



Symphony IPMS v3.6

User Guide – Responsible Manager

Last Updated: June 2022

ThermoFisher
SCIENTIFIC

About the Document

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

The User Guide enables the Responsible Manager 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 Responsible Manager/Responsible Manager/You/User are used interchangeably to reflect the functions performed by the Responsible Manager profile.

Revision History

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

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Introduction

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

Symphony 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 Iadaptive; (<https://thermofisher.my.idaptive.app/my#/MyApps>)
Search for Symphony and logon through SSO.

If you cannot find Symphony in the My Iadaptive 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



The screenshot shows the Symphony IP Management platform dashboard. At the top, there's a navigation bar with links for System Administrator, Home, Invention Disclosures, Patents, Reports, Dashboards, Admin, Import, Other Matters, Trademarks, Person, Inventor Awards, and More. Below the navigation is a search bar and a user profile icon.

The main dashboard area has several sections:

- Dashboard:** A large section featuring a "symphony" logo, a "Welcome, System Admin TF" message, and a "Contact Us | Help | About Maxval" link.
- Confidentiality Notice:** A section containing a notice about the confidential and proprietary nature of the information.
- Incoming Email Dashboard:** A sidebar with links to Incoming Email Dashboard, Upcoming PRB Meeting, Trademark Dashboard, Remuneration Rewards, and Inventor Awards Dashboard.
- Docket Items Due Tomorrow:** A circular chart titled "Docket Items Due Tomorrow" showing a total of 546 items. The chart is divided into several colored segments representing different types of renewals and maintenance fees. A "View Report" button is located below the chart.
- Invention Disclosure Submission:** A section with a "Invention Disclosure Form" button.
- Incoming Email Review Alerts:** A section stating "You don't have any outstanding reviews of incoming emails."
- Portfolio Breakdown:** A section that is currently empty.

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:

- Dashboards
- Rocket Docket (Patent/ID)
- Dashboard Reports

a. Dashboards

The IP Responsible Manager 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 a Responsible Manager view:

i. Incoming Email Dashboard

The screenshot shows the Incoming Email Dashboard with two main sections. The left section, titled "My Email Tracker - Pending Review", contains a table with the following data:

Date Rec'd	Email Tracker Email Track--	Short Subject	Patent Link	To Be Revied
5/19/2022	EMTK-150	[TP346324USORG1] test	TP346324U SORG1	Paralegal 1
5/19/2022	EMTK-157	test [TP346324USORG1] test subject	TP346324U SORG1	Paralegal 1
5/18/2022	EMTK-120	[TP346346USPRV1] - MyTEST2	TP346346U SPRV1	Paralegal 1
5/18/2022	EMTK-126	[TP346346USPRV1] - test33	TP346346U SPRV1	Paralegal 1
5/18/2022	EMTK-132	[TP346346USPRV1] - MyTEST3	TP346346U SPRV1	Paralegal 1
5/18/2022	EMTK-114	[TP346346USPRV1] - My TEST	TP346346U SPRV1	Paralegal 1
5/17/2022	EMTK-50	TP346346USPRV1 - New	TP346346U	Paralegal 1

The right section, titled "My Email Tracker - Follow-up", displays a chart message: "We can't draw this chart because there is no data." Both sections have a "View Report" link at the bottom.

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

ii. Patent Dashboard

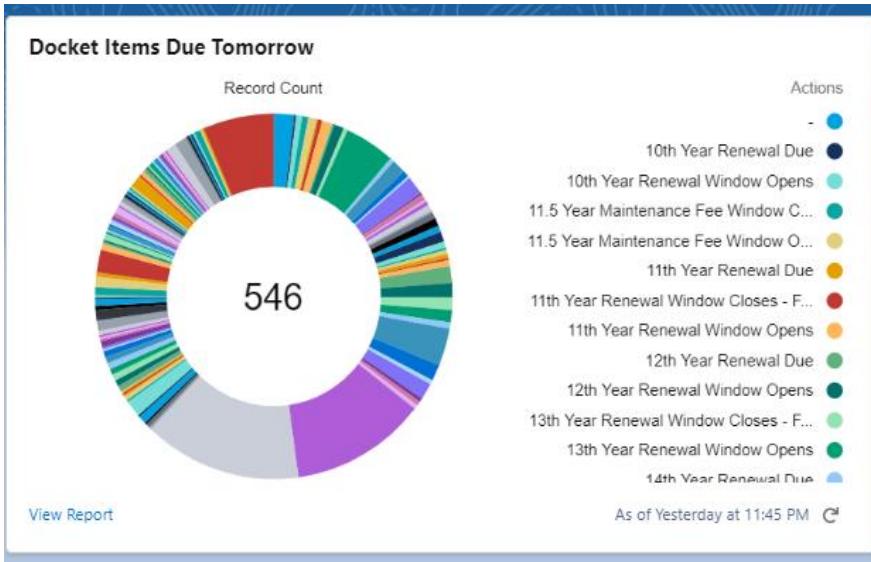
Patent Dashboard provides a quick view of the critical upcoming actions and updates on the patents that may require the IP Responsible Manager's attention.

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.

System Administrator Home Admin Import Invention Disclosures Patents

- Remuneration Rewards
- Inventor Awards Dashboard
- Patent Dashboard**

Dashboard
Patent Dashboard
As of Jun 19, 2022, 11:47 AM-Viewing as Patti Selan

Rocket Docket - Patent - Today/Tomorrow

We can't draw this chart because there is no data.

[View Report \(Rocket Docket - Patent - Today/Tomorrow\)](#)

Pending - NOA Checklist
(Current Role - Paralegal or IP RM)

We can't draw this chart because there is no data.

[View Report \(Pending - NOA Checklist\)](#)

c. Dashboard Reports

Responsible Managers 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**.

Dashboard
Incoming Email Dashboard
As of May 25, 2022, 12:41 AM Viewing as Paralegal 1
Open
Refresh
▼

My Email Tracker - Pending Review

Date Received	Email Tracker: Email Tracker Name	Short Subject	Patent Link	To Be Reviewed By
5/17/2022	EMTK-108	[TP346406USPRV1]	TP346406USPRV1	Paralegal 1
5/16/2022	EMTK-14	TP346346USPRV1	TP346346USPRV1	Paralegal 1
5/16/2022	EMTK-18	TP346394USPRV1	TP346394USPRV1	Paralegal 1
5/16/2022	EMTK-25	TP346324USORG1 test subject	TP346324USORG1	Paralegal 1
5/16/2022	EMTK-38	TP346346USPRV1 - test	TP346346USPRV1	Paralegal 1
5/13/2022	EMTK-6	TP346324USORG1	TP346324USORG1	Paralegal 1

[View Report \(My Email Tracker - Pending Review\)](#)

My Email Tracker - Follow-up

Follow-up Due	Date Rec'd	Email Tracker: Email Tracker Name	Short Subject	Patent Link	To Be Reviewed By
5/24/2022	5/19/2022	EMTK-150	[TP346324USORG1] test	TP346324USORG1	Paralegal 1

[View Report \(My Email Tracker - Follow-up\)](#)

Report Email Trackers: My Email Tracker - Pending Review
System Admins see all Pending Review (AV)

Total Records: 23

Date Received	Email Tracker: Email Tracker Name	Short Subject	To Be Reviewed By	Patent Link	Patent Jurisdiction	Email Tracker: Created Date
5/24/2022 (1)	EMTK-048	[TP346324USORG1].Att	Paralegal 1	TP346324USORG1	United States of America	5/23/2022
5/20/2022 (3)	EMTK-212	[TP346346USPRV1] - emdr	Paralegal 1	TP346346USPRV1	United States of America	5/20/2022
	EMTK-206	[TP346346USPRV1] - emor	Paralegal 1	TP346346USPRV1	United States of America	5/20/2022
	EMTK-208	[TP346346USPRV1] - test emdr	Paralegal 1	TP346346USPRV1	United States of America	5/20/2022
5/18/2022 (1)	EMTK-091	[TP346437USPRV1] - TEST MAY 20	Paralegal 1	TP346437USPRV1	United States of America	5/18/2022
5/18/2022 (4)	EMTK-214	[TP346346USPRV1] - My TEST	Paralegal 1	TP346346USPRV1	United States of America	5/18/2022
	EMTK-132	[TP346346USPRV1] - MyTEST3	Paralegal 1	TP346346USPRV1	United States of America	5/18/2022
	EMTK-206	[TP346346USPRV1] - test33	Paralegal 1	TP346346USPRV1	United States of America	5/18/2022
	EMTK-130	[TP346346USPRV1] - MyTEST2	Paralegal 1	TP346346USPRV1	United States of America	5/18/2022
5/17/2022 (9)	EMTK-108	[TP346406USPRV1]	Paralegal 1	TP346406USPRV1	United States of America	5/17/2022
	EMTK-088	[TP346346USPRV1]	Paralegal 1	TP346346USPRV1	United States of America	5/17/2022
	EMTK-104	[TP346346USPRV1]	Paralegal 1	TP346346USPRV1	United States of America	5/17/2022
	EMTK-174	[TP346346USPRV1] - test1	Paralegal 1	TP346346USPRV1	United States of America	5/17/2022
	EMTK-086	[TP346346USPRV1] - TESTNEW	Paralegal 1	TP346346USPRV1	United States of America	5/17/2022
	EMTK-162	[TP346346USPRV1] - NEW	Paralegal 1	TP346346USPRV1	United States of America	5/17/2022

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.

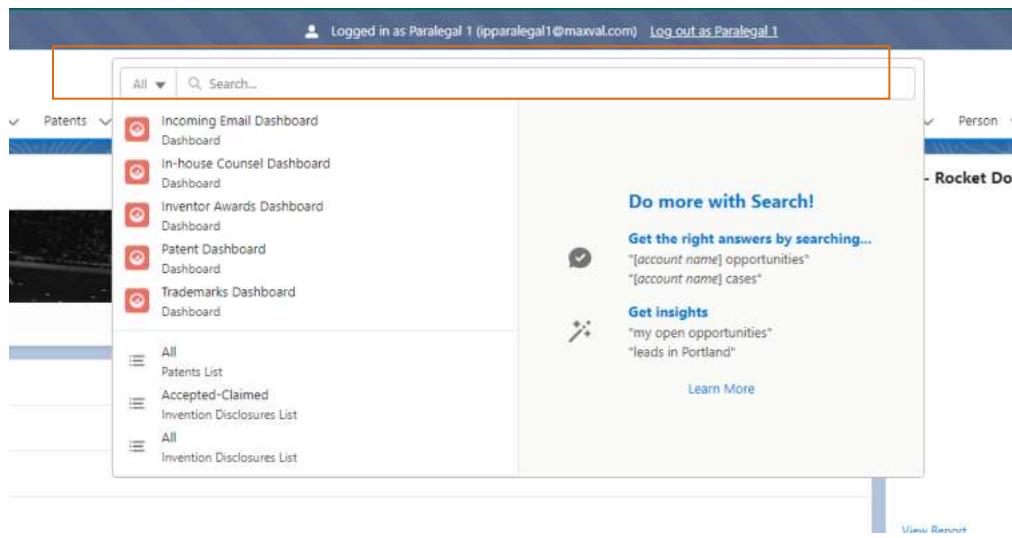
In addition to this, you can also perform the following functions on the report:

- 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

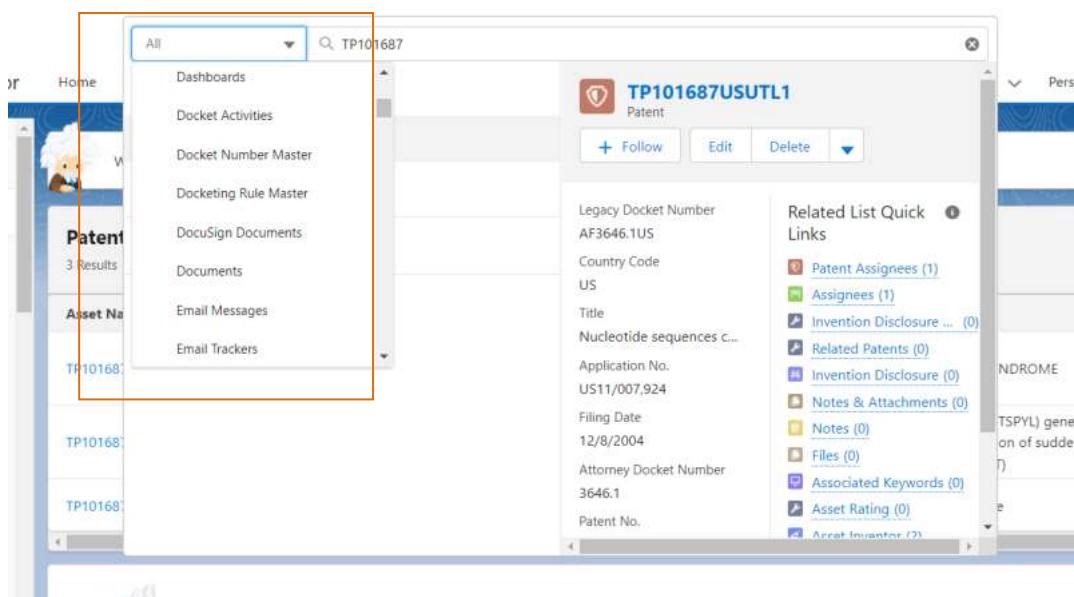
Global Search feature allows you to search the file number/keywords globally. Below are the steps to conduct a global search on Symphony:

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.



The screenshot shows the Symphony web interface. At the top, there's a navigation bar with a user icon, the text "Logged in as Paralegal 1 (iparalegal1@maxval.com)", and a "Log out as Paralegal 1" button. Below this is a search bar with a magnifying glass icon and the placeholder text "Search...". To the left of the search bar is a sidebar with a "Patents" section containing links like "Incoming Email Dashboard", "Dashboard", and "Trademarks Dashboard". On the right, there's a sidebar titled "Person" with a section for "Rocket Doc". A central panel has a heading "Do more with Search!" and sections for "Get the right answers by searching..." and "Get insights". At the bottom right of this panel is a "Learn More" link and a "View Report" button.

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.



This screenshot shows the "Patent" module of Symphony. On the left, there's a sidebar with a "Home" icon, a user profile picture, and a "Patent" section indicating "3 results". Below this are filters for "Asset Name" and "TP10168". The main area shows a search bar with "All" selected and the search term "TP101687". The results list includes items like "Dashboards", "Docket Activities", and "Email Messages". To the right, a detailed view of a patent record for "TP101687USUTL1" is shown. The record includes fields such as "Legacy Docket Number" (AF3646.1US), "Country Code" (US), "Title" (Nucleotide sequences c...), "Application No." (US11/007,924), "Filing Date" (12/8/2004), "Attorney Docket Number" (3646.1), and "Patent No.". On the far right, there's a "Related List Quick Links" sidebar with options like "Patent Assignees (1)", "Assignees (1)", and "Notes & Attachments (0)".

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

Patents								
3 Results • Sorted by Relevance ▾								
Asset Name	Legacy Docket Number	Type	Title	Applic...	Filing...	Attorney D...	Patent...	Issue...
TP101687WO1	AF3646.1WO	WO	ASSOCIATION OF TSPYL POLYMORPHISMS WITH SIDDT SYNDROME	CA2,339,54 8	8/5/1998	Y10B-CA/PCT	CA233954C	7/10/2007
			Nucleotide sequences coding testis specific-protein y-like (TSPYL) genes for use in identifying modulator for treatment and prevention of sudden infant death with dysgenesis of the testes syndrome (SIDDT)				PCT/US 04/415 40	12/8/2 004
TP101687USU1	AF3646.1US	US					U511/0 07,924	12/8/2 004
TP101687USPRV1	AF3646US	US	Association Of Tspyl Polymorphisms With Swaray Syndrome	CA2,339,54 8	8/5/1998	Y10B-CA/PCT	CA233954P	12/8/2 003
							U560/5 27,682	3646

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

Patents								
58+ Results • Filtered by Country Code: CA • Sorted by Relevance ▾								
Asset Name	Legacy Docket No.	Type	Title	Applic...	Filing...	Attorney D...	Patent...	Issue...
TP101687CA/PCT1	TP2007CA23-PCT	C	APPARATUS AND METHOD FOR ATMOSPHERIC PRESSURE 3-DIMENSIONAL ION TRAPPING	CA2,339,54 8	8/5/1998	Y10B-CA/PCT	CA233954C	7/10/2007
		A	ELIMINATION OF CATALYZED PRODUCED RECOMBINANT FUSION PROTEINS	CA2,339,54 8	7/14/1999	82104-1		LIG-BID-Sample Prep (R)
TP101687CA/PCT1	TP2007CA-PCT	C	METHOD FOR SEPARATION OF ISOMERS AND DIFFERENT CONFORMATIONS OF IONS IN A GASOUS PHASE	CA2,339,55 3	8/5/1998	10814-CA/PCT	CA233953C	11/18/200
		A	METHOD FOR SEPARATION AND ENRICHMENT OF ISOTOPES IN GASOUS PHASE	CA2,339,54 8	8/5/1998	Y10B9-CA/PCT	CA2339549	10/14/200
TP101687CA/PCT1	PS0004CA1-PCT	C	Drug Delivery System	CA2,302,97 1	3/11/2014	56009-1		PGO-PPD-Pathogen Pharmaceuticals (PPS) (R)
		A	Method And System For Drug Screening	CA2,604,24 4	2/1/2008	8462		AIG-OMD-AAT-Laboratory Automation Burlington, ON (R)
TP101687CA/PCT1	TP101687CA1-PCT	C	Apparatus And Method For Forming A Gas Composition Gradient Between Farns Electrodes	CA2,593,28 8	2/17/2006	131-32 CA/PCT		AIG-OMD-LSMS-SI Life Science Mass Spectrometry (R)
		A	SYSTEM AND METHOD FOR FOCUSED ION BEAM DATA ANALYSIS	CA2,587,74 7	11/15/200	5	CA2,387,747	1/8/2013
TP101687CA/PCT1	TP101687CA1-PCT	C	SYNTACTIC-INFERENTIAL MOTION PLANNING METHOD FOR ROBOTIC SYSTEMS	CA2,314,20 4	1/10/2004	8907	CA2514204C	12/15/201
		A	FLAMES APPARATUS AND METHOD FOR SEPARATING IONS IN THE GAS PHASE	CA2,A99,33 8	9/23/2003	131-16 CA/PCT	CA249933C	11/24/200
TP101687CA/PCT1	TP101687CA1-PCT	C	Segmented Side-To-Side Farns	CA2,473,35 5	3/7/2003	131-04 CA/PCT		AIG-OMD-LSMS-SI Life Science Mass Spectrometry (R)
		A	Farns Apparatus Having Plural Ion Inlets And Method Therefor	CA2,474,58 4	3/7/2003	131-09 CA/PCT		AIG-OMD-LSMS-SI Life Science Mass Spectrometry (R)

List View

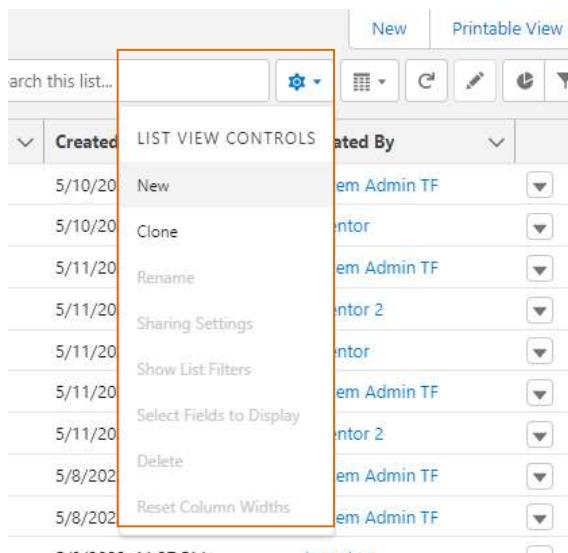
All the modules in Symphony have a list view that displays columns specific to a particular module. Responsible Managers can perform following functions to customize the list view.

150+ items • Sorted by Status • Filtered by All patents • Updated a few seconds ago															New	Printable View	Data Sync	Manual Overriding
Patents	All	Asset Name	Docket No.	Legacy DocID	C...	Title	B...	A...	Filing Date	Publication Date	Patent No.	Issue Date	Case Type	Status	Created Date			
36	TP10447AUUSCON5	TP10447AUUSCON5	SVP-111-CSUS	US	Time-of-flight mass spec...	3/16/20...			U562814...	8/26/20...			Continuation	Sold	1/13/2022, 9:27 AM			
37	TP10447AUUSCON1	TP10447AUUSCON1	SVP-105-FW...	US	Methods for automated ...	8/11/19...			U560435...	3/16/20...			Continuation	Sold	1/13/2022, 9:26 AM			
38	TP10447AUUSCON1	TP10447AUUSCON1	SVP-111-US	US	Time-of-flight mass spec...	5/19/19...			U554231...	4/29/19...			Utility Original	Sold	1/13/2022, 9:26 AM			
39	TP10447AUUSCON2	TP10447AUUSCON2	SVP-111-C2US	US	Time-of-flight mass spec...	4/10/19...			U560021...	12/14/1...			Continuation	Sold	1/13/2022, 9:27 AM			
40	TP105210US0R01	TP105210US0R01	SVP-163-US	US	Tandem time-of-flight m...	11/15/2...			U564413...	8/27/20...			Utility Original	Sold	1/13/2022, 9:25 AM			
41	TP105210USCON1	TP105210USCON1	SVP-163-CHUS	US	Tandem time-of-flight m...	6/04/20...	U562091...	10...	U565122...	1/26/20...			Continuation	Sold	1/13/2022, 9:25 AM			
42	TP10447BUUS0R01	TP10447BUUS0R01	SVP-114-US	US	COMPUTERIZED DATA A...	5/19/19...			U553892...	2/9/1999...			Utility Original	Sold	1/13/2022, 9:28 AM			
43	TP10447AUUSDV1	TP10447AUUSDV1	SVP-111-DVUS	US	Time-of-flight mass spec...	10/17/1...			U557603...	6/2/1998...			Divisional	Sold	1/13/2022, 9:26 AM			
44	TP10447AUUSCON4	TP10447AUUSCON4	SVP-111-C4US	US	Time-of-flight mass spec...	7/13/19...			U560575...	5/2/2000...			Continuation	Sold	1/13/2022, 9:27 AM			
45	TP10447AUUSCON1	TP10447AUUSCON1	SVP-111-CHUS	US	Time-of-flight mass spec...	5/7/1995...			U556273...	5/6/1997...			Continuation	Sold	1/13/2022, 9:26 AM			
46	TP10447AUUSCON3	TP10447AUUSCON3	SVP-111-C3US	US	Time-of-flight mass spec...	5/29/19...			U565417...	4/1/2003...			Continuation	Sold	1/13/2022, 9:27 AM			
47	TP104813USCP01	TP104813USCP01	SVP-137-CPUS	US	Tandem time-of-flight m...	1/19/19...			U563486...	2/19/20...			Continuation-in-Part	Sold	1/13/2022, 9:31 AM			
48	TP10447USCP02	TP10447USCP02	SVP-091-CHUS	US	Synthesis for the synthesis...	6/7/1995...			U56134...	10/17/2...			Continuation-in-Part	Sold	1/13/2022, 9:30 AM			
49	TP104813USCON1	TP104813USCON1	SVP-137-CHUS	US	Tandem time-of-flight m...	12/17/2...	U562001...	8/...	U567708...	8/3/2004...			Continuation	Sold	1/13/2022, 9:31 AM			
50	TP103917USRE01	TP103917USRE01	SVP-098-REU...	US	ELECTRIC MOTOR,	12/1/19...			U510340...	7/30/19...			Re-issue	Sold	1/13/2022, 9:32 AM			
51	TP103917US01L1	TP103917US01L1	SVP-098-US01	US	USING PHOSPHINE DERIVAT...	6/18/19...			U547256...	2/18/19...			Utility Non-Provisional	Sold	1/13/2022, 9:32 AM			
52	TP104663USDV1	TP104663USDV1	SVP-115-DVUS	US	Methods for sequencing...	4/18/19...			U556210...	10/13/1...			Divisional	Sold	1/13/2022, 9:33 AM			

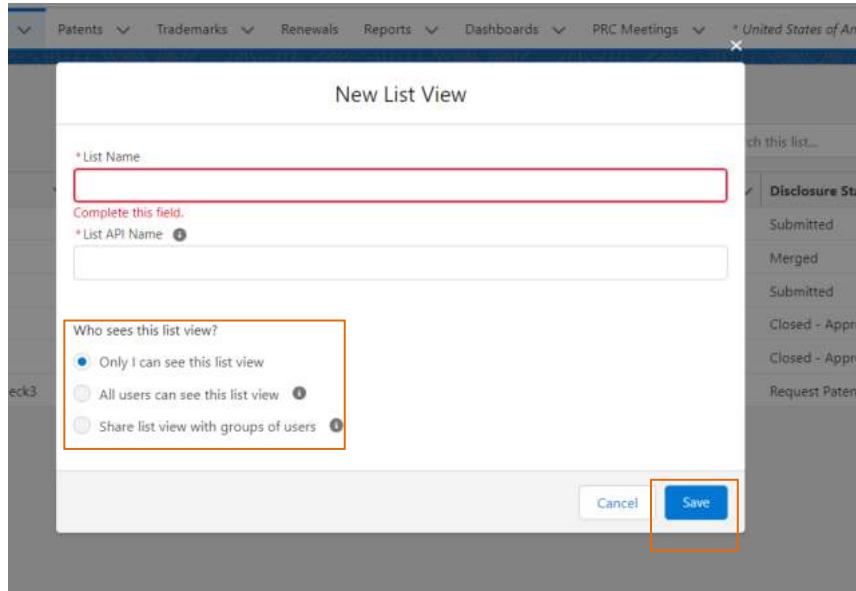
a. Create a New List

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

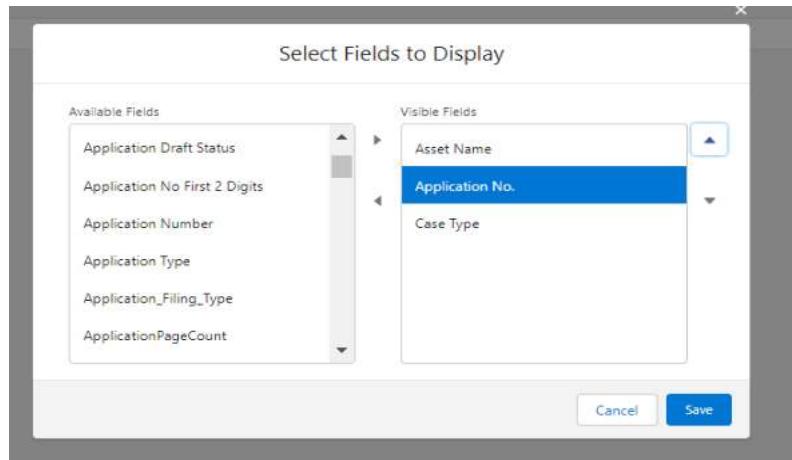
1. Click on List View Controls and select **New**.



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**.



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

The screenshot shows a 'Patents My View' list view with 50 items. The columns are: Asset Name, Application No., Case Type, Application Type, and Status. The filter panel on the right is highlighted with an orange border. It includes a 'Business Unit' dropdown set to 'Case Type', an 'Operator' dropdown set to 'equals', and a 'Value' dropdown set to '1 option selected'. A yellow box highlights the 'New Filter' button in the filter panel.

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

- 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**.

Clone List View

* List Name: Copy of All

* List API Name: Copy_of_All

Who sees this list view?

- Only I can see this list view
- All users can see this list view
- Share list view with groups of users

Cancel Save

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

Patents My View ▾

100+ items LIST VIEWS

1	All			
2	Legacy Patent (Do not use for testing)			
3	Litigation on Hold - Patents			
4	My View			
5	New			
6	Recently Viewed (Pinned list)			
7				
8	TP100003USORG1	US06/439,252	Utility Original	Utility
9	TP100009USORG1	US08/409,561	Utility Original	Utility
10	TP100010USORG1	US2111111	Utility Original	Utility

Step-by-Step Guide on creating a List view for Family Status:

Note: This is a one time activity that you might need to perform in Symphony for creating a custom list view for Family Status.

- Select **All** in the list view drop-down.

2. Click on **Clone** from **List View Controls**, provide **List Name**, define view permissions, and select **Save**.

The screenshot shows a list view with columns: Patent No., Issue Date, Status, and Created Date. A dropdown menu titled 'List View Controls' is open, listing options: New, Clone, Rena, List View Controls, Sharing Settings, Show List Filters, Select Fields to Display, Delete, and Reset Column Widths. The 'Clone' option is highlighted with a red box.

Clone List View

* List Name
Family Status

* List API Name ⓘ
Family_Status

Who sees this list view?

Only I can see this list view

All users can see this list view ⓘ

Share list view with groups of users ⓘ

Cancel Save

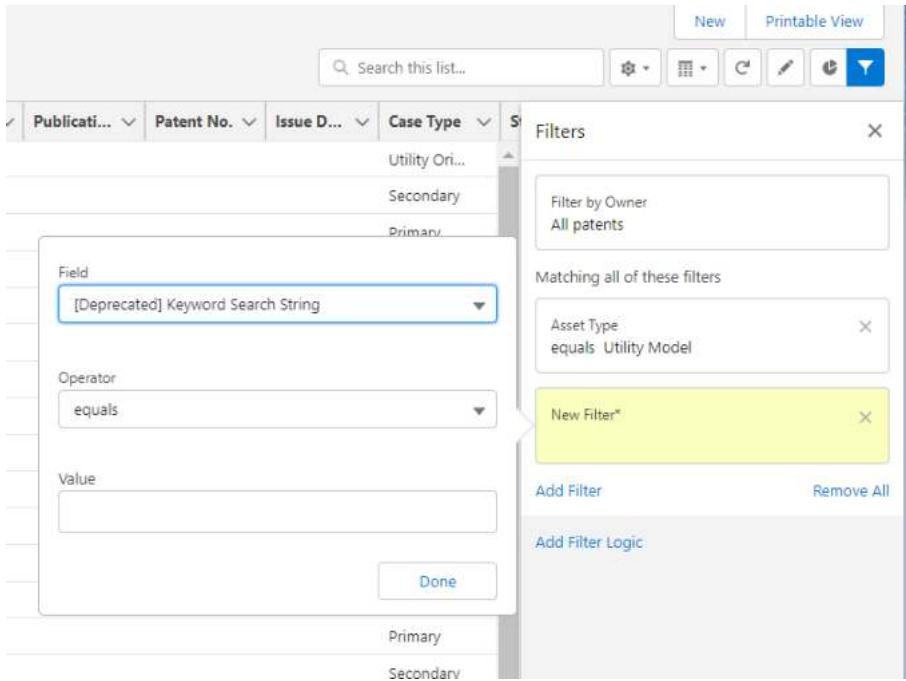
TP2 CN Daily Detector Operable 9/23/2021

3. Once the view is created, select **Fields to Display** to add any additional columns to the view as required, such as **Base Invention Disclosure** etc. and click **Save**.

The screenshot shows the IP Department software interface. At the top, there's a navigation bar with links like Home, Invention Disclosures, Patents, Reports, Dashboards, PRC Meetings, Other Matters, Inventor Awards, Person, and Help. Below the navigation bar, a list of patent items is displayed under the heading "Family Status". The list includes columns for Asset Name, Docket No., Le..., Cou..., Title, B..., Appl..., Filing Date, Publicati..., Publication..., Patent No., Issue D..., Case Ty, and Created Date. A "Select Fields to Display" dialog box is overlaid on the screen. This dialog has two main sections: "Available Fields" on the left and "Visible Fields" on the right. In the "Available Fields" section, there are several options listed: Attorney Docket Number Check, Bar Date, Business Contact, Business Unit, Business Unit, and Category. In the "Visible Fields" section, the following fields are listed: Asset Name, Docket No., Legacy Docket Number, Base Invention Disclosure (which is highlighted with a blue background), Country Code, and Title. At the bottom of the dialog are "Cancel" and "Save" buttons.

Note: You can select up to 15 fields for Display.

4. Once the fields are selected, click on Filters on top and click **Add Filter**.

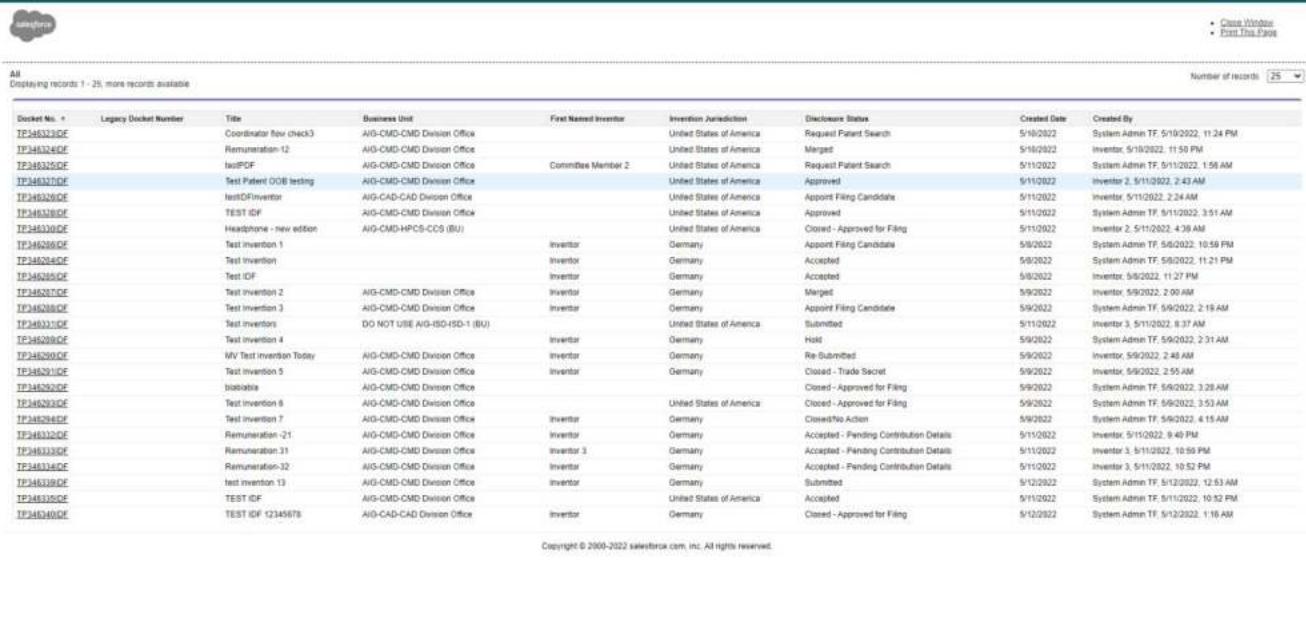


Note: Do not forget to keep **Filter by Owner** filter to **All patents** and **Asset Type** to include all **Patents, Utility Model, Design and Other**.

5. Add **Field = Family ID**, select **operator = equal** and click **Save**. OR
If you want to search using Legacy Docket Number, add **Field = Legacy Docket Number**, select **operator = contains** and click **Save**.
6. Whenever you want to search for a given family, select **Family Status** view from the list view drop-down, click on **Filters** and in the **Family ID/Legacy Docket Number** filter add required **value** and click **Save**.

Patients: Family Status														Filters	
	Asset Name	Docket No.	Le...	Cou...	Title	B...	Appl...	Filing Date	Published...	Published...	Patent No.	Issue D...	Search this list...	New	Printable View
1.	TP103344USP1	TP103344USP1	LTD...	GB	Layered Cell Culture Me...	12/30/20...	GB3397749	GB33977...	1/26/20...						
2.	TP103344CHEPV1	TP103344CHEPV1	LTD...	CH	Layered Cell Culture Me...	12/30/20...	CH33977...	CH33977...							
3.	TP103344DEP1	TP103344DEP1	LTD...	DE	LAYERED CELL CULTURE...	12/30/20...	DE3397749	DE60201...	1/26/20...						
4.	TP103344FRP1	TP103344FRP1	LTD...	FR	Layered Cell Culture Me...	12/30/20...	FR3397749	FR3397749	1/26/20...						
5.	TP103344EP1	TP103344EP1	LTD...	EP	LAYERED CELL CULTURE...	12/30/20...	EP4096772	6/6/2022							
6.	TP103344USPCT1	TP103344USPCT1	LTD...	SG	Layered Cell Culture Me...	12/30/20...	SG11201...	7/30/2018							
7.	TP103344EURCT1	TP103344EURCT1	LTD...	RU	LAYERED CELL CULTURE...	12/30/20...	RU27622...	1/31/2020							
8.	TP103344INPCT1	TP103344INPCT1	LTD...	IN	Layered Cell Culture Me...	12/30/20...	IN201817...	11/30/20...							
9.	TP103344USP1	TP103344USP1	LTD...	US	Layered Cell Culture Me...	12/30/20...									
10.	TP103344USPCT1	TP103344USPCT1	LTD...	US	LAYERED CELL CULTURE...	12/30/20...	US20180...	9/26/2019							
11.	TP103344KRPCT1	TP103344KRPCT1	LTD...	KR	LAYERED CELL CULTURE...	12/30/20...	KR20180...	8/20/2018							
12.	TP103344CNPCT1	TP103344CNPCT1	LTD...	CN	LAYERED CELL CULTURE...	12/30/20...	CN10884...	10/23/20...							
13.	TP103344JPCT1	TP103344JPCT1	LTD...	JP	LAYERED CELL CULTURE...	12/30/20...	JP201950...	1/10/2019							
14.	TP103344CAPCT1	TP103344CAPCT1	LTD...	CA	LAYERED CELL CULTURE...	12/30/20...	CA30998...	7/6/2017							
15.	TP103344EPCT1	TP103344EPCT1	LTD...	EP	Layered Cell Culture Me...	12/30/20...	EP339774...	11/7/2018	EP3397749	1/26/20...					
16.	TP103344WO1	TP103344WO1	LTD...	WO	LAYERED CELL CULTURE...	12/30/20...	WOD917...	7/6/2017							

7. You may save the view as PDF or print the view by selecting **Printable View**. On selecting the Printable View, the IP Responsible Manager can export the current view to the print-friendly interface. They can also select the number of items that need to be printed.



All	Displaying records 1 - 25, more records available							Number of records
Docket No. *	Legacy Docket Number	Title	Business Unit	First Name Inventor	Invention Jurisdiction	Disclosure Status	Created Date	Created By
TP346323IDF		Coordinator Rev check3	AIG-CMD-CMD Division Office		United States of America	Request Patent Search	5/10/2022	System Admin TF, 5/19/2022, 11:24 PM
TP346324IDF		Remuneration-12	AIG-CMD-CMD Division Office		United States of America	Merged	5/10/2022	Inventor, 5/19/2022, 11:59 PM
TP346325IDF		testIPDF	AIG-CMD-CMD Division Office	Committee Member 2	United States of America	Request Patent Search	5/11/2022	System Admin TF, 5/11/2022, 1:56 AM
TP346327IDF		Test Patent OOB testing	AIG-CMD-CMD Division Office		United States of America	Approved	5/11/2022	Inventor 2, 5/11/2022, 2:43 AM
TP346328IDF		testIDF/inventor	AIG-CAD-CAD Division Office		United States of America	Appoint Filing Candidate	5/11/2022	Inventor, 5/11/2022, 2:24 AM
TP346329IDF		TEST IDF	AIG-CMD-CMD Division Office		United States of America	Approved	5/11/2022	System Admin TF, 5/11/2022, 3:51 AM
TP346330IDF		Headphone - new edition	AIG-CMD-HPCS-CCS (BU)		United States of America	Closed - Approved for Filing	5/11/2022	Inventor 2, 5/11/2022, 4:38 AM
TP346336IDF		Test invention 1		Inventor	Germany	Appoint Filing Candidate	5/9/2022	System Admin TF, 5/6/2022, 10:59 PM
TP346341IDF		Test invention		Inventor	Germany	Accepted	5/9/2022	System Admin TF, 5/6/2022, 11:21 PM
TP346349IDF		Test IDF		Inventor	Germany	Accepted	5/9/2022	Inventor, 5/6/2022, 11:27 PM
TP346351IDF		Test invention 2	AIG-CMD-CMD Division Office	Inventor	Germany	Merged	5/9/2022	Inventor, 5/9/2022, 2:00 AM
TP346358IDF		Test invention 3	AIG-CMD-CMD Division Office	Inventor	Germany	Appoint Filing Candidate	5/9/2022	System Admin TF, 5/6/2022, 2:19 AM
TP346353IDF		Test invention	DO NOT USE AIG-ISD-ISD-1 (BU)		United States of America	Submitted	5/11/2022	Inventor 3, 5/11/2022, 8:37 AM
TP346359IDF		Test invention 4		Inventor	Germany	Held	5/9/2022	System Admin TF, 5/6/2022, 2:31 AM
TP346360IDF		MV Test invention Today	AIG-CMD-CMD Division Office	Inventor	Germany	Re-Submitted	5/9/2022	Inventor, 5/9/2022, 2:48 AM
TP346379IDF		Test invention 5	AIG-CMD-CMD Division Office	Inventor	Germany	Closed - Trade Secret	5/9/2022	Inventor, 5/6/2022, 2:55 AM
TP346382IDF		testable	AIG-CMD-CMD Division Office			Closed - Approved for Filing	5/9/2022	System Admin TF, 5/6/2022, 3:28 AM
TP346393IDF		Test invention 6	AIG-CMD-CMD Division Office		United States of America	Closed - Approved for Filing	5/9/2022	System Admin TF, 5/6/2022, 3:53 AM
TP346394IDF		Test invention 7	AIG-CMD-CMD Division Office	Inventor	Germany	Close/Revise Action	5/9/2022	System Admin TF, 5/6/2022, 4:15 AM
TP346396IDF		Remuneration-21	AIG-CMD-CMD Division Office	Inventor	Germany	Accepted - Pending Contribution Details	5/11/2022	Inventor, 5/10/2022, 8:40 PM
TP346397IDF		Remuneration 31	AIG-CMD-CMD Division Office	Inventor 3	Germany	Accepted - Pending Contribution Details	5/11/2022	Inventor 3, 5/11/2022, 10:59 PM
TP346398IDF		Remuneration-32	AIG-CMD-CMD Division Office	Inventor	Germany	Accepted - Pending Contribution Details	5/11/2022	Inventor 3, 5/11/2022, 10:52 PM
TP346399IDF		test invention 13	AIG-CMD-CMD Division Office	Inventor	Germany	Submitted	5/12/2022	System Admin TF, 5/12/2022, 12:53 AM
TP346335IDF		TEST IDF	AIG-CMD-CMD Division Office		United States of America	Accepted	5/11/2022	System Admin TF, 5/11/2022, 10:52 PM
TP346340IDF		TEST IDF 12345678	AIG-CAD-CAD Division Office	Inventor	Germany	Closed - Approved for Filing	5/12/2022	System Admin TF, 5/12/2022, 1:16 AM

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Invention Disclosure

The Invention Disclosure section allows you to view and manage the complete list of invention disclosures submitted by the inventors. The Responsible Manager 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'

This screenshot shows the Thermo Fisher Scientific Invention Disclosure interface. At the top, there is a navigation bar with links for Home, Invention Disclosures (which is highlighted with a red box), Patents, Trademarks, Renewals, Reports, Dashboards, PRC Meetings, Other Matters, Inventor Awards, and More. Below the navigation bar is a search bar and a toolbar with various icons. The main area displays a table of invention disclosures with the following columns: Docket, Legal Status, Title, Business Unit, First Named Inventor, Invention Jurisdiction, Disclosure Status, Created Date, and Created By. The table contains 7 rows of data, each with a unique docket number and details about the invention disclosure. A search bar and filter options are located at the top of the table.

This screenshot shows the 'Recently Viewed' list in the Thermo Fisher Scientific Invention Disclosure interface. At the top, there is a navigation bar with links for Home, Admin, and Import. Below the navigation bar is a search bar and a toolbar with various icons. The main area displays a list of items under the heading 'Recent Views'. The list includes: Accepted-Claimed (1 item), All (2 items), Approved for Filing (1 item), Draft (1 item), Legacy Records (Do not use for testing) (1 item), and Recently Viewed (Pininal list) (1 item, which is checked). A red box highlights the 'Recently Viewed' dropdown menu.

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.

Invention Disclosures		
All		
50+ items • Sorted by Created Date • Filtered by All invention disclosures • Updated a few seconds ago		
Docket No.	Title	Business Unit
TP33569:IDF	Test Case 1400	AIG-CMD-Software
TP33568:IDF	Test Case 1290	AIG-CMD-HPC5:C
TP33567:IDF	Test case 1280	AIG-CMD-CMD_D

The Invention Disclosure page is divided into four sections:

The screenshot shows the Invention Disclosure page with the following sections highlighted:

- Top ribbon:** Includes basic bibliographic information: Docket No. (TP346311:IDF), Submitted Date (5/10/2022), Disclosure Status (Submitted), First Named Inventor (Guna Inventor), and Business Unit (AIG-CMD-CMD Division Office).
- Docket Activities (2):** A table showing two entries:

Docket Activity No.	Activity Date	Actions	Due Date	Is Closed	Is Complete
DA-0003806180	5/10/2022	Notice of defect	7/6/2022	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DA-0003806181	5/10/2022	IDF deemed complete - Due	7/10/2022	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
- Invention Disclosure:** Details including Information, Roles, Rating, Correspondence, Contribution, Remuneration Records, Email History, and DocSign Documents.
- Sidebar:** Contains sections for Confirm Group, Division and Business Unit, Invention Completeness Check (with a Yes/No toggle), and Review Board (with a Select Review Board dropdown).

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.

The screenshot shows the Invention Disclosure page with the following top ribbon information:

- Invention Disclosure (TP346424:IDF)
- Submitted Date: 5/18/2022
- Disclosure Status: Revision Requested
- First Named Inventor
- Business Unit: AIG-CMD-AAT-Micro GC Enschede (BU)

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

The screenshot shows the Invention Disclosure page with the following Docket Activities section:

Docket Activities (2): A table showing two entries:

Docket Activity No.	Activity Date	Actions	Due Date	Is Closed	Is Complete
DA-0000311029	1/11/2022	Notice of defect	3/10/2022	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DA-0000311030	1/11/2022	IDF deemed complete - Due	3/11/2022	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Docket activities represent the actions that need to be performed by either the IP Responsible Manager or the IP Coordinator.

Note: If a Business Unit has an assigned IP Coordinator, then the IP Coordinator will take these steps. If there is no IP Coordinator, then the IP Responsible Manager will take these steps.

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:

Docket Activity
IDF deemed complete - Due

Disclosing Activity No:
DA-0007218473

Trigger:
Completeness Check

Action:
IDF deemed complete - Due

Comments:
Create IDTs in pending U1 and IL cases

Owner:
Responsible Manager

Comments:
Create IDTs in pending U1 and IL cases

Next Action:

Other Matters:

Closed / Completed

Is Closed:

Closed Date:

Reason to Close:

Closed By:
Created By:
Responsible Manager, 5/25/2022, 9:37 PM

Completed By:
Responsible Manager

Completion Date:
5/25/2022

Reason to Complete:
Based on completeness check decision

Last Modified By:
Responsible Manager, 5/25/2022, 10:03 PM

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.

Invention Completeness Check

Is the IDF Complete? i

Yes
 No

Next

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	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	DA-0007218473	5/25/2022	IDF deemed complete - Due	7/25/2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>

[View All](#)

If the disclosure requires changes or additional information, then the IP Coordinator or the 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						
	Docketing Activity No	Activity Date	Actions	Due Date ↑	Is Closed	Is Complet...
1	DA-0007218501	5/26/2022	IDF revision due	7/21/2022	<input type="checkbox"/>	<input type="checkbox"/>
2	DA-0007218499	5/26/2022	Notice of defect	7/25/2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	DA-0007218500	5/26/2022	IDF deemed complete - Due	7/26/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[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						
	Docketing Activity No	Activity Date	Actions	Due Date ↑	Is Closed	Is Complet...
1	DA-0007218476	5/25/2022	IDF revision due	7/20/2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	DA-0007218474	5/25/2022	Notice of defect	7/24/2022	<input type="checkbox"/>	<input type="checkbox"/>
3	DA-0007218475	5/25/2022	IDF deemed complete - Due	7/25/2022	<input type="checkbox"/>	<input type="checkbox"/>

[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 Responsible Manager to verify whether the submitted details are accurate and are aligning to the questions asked in the disclosure form.

The screenshot shows a 'Invention Completeness Check' section. It asks 'Is the IDF Complete?' with a question mark icon. Two radio buttons are available: 'Yes' (selected) and 'No'. A blue 'Next' button is located at the bottom right.

If the submitted record has all the required information in the right order, the IP Coordinator or 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:

- Change in invention disclosure status: Status changes from **Submitted** to **Accepted**
- Change in the associated docket action: 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 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).

The screenshot shows the same 'Invention Completeness Check' section. This time, the 'No' radio button is selected. A blue 'Next' button is located at the bottom right.

The screenshot shows the 'Invention Completeness Check' section again. It asks for comments with a note: 'Please provide comments for the specific information you are expecting from the inventor(s.)'. Below is a large red-bordered text input field labeled '* Comments'. A small green 'G' icon is in the top right corner of the input field. A red message 'Complete this field.' is displayed below the input field. At the bottom are 'Previous' and 'Next' buttons.

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

- Change in invention disclosure status:** Status changes from **Submitted** to **Revision Requested**
- 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 Responsible Manager has the permission to change the Group, Division and Business Unit that were assigned at the time of submission.

Confirm Group, Division and Business Unit

Current Group: **LSG**
Current Division: **BID**
Current Business Unit: **LSG-BID-Molecular Biology (BU)**

Change? No

Next

Confirm Group, Division and Business Unit

Current Group: **LSG**
Current Division: **BID**
Current Business Unit: **LSG-BID-Molecular Biology (BU)**

Change? Yes

Edit/Enter new values below.

* New Group
AIG

* New Division
MSD

* New Business Unit
AIG-MSD-SPEC-Brno

Next

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 Responsible Manager risks losing write permissions to that record; the IP Coordinator or Responsible Manager assigned to the new Business Unit will then take over.

- **Review Board**

IP Coordinators or 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.

Review Board

* Select Review Board

--None--

Next

Review Board

* Select Review Board

--None--

--None--

HPLC - Germering IP Committee
 ICSP - Sunnyvale 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 Committee
 AIG - MSG - Spectroscopy
 AIG - MSD US - IPRB
 AIG - MSD EU - IPRB
AIG - MSD Global - IPRB

Ralf Gunter

Email: ralf.hartmer@thermofisher.com.invalid
 First Named Inventor?

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

PRC Meetings

Recently Viewed

PRC Meeting	Review Board	Meeting Date	Start Time	Duration in ...	Location	Number of D...	Number of D...
1 AIG - MSD EU - IPRB	AIG - MSD EU - IPRB	1/1/2023				2	
2 IOMS - Bremen IP Committee	IOMS - Bremen IP Committee	1/1/2023				3	
3 HPLC - Germering IP Committee	HPLC - Germering IP Committee	1/1/2023				2	
4 LSMS - Bremen IP Committee	LSMS - Bremen IP Committee	1/1/2023				2	
5 CCS - Sunnyvale	CCS - Sunnyvale	1/1/2023				3	
6 AIG - MSD Global - IPRB	AIG - MSD Global - IPRB	1/1/2023				2	
7 ICSP - Sunnyvale IP Committee	ICSP - Sunnyvale IP Committee	1/1/2023				6	
8 Test Docketing Rule		3/21/2022				0	

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

The screenshot shows the 'Details' tab for an 'Invention Disclosure Queue'. It includes fields for 'PRC Meeting' (AIG - MSD EU - IPRB), 'Meeting Date' (1/1/2023), 'Duration in Minutes', 'Number of Disclosures Added' (2), 'Created By' (System Admin TF, 3/9/2022, 3:09 AM), 'Review Board' (AIG - MSD EU - IPRB), 'Start Time (HH:MM)', 'Location', and 'Last Modified By' (Pype Faber, 4/11/2022, 1:55 AM).

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.

The screenshot shows the 'Invention Disclosure Queue' list. It displays two entries:

Invention Disclosure	Invention Title	Submitted Date	Status
TP304967/IDF	UAT 2 permissions and roles test	3/16/2022	Accepted
TP305112/IDF	Demo aan Sylvia	4/11/2022	Accepted

A 'View All' link is also present.

- **Inventor Awards**

This section summarizes the approved awards for the inventors.

The screenshot shows the 'Inventor Awards' section, which currently displays 0 awards.

- **Files**

The screenshot shows the 'Files' section, which contains 3 files:

- TP33467/IDF-Submitted-Jan-05-2022: Jan 5, 2022 • 9KB • pdf
- TP33467/IDF-Alin Srivastava-MV001-Jan-05-2022: Jan 5, 2022 • 5KB • pdf
- TP33467/IDF-Andrii Romash-123456-Jan-05-2022: Jan 5, 2022 • 5KB • pdf

An 'Add Files' button is located in the top-right corner of the list.

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.

The screenshot shows a software interface titled "All Inventors (2)". At the top right, there is a dropdown menu with an arrow pointing down, and a blue rectangular box highlights the word "New" next to it. Below this, there are fields for "Employment Status" (set to "Active") and "Email" (set to "sfider4@mail.com"). A large button labeled "New All Inventors" is centered below these fields. Below this button is a sub-section titled "Invention Disclosure" containing a field with the value "TP346323IDF". Underneath this is a search bar labeled "Inventor" with the placeholder "Search Person..." and a magnifying glass icon. The main form area is titled "System Information" and contains several dropdown menus and input fields:

- "First Named Inventor?" checkbox (unchecked)
- "Utilization/Release Notification Status" dropdown menu set to "Not Applicable"
- "PIR Status" dropdown menu set to "Not Applicable"
- "PIR Agreement Date" date picker field
- "Is Contribution Applicable" checkbox (unchecked)
- "Contribution" input field set to "0.00"
- "Is Contribution Approved" checkbox (unchecked)
- "skipValidation" checkbox (checked)
- "Other Matters" search bar with placeholder "Search Other Matters..." and a magnifying glass icon

At the bottom of the form are three buttons: "Cancel", "Save & New" (highlighted in blue), and "Save".

If necessary, additional Inventor names can be added by the IP Coordinator or 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.

The screenshot shows a software interface titled "Diary Notes (1)". At the top left is a blue icon of a notepad with a pencil. Below the title is a dropdown menu with an arrow pointing down. The main form area contains the following fields:

- "Priority:" dropdown menu set to "None"
- "For the attention of:" dropdown menu with an arrow pointing down
- "Note:" text area (empty)

At the bottom of the form is a blue "View All" button.

- **Notes**

Notes (2)

Analytical Chemistry
5/23/2022, 7:18 AM by Paralegal 1
Analytical chemistry studies and uses instruments and methods used to separate, identify, and quantify matter. [1] In practice, separation, identification or quantification may constitute the enti...

Request Patent Search - 5/12/2022
5/12/2022, 5:40 AM by System Admin TF

New

View All

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

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.

Notes (1)

Request to hold submission
12/12/2017 12:37 AM by Platform Inventor1
The invention disclosure is ready to go. But there are minor changes in the description. The change will be updated shortly

New

Request to hold submission

Request to hold submission

B I U $\frac{1}{2}$ $\frac{1}{3}$ $\frac{1}{4}$ $\frac{1}{5}$ $\frac{1}{6}$ $\frac{1}{7}$ $\frac{1}{8}$ $\frac{1}{9}$ $\frac{1}{10}$

The invention disclosure is ready to go. But there are minor changes in the description. The change will be updated shortly

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

Notes (2)

Inventor Response to Request for Information - 2018-03-07
3/7/2018 5:45 AM by Platform inv1
I have added more supporting document in the Files section of the disclosure, please verify and let me know if you need more...

PPA Request for Information - 2018-03-07
3/7/2018 5:16 AM by Symphony Maxval
Send me more supporting documents with reference to your invention. Also, add more description in the Detailed Inventio...

[View All](#)

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

Invention Disclosure	Roles	Rating	Correspondence	Contribution	Remuneration Records	Email History	DocuSign Documents																																												
Information <table border="1"> <tr> <td>Docket No.</td> <td>TP346323 DF</td> <td>Title</td> <td>Coordinator flow check3</td> </tr> <tr> <td>Submitted Date</td> <td>5/10/2022</td> <td>Group</td> <td>AIG</td> </tr> <tr> <td>Submitted By</td> <td>System Admin TF</td> <td>Division</td> <td>CMD</td> </tr> <tr> <td>Re-Submission Date</td> <td></td> <td>Business Unit</td> <td>AIG-CMD-CMD Division Office</td> </tr> <tr> <td>Re-submitted By</td> <td></td> <td>Accepted Date</td> <td>5/12/2022</td> </tr> <tr> <td>CSO Top Program</td> <td></td> <td>Claim Date</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>CSO Innovation Type</td> <td>Is Automatically Claimed</td> <td><input type="checkbox"/></td> </tr> <tr> <td>CSO Program Name</td> <td></td> <td>Current Role</td> <td></td> </tr> <tr> <td>Gov. Contract Built</td> <td></td> <td>Is Contribution Accepted</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Gov. Contract Conceived Desc.</td> <td></td> <td>Is the Invention in Use</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Export Control</td> <td></td> <td>Intensifying Innovation</td> <td><input type="checkbox"/></td> </tr> </table>								Docket No.	TP346323 DF	Title	Coordinator flow check3	Submitted Date	5/10/2022	Group	AIG	Submitted By	System Admin TF	Division	CMD	Re-Submission Date		Business Unit	AIG-CMD-CMD Division Office	Re-submitted By		Accepted Date	5/12/2022	CSO Top Program		Claim Date		<input type="checkbox"/>	CSO Innovation Type	Is Automatically Claimed	<input type="checkbox"/>	CSO Program Name		Current Role		Gov. Contract Built		Is Contribution Accepted	<input type="checkbox"/>	Gov. Contract Conceived Desc.		Is the Invention in Use	<input type="checkbox"/>	Export Control		Intensifying Innovation	<input type="checkbox"/>
Docket No.	TP346323 DF	Title	Coordinator flow check3																																																
Submitted Date	5/10/2022	Group	AIG																																																
Submitted By	System Admin TF	Division	CMD																																																
Re-Submission Date		Business Unit	AIG-CMD-CMD Division Office																																																
Re-submitted By		Accepted Date	5/12/2022																																																
CSO Top Program		Claim Date																																																	
<input type="checkbox"/>	CSO Innovation Type	Is Automatically Claimed	<input type="checkbox"/>																																																
CSO Program Name		Current Role																																																	
Gov. Contract Built		Is Contribution Accepted	<input type="checkbox"/>																																																
Gov. Contract Conceived Desc.		Is the Invention in Use	<input type="checkbox"/>																																																
Export Control		Intensifying Innovation	<input type="checkbox"/>																																																

- 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 Responsible Manager and the inventor(s).
- h. **DocuSign Documents:** In this section, IP Compensation Managers and/or Responsible Managers 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	Roles	Rating	Correspondence	Contribution	Remuneration Records	Email History	DocuSign Documents
> Information							
> Invention Details							
> Additional Details							
> PIRA & Compensation Info							
> Patent Review Board							
> Request Patentability Search / Defensive Publication							
> Related Records							
> Legacy Details							
> System Information							

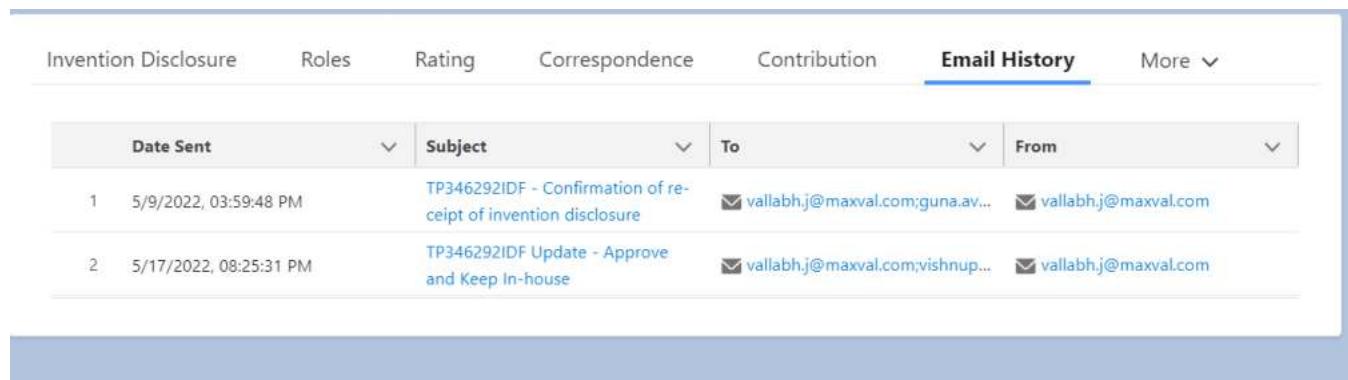
Invention Disclosure section contains the following details:

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 Responsible Manager) and the inventor is recorded in the Email History tab.



The screenshot shows a table with columns: Invention Disclosure, Roles, Rating, Correspondence, Contribution, Email History, and More. The Email History column is underlined, indicating it is active. The table has two rows of data:

	Date Sent	Subject	To	From
1	5/9/2022, 03:59:48 PM	TP346292IDF - Confirmation of receipt of invention disclosure	vallabh.j@maxval.com; guna.av...	vallabh.j@maxval.com
2	5/17/2022, 08:25:31 PM	TP346292IDF Update - Approve and Keep In-house	vallabh.j@maxval.com; vishnup...	vallabh.j@maxval.com

c. Roles

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



The screenshot shows a table with columns: Invention Disclosure, Roles, Rating, Correspondence, Contribution, Remuneration Records, Email History, and DocuSign Documents. The Roles column is underlined, indicating it is active. The table has one section titled "Invention Disclosure Roles (3)" with three rows of data:

Invention Disclosure Role Name	Role	Person	Created Date
IDR-103263	IP Responsible Manager	Responsible Manager	5/10/2022, 11:25 PM
IDR-103264	IP Coordinator	Coordinator	5/10/2022, 11:25 PM
IDR-103265	IP Compensation Manager	Comp Manager	5/10/2022, 11:25 PM

[View All](#)

Note: Responsible Managers should email Docketing 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 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 Responsible Manager 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.

Please update your Disclosure Rating for the Invention Disclosure if the status is 'Accepted' by clicking the button below.

[View Rating Summary](#) Add/Edit Rating

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.

Note: Please rate the following questions related to the disclosure on a scale of 1-5 wherein 1 being the lowest and 5 being the highest.

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 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

Recommendations Select an Option

Review comments:
 [Large text area]

Cancel Save

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 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.

Invention Disclosure Roles **Rating** Correspondence Contribution Remuneration Records Email History DocuSign Envelopes

Please update your Disclosure Rating for the Invention Disclosure if the status is '**Accepted**' by clicking the button below.

View Rating Summary Add/Edit Rating

Rating Summary - TP305244IDF

REVIEWER	SYSTEM ADMIN TT
Originality ⓘ	2
Problem Resolution ⓘ	3
Favorable Results ⓘ	4
Competitive Advantage ⓘ	
Competitors Usage ⓘ	
Applicability ⓘ	
Business Value ⓘ	
Invention Design Complexity ⓘ	
Invention Complexity ⓘ	
Commercial Use ⓘ	
Recommendations	Recommend Defensive Publication
Comments	

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

The screenshot shows a user interface titled "Disclosure Review Decision". It includes a header stating "Action to be performed by IP Responsible Manager/IP Coordinator" and a sub-instruction "Ready to take action? Select your desired action and click Next to continue." Below this is a section titled "*Action" containing a list of eight options, each preceded by a radio button:

- Approve and Keep In-house
- Approve and Send to OC
- Appoint Filing Candidate
- Request Patentability Search
- Defensive Publication
- Trade Secret
- Hold
- Combine
- Close

At the bottom right of the form is a blue "Next" button.

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.

Disclosure Review Decision

Action to be performed by **IP Responsible Manager/IP Coordinator**

Ready to take action? Select your desired action and click Next to continue.

*Action

Approve and Keep In-house
 Approve and Send to OC
 Appoint Filing Candidate
 Request Patentability Search
 Defensive Publication
 Trade Secret
 Hold
 Combine
 Close

Next

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

Disclosure Review Decision

*First Filing Jurisdiction
United States of America

*Filing Type
Provisional

*Applicant
Search Entities... 

Comments

Previous **Next**

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

Disclosure Review Decision

To
Search for persons
 Inventor02 (vishnupriya.d+inv02@maxval.com) X

Cc
Search for persons
 Responsible Manager (vishnupriya.d+resp@maxval.com) X

Subject
TP346480IDF Update - Approve and Keep In-house

Mail body

Salesforce Sans ▾ 12 ▾ B I U 


Thank you for submitting the [invention disclosure](#) identified above. We appreciate you are taking the time to complete this document.

This disclosure has been reviewed and approved for filing a patent application covering your invention. Responsible Manager will be responsible for its preparation and will contact you within the next one to two months to initiate the patent application preparation process.

In the meantime, if you have not already done so, please collect and submit all relevant materials you may have regarding this invention, including notebook entries, test results, drawings, meeting notes, and prior art references. In addition, if you have

[Previous](#) [Send](#)

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.

Disclosure Review Decision

This Disclosure is approved and the patent shell record can be accessed [here](#).

[Save](#)

International Filing Decision

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

International Filing Decision

* Do you intend to file internationally?

Yes
 No

Next

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.

International Filing Decision

* Select the desired Country Groups:

-- None --

-- None --

AIG-MSD-All BU- T3 (US)
AIG-MSD-EBU-T1 (KR, US, JP, TW, CN)
AIG-MSD-EBU-T2 (CN, US, KR)
AIG-MSD-LSBU-T1 (US, EP, JP, CN)
AIG-MSD-LSBU-T2 (JP, EP, US, CN)
AIG-MSD-MSBU-T1 (KR, EP, US, CN, JP)
AIG-MSD-MSBU-T2 (JP, US, CN, EP)
LSG-BID - Tier 2
LSG-BID - Tier 3 (JP, GB)
Tier 1 (TW, EP, CN, WO, DE, KR, FR, IN)

International Filing Decision

* Select the desired Country Groups:

-- None --

Select the desired countries :

Search Countries

Germany X United Kingdom X

Previous **Next**

Click Finish to complete the process.

International Filing Decision

International Filing Strategy is created successfully

Previous **Finish**

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**.

The screenshot shows a user interface titled "Disclosure Review Decision". It includes a sub-instruction: "Action to be performed by IP Responsible Manager/IP Coordinator". Below this, a note says: "Ready to take action? Select your desired action and click Next to continue." A section labeled "Action" contains several radio button options, with the second one, "Approve and Send to OC", selected. Other options include: "Approve and Keep In-house", "Appoint Filing Candidate", "Request Patentability Search", "Defensive Publication", "Trade Secret", "Hold", "Combine", and "Close". At the bottom right of the form is a blue "Next" button.

IP Responsible Manager OR IP Coordinator 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.

Disclosure Review Decision

* First Filing Jurisdiction
United States of America

* Filing Type
Provisional

OC Instructions

* Instruction for Case
Draft without PFS

Instruction for Outside Counsel

Target Filing Date

* Applicant
Search Entities... 

* Confirm Law Firm Tier
Tier A

* Select Law Firm
-- None -- 

Complete this field.

Select Outside Counsel Individual
None

[Previous](#) [Next](#)

c. Appoint Filing Candidate

On selecting the Appoint Filing Candidate option, the IP Responsible Manager 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**.

Disclosure Review Decision

Action to be performed by **IP Responsible Manager/IP Coordinator**

Ready to take action? Select your desired action and click Next to continue.

* Action

- Approve and Keep In-house
- Approve and Send to OC
- Appoint Filing Candidate
- Request Patentability Search
- Defensive Publication
- Trade Secret
- Hold
- Combine
- Close

[Next](#)

Disclosure Review Decision

You can provide optional comments below related to the decision that will reflect on the disclosure.

Comments

[Previous](#) [Next](#)

d. Request Patentability Search

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

Disclosure Review Decision

Action to be performed by IP Responsible Manager/IP Coordinator

Ready to take action? Select your desired action and click Next to continue.

* Action

Approve and Keep In-house
 Approve and Send to OC
 Appoint Filing Candidate
 Request Patentability Search
 Defensive Publication
 Trade Secret
 Hold
 Combine
 Close

Next

Disclosure Review Decision

You can provide optional comments below related to the decision that will reflect on the disclosure.

Comments

G

* Choose Law Firm/Vendor

Law Firm
 Vendor

* Confirm Law Firm Tier

-- None --

* Select Law Firm

-- None --

Select Outside Counsel Individual

None

Previous **Next**

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

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

Disclosure Review Decision

You can provide optional comments below related to the decision that will reflect on the disclosure.

Comments

*Choose Law Firm/Vendor
 Law Firm
 Vendor

*Confirm Law Firm Tier
 -- None --

*Select Law Firm
 -- None --

Select Outside Counsel Individual
 None

Previous **Next**

On selecting the Vendor, the Responsible Manager 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 Responsible Manager should select the vendor who will carry out the publication action on behalf of the organization. Add any additional comments if required.

Disclosure Review Decision

Action to be performed by **IP Responsible Manager/IP Coordinator**

Ready to take action? Select your desired action and click Next to continue.

*Action
 Approve and Keep In-house
 Approve and Send to OC
 Appoint Filing Candidate
 Request Patentability Search
 Defensive Publication
 Trade Secret
 Hold
 Combine
 Close

Next

Disclosure Review Decision

You can provide optional comments below related to the decision that will reflect on the disclosure.

* Vendor
--Select--

Comments

Previous Next

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.

Disclosure Review Decision

You can provide optional comments below related to the decision that will reflect on the disclosure.

Comments

Previous Next

Trade Secret TS-0011

Inventor: InventorID: Date: AIG-CAD-M&M Gauging, Wilmington (EU)

Information

Trade Secret:	TS-0011	Invention Date:	5/27/2022
Title:		Owner:	System Admin TF
Test details:		File:	AIG-CAD-M&M Gauging, Wilmington (EU)
Inventor:	InventorID:		
Base invention Disclosure:	TP34249464		

Files (0)

Upload files
Or drop files

Notes (0)

g. Hold

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

Disclosure Review Decision

Action to be performed by **IP Responsible Manager/IP Coordinator**

Ready to take action? Select your desired action and click Next to continue.

* Action

Approve and Keep In-house
 Approve and Send to OC
 Appoint Filing Candidate
 Request Patentability Search
 Defensive Publication
 Trade Secret
 Hold
 Combine
 Close

Next

Disclosure Review Decision

You can provide optional comments below related to the decision that will reflect on the disclosure.

Comments

Previous **Next**

h. Combine

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

Disclosure Review Decision

Action to be performed by **IP Responsible Manager/IP Coordinator**

Ready to take action? Select your desired action and click Next to continue.

* Action

Approve and Keep In-house
 Approve and Send to OC
 Appoint Filing Candidate
 Request Patentability Search
 Defensive Publication
 Trade Secret
 Combine
 Close

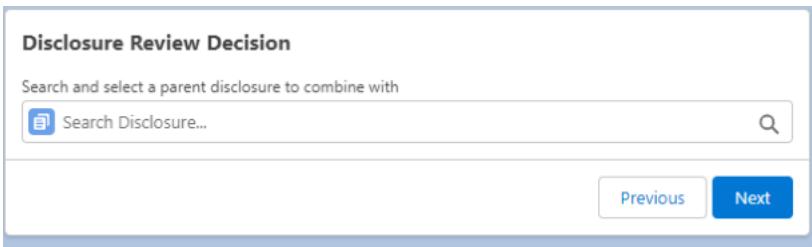
Next

Disclosure Review Decision

Search and select a parent disclosure to combine with

Search Disclosure... 

[Previous](#) [Next](#)



Note: IP Responsible Manager 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.

Disclosure Review Decision

Action to be performed by **IP Responsible Manager/IP Coordinator**

Ready to take action? Select your desired action and click Next to continue.

* Action

Approve and Keep In-house
 Approve and Send to OC
 Appoint Filing Candidate
 Request Patentability Search
 Defensive Publication
 Trade Secret
 Hold
 Combine
 Close

[Next](#)



Disclosure Review Decision

You can provide optional comments below related to the decision that will reflect on the disclosure.

Comments



[Previous](#) [Next](#)



Patent

Selection of Patent from the tabs at the top allows you to manage the complete list of patent assets of your organization. The Responsible Manager 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'

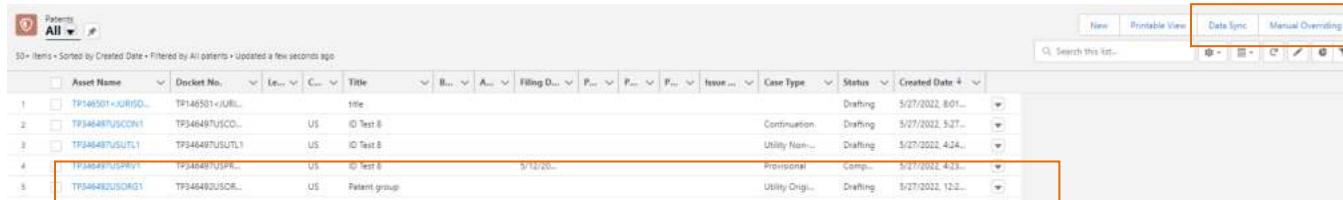
	<input type="checkbox"/>	Asset Name
1	<input type="checkbox"/>	Test123
2	<input type="checkbox"/>	TP346441ILSEC2
3	<input type="checkbox"/>	TP346441CNSEC1
4	<input type="checkbox"/>	TP346441ILSEC1
5	<input type="checkbox"/>	TP346441JPSEC1
6	<input type="checkbox"/>	TP346441USCON2
7	<input type="checkbox"/>	TP346441USCON1
8	<input type="checkbox"/>	TP346441USPRV1
9	<input type="checkbox"/>	TP346440USPRV1
10	<input type="checkbox"/>	TP346429USPRV2
11	<input type="checkbox"/>	TP346430USPRV2
12	<input type="checkbox"/>	TP346437USPRV1

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

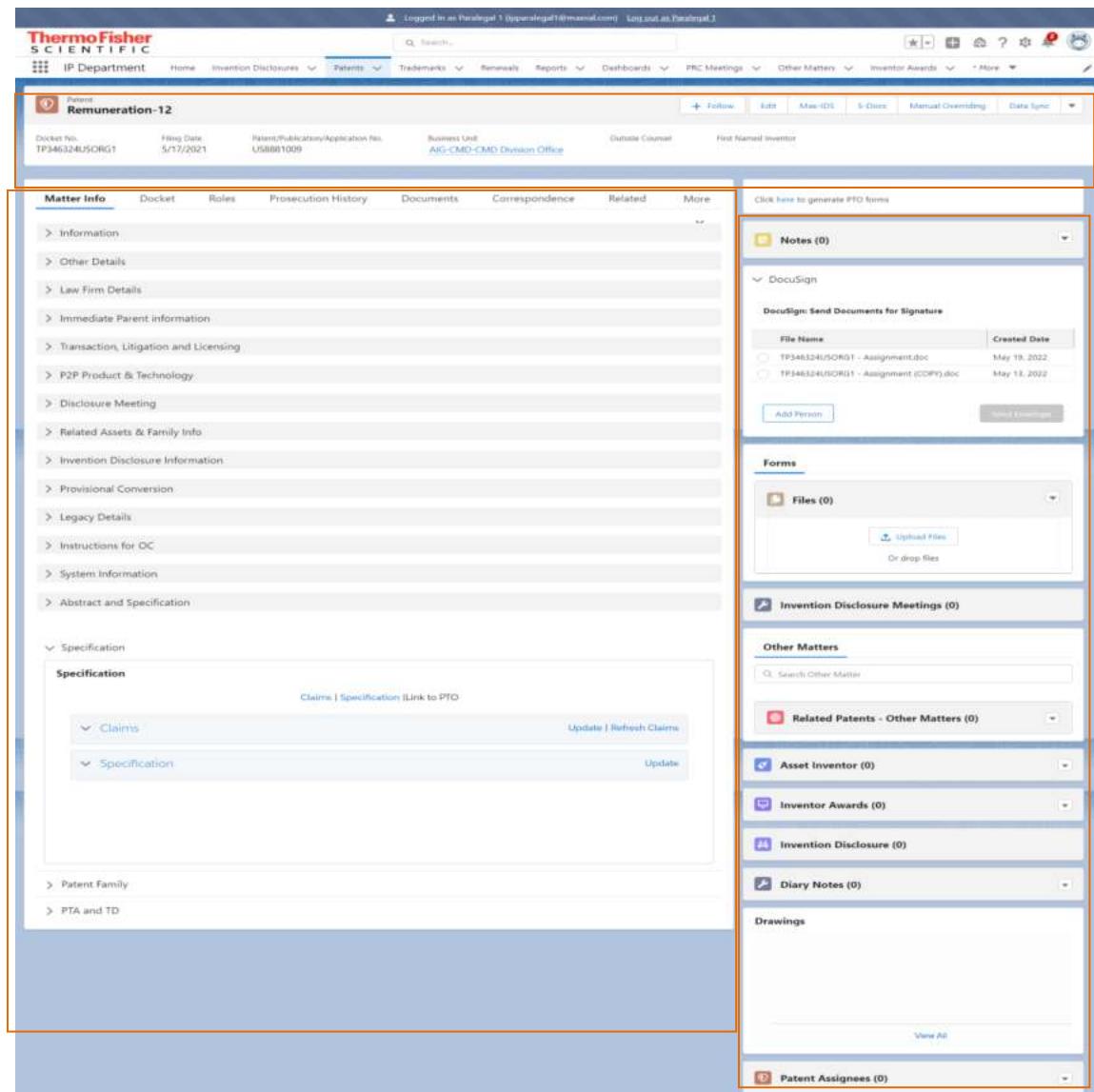
1. View Patent (Asset Detailed View)

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



	Asset Name	Docket No.	Title	Filing Date	Status	Created Date
1	TP146501-US0...	TP146501-US...	title		Drafting	5/27/2022, 8:01...
2	TP346487USCON1	TP346487USCO...	US ID Test 8		Continuation	5/27/2022, 5:27...
3	TP346487USUTL1	TP346487USUTL1	US ID Test 8		Utility Nat...	5/27/2022, 4:24...
4	TP346482USORG1	TP346482US...	US ID Test 8	5/12/20...	Provisional	Comp... 5/27/2022, 4:23...
5	TP346482USORG1	TP346482USORG...	US Patent group		Utility Org...	Drafting 5/27/2022, 12:2...

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



The screenshot shows the Thermo Fisher Scientific Symphony User Interface. On the left, there's a sidebar with 'Matter Info' expanded, showing sections like 'Information', 'Other Details', 'Law Firm Details', etc. Below it is a 'Specification' section with 'Claims' and 'Specification' tabs. On the right, there are several expandable sections: 'Notes (0)', 'Forms', 'Invention Disclosure Meetings (0)', 'Other Matters', 'Related Patents - Other Matters (0)', 'Asset Inventor (0)', 'Inventor Awards (0)', 'Invention Disclosure (0)', 'Diary Notes (0)', 'Drawings', and 'Patent Assignees (0)'. The entire right panel is highlighted with a large red border.

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.

A screenshot of a patent page. At the top left is a red shield icon with a white 'P' and the word 'Patent'. Next to it is the title 'Multi-reflection mass spectrometer'. To the right are buttons for '+ Follow', 'Edit', and 'Delete'. A dropdown menu shows 'Max-IDS', 'S-Docs', 'Manual Overriding', and a downward arrow. Below this is a table with fields: Docket No. (TP108673USUTL1), Filing Date (11/27/2019), Patent/Publication/Application No. (US10964520), Business Unit (AIG-CMD-LSMS-Bremen (BU)), Outside Counsel, and First Named Inventor (Hamish Stewart). The 'First Named Inventor' field has a small orange box around it.

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 Responsible Managers 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 Responsible Manager 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 Responsible Managers conduct review meetings, but if you support a Business Unit that does this, the features are available and shown in more detail below:

Schedule Disclosure Meeting

* Select an option

Skip Disclosure Meeting
 Schedule Disclosure Meeting

Schedule Disclosure Meeting

* Meeting Date: Complete this field.

* Meeting Start Time (HH:MM):

* Meeting Duration (in minutes):

* Meeting Location:

Previous Next

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

The screenshot shows a widget titled "Invention Disclosure Meetings (1)". It displays a single meeting entry with the following details:
IDM-TP346480USPRV1-May 4, 2022
Record ID: a1b4W000007yzZoQAI
Meeting Date: 5/4/2022
Start Time (HH:MM): 09:00

At the bottom of the widget is a blue "View All" button.

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

The screenshot shows a form titled "Disclosure Meeting Review". It includes fields for "Minutes of Meeting" (with a large text input area), "Attachments" (with a "Upload Files" button and a placeholder "Or drop files"), and a section for "Uploaded Files" (with a list area). At the bottom right is a blue "Next" button.

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

The screenshot shows a widget titled "Notes (1)". It displays a single note entry with the following details:
Review about the meeting - 2022-05-30
5/30/2022, 12:02 AM by Responsible Manager
abc

At the bottom of the widget is a blue "View All" button.

- **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.

The screenshot shows a 'Notes (1)' section with a single entry. The entry has a yellow icon, the text 'New', the date '5/23/2022, 6:09 PM by Paralegal 1', and a truncated description: 'chemical analysis, the study of the chemical composition and structure of substances. More broadly, it may be considered the corpus of all techniques whereby any exact chemical informatio...'. A 'View All' link is at the bottom.

- **DocuSign**

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

DocuSign: Send Documents for Signature

Add Person Send Envelope

- **Forms**

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

The screenshot shows a 'Forms' section with a single file entry. The entry has a blue icon, the text 'Files (1)', the file name 'Symphony Data Migration cont'd_2022-05-19', the type 'doc', the date 'May 23, 2022 • 26KB • docx', and a 'View All' link. A 'Add Files' button is visible.

- **Other Matters**

Other Matters widget allows the user to search for Other Matter records.

The screenshot shows a user interface for managing other matters. At the top, there is a header titled "Other Matters". Below it is a search bar with the placeholder text "Search Other Matter". Underneath the search bar is a dropdown menu with a globe icon and the text "Related Patents - Other Matters (0)".

- **Asset Inventor**

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

The screenshot shows a list of inventors for an asset. There are three entries: 1. Hamish Stewart: Person Email, Primary Inventor (checkbox checked), Is External Inventor (checkbox unchecked). 2. Dmitry Grinfeld: Person Email, Primary Inventor (checkbox unchecked), Is External Inventor (checkbox unchecked). 3. Alexander Makarov: Person Email, Primary Inventor (checkbox unchecked), Is External Inventor (checkbox unchecked). A "View All" link is at the bottom.

- **Inventor Awards**

This section summarizes the approved awards for the inventors.

The screenshot shows a summary of inventor awards. It displays a count of "Inventor Awards (0)" next to a computer monitor icon.

- **Invention Disclosure**

This section displays the related invention disclosure.

The screenshot shows a list of invention disclosures. There is one entry: TP346292|IDF. The details shown are: Title: blablabla, Business Unit: AIG-CMD-CMD Division Office, and First Named Inventor: (with an "Edit" button). A "View All" link is at the bottom.

- **Diary Notes**

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

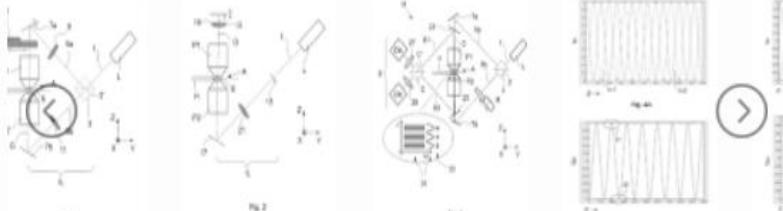
Diary Notes (1)

Priority:	None
For the attention of:	
Note:	
View All	

- **Drawings**

This contains the drawings and illustrations applicable to the invention.

Drawings



[View All](#)

- **Patent Assignees**

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

Patent Assignees (1)

Fundacion Instituto de Estudios de Ciencias de la Salud de Castilla y Leon	
Is Current Assignee:	<input checked="" type="checkbox"/>
View All	

- **Provisional Conversion**

The IP Responsible Manager 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 Responsible Manager can take any one of the following three decisions on the Provisional application:

Provisional Conversion Decision

Provisional Conversion Reminder - **September 1, 2022**
Provisional Conversion Due - **December 1, 2022**

Decision

Convert
 Combine
 Close

Decision Comments

Next

- **Convert:** By selecting convert, they can convert the selected provisional patent to another type of patent application such as non-provisional, etc.
- **Combine:** The Responsible Manager 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:

The screenshot shows a user interface for managing assets. At the top, there is a navigation bar with tabs: Matter Info (which is selected and highlighted in blue), Docket, Roles, Prosecution History, Documents, Correspondence, Related, Checklists (which is also underlined in blue), Rating, and More. Below the navigation bar is a sidebar containing a list of expandable sections, each preceded by a right-pointing arrow: Information, Other Details, Law Firm Details, Immediate Parent information, Transaction, Litigation and Licensing, P2P Product & Technology, Disclosure Meeting, Related Assets & Family Info, Invention Disclosure Information, and Provisional Conversion.

- 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:

Matter Info Docket Roles Prosecution History Documents Correspondence Related Checklists Rating More ▾

> Information

> Other Details

> Law Firm Details

> Immediate Parent information

> Transaction, Litigation and Licensing

> P2P Product & Technology

> Disclosure Meeting

> Related Assets & Family Info

> Invention Disclosure Information

> Provisional Conversion

> Legacy Details

> Instructions for OC

> System Information

✓ Abstract and Specification

Abstract ⓘ

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.

Matter Info	Docket	Roles	Prosecution History	Documents	Correspondence	Related	Checklists	Rating	More ▾
<input type="button" value="Add Event"/> <input type="button" value="Add Ad hoc Activity"/> <input type="button" value="Abandon"/> Show Pending 									
<input type="text" value="Q_ Search Actions"/>									
EVENT DATE	EVENT	DE-DOCKETED BY	DE-DOCKETED DATE ACTION						
+ 06-02-2022	Notice of Allowabili...		Continuation/CIP/Divisional Application Due 09-02-2022						
+ 05-23-2022	Notice of Allowabili...		Continuation/CIP/Divisional Application Due 08-23-2022						
+ 05-17-2022	Filing Date		Adjusted Expiry 04-22-2042						
+ ✓ 05-11-2022	Patent Shell Record Created		Foreign Filing Due 04-22-2023						
+ 04-22-2022	Effective Filing Date		Expiry 04-22-2042						

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

Last synced date : May 24, 2022

MAIL ROOM DATE	DOC. DESCRIPTION	DOC. CODE	PTO DOCUMENT
Aug 03, 2021 Nov 27, 2019	Certificate of Correction - Post issue Communication Drawings-only black and white line drawings	DRW	COOLIT 7
Nov 27, 2019	Assignee showing of ownership per 37 CFR 3.73	R3.73	7

Mar 11, 2021 Email Notification OA.EMAIL 7

[Refresh](#) [Sync IFW](#) [Application Mapping](#)

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.

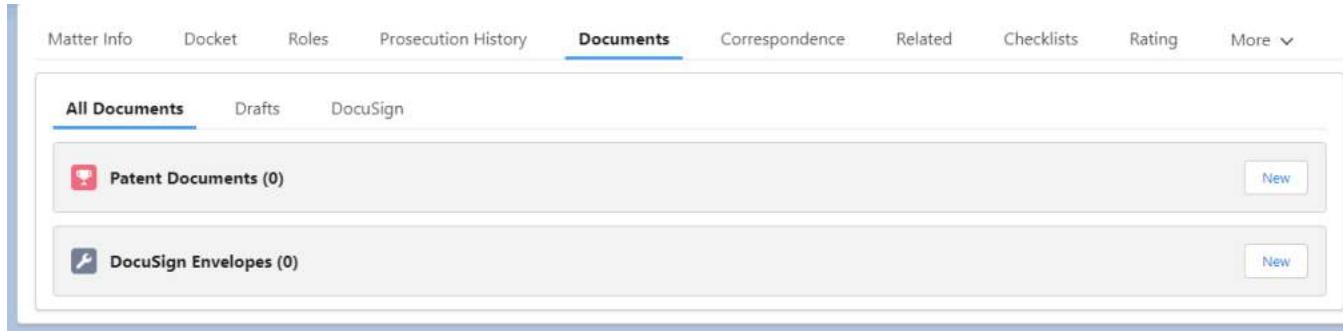
d. Documents

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.

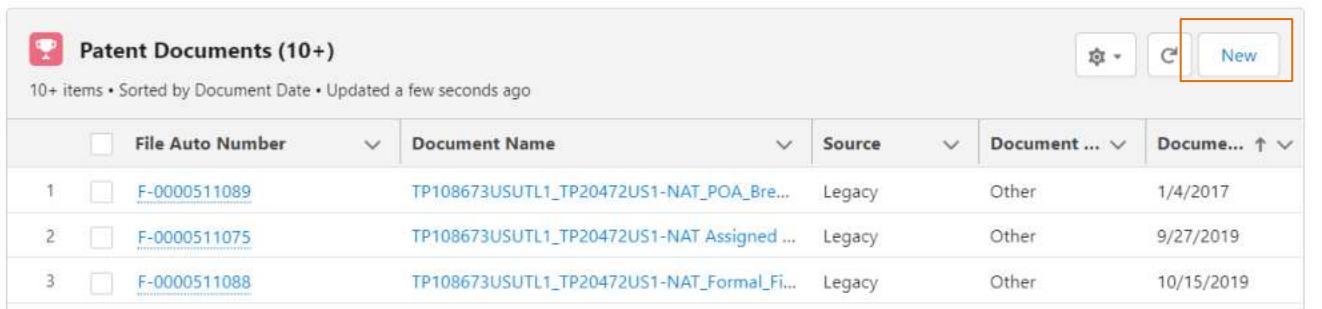


Following are some examples of what is in **All Documents**:

- 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

a. Manual Document Upload

1. To upload a document under **All Documents**, select **New**



File Auto Number	Document Name	Source	Date
F-0000511089	TP108673USUTL1_TP20472US1-NAT_POA_Bre...	Legacy	1/4/2017
F-0000511075	TP108673USUTL1_TP20472US1-NAT Assigned ...	Legacy	9/27/2019
F-0000511088	TP108673USUTL1_TP20472US1-NAT_Formal_Fi...	Legacy	10/15/2019

2. Provide details related to the document in the **New Patent Document** pop-up, upload files and click **Upload**

Patent > TP108673USUTL1

* Upload File

Or drop files

* Document Name

* Document Type
--None--

* Document Date

Comments

Upload

3. Symphony will automatically provide a **File Number** and a **Document Name** to the uploaded document

	File Auto Number	Document Name	Source	Document ...	Docume... ↑
1	<input type="checkbox"/> F-0000511089	TP108673USUTL1_TP20472US1-NAT_POA_Bre...	Legacy	Other	1/4/2017
2	<input type="checkbox"/> F-0000511075	TP108673USUTL1_TP20472US1-NAT Assigned ...	Legacy	Other	9/27/2019
3	<input type="checkbox"/> F-0000511088	TP108673USUTL1_TP20472US1-NAT_Formal Fi...	Legacy	Other	10/15/2019
4	<input type="checkbox"/> F-0000511074	TP108673USUTL1_TP20472US1-NAT Draft Appl...	Legacy	Other	11/20/2019

b. Legacy Documents

- For applications in prosecution, all the documents received from the Legacy system are uploaded with the source as **Legacy** and Document type as **Other**

	File Auto Number	Document Name	Source	Document ...	Docume... ↑
1	<input type="checkbox"/> F-0000511089	TP108673USUTL1_TP20472US1-NAT_POA_Bre...	Legacy	Other	1/4/2017
2	<input type="checkbox"/> F-0000511075	TP108673USUTL1_TP20472US1-NAT Assigned ...	Legacy	Other	9/27/2019
3	<input type="checkbox"/> F-0000511088	TP108673USUTL1_TP20472US1-NAT_Formal Fi...	Legacy	Other	10/15/2019
4	<input type="checkbox"/> F-0000511074	TP108673USUTL1_TP20472US1-NAT Draft Appl...	Legacy	Other	11/20/2019

- For granted patents outside the US and the Global Dossier countries, all the documents received from the Legacy system are uploaded under a single folder with the source as **Legacy**

Details

Document Name: TP103410UMCNSEC1_TP107708CNSEC1U_LT01197CNUTM_Legacy_documents_2022-06-27

Patent: TP103410UMCNSEC1

File Name: TP107708CNSEC1U_LT01197CNUTM_Legacy_documents

Source: Legacy

Document Type: Other

Comments:

Created By: System Admin TF, 5/20/2022, 6:13 AM

Last Modified By: System Admin TF, 5/20/2022, 6:13 AM

Files (3+)

- LT01197CNUTM - Confirmation email (May 20, 2022 • 128KB • msg)
- LT01197CNUTM - Annuities Instructions (May 20, 2022 • 103KB • msg)
- LT01197CNUTM - Annuity Inst. to FA (May 20, 2022 • 69KB • msg)

[View All](#)

ii. Draft Documents

This section displays the response drafts exchanged between outside counsel, in-house counsel, or the reviewer using Symphony.

Matter Info	Docket	Roles	Prosecution History	Documents	Correspondence	Related	Checklists	Rating	More
All Documents	Drafts	DocuSign							New
Last Modified	DOCUMENT #	VERSION	REVIEW BY	DOCUMENT TYPE	UPLOADED FILES	RESPOND BY			
3/24/2022	[APP-0001]	Initial	IP Responsible Manager	Application Draft	Draft Doc				
3/24/2022	[AGR-0001]	Initial	IP Responsible Manager	Assignments	Draft Doc				
3/24/2022	[EPA-0002]	Intermediate		Examiner Proposed Amendment	Draft Doc				
3/24/2022	[APP-0003]	Intermediate		Application to be Filed	Draft Doc				

The section also provides a detailed document view where you can see the list of instructions and requests raised by the outside counsel with respect to a submitted disclosure for filing.

The document detailed view includes the following:

- Basic details about the review

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

To see the details of any document, click the **View Document History** button to the right of Status (Review Pending). The following page will pop up.

The screenshot shows a detailed view of a document's history and review process. At the top, there's a table with the following data:

Last Updated	Document #	Actor	Document Type	Attachments	Respond By Date	Status
12/15/2020, 9:27 PM	[APP-0001]	To be reviewed by In-house Counsel 1	Application Draft		2020-12-15	Review Pending

Below this is a large form area divided into several sections:

- History:** Shows the initial submission on 12/15/2020 at 9:27 PM by In-house Counsel 1, with a status of "One or more reviews pending".
- Document Submitted for Review:** Details the document type as an Application Draft, due date of Dec 15, 2020, and a status of "One or more reviews pending". It also lists comments and uploaded files (A - Petitions other draft.pdf).
- Your Response:** A text input field with placeholder text "Please enter your comments".
- Reviewer's Response:** A section for the reviewer to provide their response, including a "Comments" field, a "Status" dropdown set to "Review", and an "Uploaded Files" section.

If you want to send the documents received from Outside Counsel (OC) for revision (see image above), enter your comments in the **Your Response** section, **Upload** any relevant documents and click **Revise**. The document's status is changed to **Revise** (image below); it goes to the OC to act upon those comments and resend for review again.

The screenshot shows the document history after a revision has been made. The top table now shows the status as "Revise". The detailed view below reflects this change:

History: Shows the initial submission on 12/15/2020 at 9:27 PM by In-house Counsel 1, with a status of "One or more revision requests received".

Document Submitted for Review: Details the document type as an Application Draft, due date of Dec 16, 2020, and a status of "One or more revision requests received". It also lists comments and uploaded files (A - Petitions other draft.pdf).

Once the OC has made the revisions and submitted the document for review, the status is changed to **Review Pending**. If you want to send the document for revision again, follow the above steps or if you want to approve, enter your comments in the **Your Response** section, **Upload** any relevant documents and click **Approve** (image below).

The screenshot shows a document titled "SYM/P/123882/US/ORG/1" in the "Patent Documents" section. The "Status" is listed as "One or more reviews pending". The "PTO Due Date" is "2020-12-16". The "Comments" section contains the text "Submitted for review". The "Uploaded Files" section shows a file named "A - Petitions other draft.pdf". The "Your Response" section is highlighted with a green border and contains a text input field with placeholder text "Please enter your comments". At the bottom right, there are two buttons: "Approve" (highlighted with an orange box) and "Reject".

The status is changed to **Approved**, and the document is moved to **All Documents**.

The screenshot shows the same document after it has been approved. The "Status" is now "Approved". The "Comments" section contains the text "Approved". The "Uploaded Files" section shows a file named "A - Declarations - PTO 2 revised.pdf". The "Reviewer's Response" section on the right shows the status "Approved" and the comment "Approved".

iii. DocuSign

This section includes all the pending documents shared with the parties using DocuSign and their respective signature status.

Matter Info	Docket	Roles	Prosecution History	Documents	Correspondence	Related	More
All Documents	Drafts			DocuSign			
Name	Status		Sent Date	Completed Date	Email		
TP346440USPRV1							
TP346440USPRV1							
TP346440USPRV1	Completed		May 23, 2022	May 23, 2022			
Inventor 5	Completed		May 23, 2022	May 23, 2022	sfdev1@maxval.com		
Inventor 6	Completed		May 23, 2022	May 23, 2022	yaroslav.lagun@gmail.c...		
TP346440USPRV1	Delivered		May 23, 2022				
TP346440USPRV1	Delivered		May 23, 2022				
TP346440USPRV1	Completed		May 20, 2022	May 20, 2022			
TP346440USPRV1	Completed		May 19, 2022	May 19, 2022			
TP346440USPRV1	Sent		May 19, 2022				

e. Related

The **Related** tab allows you to view and add new related patent records (child record) for a patent (parent record). This section divides the filing of child record into two types:

- Filing a patent in another country (international filing feature)
- Filing a related patent application for a parent invention

Related patent applications are filed after an initial original application but before it is issued as a patent. The related patents have similar or related technologies as that of the original patent.

From the **Related** tab, you can create a related record under the below-listed categories:

Family Patents:

- **Provisional**

Provisional application filed in the family.

- **Utility Non-Provisional**

A non-provisional application is examined by a patent examiner and may be issued as a patent if all the requirements for patentability are met.

- **Foreign Case**

This application type allows filing an application in different countries. This includes PCT filings as well.

- **Continuation**

The continuation application is filed to pursue additional claims in an earlier application, i.e., the parent application.

- **Continuation-in-Part**

This application type is filed when the application contains subject matter that was not disclosed in the parent application.

- **Divisional**

This application type is filed when a parent application contains claims beyond the acceptable limit for one patent application or claims that do not match an application.

Other Patents:

Other patents demonstrate subject matter related applications that might not be directly in PTO records.

f. Correspondence

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

You can compose and send out emails based on your requirement from the **Email** tab.

The screenshot shows the 'Correspondence' tab for a patent application titled 'System And Method For Determining Copies-Per-Unit-Volume Using Pcr And Flow Control Of Droplets'. The application number is US2020224280A1, and the filing date is 1/13/2020. The Business Unit is GSG-GSD-Genetic Analysis (BU). The 'Correspondence' tab is selected, showing a compose form with fields for 'Email' and 'Write an email...', and a 'Compose' button. Below the form, there are filters for 'All time • All activities • All types' and buttons for 'Refresh • Expand All • View All'. A section titled 'Upcoming & Overdue' indicates 'No next steps. To get things moving, add a task or set up a meeting.' and 'No past activity. Past meetings and tasks marked as done show up here.'

This section also displays the emails exchanged against the asset.

May • 2022

This Month

> TP303680USUTL1 - 1.56 DoD 12:32 PM | May 9 ▾
Mila Kasan sent an email to Mila Kasan

March • 2022

2 Months Ago

> REQUEST: Inventor Information (Our Ref. Terrie Strawn, Patti Selan, Susanna Li, Mila Kasan) 3:36 AM | Mar 17 ▾
Mila Kasan sent an email to Mila Kasan

No more past activities to load.

Sort by: Most Recent Activity ▾

Search this feed... ▾

System Admin TF updated this record. May 16, 2022 at 5:20 AM

Status
Issued to Sold

Prosecution Status Date
4/26/2022 to 5/16/2022

Like Comment

Write a comment...

System Admin TF updated this record. May 5, 2022 at 12:07 AM

Inventors
Changed

g. Patent Rating

This section allows a Responsible Manager to provide an optional rating to the given asset and allows to view the rating provided by others. Only the IP Responsible Manager can add a rating.

Follow the steps below to rate or change the asset rating:

Invention Disclosure Roles **Rating** Correspondence Contribution Remuneration Records Email History DocuSign Envelopes

Please update your Disclosure Rating for the Invention Disclosure if the status is '**Accepted**' by clicking the button below.

[View Rating Summary](#) [Add/Edit Rating](#)

1. Choose a rating from the drop-down in each category available under the **Patent Rating** to rate an asset and click **Save** to continue.

Sandbox Partial

ThermoFisher
SCIENTIFIC

System Administrator Home Dashboards Renewals Patents Admin Invention Disclosures Import Reports

Patent lawyer day

Docket No.: TP305226USPRV1 Filing Date: Patent/Publication/Application No.: Business Unit: PSG-PTH-Patheon Biologics (PB) (BU) Outside Counsel:

Matter Info	Docket	Roles	Prosecution History	Documents	Rating	More
CSO Program Data						
Intensifying Innovation	<input type="checkbox"/>	No				
CSO Program Name	<input type="text"/>					
CSO Innovation Type	<input type="text"/>					
CSO Top Program	<input type="checkbox"/>	No				
CSO NPI Number	<input type="text"/>					
CSO Tech Area 1	<input type="text"/>					
CSO Tech Area 2	<input type="text"/>					
P2P Program Data						
Product Lines	<input type="text"/>					
Select an Option	<input type="button" value="▼"/>					
Q. Or search	<input type="text"/>					
Products	<input type="text"/>					
Select an Option	<input type="button" value="▼"/>					
Q. Or search	<input type="text"/>					
Taxonomy	<input type="text"/>					
Select an Option	<input type="button" value="▼"/>					
Patent Rating						
Case Rating	<input type="text"/>					
Select an Option	<input type="button" value="▼"/>					
Cancel Save						

h. Checklists

The Responsible Manager can access Notice of Allowance checklist under the **Checklist** tab when the selected patent's status is Allowed.

1. Wait for the paralegal to complete their tasks.
2. Fill out the checklist and click **Next**
3. The checklist is saved with the inputs provided by the Responsible Manager

The screenshot shows a list titled "NOA Checklists (1)". It contains one item: "US NOA Checklist". Below it, there is a specific checklist entry for "NOA-0000115" with the number "1". At the bottom right of the list area, there is a "View All" link.

4. Only after both the Responsible Manager and the Paralegal have filled it, a complete NOA checklist will be created.

The screenshot shows the "Details" tab of a NOA Checklist for patent "TP346340USORG1". The checklist includes the following items:

Item	Description	Status
Allowed claims match most recent amendment	✓	
Comments 11	test10	
No amendment to claims needed	✓	
Comments 12	test11	
Invention is correct for allowed claims	✓	
Comments 13	test12	
Non-publication Request was filed	✓	
Comments 14	test13	
Government has rights in invention	✓	
Comments 15	test14	
Will Thermo Fisher pay maintenance fees?	✓	
Comments 16	test15	
If allowed before 12-month date, confirm	✓	

i. Group, Division, and Business Unit

This section provides the Group, Division, Business Unit and Cost Center/GL for that asset.

The screenshot shows a user interface for configuring Group, Division, and Business Unit settings. At the top, there is a navigation bar with tabs: Matter Info, Docket, Roles, Prosecution History, Documents, Correspondence, Related, **Group, Division And BU**, and More. The 'Group, Division And BU' tab is currently selected. Below the navigation bar, the title 'Group, Division and Business Unit' is displayed, followed by a note: 'Please, select the Group, Division and Business Unit.' There are three dropdown menus: 'Group' (selected value: AIG), 'Division' (selected value: CMD), and 'Business Unit' (selected value: AIG-CMD-LSMS-SJ Life Science Mass Spectrometry (BU)). At the bottom of the form, there is a note: 'Cost Center/GL - 700.9801.2700.19326' and a small note: '(Cost Center/GL is updated based on Business Unit.)'. A blue 'Save' button is located at the bottom right of the form area.

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.

Docket No.	Legacy Docket No.	Project...	Asset Type	Product	Filing ...	Status	Country	Last Modified By	Last Modified Date	Created By	Created Date
1	OM000016	Xyto Portfolio Prosecution-General	Miscellaneous			Closed	United States of America	System Admin TF	3/17/2022, 11:38 AM	System Admin TF	3/9/2022, 3:33 AM
2	OM00007	Workman Nydegger Source Record	Miscellaneous			Closed	United States of America	System Admin TF	3/17/2022, 11:39 AM	System Admin TF	3/9/2022, 3:35 AM
3	OM000453	WCH2013-006	Miscellaneous			Closed	China	System Admin TF	3/17/2022, 11:39 AM	System Admin TF	3/9/2022, 3:34 AM
4	OM000098	U.S. Genomics	Miscellaneous			Closed	United States of America	System Admin TF	5/13/2022, 6:47 AM	System Admin TF	3/9/2022, 3:33 AM
5	OM000094	TT0247-00-MISC	Miscellaneous			Pending	China	System Admin TF	3/17/2022, 11:39 AM	System Admin TF	3/9/2022, 3:35 AM
6	OM0001392	TPM00574	Patentability Sear...			Pending	China	System Admin TF	5/13/2022, 6:47 AM	System Admin TF	4/13/2022, 5:06 AM
7	OM0001389	TPM00573	Patentability Sear...			Pending	Germany	System Admin TF	5/13/2022, 6:47 AM	System Admin TF	4/13/2022, 5:06 AM
8	OM0001388	TPM00972	Patentability Sear...			Pending	United States of America	System Admin TF	5/13/2022, 6:47 AM	System Admin TF	4/13/2022, 5:06 AM
9	OM0001309	TPM00571	Miscellaneous			Pending	United States of America	System Admin TF	5/13/2022, 6:47 AM	System Admin TF	4/13/2022, 5:06 AM
10	OM0001301	TPM00570	Patentability Sear...			Pending	United States of America	System Admin TF	5/13/2022, 6:47 AM	System Admin TF	4/13/2022, 5:06 AM
11	OM0001388	TPM00569	Patentability Sear...			Pending		System Admin TF	5/13/2022, 6:47 AM	System Admin TF	4/13/2022, 5:06 AM
12	OM0001371	TPM00568	Patentability Sear...			Pending	United States of America	System Admin TF	5/13/2022, 6:47 AM	System Admin TF	4/13/2022, 5:06 AM
13	OM0001370	TPM00567	Patentability Sear...			Pending	United States of America	System Admin TF	5/13/2022, 6:47 AM	System Admin TF	4/13/2022, 5:06 AM
14	OM0001367	TPM00566	Patentability Sear...			Pending	United States of America	System Admin TF	5/13/2022, 6:47 AM	System Admin TF	4/13/2022, 5:06 AM
15	OM0001366	TPM00565	Patentability Sear...			Pending	United States of America	System Admin TF	5/13/2022, 6:47 AM	System Admin TF	4/13/2022, 5:06 AM
16	OM0001365	TPM00564	Patentability Sear...			Closed	United States of America	System Admin TF	6/13/2022, 6:47 AM	System Admin TF	4/13/2022, 5:06 AM

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

Filing Date	Status	Country
11/28/20...	Pending	United States of Am...
12/8/2021	Pending	China
12/1/2021	Pending	India
12/17/20...	Draft	India
	Draft	United States of Am...
	Closed	United States of Am...
	Closed	United States of Am...
	Closed	United States of Am...
	Closed	United States of Am...
	Closed	United States of Am...
	Closed	United States of Am...
	Closed	European Patent Of...
	Closed	United States of Am...

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.

The screenshot shows a software interface for managing intellectual property. At the top, there's a header with tabs for 'Edit' and 'Delete'. Below the header, the title 'Other Matters' and the name 'Lipofectamine Plus' are displayed, along with a docket number 'OM000054' and a business unit '100-BIO-Cellfree-Symphony-2019'. The main area is divided into several sections:

- Details:** Contains fields for Docket No., Title, Patentability Search, Country, Project Name, Abstract, Legacy Sub Status, Legacy Date, Related Keywords, Legacy Docket No., Application Number, Counter Party, and Counter Party Note.
- Invention Disclosures:** Includes a search bar and a link to 'Related Invention Disclosures (0)'.
- Patents:** Includes a search bar and a link to 'Related Patents - Other Matters (0)'.
- Trademarks:** Includes a search bar and a link to 'Related Trademarks (0)'.
- Inventors:** A section for managing inventors.

ii. Correspondence

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

The screenshot shows the 'Correspondence' tab selected. The interface includes a toolbar with tabs for 'Details', 'Correspondence' (which is active), 'Docket', and 'Group, Division And BU'. Below the toolbar, there's a 'New Task' button and an 'Email' tab. The email form fields are as follows:

- From:** System Admin TF <guna.av@maxval.com>
- To:** [empty input field]
- Bcc:** guna.av@maxval.com
- Subject:** Enter Subject...
- Editor:** A rich text editor with standard toolbar icons for font, size, bold, italic, etc.
- Related To:** A dropdown menu showing 'OM000054'.
- Send:** A blue 'Send' button.

iii. Docket

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

Press the button below to create new Ad hoc Docketing Activity.

Create Ad hoc Activity

Docket Activities (0)

Add Ad hoc activity

* Docketing activity

* Event date

* Due date

Comments

Cancel Save

- **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.

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		

[View All](#)

iv. Group, Division, and BU

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

The screenshot shows a software interface for managing other matter records. At the top, there's a header bar with the title 'Other Matters' and a sub-section 'Test add roles and inventors'. Below this, there are several input fields: 'Docket No.' (OM001302), 'Country' (United States of America), 'Product' (FreeStyle), 'Project Name' (test), 'Asset Type' (FTO), and 'Business Unit' (AIG-CMD-CMD Division Office). A navigation bar below these fields includes tabs for 'Details', 'Correspondence', 'Docket', and 'Group, Division And BU', with 'Group, Division And BU' being the active tab. Underneath the tabs, there's a section titled 'Group, Division, Business Unit Configuration' with a note: 'Please, select the Group, Division and Business Unit for the following record.' It contains three dropdown menus: one for 'Group' (selected value: AIG), one for 'Division' (selected value: CMD), and one for 'Business Unit' (selected value: AIG-CMD-AAT-GC/GCMS Austin (BU)). A blue 'Save' button is located at the bottom right of this section.

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.

This screenshot shows the 'Invention Disclosures' section. It features a header with the title 'Invention Disclosures' and a search bar labeled 'Search disclosure'. Below the search bar is a button labeled 'Related Invention Disclosures (0)' with a small icon of a document with a plus sign.

ii. Inventors

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

This screenshot shows the 'Inventors' section. It has a header with the title 'Inventors' and a search bar labeled 'Search inventor'. Below the search bar is a button labeled 'Inventors (0)' with a small icon of a person with a globe.

iii. Patents

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

The screenshot shows a user interface for managing patents. At the top, the word "Patents" is displayed in bold. Below it is a search bar with the placeholder text "Search patent". At the bottom of the section is a button labeled "Related Patents - Other Matters (0)" with a small globe icon to its left. The entire section is enclosed in a light gray border.

iv. Trademarks

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

The screenshot shows a user interface for managing trademarks. At the top, the word "Trademarks" is displayed in bold. Below it is a search bar with the placeholder text "Search trademarks". At the bottom of the section is a button labeled "Related Trademarks (0)" with a small triangle icon to its left. The entire section is enclosed in a light gray border.

v. Assignees

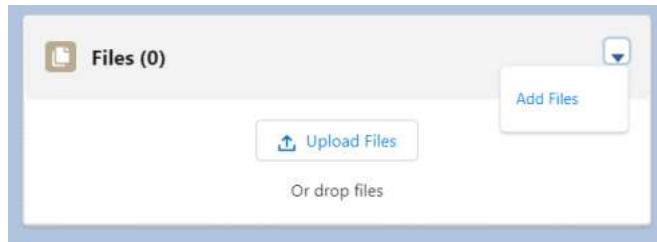
Docketing can assign any associated assignee by selecting the entity and matter IDF associated with the other record.

The screenshot shows a user interface for managing assignees. At the top, the word "Assignees" is displayed in bold. Below it is a button labeled "Other Matter Assignees (0)" with a small globe icon to its left. The entire section is enclosed in a light gray border.

The screenshot shows a software interface titled "New Other Matter Assignee". At the top, there is a navigation bar with links: Disclosures, Patents, Trademarks, Renewals, Reports, Dashboards, PRC Meetings, and Other Matters. Below the title, a section titled "Information" contains fields for "Other Natter Assignee Name" (with a dropdown menu showing "OM00000001"), "Entity" (with a search bar), "Is Current Assignee" (with a checkbox), and "Matter ID" (with an empty input field). At the bottom, there are three buttons: "Cancel", "Save & New", and a blue "Save" button.

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.

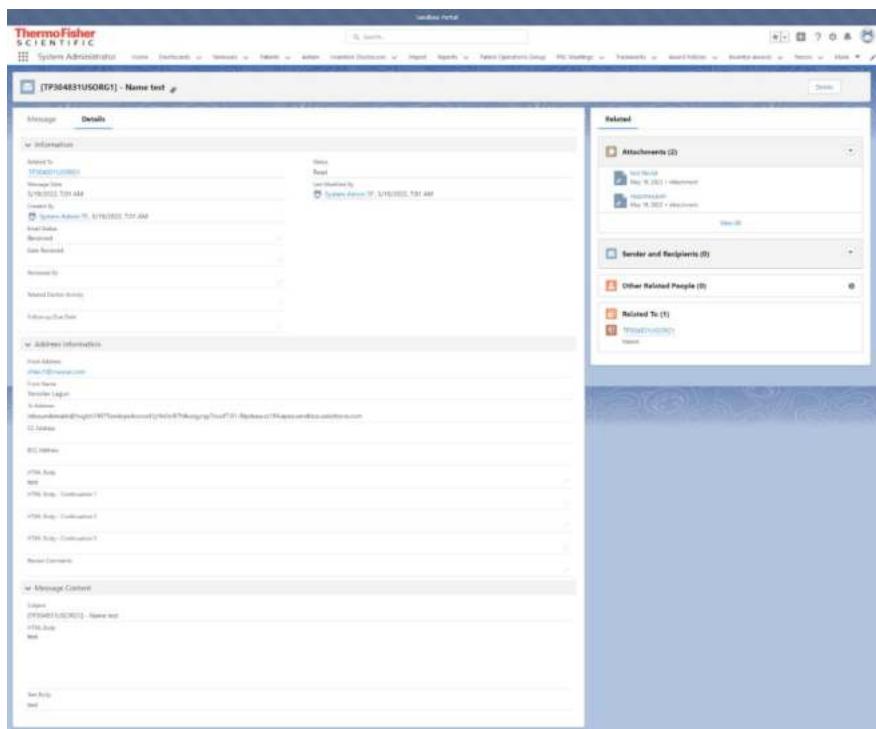
As shown below, all the emails with the subject format **[Symphony Docket Number]** are tracked in the **Incoming Email Dashboard** present on the **Homepage**.

Note: You shall be receiving emails for a particular matter only if you have a Role on that matter.

The screenshot shows the 'Incoming Email Dashboard' interface. At the top, there's a header with a refresh icon, the title 'Incoming Email Dashboard', and buttons for 'Open' and 'Refresh'. Below the header, a message says 'As of May 9, 2022, 7:08 PM Viewing as System Admin TF'. The dashboard is divided into two main sections: 'My Email Tracker - Pending Review' and 'My Email Tracker - Follow-up'. Both sections are tables with columns for Date Rec'd, Email Tracker: Email Track..., Short Subject, Patent Link, To Be Reviewed By (Pending Review), Follow-u..., Da..., Email Tracker: Email... (Follow-up), Short Subject, Date..., and To Be Revie... (Follow-up). The Pending Review section contains 7 rows of data, and the Follow-up section contains 6 rows of data. At the bottom of each section is a link 'View Report (My Email Tracker - Pending Review)' and 'View Report (My Email Tracker - Follow-up)' respectively.

On selecting the Email link, the message details and the list of attached documents are displayed to the user.

My Email Tracker - Pending Review				
Date Rec'd	Email Tracker: Email Track...	Short Subject	Patent Link	To Be Reviewed By
5/9/2022	EMTK-476	TP303680USUTL1 - 1.56 DoD	TP303680 USUTL1	Mila Kasan
4/29/2022	EMTK-475	[TP304831USORG1] - Test Email3	TP304831 USORG1	XDiv Partner
4/29/2022	EMTK-472	[TP304831USORG1] - Test Email3	TP304831 USORG1	IP Comp Manager
4/27/2022	EMTK-466	[TP305026USPRV1]	TP305026 USPRV1	B Test User B user
4/26/2022	EMTK-455	[TP303722USORG1] - Email Test1	TP303722 USORG1	IP Compensation Manager
4/26/2022	EMTK-462	[TP303722USORG1] - Email Test2	TP303722 USORG1	IP Compensation Manager
4/26/2022	EMTK-453	[TP303722USORG1] -	TP303722	IP Paralegal 1



To view the complete list of incoming emails, the user can click on **View Report (My Email Tracker-Pending Review)**.

Incoming Email Dashboard		TP346346USPRV1 - test	TP346346USPRV1 - test
5/13/22	EMTK-6	TP346324USORG1	TP346324USORG1
View Report (My Email Tracker - Pending Review)			

Report: Email Trackers
My Email Tracker - Pending Review
System Admins see all Pending Review [AY]

Total Records
8

Date Received	Email Tracker: Email Tracker Name	Short Subject	To Be Reviewed By	Patent Link	Patent Jurisdiction	Email Tracker: Created Date
5/23/2022 (2)	EMTK-229	[TP346324USORG1] - test name2	Docketer	TP346324USORG1	United States of America	5/23/2022
	EMTK-223	[TP346324USORG1] - Test Name	Docketer	TP346324USORG1	United States of America	5/23/2022
5/19/2022 (5)	EMTK-169	[TP346435USPRV1] - Attachment Name	Docketer	TP346435USPRV1	United States of America	5/19/2022
	EMTK-187	[TP346435USPRV1] - Test Name	Docketer	TP346435USPRV1	United States of America	5/19/2022
	EMTK-162	[TP346435USPRV1]	Docketer	TP346435USPRV1	United States of America	5/19/2022
	EMTK-178	[TP346324USORG1] - Attachment Name	Docketer	TP346324USORG1	United States of America	5/19/2022
	EMTK-172	[TP346435USPRV1] - Attachment Name	Docketer	TP346435USPRV1	United States of America	5/19/2022
5/17/2022 (1)	EMTK-109	[TP346406USPRV1]	Docketer	TP346406USPRV1	United States of America	5/17/2022
Total (8)						

As a Responsible Manager, you can see the following two action options available in a given email.

The screenshot shows the Email Tracker interface for an email titled "EMTK-251". The left pane displays the "Email Message" with fields for "From", "To", and "Date". The right pane is divided into sections: "Details" (containing the email link, short subject, patent link, jurisdiction, and date received), "My Review" (showing the responsible manager as "Responsible Manager" and the review due date as "6/1/2022"), and "Attachments" (listing three attachments: "Doc.aspx test.pdf", "Exported.xls", and "Draft Doc.pdf").

a. No Action Needed

By selecting this option, a Responsible Manager can add comments (optional) without undertaking any further action on the email. They would do this when they have no action for a particular email. For example, for an email from OC saying a Declaration and Assignment needed signatures, since the Responsible Manager does not have to collect signatures, the Responsible Manager can select No Action Needed. The IP Paralegal will also see the email in their own dashboard. The IP Responsible Manager's action on the email does not impact the IP Paralegal's action on the email.

Process Email

* **Select Email Action**

No Action Needed
 Follow-up
 Add attachment(s) to the matter?

Create

b. Follow-Up

By selecting the Follow-Up option, the Responsible Manager can add required comments and a follow-up date when the email needs to be revisited. Post the selected action, they can view the email record under the right-hand side My Email Tracker - Follow Up section on the dashboard.

Process Email

* **Select Email Action**

No Action Needed
 Follow-up
 Add attachment(s) to the matter?

Review Comments (if any)

* Follow-up Due Date

Add attachment(s) to the matter?

Document Name	Document Date	Comments	Document Type
1 Symphony Data Migration ...	5/25/2022	Others	
2 Invention claim No email fe...	5/25/2022	Others	
3 Disclosure follow-up memo...	5/25/2022	Others	

Create

My Email Tracker - Follow-up

Follow-up...	Date...	Email Tracker: Email ...	Short Subject	Date...	To Be Review...
3/30/2022	3/30/	EMTK-318	[TP305061USPRV1] - test	TP305 061US PRV1	B Test User B user
3/31/2022	3/30/	EMTK-315	[TP305061USPRV1]	TP305 061US PRV1	Parag Shekher
3/31/2022	3/29/	EMTK-308	[TP305056USPRV1]	TP305 056US PRV1	A Test user
4/8/2022	4/7/2	EMTK-337	[TP105092USPRV1]	TP105 092US PRV1	A Test user
4/8/2022	3/29/	EMTK-303	[TP305057USPRV1]	TP305 057US	A Test user

View Report (My Email Tracker - Follow-up)

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.

EVENT DATE	EVENT	DE-DOCKETED BY	DE-DOCKETED DATE	ACTION
+ 05-05-2022	Doc Description test			
+ 05-03-2022	Latest Patent family member expired			<div style="background-color: #c8f7e4; border-radius: 10px; padding: 5px; display: inline-block;">Documents Purging Due (Family Expired) - Reminder 04-23-2028</div> CALENDAR
+ 05-02-2022	Notice to File Miss...			<div style="background-color: #c8f7e4; border-radius: 10px; padding: 5px; display: inline-block;">Documents Purging Due (Family Expired) 05-03-2028</div>

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.

Transaction, Litigation and Licensing

Litigation on Hold

In-Licensed

Out-Licensed

Out-licensed Project

Counter Party

In-Licensed LA

Out-Licensed LA

Transaction

Search Transaction...

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.

A screenshot of a software interface titled "Reports Recent". On the left, there's a sidebar with categories like "Recent", "Created by Me", "Private Reports", "Public Reports", "All Reports", "Folders", "All Folders", "Created by Me", "Shared with Me", and "Favorites". The main area shows a table of reports with the following columns: REPORTS, Report Name, Description, Folder, Created By, Created On, and Subscribed. A red box highlights the first row of the table, which contains the report "Invention Disclosures by Status - IP".

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Invention Disclosures by Status - IP	Invention Disclosure Reports	System Admin TF	6/20/2022, 2:50 AM		
Created by Me	All ID - Rocket Docket- Today & tomorrow	Invention Disclosure Reports	System Admin TF	6/21/2022, 8:06 AM		
Private Reports	Y-o-Y Filed Patents	Patent Reports	System Admin TF	6/20/2022, 5:32 AM		
Public Reports	Patent - Rocket Docket- Today & Tomorrow	Patent Reports	System Admin TF	5/7/2022, 7:05 AM		
All Reports	Patents by Status	Patent Reports	System Admin TF	9/15/2020, 2:04 AM		
	All Invention Disclosures by Status	Documents Reports	System Admin TF	9/15/2020, 2:04 AM		
FOLDERS	My Email Tracker - Pending Review	System Admins see all Pending Review [AY]	Email Reports	System Admin TF	5/11/2022, 12:47 AM	
All Folders	Search Report (Received)	TM Search Instruction Reports	System Admin TF	6/21/2022, 10:20 AM		
Created by Me	Search Instruction (Received)	TM Search Instruction Reports	System Admin TF	6/21/2022, 10:20 AM		
Shared with Me	Trademarks (Jurisdiction wise)	TM Filing Reports	System Admin TF	6/21/2022, 10:20 AM		
FAVORITES	sIDS - Open Docket Activities (DTD)	Patent Reports	System Admin TF	6/20/2022, 5:02 AM		
All Favorites	Remuneration Rewards	Remuneration Reports	System Admin TF	5/26/2022, 10:28 AM		
	Upcoming Due Actions Rocket Docket< 50 Days	Docket - Upcoming Due Actions (Rocket Docket ~< 50 Days)	Patent Reports	System Admin TF	5/24/2022, 12:02 AM	

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



Recent						
Report Name	Description	Folder	Created By	Created On	Subscribed	
Portfolio Breakdown	Documents Reports	System Administrator	1/9/2018, 6:09 AM			
Renewals	Annuity Reports	System Administrator	8/9/2018, 11:16 PM			
Patent - Billing Vs Projection	Patent Reports	System Administrator	8/27/2018, 2:35 AM			
Annual Disclosure Comparison	Invention Disclosure Reports	System Administrator	11/12/2018, 5:24 PM			
Keyword Associations	Invention Disclosure Reports	System Administrator	1/8/2018, 4:53 AM			
Invention Disclosures by Hierarchy	Invention Disclosure Reports	System Administrator	1/8/2018, 4:36 AM			

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:

- o **Recent**

Sorts the list of reports based on the last modified date

- o **Created by Me**

Lists all the reports that were created by you

- o **Private Reports**

Displays only the reports that are marked as 'private' when created

- o **Public Reports**

Retrieves all the reports except those marked as private

- o **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				
All Folders	Documents Drafted	Documents Reports	System Administrator	1/9/2018, 6:06 AM
Created by Me	Cost Projections: Prosecution Status	Cost Projection Reports	System Administrator	8/9/2018, 7:29 AM
Shared with Me	Invention Disclosures by Status	Documents Reports	System Administrator	1/6/2018, 3:22 AM
All Favorites	Inventor Patent Status	Patent Reports	System Administrator	9/12/2018, 6:31 AM
	Cost Projections: Fee Type	Cost Projection Reports	System Administrator	8/9/2018, 11:09 PM
	Patent Filings by Country and Path	Patent Reports	System Administrator	8/23/2018, 1:45 AM
	Revised Claims Drafts	Documents Reports	System Administrator	9/2/2020, 3:55 AM
	Revised Application Drafts	Documents Reports	System Administrator	7/20/2018, 3:42 AM

- **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.

- o **Created by Me**

Displays the list of folders created by you

- o **Shared with Me**

Lists all folders that are shared by other users

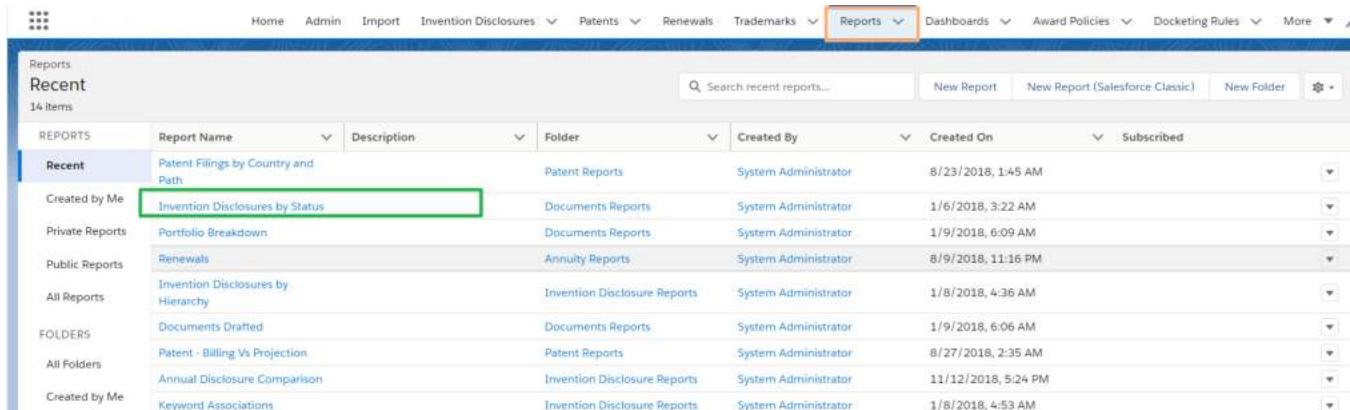
- o **All Folders**

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:

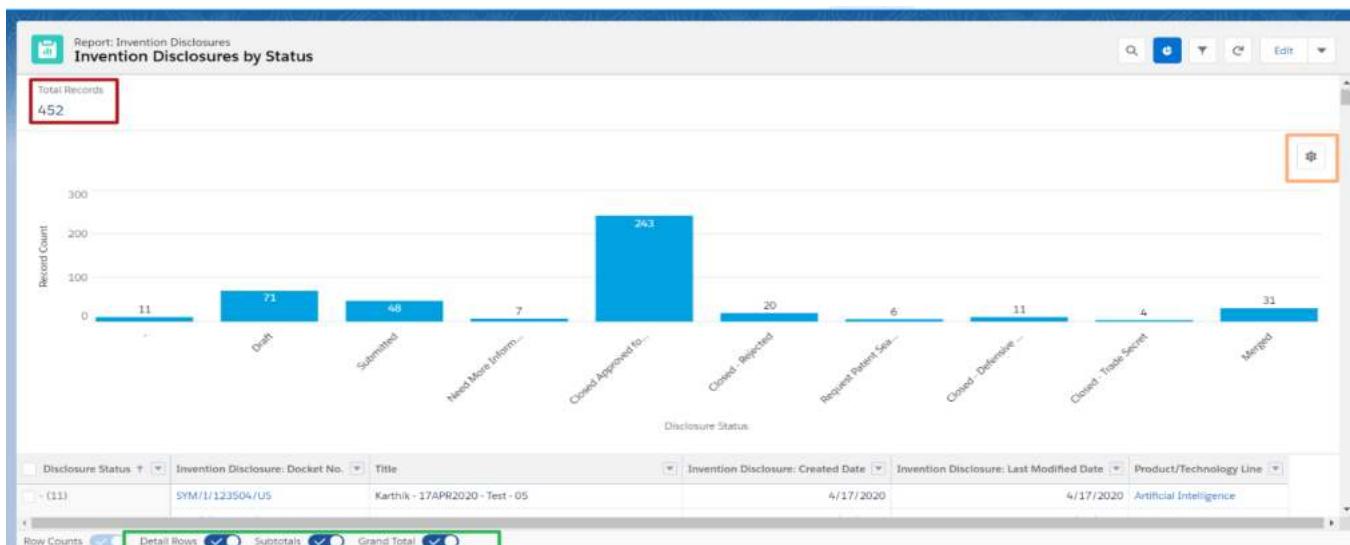


The screenshot shows the 'Reports' section of a software interface. The 'Recent' tab is selected, displaying 14 items. The reports are listed in a table with columns: REPORTS, Report Name, Description, Folder, Created By, Created On, and Subscribed. A search bar at the top right allows searching for recent reports. Buttons for 'New Report', 'New Report (Salesforce Classic)', and 'New Folder' are also present. The report 'Invention Disclosures by Status' is highlighted with a green border.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Patent Filings by Country and Path		Patent Reports	System Administrator	8/23/2018, 1:45 AM	
Created by Me	Invention Disclosures by Status		Documents Reports	System Administrator	1/6/2018, 3:22 AM	
Private Reports	Portfolio Breakdown		Documents Reports	System Administrator	1/6/2018, 6:09 AM	
Public Reports	Renewals		Annuity Reports	System Administrator	8/9/2018, 11:16 PM	
All Reports	Invention Disclosures by Hierarchy		Invention Disclosure Reports	System Administrator	1/8/2018, 4:36 AM	
FOLDERS	Documents Drafted		Documents Reports	System Administrator	1/9/2018, 6:06 AM	
All Folders	Patent - Billing Vs Projection		Patent Reports	System Administrator	8/27/2018, 2:35 AM	
Created by Me	Annual Disclosure Comparison		Invention Disclosure Reports	System Administrator	11/12/2018, 5:24 PM	
	Keyword Associations		Invention Disclosure Reports	System Administrator	1/8/2018, 4:53 AM	

• 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).



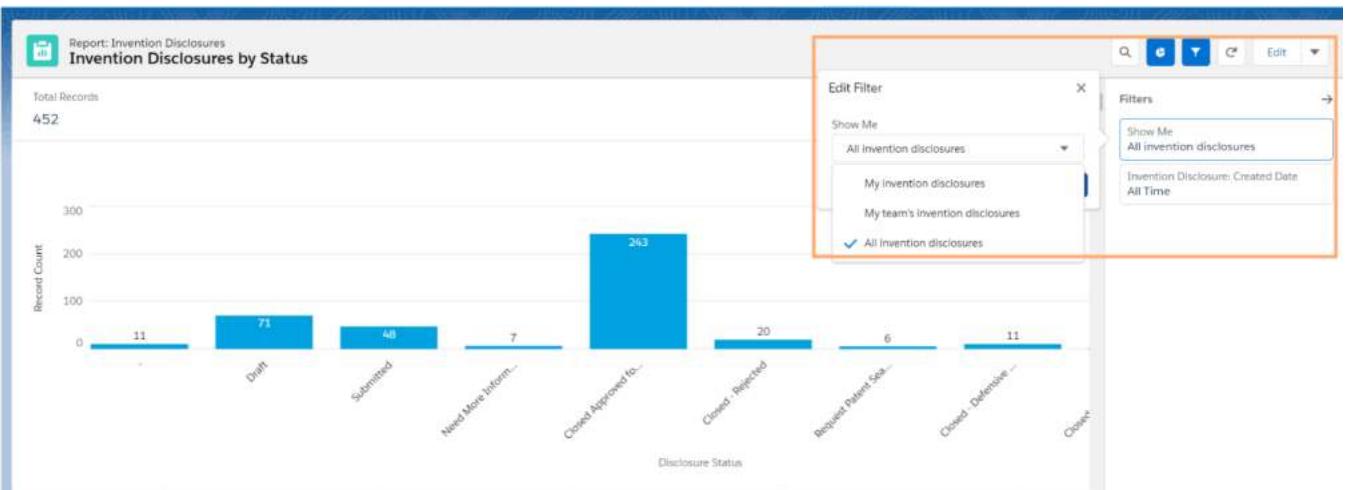
• Record Table

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.

Disclosure Status	Invention Disclosure: Docket No.	Title	Invention Disclosure: Created Date	Invention Disclosure: Last Modified Date	Product/Technology Line
Submitted (48)	IPR001.12388804	Initial Filing - Patent prosecution	11/20/2020	11/20/2020	Artificial Intelligence
	IPR001.12388803	None	11/19/2020	11/19/2020	Artificial Intelligence
	IPR001.12388805	Testing PDF	9/18/2020	10/28/2020	Artificial Intelligence
	IPR001.12388806	IPF-901	9/17/2020	9/23/2020	Artificial Intelligence
	IPR001.12388807	Get IP International filing	9/17/2020	9/17/2020	Artificial Intelligence
	IPR001.12388808	testfile	9/17/2020	9/17/2020	Artificial Intelligence
	IPR001.12388809	IPR - Customer application - 20191109	9/14/2020	9/14/2020	Artificial Intelligence
	IPR001.12388810	IPR - Customer application - 20191109	9/14/2020	9/14/2020	Artificial Intelligence
	IPR001.12388810	Test 401-00	9/7/2020	9/7/2020	Artificial Intelligence

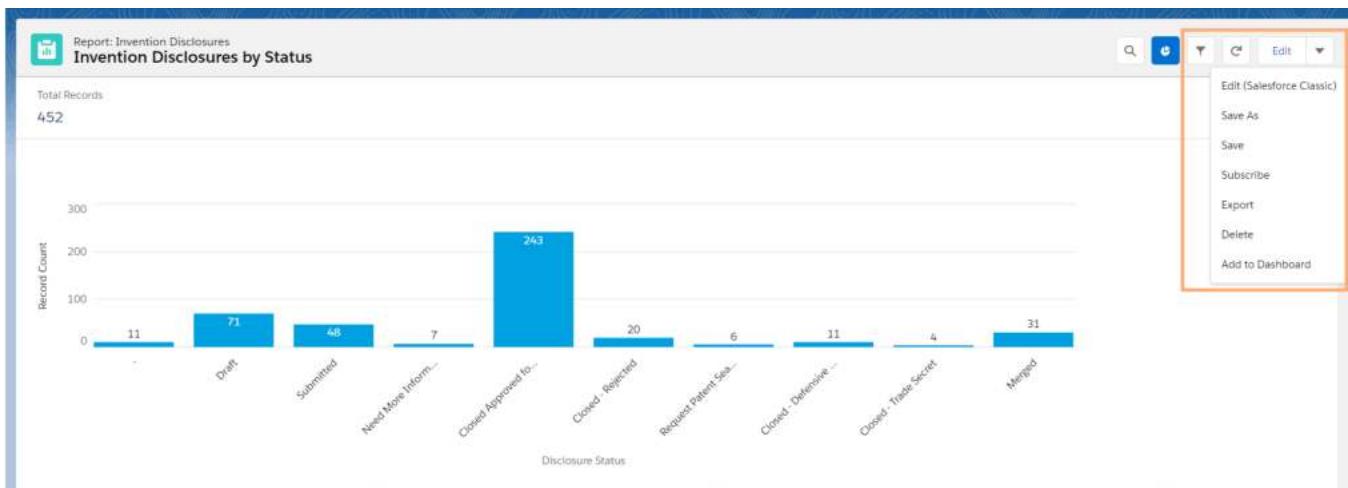
- **Filter Option**

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:

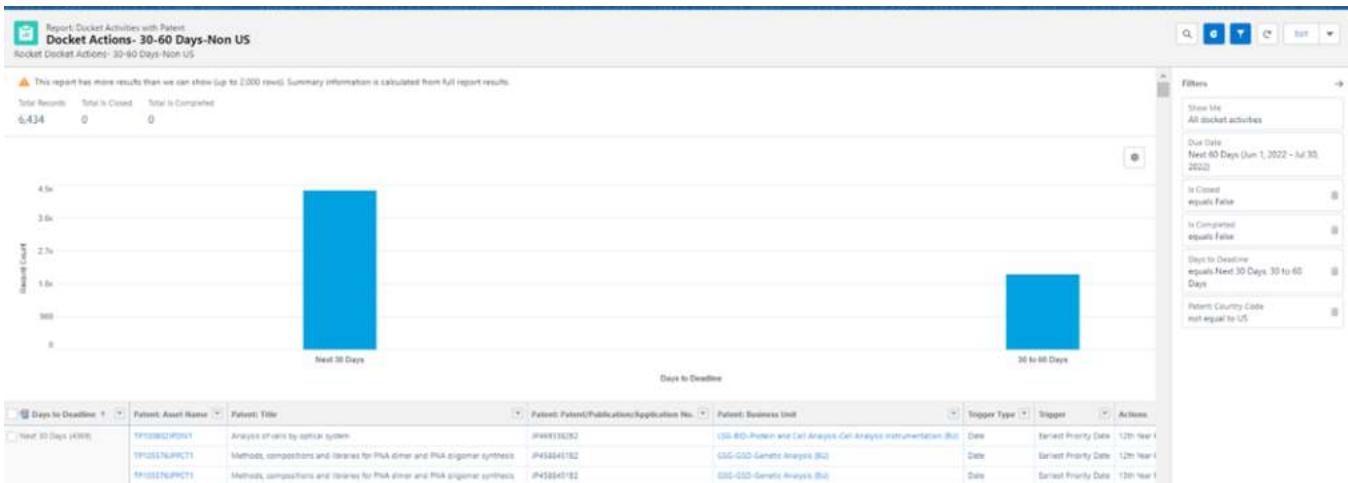
1. Click the **Reports** tab and select a report from the reports list. The report page will display the following information:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Patent Filings by Country and Path		Patent Reports	System Administrator	8/23/2018, 1:45 AM	
Created by Me	Invention Disclosures by Status		Documents Reports	System Administrator	1/6/2018, 3:22 AM	
Private Reports	Portfolio Breakdown		Documents Reports	System Administrator	1/9/2018, 6:09 AM	
Public Reports	Renewals		Annuity Reports	System Administrator	8/9/2018, 11:16 PM	
All Reports	Invention Disclosures by Hierarchy		Invention Disclosure Reports	System Administrator	1/8/2018, 4:36 AM	
FOLDERS	Documents Drafted		Documents Reports	System Administrator	1/9/2018, 6:06 AM	
All Folders	Patent - Billing Vs Projection		Patent Reports	System Administrator	8/27/2018, 2:35 AM	
Created by Me	Annual Disclosure Comparison		Invention Disclosure Reports	System Administrator	11/12/2018, 5:24 PM	
	Keyword Associations		Invention Disclosure Reports	System Administrator	1/8/2018, 4:53 AM	

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

Reports		Search all Folders...				
All Folders		New Report		New Report (Enterprise Classic)		New Folder
Recent		Last Modified By		Last Modified Date		
Created by Me	System Admin T9	System Admin T9	System Admin T9	9/15/2022, 2:04 AM	9/15/2022, 2:04 AM	
Private Reports	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 6:57 AM	5/7/2022, 6:57 AM	
Public Reports	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 6:58 AM	5/7/2022, 6:58 AM	
All Reports	System Admin T9	System Admin T9	System Admin T9	9/15/2020, 2:04 AM	9/15/2020, 2:04 AM	
FOLDERS	System Admin T9	System Admin T9	System Admin T9	4/29/2022, 12:54 AM	4/29/2022, 12:54 AM	
All Folders	System Admin T9	System Admin T9	System Admin T9	5/1/2022, 12:44 AM	5/1/2022, 12:44 AM	
Created by Me	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:01 AM	5/7/2022, 7:01 AM	
Shared with Me	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:02 AM	5/7/2022, 7:02 AM	
FAVORITES	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:03 AM	5/7/2022, 7:03 AM	
All Favorites	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:05 AM	5/7/2022, 7:05 AM	
Report: Audit History Reports	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:06 AM	5/7/2022, 7:06 AM	
Report: Case Draft Reports	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:07 AM	5/7/2022, 7:07 AM	
Report: Data Migration Reports	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:08 AM	5/7/2022, 7:08 AM	
Report: Email Reports	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:09 AM	5/7/2022, 7:09 AM	
Report: Invention Disclosure Reports	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:10 AM	5/7/2022, 7:10 AM	
Report: MacID Reports	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:11 AM	5/7/2022, 7:11 AM	
Report: Other Matter Reports	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:12 AM	5/7/2022, 7:12 AM	
Report: Patient Reports	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:13 AM	5/7/2022, 7:13 AM	
Report: Communication Reports	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:14 AM	5/7/2022, 7:14 AM	
Report: Renewal Reports	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:15 AM	5/7/2022, 7:15 AM	
Report: Renewals Report Dashboard	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:16 AM	5/7/2022, 7:16 AM	
Report: Symphony Reports	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:17 AM	5/7/2022, 7:17 AM	
Report: Trademarks Report	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:18 AM	5/7/2022, 7:18 AM	
Report: User - Person / Roles	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:19 AM	5/7/2022, 7:19 AM	
(Deprecated)Renewals Reports	System Admin T9	System Admin T9	System Admin T9	5/7/2022, 7:20 AM	5/7/2022, 7:20 AM	

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.



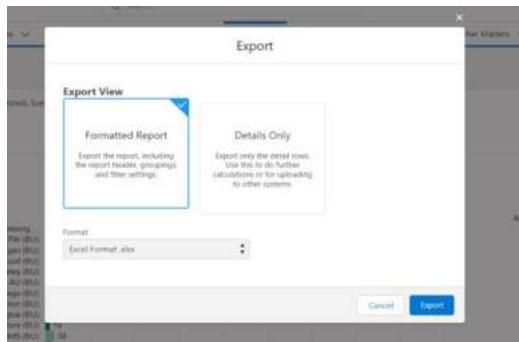
4. To group records in your report, choose a column from the **Add group...** picklist under GROUP ROWS. After grouping a row, you can group a column by choosing a column from the Add group... picklist under GROUP COLUMNS. Group up to 2 rows and 2 columns.

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.

The screenshot shows the 'Docket Actions- 30-60 Days-Non US' report. On the left, the 'Fields' pane is expanded, listing various fields like 'Days to Deadline', 'Patient Asset Name', and 'Comments'. The 'Filters' pane is also visible. At the top right, there are buttons for 'Get Feedback!', 'Save & Run', 'Save', 'Close', and a large blue 'Run' button. A red box highlights the 'Run' button.

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:**

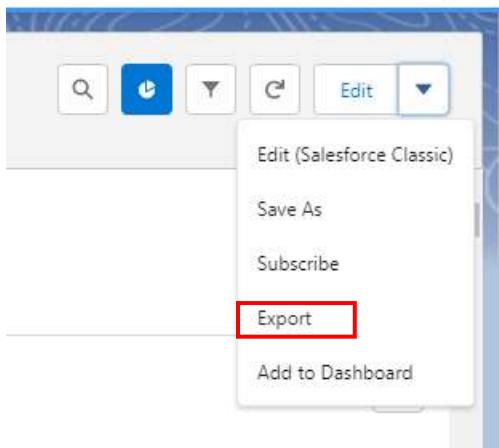
1. Click the **Reports** tab and click on **All Reports**.
2. Search for the report in the **Search** bar.
3. Click on the report that you want to run. In this example we are selecting **Docket Actions – 30-60 Days – US**.

The screenshot shows the 'Reports' section of the Symphony interface. On the left, there's a sidebar with categories like 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', and 'FAVORITES'. The 'All Reports' section is highlighted with a red box and a circled '3'. The main area is a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. A search bar at the top right contains 'docket' with a circled '2'. Several report names are highlighted with yellow boxes: 'Docket Actions - 30-60 Days - US', 'Docket Actions - 30-60 Days - Non US', 'Docket Actions - Today & Tomorrow', 'Docket Actions - History', and 'Docket Actions - ID'. These highlighted reports correspond to the steps in the guide.

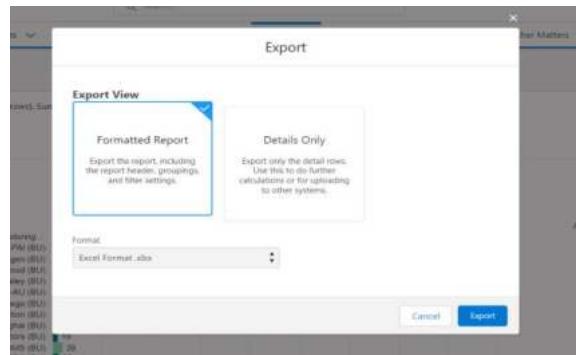
Alternatively, for quick access, you may create a folder and move all frequently used reports in the newly created folder.

The screenshot shows the 'Reports' section with the 'All Folders' sidebar selected. A new folder named 'Docketing Reports' is visible in the 'Recent' section of the main table, highlighted with a red box. The table has columns: Name, Created By, Created On, Last Modified By, and Last Modified Date. The 'Docketing Reports' folder was created by 'System Admin TF' on '9/15/2020, 2:04 AM' and last modified by 'System Admin TF' on '9/15/2020, 2:04 AM'.

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**.

This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.

Total Records:	Total Is Closed:	Total Is Completed:
3,571	0	0

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.

REPORT ▾

Docket Actions - 30-60 Days - US ↗ Docket Activities with Patent

Outline

Groups

- GROUP ROWS
- Add group...
- Days to Deadline
- Actions

GROUP COLUMNS

Add column...

Columns

Patent: Asset Name

Patent: Title

Patent: Patent/Publication/Applic

Patent: Business Unit

Trigger Type

Comments

Due Date

Is Closed

Days to Deadline ↑ Actions ↓ Patent: Asset Name Patent: Title

Days to Deadline ↑	Actions ↓	Patent: Asset Name	Patent: Title
Next 30 Days (20)	7.5 Year Maintenance Fee Due (1)	TP104512USPCT1	In vitro multiparameter determination method for the diagnosis and early diagnosis of neurodegenerative diseases
	7.5 Year Maintenance Fee Window Opens (4)	TP100962USCON2	Ultra-fast nucleic acid sequencing device and a method for making and using the same
		TP103412USPCT1	Sulfonate modified nanocellulose
		TP102957USUTL1	P And N Region Differentiation For Image-To-Cloud Alignment
		TP106862US2011	Sample Pretreatment And Extraction
		TP102893USCON1	Detection of target nucleic acids in a cellular sample
		TP103146USUTL1	Gas filter systems for fluid processing systems

Patent: Patent/Publication/Application No. Patent: Business Unit

US89163882 SGD-CDD-Biomarkers Herrington (BLU)

US9063081 GSO-CSD-Next Generation Sequencing (BLU)

US9061903 LSG-BID-Protein and Cell Analysis (BLU)

US906408182 AIG-MSD-EM-Electrical Fault Analysis (EFA) (BLU)

US9063045 AIG-CMD-ICP-Ion Chromatography (BLU)

US9068662782 LSG-BID-Protein and Cell Analysis-Cell & Protein Car...

US9068429 EPG-SUT-Single Use Technology (BLU)

Record Count

20
16
12
8
4
0

- 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.

REPORT ▾

Docket Actions - 30-60 Days - US ↗ Docket Activities with Patent

Outline

Groups

- GROUP ROWS
- Add group...
- Days to Deadline
- Actions

GROUP COLUMNS

Add column...

Columns

Patent: Asset Name

Patent: Title

Patent: Patent/Publication/Applic

Patent: Business Unit

Trigger Type

Comments

Due Date

Is Closed

Reason to Close

Reason to Complete

Docket Activity: Last Modified B

Docket Activity: Last Modified D

Patent: Pitch/Catch Comments

Patent: Last Comments

Days to Deadline ↑ Actions ↓

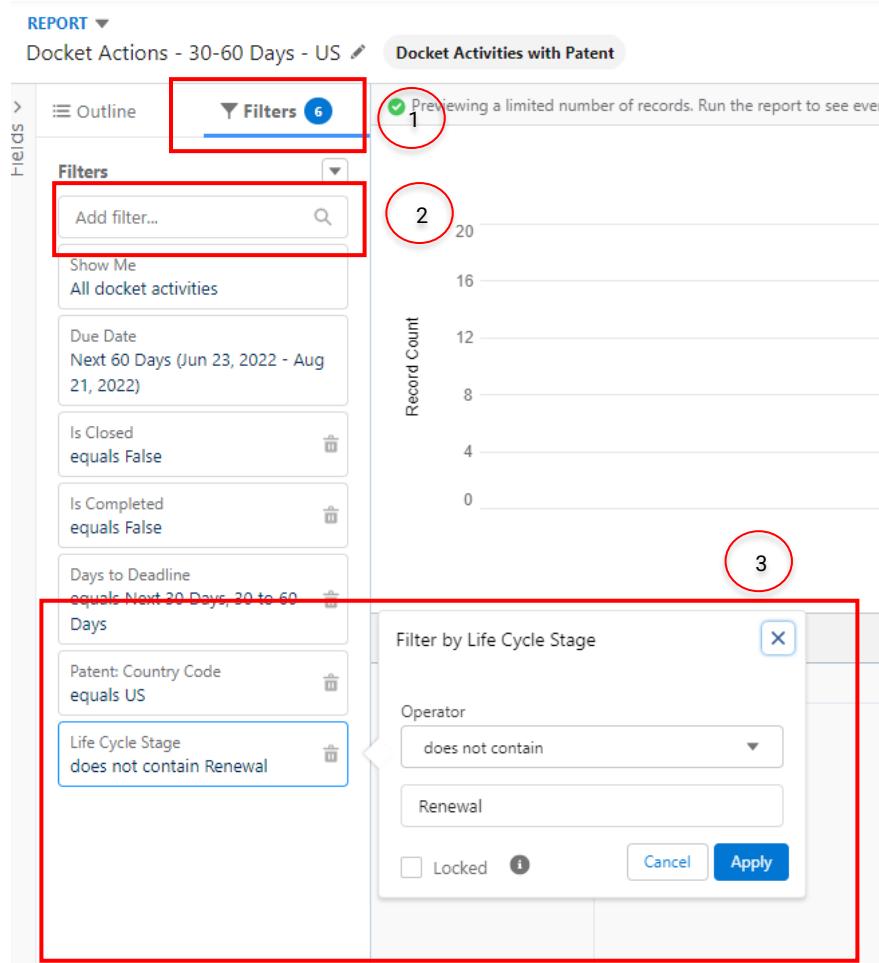
Days to Deadline ↑	Actions ↓
Next 30 Days (20)	Appl Broad

Row Counts Detail Rows

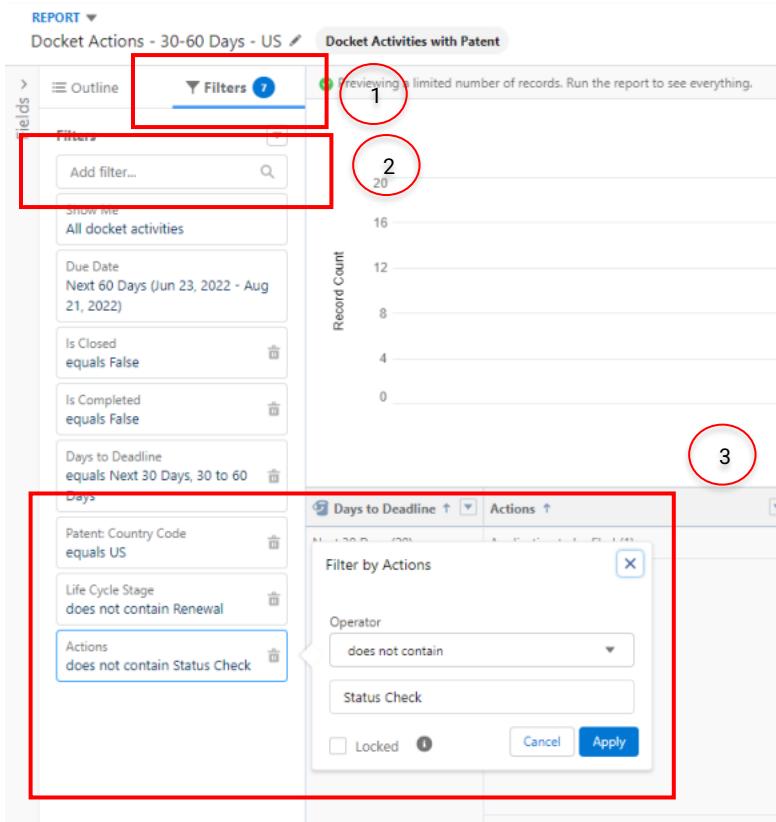
Record Count

20
16
12
8
4
0

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**.



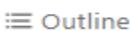
9. If you want to remove all Status Checks from the report, click on **Filters** and choose **Actions** from the **Add filter...** picklist. Use operator ***does not contain*** and enter the value as **Status Check**. Click **Apply**.



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 Responsible Manager**. Click **Apply**.

REPORT ▾

Docket Actions - 30-60 Days - US 

Fields >  **Filters 8**

Filters

Add filter... 

Show Me
All docket activities

Due Date
Next 60 Days (Jun 23, 2022 - Aug 21, 2022)

Is Closed
equals False 

Is Completed
equals False 

Days to Deadline
equals Next 30 Days, 30 to 60 Days 

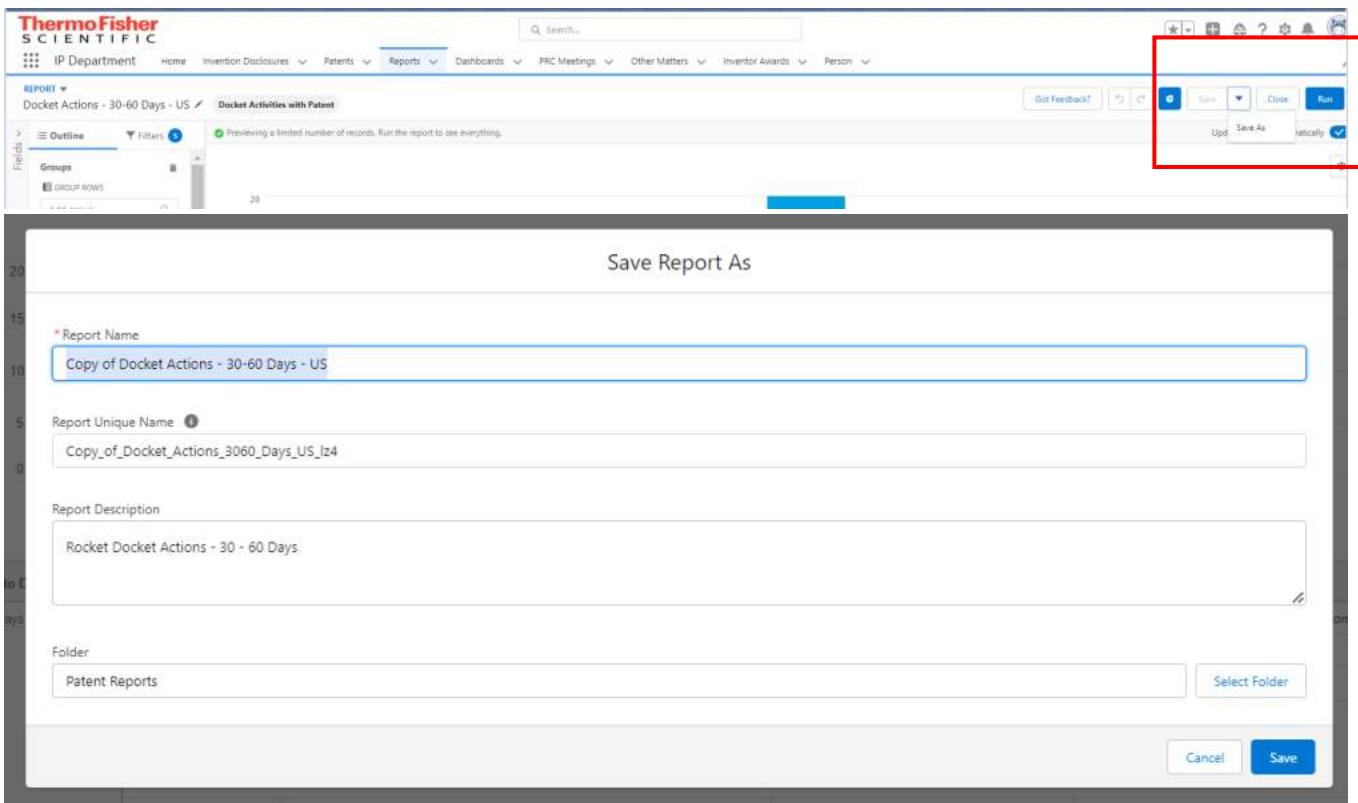
Patent: Country Code
equals US 

Life Cycle Stage
does not contain Renewal 

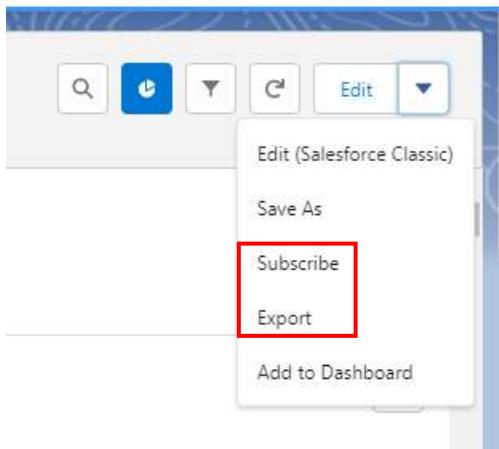
Actions
does not contain Status Check 

Patent: Current Role
contains 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 Responsible Manager 

- 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.

Conditions

In addition to subscribing, you can set up conditions on this report. You will be notified when conditions are met. This is optional.

- Add conditions to this report

You will get notified when all of the conditions are met (**AND**)

* Aggregate	* Operator	* Value
Record Count	Greater than	10
* Aggregate	* Operator	* Value
AND Average Expected Rever	Greater than	50,000

[+ Add Condition](#)

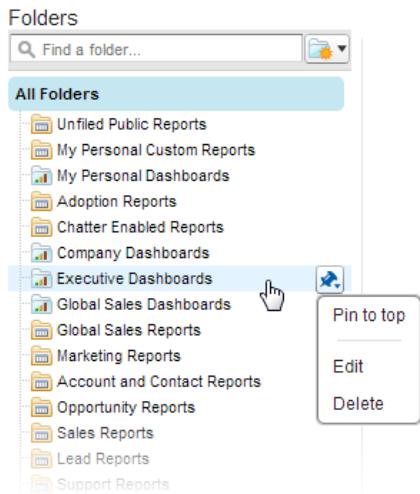
7. Click **Save**.

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 .

Reports & Dashboards



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

Inventor Awards								
All		Search this list...						
1 Item • Sorted by Name • Filtered by all Inventor awards • Updated a minute ago								
	Name	Inventor	Invention Disclosure	Invention Status	Award Curren...	Award Amount	Approval Status	Created Date
1	Award-0	CompanyCode-MVT/Asset-1/100006/US	Submitted	Dollar	1,000.00	Approved	3/19/2019 1:06 AM	

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

The screenshot shows the 'Inventor Award - Award-15' page. At the top, there is a header with the award name 'Award-15'. Below the header, there are two tabs: 'Related' and 'Details'. The 'Details' tab is highlighted with an orange border. Under the tabs, there are three expandable sections: 'Information', 'Award Information', and 'Approval Information'. The 'Information' section is currently expanded, showing some content.

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**.

Information	
Name	Invention Disclosure
Award	CompanyCode-MIT1 Award-1 202006171700
Inventor	Patent
Invention Status	SYNTH ONE 123456789 (100% PELL)
Submitted	
Patent Status	
Application	

Award Information	
Award Currency	Award Amount
Dollar	1,000.00
Award (Additional)	
Inventor Award	

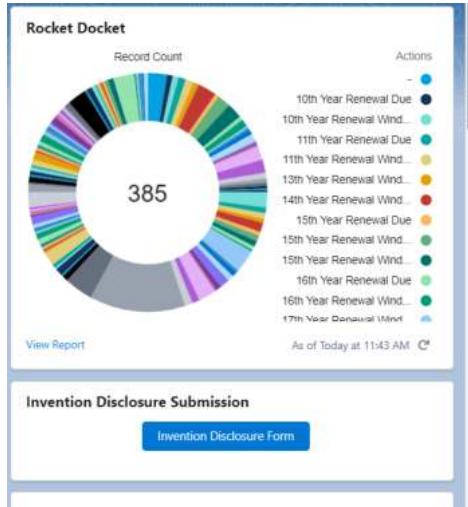
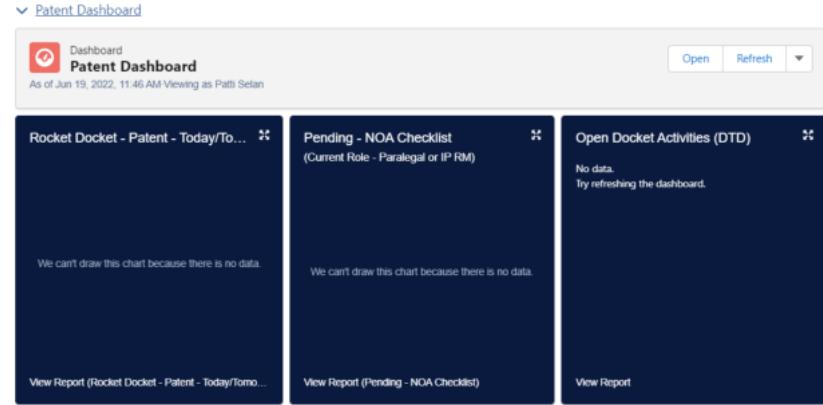
Approval Information	
Approval Status	Approval Required?
Approved	<input checked="" type="checkbox"/>
	Approver
Created By	Last Modified By
Symphony One, 3/19/2019 1:06 AM	Symphony One, 3/19/2019 1:06 AM

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 Responsible Manager	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 <i>Note: If IP Partner exists, the IP Partner's paralegal has role. If no IP Partner exists, the RM's paralegal has role</i>
IP Partner	Attorney, Agent or trainee responsible for prosecution in local patent office; works with Responsible Manager 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 Responsible Manager
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
1 st Remuneration Manager	Site manager or Finance Manager who counter-signs Remuneration Agreements on behalf of that entity
2 nd 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 Responsible Manager 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 Responsible Manager'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	<p>Tabs in each module. To collapse an accordion tab, select another one to expand</p> <ul style="list-style-type: none"> ➢ Incoming Email Dashboard ➢ Upcoming PRB Meeting ➢ Trademark Dashboard ➢ Remuneration Rewards ➢ Inventor Awards Dashboard

Widget	<p>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.</p> 
Dashlet	<p>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</p> 
List View	<p>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</p> 