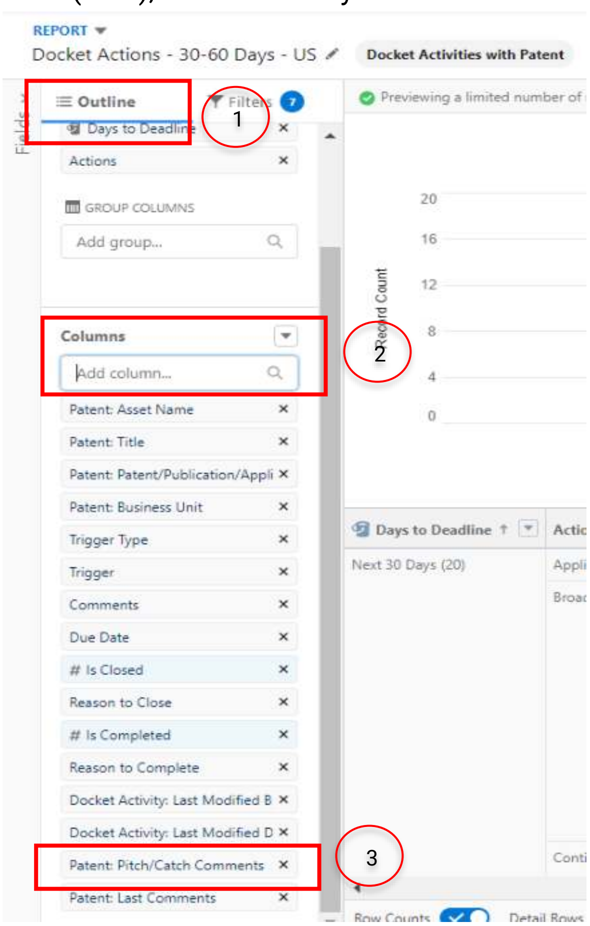
5. If you want to make some changes to the report before Export, click on **Edit**.



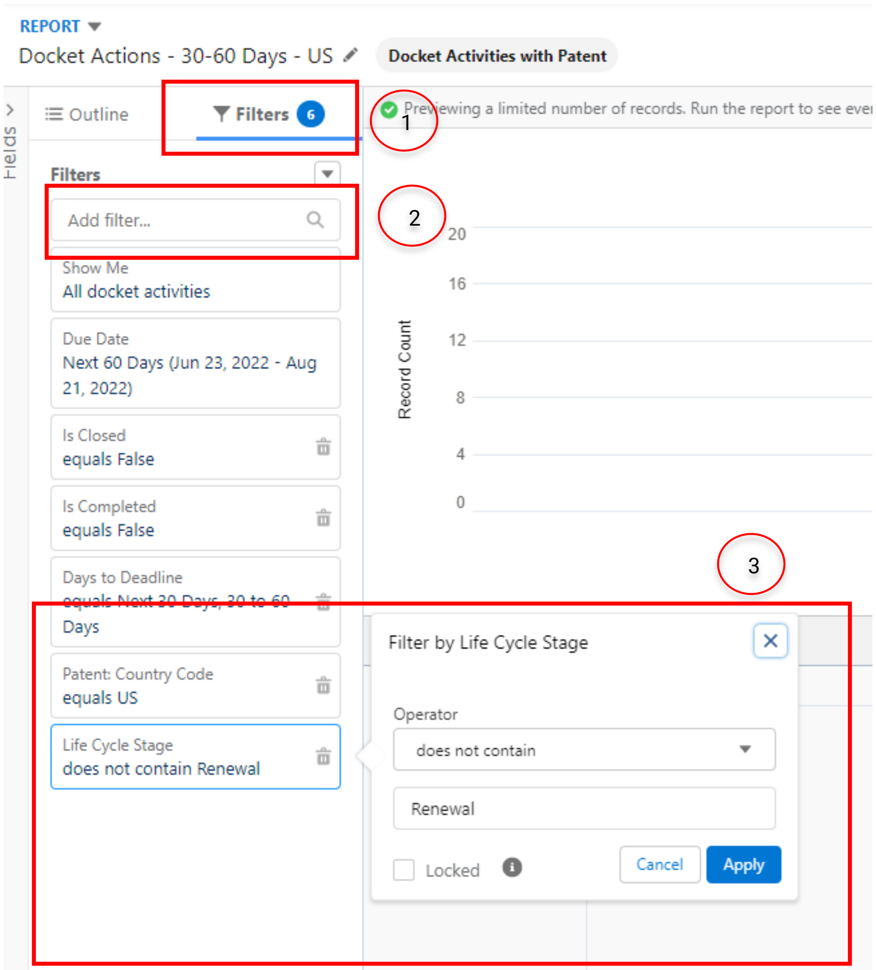
6. If you want to group the records based on Docket Actions, choose Actions from the **Add group**... picklist under GROUP ROWS. This will group the records based upcoming actions in next 30 days and 60 days.



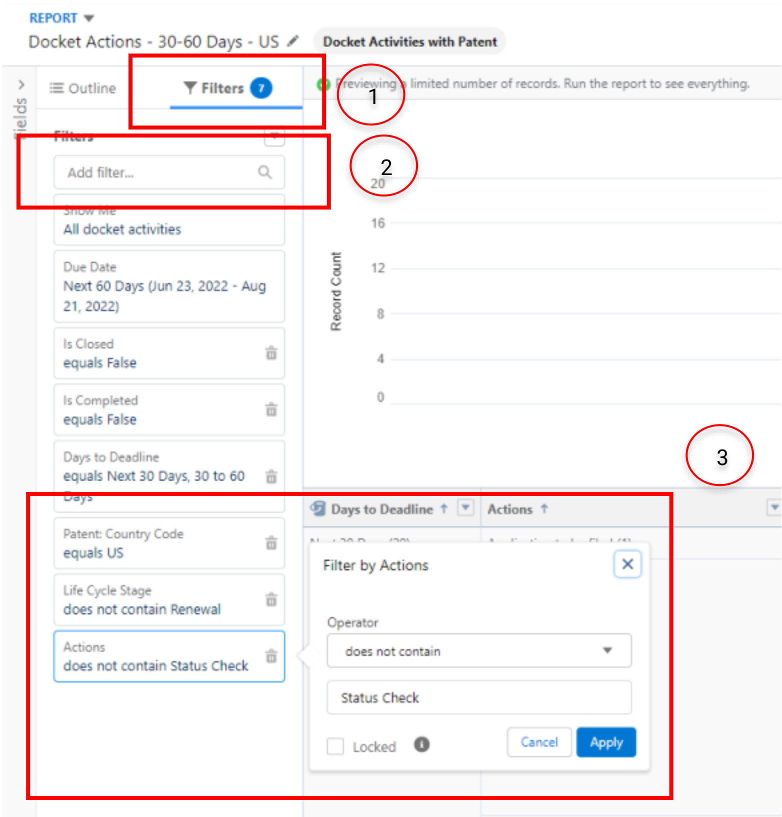
7. To add additional columns to your report such as **Pitch/Catch Comments,** etc, choose the fields from the **Add column**... picklist. Alternatively, expand the Fields pane, then drag a field onto the Columns list or directly onto the report preview. To select multiple fields, press Ctrl (Windows), Cmd (Mac), or Shift when you click.



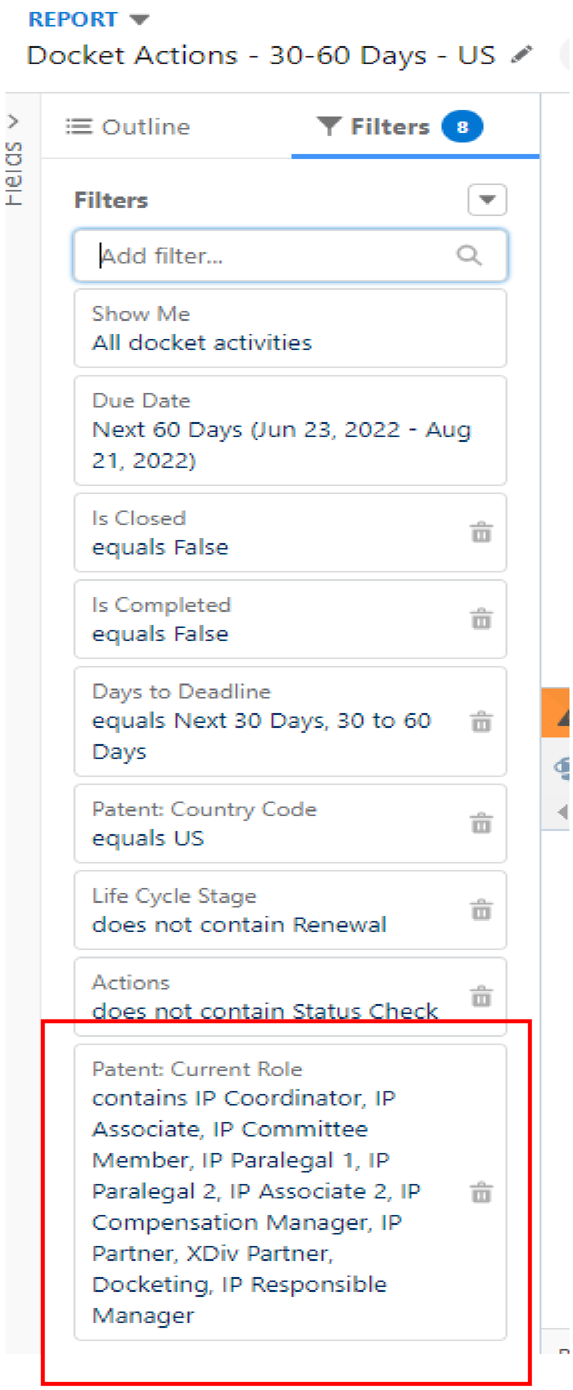
8. If you want to remove all Renewals deadlines from the report, click on **Filters** and choose **Life Cycle Stage** from the **Add filter**... picklist. Use operator ***does not contain*** and enter the value as **Renewal**. Click **Apply**.



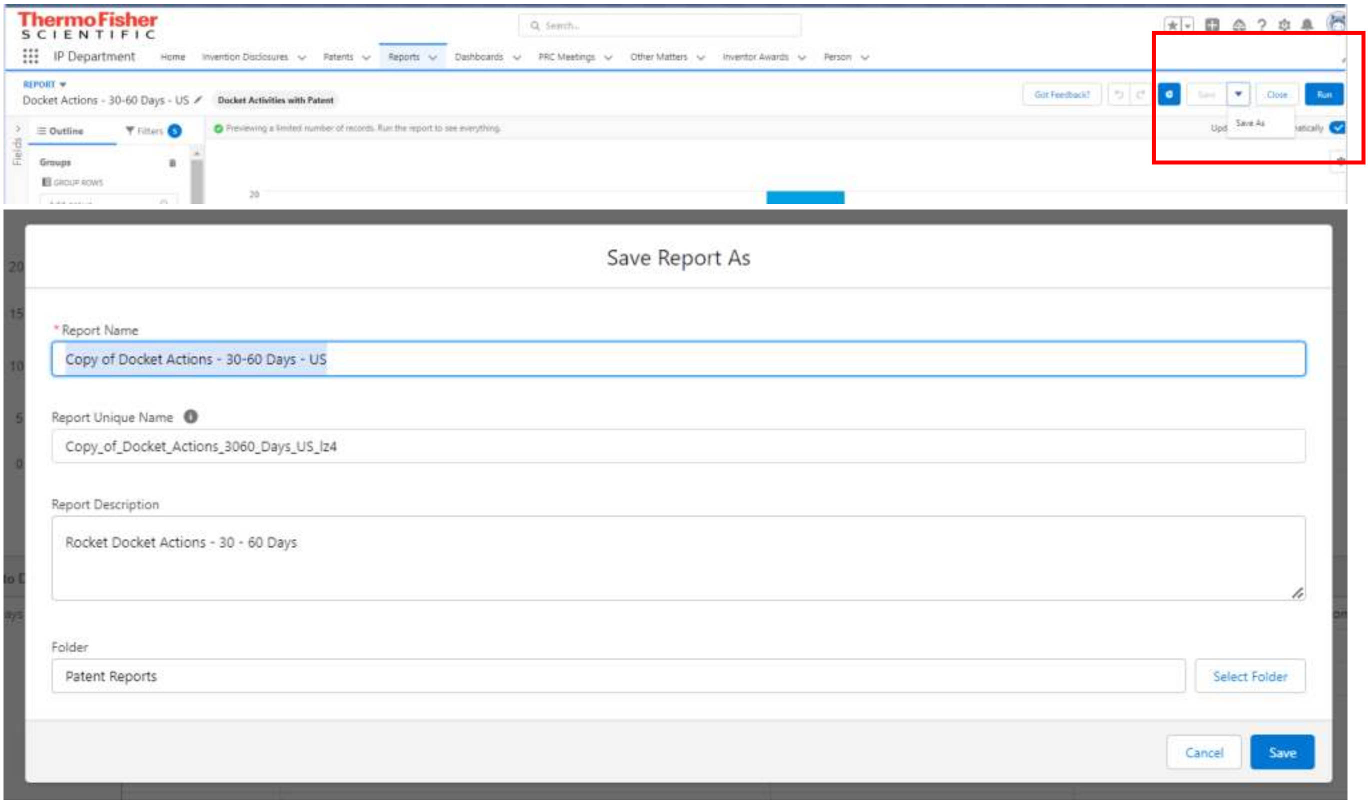
9. If you want to remove all Status Checks from the report, click on **Filters** and choose **Actions** from the **Add filter**... picklist. Use operator ***does not contain*** and enter the value as **Status Check**. Click **Apply**.



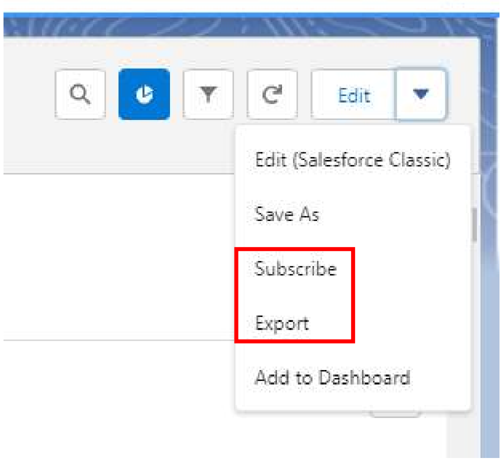
10. To further filters the report for only those cases where you have a role, click on **Filters** and choose **Current Role** from the **Add filter**... picklist. Use operator ***contains*** and enter the value as **IP Coordinator, IP Associate, IP Committee Member, IP Paralegal 1, IP Paralegal 2, IP Associate 2, IP Compensation Manager, IP Partner, XDiv Partner, Docketing, IP Coordinator**. Click **Apply**.



11. Once the edits are done, click on **Run.** If you want to save the report for future purposes, click on **Save As** and create a copy of the report with the new edits. Rename the report, select the folder and **Save**.



12. If you want to download the newly edited report, click on the drop-down on top and select **Export**. You may also subscribe to a report by selecting **Subscribe**. The steps on how to Subscribe to a report are provided below.



The steps mentioned above can be followed for running other frequently used reports as well such as Patent Family Status (Report Name : Patent Family Status), Pending Cases (Report Name : Patent Pending Cases), Issued Cases (Report Name : Patent Issued Cases), Active Portfolio (Report Name : Patent Active Cases) etc. All the reports are saved under **Frequently Used Reports** folder.

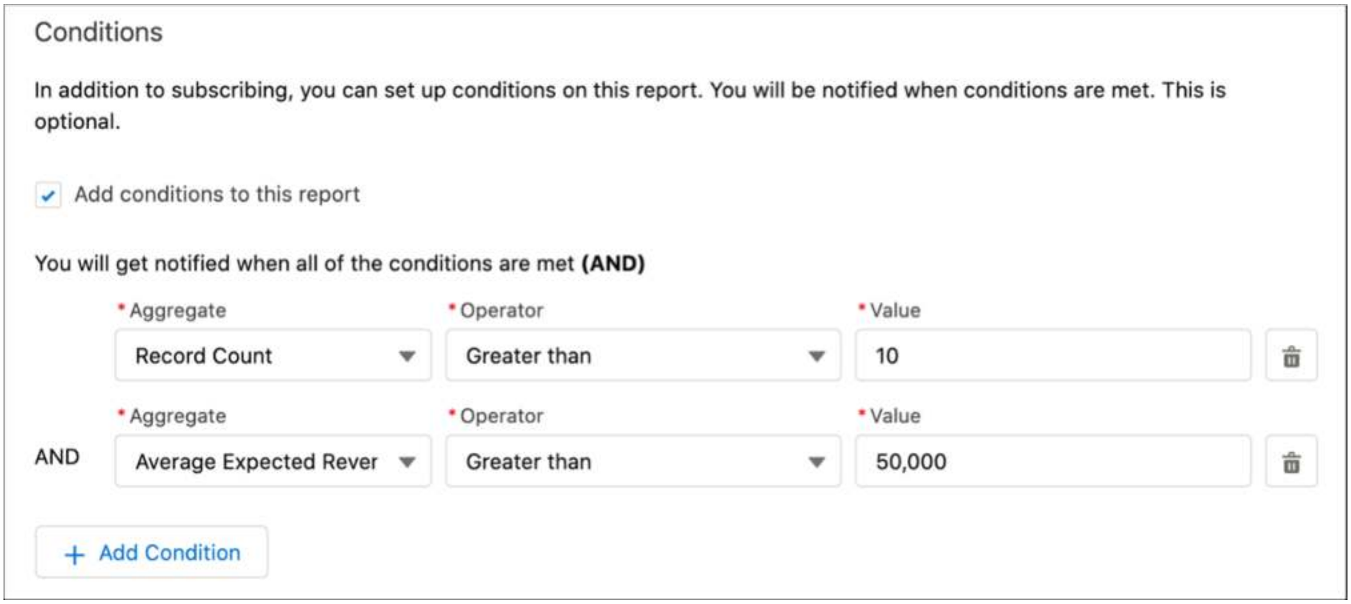
c. Schedule/Subscribe Reports

You may subscribe yourself and other users, groups, or roles to receive refreshed report results by email on a schedule that you set.
Use these steps to create a subscription or edit an existing one.

1. From the Reports tab or from the report run page, click | **Subscribe**.
2. In the **Edit Subscription** window, set the subscription schedule. For the weekly docket report, choose a weekly subscription with delivery Monday 8:00 AM.
3. To have the report results delivered as an attached file, click **Attach File**. Select **Formatted Report** (.xlsx format) or **Report Details** (.csx format). For .csx attachments, it's optional to change the encoding type. When you're finished selecting the attachment type, click **Save**.
4. Under Recipients, you're automatically selected as a recipient. To add others or remove yourself, click **Edit Recipients**. Select from the available entity types and start typing to see all the matching names. Only the users, groups, or roles with permission to access the report are shown in the list of matches. Select from the matching options and click **Add**. Add more users, groups, or roles as needed and then close the **Edit Recipients** window.

   When the subscription emails the refreshed report to each recipient, it sends it to the email address set in **Settings | Email | My Email Settings**. If no email is set in **My Email Settings**, then the refreshed report is sent to the recipient's email address set on their Symphony User record.

5. Under Run Report As, specify whose perspective is used when running the report.
   - **Me** — You run the report, and recipients see the same report data that you see.
   - **Another Person** — Recipients see the same report data as the person you select. The person must have permission to run reports and have access to this report.
6. Optionally, add conditions. The conditions are evaluated when the report is run according to the schedule you set. The report is emailed only if all conditions are met. For each condition, select an aggregate measure, an operator, and a value to match. You can add up to 5 conditions.

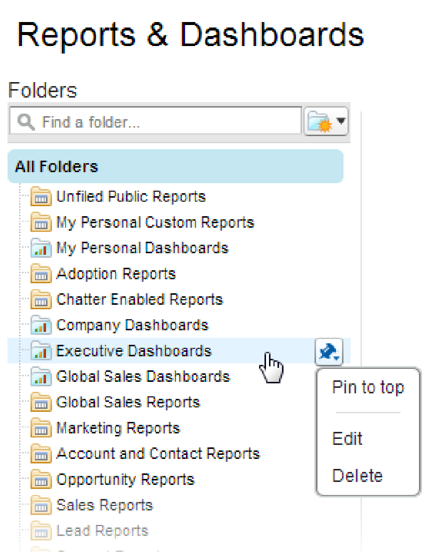


7. Click **Save**.

d. Organize Reports

Pin your most-used report and dashboard folders to the top of the folder list so you don't have to scroll down every time you need them.

1. In the list of report and dashboard folders, hover over any folder, then click .



2. Select **Pin to top**.

   Your folder moves to the top of the folders list.

Inventor Awards

The **Inventors Awards** tab displays the list of awards granted to the inventors based on the organization's award policy. This is a confidential tab and only IP Compensation Managers will be able to view the details and take actions. The award policy allows the IP Compensation Managers to trigger awards to the inventors based on the stages of the disclosure or an asset in your portfolio. For more information, see the IP Compensation Manager Guide.

The **Inventors Awards** page displays the generated awards in a list, along with:

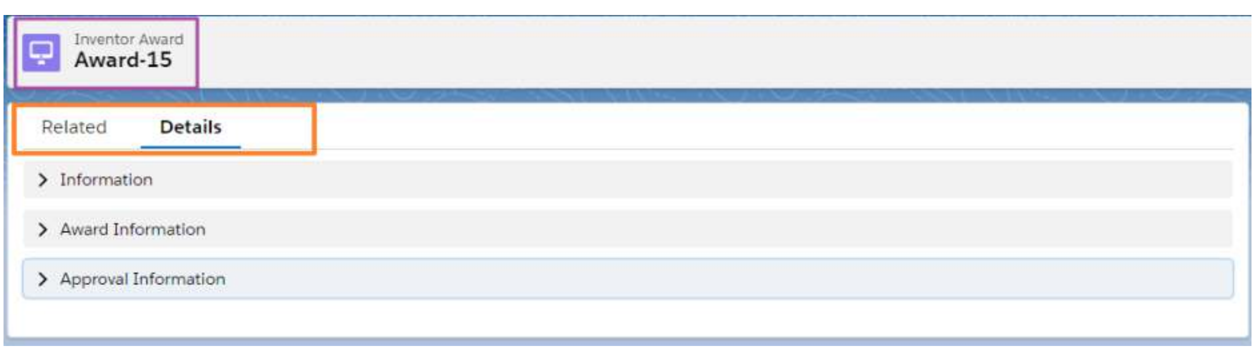
- Name of the Award
- Inventor Name
- Invention Disclosure Name
- Invention Status
- Award Currency
- Award Amount
- Approval Status
- Created Date
- Action

Click any award from the **Inventor Awards** page to view the award details.

a. Inventor Award – Detailed View

The inventor award detailed view displays the award name and other related information in two different tabs:

- Details
- Related



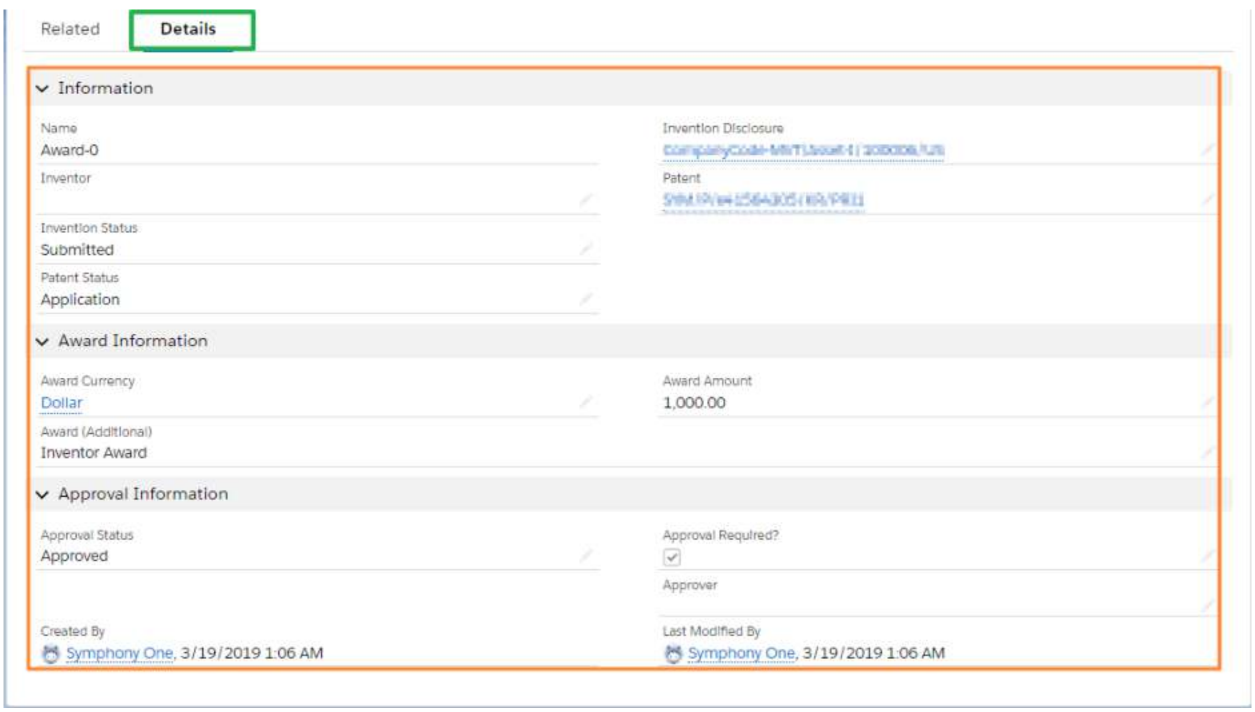
a. Details

This section of the awards detailed view displays the major information related to the generated award under different topics. The **Details** tab is divided into the following sections:

- **Information**
  This section displays the name of the award, inventor, invention disclosure, invention status, patent status, award policy, and payment status.

- **Award Information**
  This section displays the award information, such as award currency, award amount, and additional information.

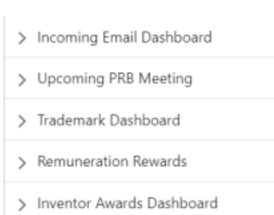
- **Approval Information**
  This section displays the approver information such as approval status, approver name, and other related information. To approve the new generated award, open it and select **Approved** from the **Approval Status** drop-down menu and **save.**

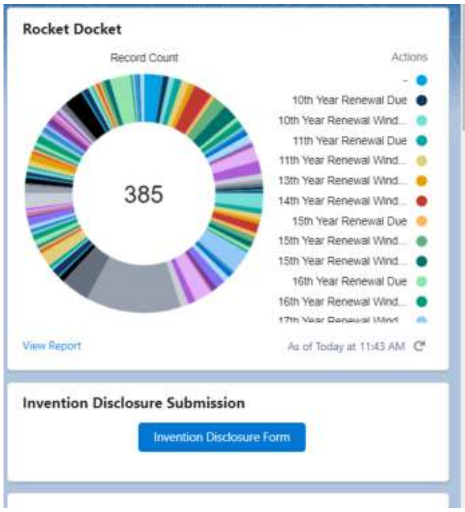
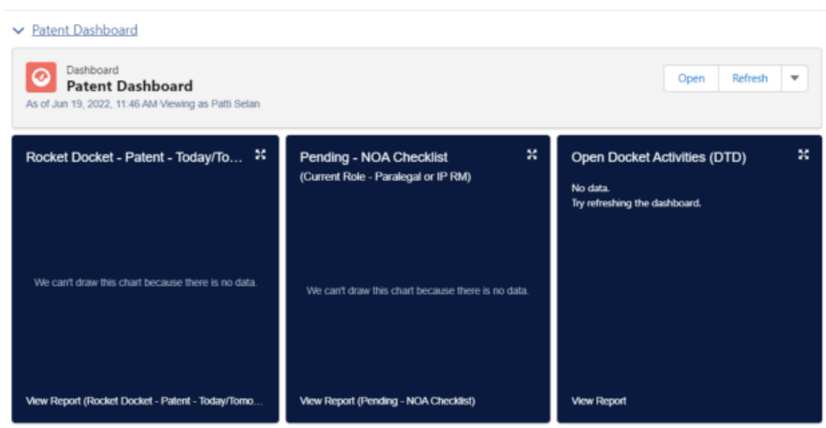
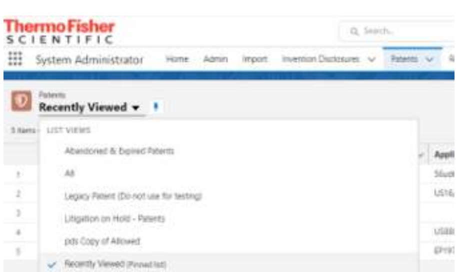


Glossary

FIELD	DESCRIPTION
Docket Number	Symphony docket number; Unique identifier created automatically for new records
Legacy Docket Number	Legacy Docket number; used in the legacy patent management system
Title	Title of the IDF, the Patent, the IP Other Matter, or the Trademark
Group	Assigned Group of the record
Division	Assigned Division of the record
Business Unit	Assigned Business Unit of the record
First Named Inventor	Displays the primary inventor
Jurisdiction	Country Name
Country Code	Two letter abbreviation for the jurisdiction
Status	Displays the current status of the record
Asset Name	Symphony Docket No.
Application No.	Displays the reference number assigned by the PTO to a patent application after it is filed
Filing Date	Displays the date of filing of the application in the PTO
Publication No.	Displays the reference number assigned by the PTO to a patent application when it was published

Publication Date	Displays the publication date for a record
Patent No.	Displays the reference number assigned by the PTO when the patent is granted
Issue Date	Displays the reference number used by the Outside Counsel to identify a patent application
Case Type	Case type of the created patent record
Patent Status	Displays the patent status of the record
IP Coordinator	If the Business Unit has an assigned IP Coordinator, this is the person who reviews and processes all incoming IDF's. This role does not have responsibility for patent prosecution; if same person is responsible for patent prosecution, then add them with Role = IP Partner to the patent record
IP Coordinator	Attorney, Agent or trainee responsible for prosecution and strategy of the entire patent family; only 1 per application
IP Paralegal	Supports Attorney or Agent responsible for prosecution *Note: If IP Partner exists, the IP Partner's paralegal has role. If no IP Partner exists, the RM's paralegal has role*
IP Partner	Attorney, Agent or trainee responsible for prosecution in local patent office; works with IP Coordinator and provides support "across the pond" from Europe, China or US
IP Associate 1	Group counsel
IP Associate 2	Div counsel or Manager of IP Coordinator
IP Associate 3	Attorney, agent or trainee who follows case but has no responsibility for prosecution
XDiv Partner	Attorney, Agent or trainee helping out on the case; will have IP Resp Manager or IP Partner role if responsible for signing/filing documents with patent office; will have role of XDiv Partner if only assisting; also for IP Associate 4 if necessary

IP Compensation Manager	Attorney, Agent, IPC or Paralegal responsible for calculating awards per the Thermo Fisher policy, or for calculation remuneration per local laws.
Patent Review Committee	Committee members who review IDF’s and assist with making a decision on whether to file
1st Remuneration Manager	Site manager or Finance Manager who counter-signs Remuneration Agreements on behalf of that entity
2nd Remuneration Manager	Second site manager or Finance Manager who counter-signs Remuneration Agreements on behalf of that entity (optional; some business units only have one)
Previous Internal IP Contact	Provides the previous IP Coordinator in the event of a Pitch/Catch. If there was > 1 Pitch/Catch, only shows the most recent person.
Outside Counsel Firm	Firm that is the IP Coordinator’s first point of contact for the application & is responsible for prosecution
Agent	The foreign associate that IC or OC uses. Can also be the firm handling EPO validations if necessary to track.
OC Support Firm	Firm that handles overflow work at RM’s direction, but is not correspondence address nor practitioner of record
Assignee 1	First named applicant or assignee on a patent
Assignee 2	Second named applicant or assignee on a patent
Assignee 3, etc	Additional-named applicants or assignee on a patent
Accordion	Tabs in each module. To collapse an accordion tab, select another one to expand 

<table>
<tr>
<td>Widget</td>
<td>White boxes to the right of the screen. These apply across the organization. The screenshot below shows the Rocket Docket widget and the Invention Disclosure Submission widget.

</td>
</tr>
<tr>
<td>Dashlet</td>
<td>Dark blue boxes on the left side of the screen. These apply only to your cases. The screenshot below shows the Rocket Docket widget, the NOA Checklist, and Open Docket Activities specific to your cases

</td>
</tr>
<tr>
<td>List View</td>
<td>The default is to only show recently viewed items. To change the view, click on the down arrow to the right of “Recently Viewed” and select “All” or another sub-category

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