



Symphony IPM

– System Administrator



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General



- ☐ Bulk Data Upload
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Dashboard

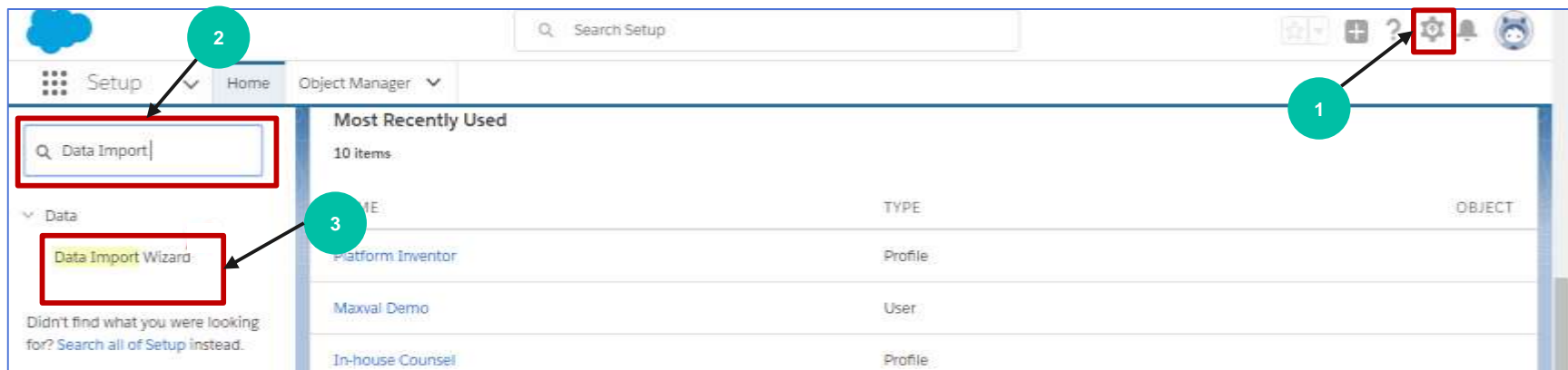
IP Committee Member will be able to view a customized dashboard with notices regarding accepted invention disclosure, status of previously reviewed invention disclosures and reports of other assigned inventions



Bulk Data Load

Using the Data Import Wizard, you can upload any number of records into Symphony. Follow the below steps.

- 1 Navigate to **Setup** page by clicking the wheel icon on the top right corner of the page.
- 2 Type **Data Import** in *Quick Find/Search* text box.
- 3 Click on **Data Import Wizard** option.



Bulk Data Load (Contd.)

4

In the Data Import Wizard click on the **Launch Wizard**.

Data Import Wizard


[Get Started](#) | [Help for this page](#)

Recent Import Jobs


Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Bulk Api Monitoring						

Import your data in 3 easy steps!


Launch the Data Import Wizard to import your data.




Pre-step: Prepare your data for import



Choose data to import



Edit field mapping



Review and start import

4

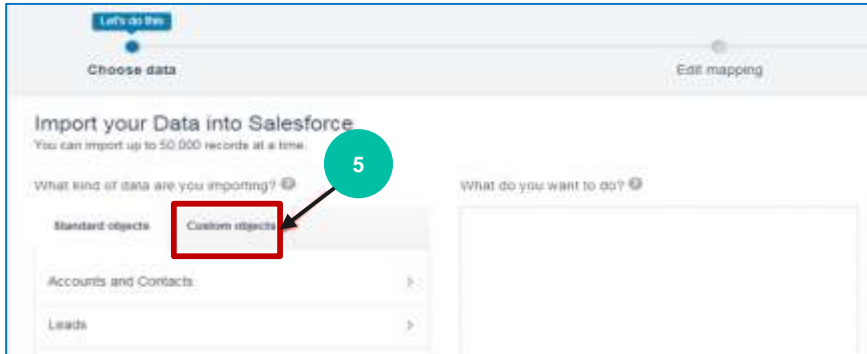
Launch Wizard!

Bulk Data Load (Contd.)

Data Import Wizard is displayed.

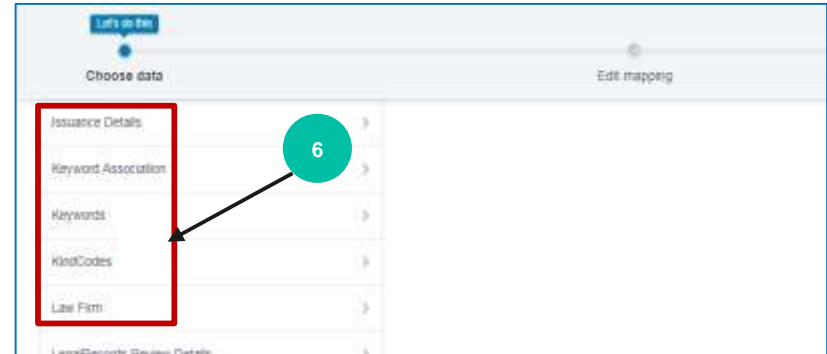
5

Select the **Custom Objects** Tab. All the custom objects are listed .



6

Choose the object name which you want to import the data.



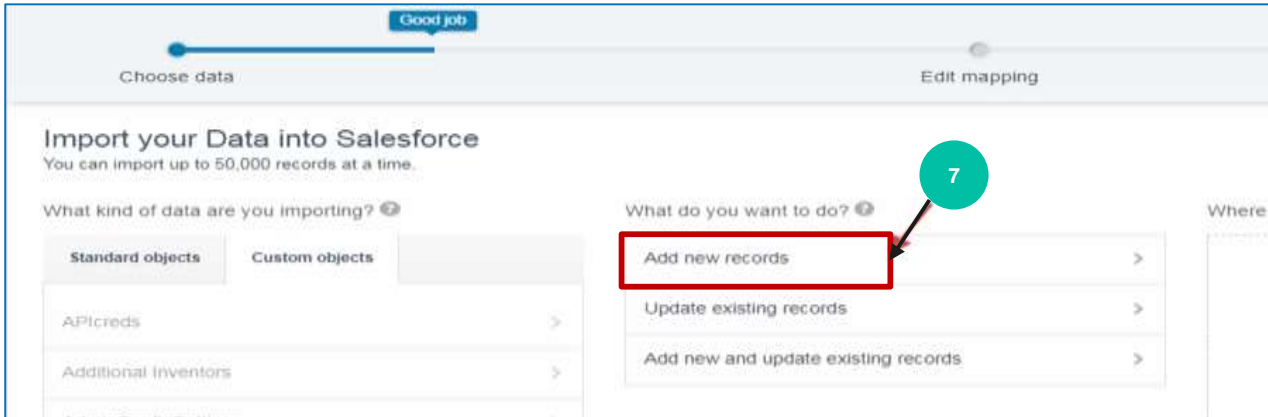
Bulk Data Load (Contd.)

You can select one of the below –

1. Add new records
2. Update existing records – in case you want to bulk update existing records.
3. Add new and update existing records- in which case if the record id is present it will update or else add a new record.

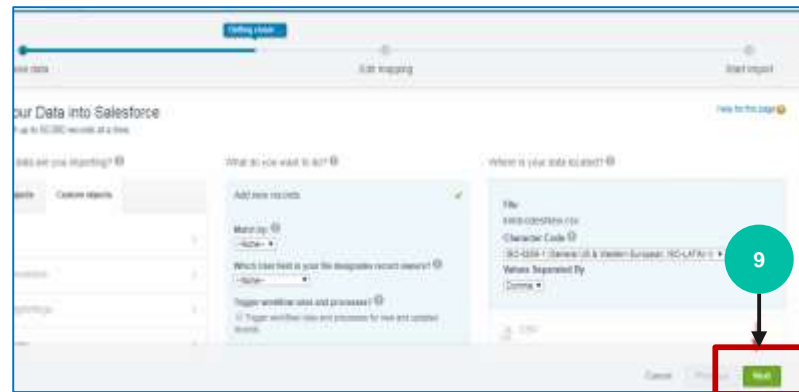
7

Choose **Add new records** option.



The screenshot shows the 'Import your Data into Salesforce' interface. At the top, there is a progress bar with a 'Good job' notification. Below the progress bar, there are two tabs: 'Choose data' and 'Edit mapping'. The main heading is 'Import your Data into Salesforce' with a subtext 'You can import up to 50,000 records at a time.' Below this, there are two sections: 'What kind of data are you importing?' and 'What do you want to do?'. The 'What kind of data are you importing?' section has two tabs: 'Standard objects' and 'Custom objects'. Under 'Standard objects', there are two options: 'APicreds' and 'Additional inventors'. The 'What do you want to do?' section has three options: 'Add new records', 'Update existing records', and 'Add new and update existing records'. The 'Add new records' option is highlighted with a red box and a green circle with the number 7. To the right of these options, there is a section titled 'Where is'.

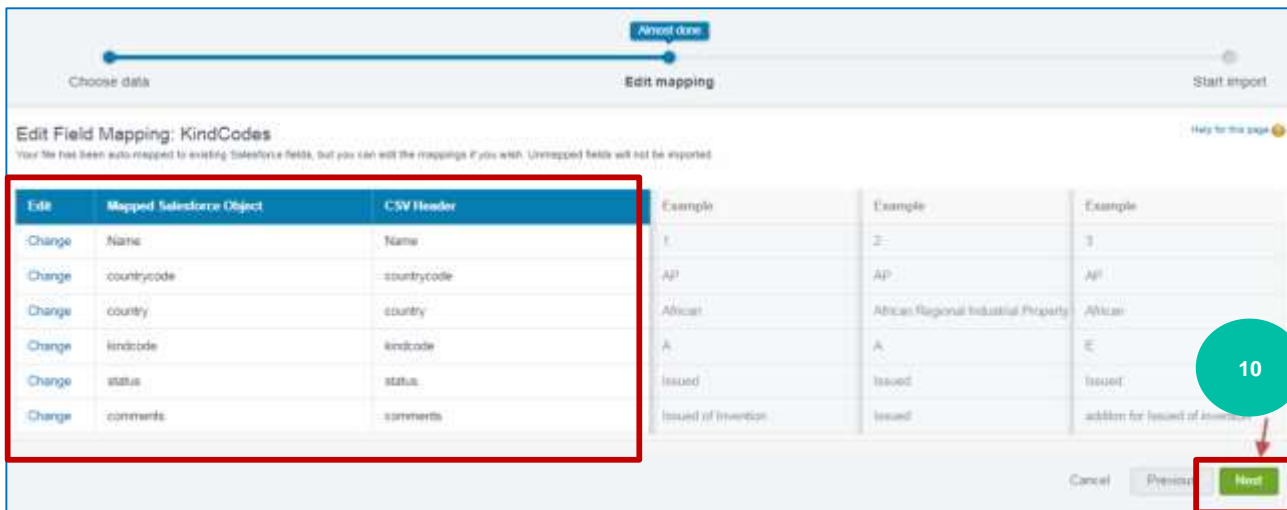
- Now you can upload the file by dragging and dropping it to the highlighted area.
- Once the file is uploaded, select **Next**.



Bulk Data Load (Contd.)

10

The system auto-maps the columns in the file (CSV Header) to the corresponding fields of the object (Mapped Salesforce Object). You can click **Change** and change the mapping if it is incorrect. Select **Next** option when you are done.



Almost done

Choose data Edit mapping Start import

Edit Field Mapping: KindCodes

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

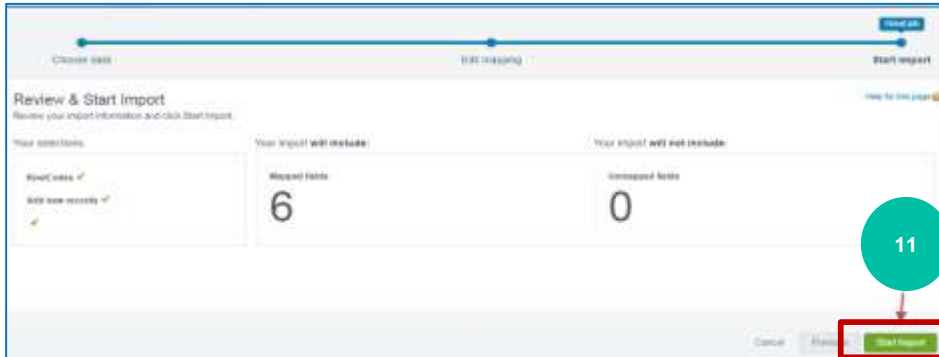
Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Name	Name	1	2	3
Change	countrycode	countrycode	AP	AP	AP
Change	country	country	African	African Regional Industrial Property	African
Change	kindcode	kindcode	A	A	E
Change	status	status	Issued	Issued	Issued
Change	comments	comments	Issued of invention	Issued	addition for issued of invention

Cancel Previous **Next**

Bulk Data Load (Contd.)

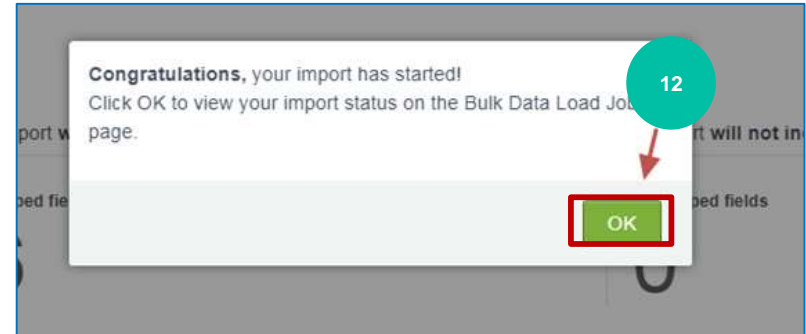
11

The system validates the records with the information provided and display a report. If everything is Good, Select **Start Import** option.



12

A success message is displayed . Select **OK** option to view the data import status.



Bulk Data Load (Contd.)

The import details are displayed to the user.

Data Import

Data

[Data Import Wizard](#)

Don't find what you were looking for? Search all of Setup instead.



SETUP

Bulk Data Load Jobs

Job ID	750410000002722	Job Type	Bulk V1	Status	Closed
Submitted By	MARK.DAVIS	Operation	Insert	Total Processing Time (hrs)	15019
Start Time	3/23/2018 8:31 AM PST	Queued Batches	0	API Active Processing Time (hrs)	15329
End Time	3/23/2018 8:32 AM PST	In Progress Batches	0	Apex Processing Time (hrs)	0
Time to Complete (hrs:min:sec)	20:17	Completed Batches	1		
Object		Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	1,068		
Concurrency Mode	Parallel	Records Failed	0		
API Version	42.0	Retries	0		

[Refresh](#)

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (hrs)	API Active Processing Time (hrs)	Apex Processing Time (hrs)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751410000004907	3/23/2018 8:31 AM	3/23/2018 8:32 AM	15019	15329	0	1,068	0	0		Completed



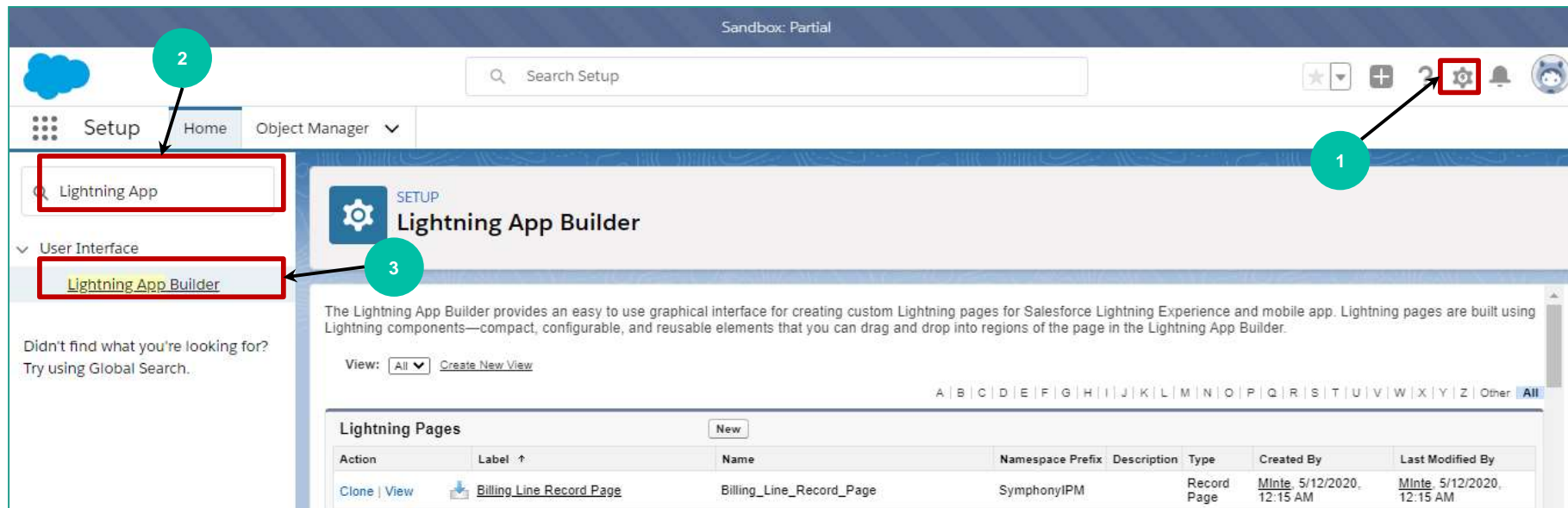
User Specific Dashboard

Table of Contents

1. Creating a user created dashboard for a specific role.
2. How dynamic vs. static dashboards work?

Creating a user created dashboard for a specific role.


- 1 Navigate to **Setup** page.
- 2 Type **Lightning App Builder** in Quick Find/Search text box
- 3 select it from the results.



The screenshot shows the Salesforce Setup page with the following annotations:

- 1**: Points to the gear icon in the top right corner of the Setup page.
- 2**: Points to the "Setup" tab in the left sidebar.
- 3**: Points to the "Lightning App Builder" link in the "User Interface" section of the left sidebar.

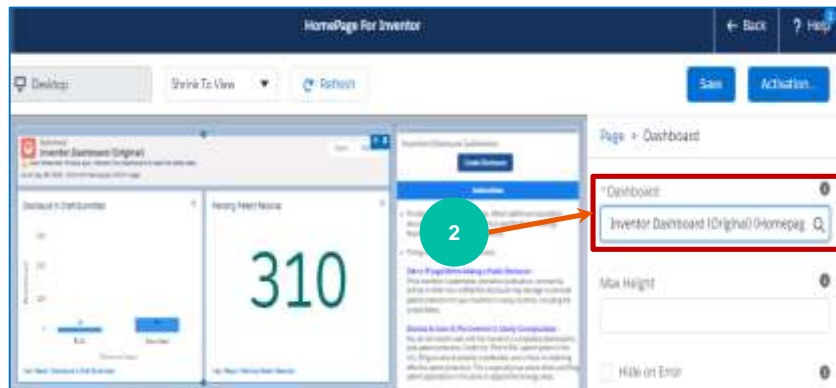
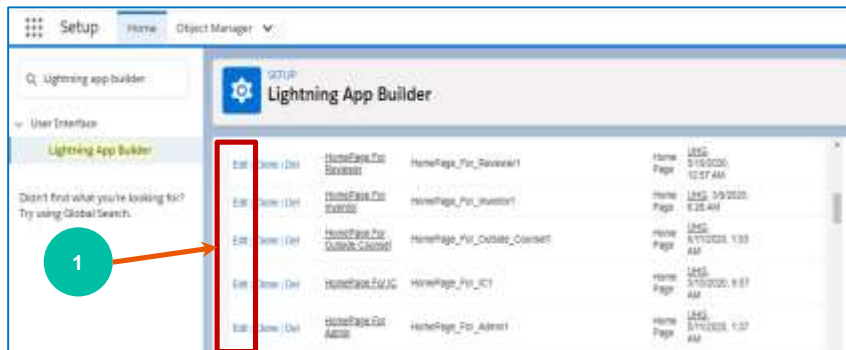
The main content area displays the "Lightning App Builder" setup page, which includes a description of the tool and a table of existing Lightning Pages.

Action	Label	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
Clone View	 Billing_Line_Record_Page	Billing_Line_Record_Page	SymphonyIPM		Record Page	Mint 5/12/2020, 12:15 AM	Mint 5/12/2020, 12:15 AM

Creating a user created dashboard for a specific role.

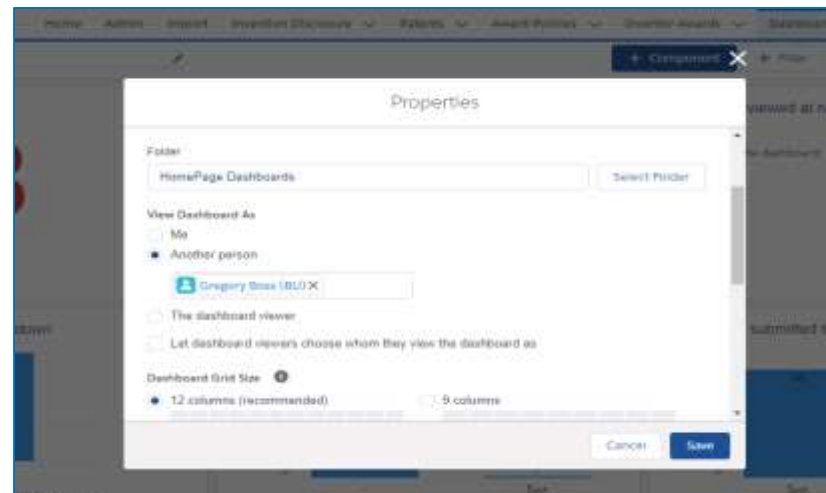
1 In the Lightning App Builder tab the list of all the homepages for various roles are displayed. Click on the **Edit** button next to the Homepage of the role whose dashboard is to be changed.

2 You can change the dashboard by selecting another from the search box. Make relevant changes to the dashboard and click **Save**.



Dynamic vs. Static dashboards

- Navigate to the **Dashboards** menu.
- Select the Dashboard you want to change and click on **Edit**. Now click on **Properties** (Gear icon).
- Choose how the dashboard should be viewed by the dashboard viewers.
 - **Me** –all the users who view the dashboard will see the dashboard values same as the values seen by the dashboard creator.
 - **Another Person** –all the users will see values as the person mentioned there.
 - **The dashboard viewer** –The dashboard converts into a **dynamic dashboard**. Now all the users who have access to the dashboard will see values from their org and not that of someone else.





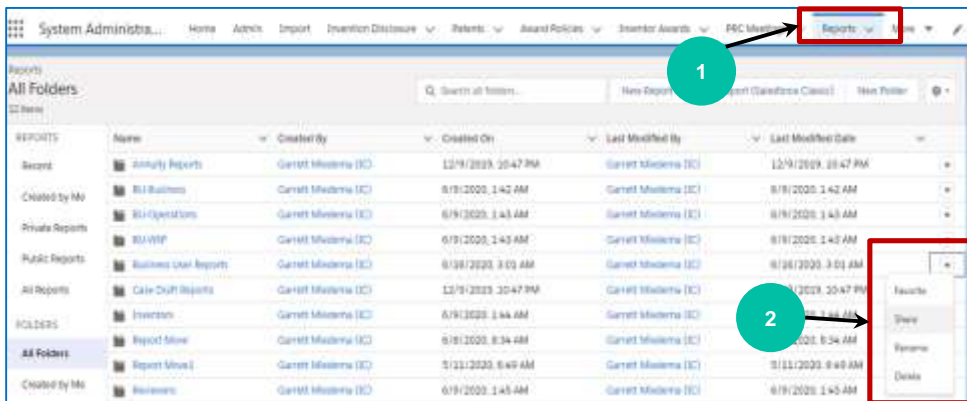
**IC sharing private reports with
inventor users.**

IC sharing private reports with inventor users.

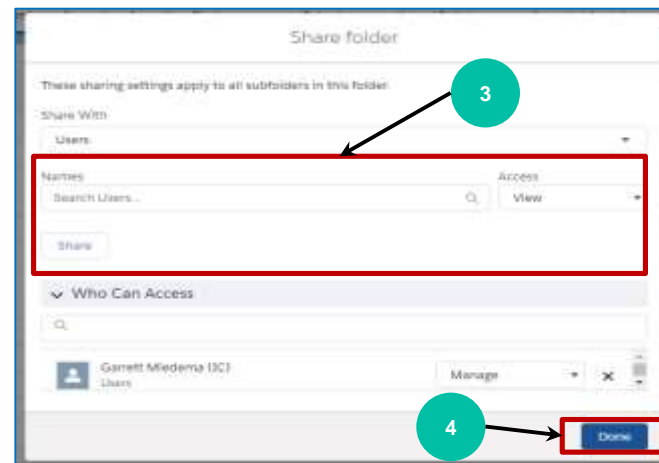
- 1 Go to **Reports** tab and create a new folder or choose an existing folder to share.

Note: If you create a new folder, move the reports you want to share to that folder.

- 2 In the right side corner of the folder name and click on the drop down and select **share**.



- 3 Select the user or user group you want to share with and the access level and click on **share**.
- 4 Click **Done** when you are finished.





Customize List View of Object tabs

Customize List View of Object tabs

Object tabs are the tabs a user can see in their menu. By clicking the tab, user is taken to the List view page of that corresponding object and the system will display a set of columns to summarize the data.

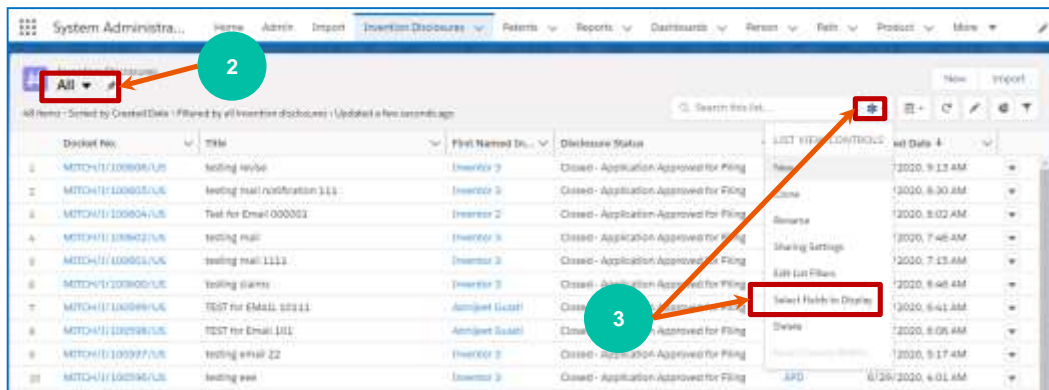
Users can edit this list view using the

1 low steps.





2 Navigate to the tab for which you want to change the list view.

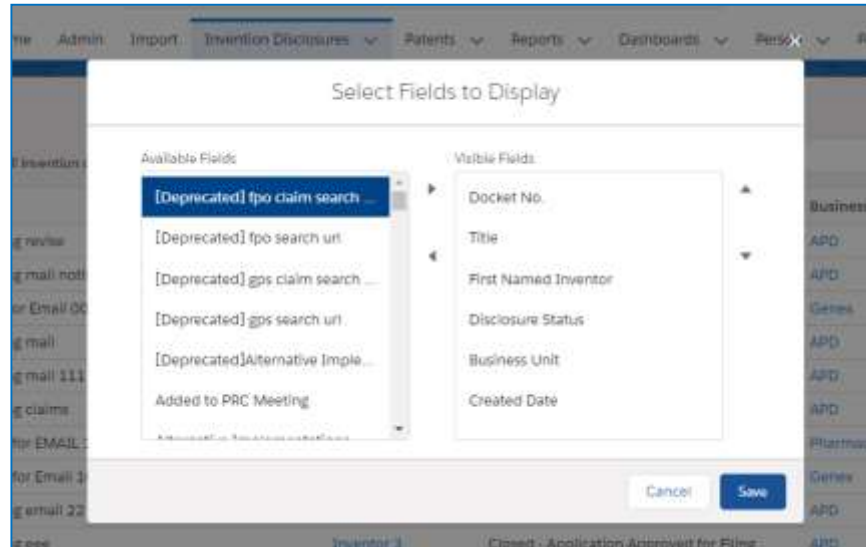
3 Change the Recently Viewed list to ALL.

- From the **List View Controls** menu, click **Select Fields to Display**.




Customize List View of Object tabs (contd.)

- Use the arrows () to add and () to remove fields(columns) to the list.
- Use the arrows () and () to reorder the fields.
- Click on **Save** to save the changes.



Note: Maximum of 15 fields can be added in the list view.



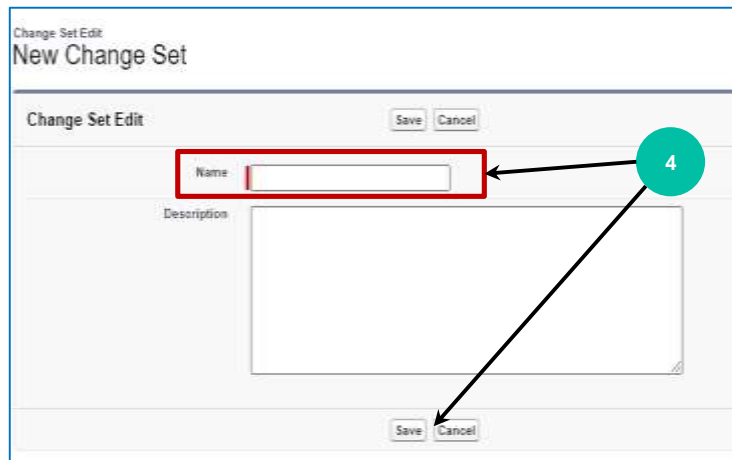
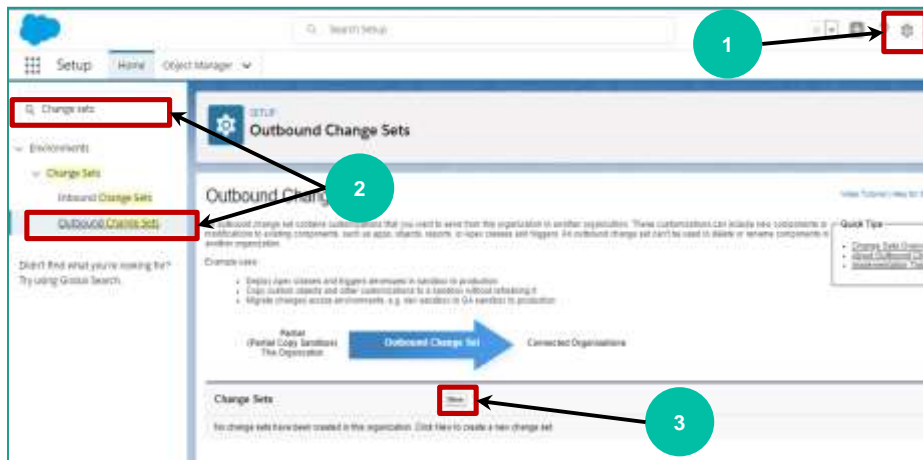
Customizing Changes in Sandbox and Publishing them to Production

Customizing Changes in Sandbox and Publishing them to Production

- 1 Navigate to '**Setup**' page.
- 2 Type '**Change Sets**' in Quick Find/Search text box and select '**Outbound Change Sets**' to move changes from Sandbox to Production.

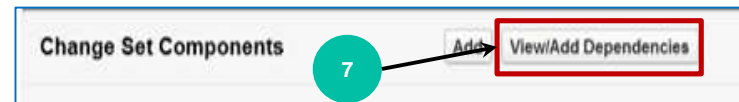
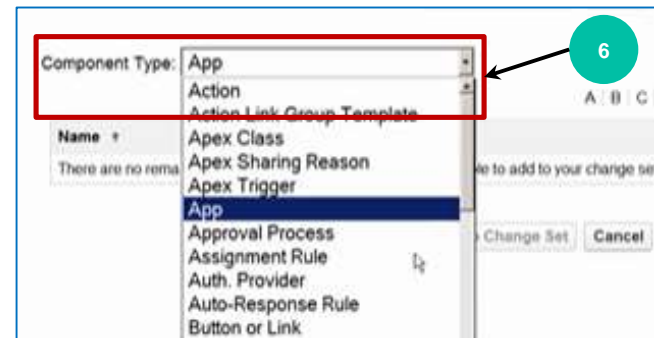
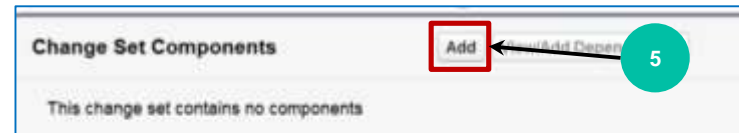
3 Click on **New**.

4 Enter the Name, Description and **Save** the change set.



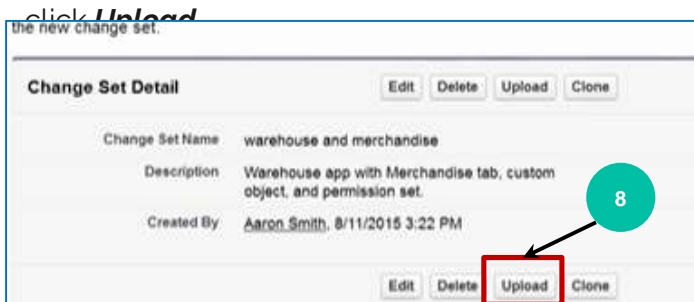
Customizing Changes in Sandbox and Publishing them to Production (contd.)

- 5 In the Change Set Components, click **Add**.
- 6 Select the **Component Type**. System will list all the items in the component. Choose what you want to move (e.g. Reports) and click **Add to Change Set**.
- 7 Click on **View/Add Dependencies**. System lists all related fields or objects that are dependent on the selected components. Select all and click **Add to Change Set**.

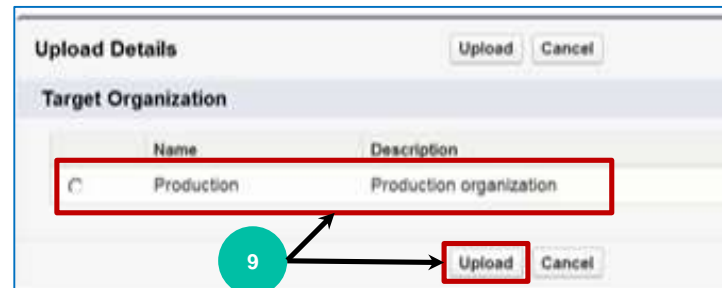


Customizing Changes in Sandbox and Publishing them to Production (contd.)

8 In the **Change Set Detail** section click on **Upload**.



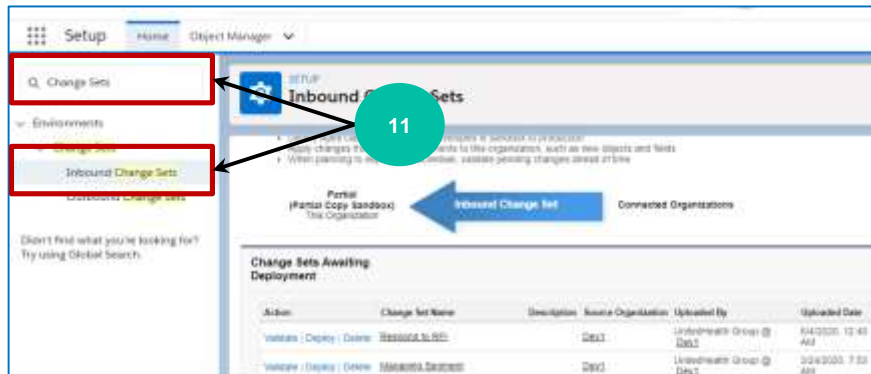
9 Select the target Organization and



Customizing Changes in Sandbox and Publishing them to Production (contd.)

10 Login as Admin in the target Organization.

11 Navigate to '**Setup**' page. Type '**Change Sets**' in Quick Find/Search text box and select '**Inbound Change Sets**'

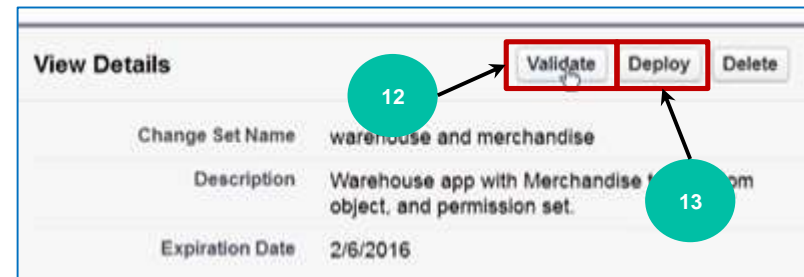


12

Select the change set that was last uploaded. Click **Validate** to check if the change set. This will execute the changes without saving them in the application. You can catch any errors easily.

13

Click **Deploy**. Choose **Default** option and select **Ok** for the confirmation. The system will successfully deploy it in the target Organization.





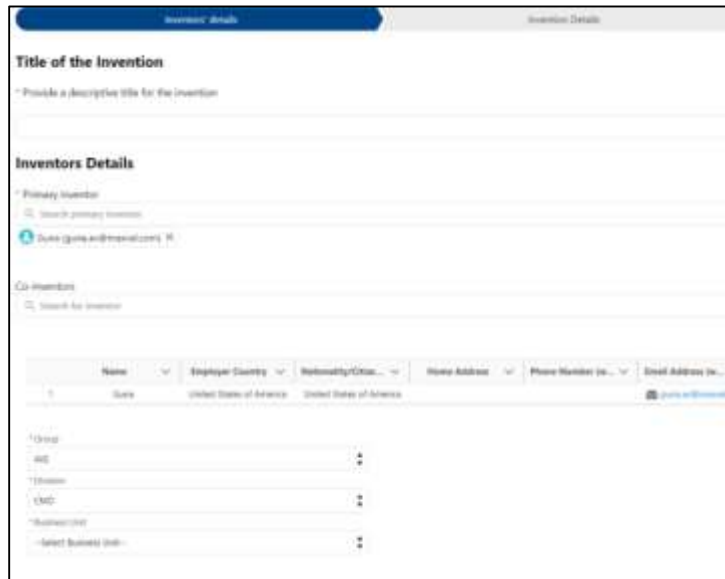
Invention Disclosure Form

Submit a New Disclosure (cont.)

Summary and Inventors

Fill out the basic information of your invention in the form, such as:

- Title of the Invention
- Primary Inventor Contact
- Primary Inventor Contact Division and Business Unit
- Others who made contributions to the conception of the invention
- Group, Division and Business Unit



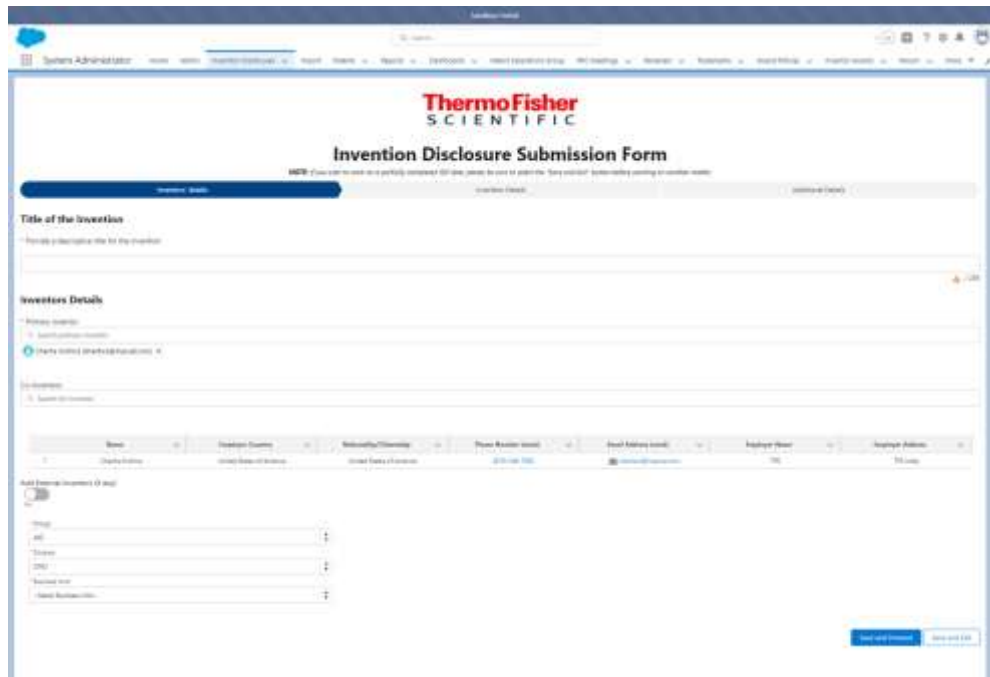
Note:

- The Title of the Invention is a mandatory field which needs to be filled, in order for the form to be saved a draft.
- Primary Inventor, Group, Division and Business Unit are mandatory field.
- To go to the next Section Click on -"Save and Proceed " , To save as draft and exit Click on - "Save and Exit".

Invention Disclosure Form- Inventor Details

The first page contains the fields for the user to add the Title, auto populated information for the primary inventor based on the logged in user, option to add external inventors and Group, Division and Business Unit which needs to manually added.

The user can change the auto populated primary inventor and add co-inventors as the need arises.



The screenshot displays the 'Invention Disclosure Submission Form' interface. At the top, the ThermoFisher Scientific logo is visible. Below the logo, the form title 'Invention Disclosure Submission Form' is centered. A blue progress bar indicates the current step is 'Inventor Details'. The form is divided into several sections:

- Title of the Invention:** A text area for the user to provide a brief description of the invention.
- Inventor Details:** This section includes:
 - Primary Inventor:** A dropdown menu showing 'Theresa Wilson (ThermoFisher Scientific)'.
 - Co-Inventors:** A section for adding additional inventors.
 - External Inventors:** A section for adding external inventors.
- Metadata:** A table with columns for 'Name', 'Department/Group', 'Relationship/Title', 'Phone Number', 'Email Address', 'Employee Status', and 'Invention Status'. The table contains one entry for 'Theresa Wilson'.
- Add External Inventor(s) (0 of 5):** A section for adding external inventors, with fields for 'Name', 'Email', 'Phone', 'Relationship', and 'Invention Status'.

At the bottom right, there are buttons for 'Save and Continue' and 'Save and Exit'.

External Inventors

The user has the option to add multiple external inventors. The user can add the name and email address of the external inventor along with any other information that the user needs to highlight to the ID reviewers

Add External inventors (if any)

☒



Name

Email

Any other information ⓘ

Add

External Inventors

	Name	Email	Comments	
1	Test inventor	testinventor@thermofisher.com	Address: 14023/12, Maple Drive Michigan	
2	Test inventor 1	testinventor1@thermofisher.com		

Submit a New Disclosure (cont.)

Invention Description (Section)

Fill out the basic information of the invention in the form, such as:

- Abstract
- Problem Description
- Detailed Description of the Invention
- Attach any files further describing the the invention



ThermoFisher SCIENTIFIC

Invention Disclosure Submission Form

NOTE: If you wish to work on a partially completed ID form, please be sure to select the "Save and Exit" button before working on another matter.

Progress bar: Abstract (green, checked), Invention Details (blue), Additional Details (grey)

Notes on Questions:

1. The information requested below should be comprehensive and complete to the extent possible.
2. The points listed below do not need to be filled in as long as they are clear from the overall content.
3. Use definitions of terms consistently and clearly. Abbreviations and terms that are not commonly used must be briefly defined when they are first used. Terms that are defined differently from normal linguistic usage must subsequently also be used in the corresponding sense in the further text.
4. Your explanations must be understandable to a person of average skill in the art. You may assume average expert knowledge, but not relevant experience with regard to the respective problem addressed.

Note:

- Abstract - Provide a brief summary of the invention and its key points of novelty. It's a mandatory Field
- Problem Description - Describe the problems that motivated this invention. It's a mandatory Field
- Detailed Description of the Invention - Provide detailed description related to the invention, It's a mandatory Field
- To go to the next Section Click on -"Save and Proceed " , To save as draft and exit Click on - "Save and Exit".

2. Which number is closest to 1000? Write it in my notebook.

Answers: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12 ☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17 ☐ 18 ☐ 19 ☐ 20 ☐ 21 ☐ 22 ☐ 23 ☐ 24 ☐ 25 ☐ 26 ☐ 27 ☐ 28 ☐ 29 ☐ 30 ☐ 31 ☐ 32 ☐ 33 ☐ 34 ☐ 35 ☐ 36 ☐ 37 ☐ 38 ☐ 39 ☐ 40 ☐ 41 ☐ 42 ☐ 43 ☐ 44 ☐ 45 ☐ 46 ☐ 47 ☐ 48 ☐ 49 ☐ 50 ☐ 51 ☐ 52 ☐ 53 ☐ 54 ☐ 55 ☐ 56 ☐ 57 ☐ 58 ☐ 59 ☐ 60 ☐ 61 ☐ 62 ☐ 63 ☐ 64 ☐ 65 ☐ 66 ☐ 67 ☐ 68 ☐ 69 ☐ 70 ☐ 71 ☐ 72 ☐ 73 ☐ 74 ☐ 75 ☐ 76 ☐ 77 ☐ 78 ☐ 79 ☐ 80 ☐ 81 ☐ 82 ☐ 83 ☐ 84 ☐ 85 ☐ 86 ☐ 87 ☐ 88 ☐ 89 ☐ 90 ☐ 91 ☐ 92 ☐ 93 ☐ 94 ☐ 95 ☐ 96 ☐ 97 ☐ 98 ☐ 99 ☐ 100

3. Which number is closest to 1000? Write it in my notebook.

Answers: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12 ☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17 ☐ 18 ☐ 19 ☐ 20 ☐ 21 ☐ 22 ☐ 23 ☐ 24 ☐ 25 ☐ 26 ☐ 27 ☐ 28 ☐ 29 ☐ 30 ☐ 31 ☐ 32 ☐ 33 ☐ 34 ☐ 35 ☐ 36 ☐ 37 ☐ 38 ☐ 39 ☐ 40 ☐ 41 ☐ 42 ☐ 43 ☐ 44 ☐ 45 ☐ 46 ☐ 47 ☐ 48 ☐ 49 ☐ 50 ☐ 51 ☐ 52 ☐ 53 ☐ 54 ☐ 55 ☐ 56 ☐ 57 ☐ 58 ☐ 59 ☐ 60 ☐ 61 ☐ 62 ☐ 63 ☐ 64 ☐ 65 ☐ 66 ☐ 67 ☐ 68 ☐ 69 ☐ 70 ☐ 71 ☐ 72 ☐ 73 ☐ 74 ☐ 75 ☐ 76 ☐ 77 ☐ 78 ☐ 79 ☐ 80 ☐ 81 ☐ 82 ☐ 83 ☐ 84 ☐ 85 ☐ 86 ☐ 87 ☐ 88 ☐ 89 ☐ 90 ☐ 91 ☐ 92 ☐ 93 ☐ 94 ☐ 95 ☐ 96 ☐ 97 ☐ 98 ☐ 99 ☐ 100

4. Which number is closest to 1000? Write it in my notebook.

Answers: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12 ☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17 ☐ 18 ☐ 19 ☐ 20 ☐ 21 ☐ 22 ☐ 23 ☐ 24 ☐ 25 ☐ 26 ☐ 27 ☐ 28 ☐ 29 ☐ 30 ☐ 31 ☐ 32 ☐ 33 ☐ 34 ☐ 35 ☐ 36 ☐ 37 ☐ 38 ☐ 39 ☐ 40 ☐ 41 ☐ 42 ☐ 43 ☐ 44 ☐ 45 ☐ 46 ☐ 47 ☐ 48 ☐ 49 ☐ 50 ☐ 51 ☐ 52 ☐ 53 ☐ 54 ☐ 55 ☐ 56 ☐ 57 ☐ 58 ☐ 59 ☐ 60 ☐ 61 ☐ 62 ☐ 63 ☐ 64 ☐ 65 ☐ 66 ☐ 67 ☐ 68 ☐ 69 ☐ 70 ☐ 71 ☐ 72 ☐ 73 ☐ 74 ☐ 75 ☐ 76 ☐ 77 ☐ 78 ☐ 79 ☐ 80 ☐ 81 ☐ 82 ☐ 83 ☐ 84 ☐ 85 ☐ 86 ☐ 87 ☐ 88 ☐ 89 ☐ 90 ☐ 91 ☐ 92 ☐ 93 ☐ 94 ☐ 95 ☐ 96 ☐ 97 ☐ 98 ☐ 99 ☐ 100

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Answers: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12 ☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17 ☐ 18 ☐ 19 ☐ 20 ☐ 21 ☐ 22 ☐ 23 ☐ 24 ☐ 25 ☐ 26 ☐ 27 ☐ 28 ☐ 29 ☐ 30 ☐ 31 ☐ 32 ☐ 33 ☐ 34 ☐ 35 ☐ 36 ☐ 37 ☐ 38 ☐ 39 ☐ 40 ☐ 41 ☐ 42 ☐ 43 ☐ 44 ☐ 45 ☐ 46 ☐ 47 ☐ 48 ☐ 49 ☐ 50 ☐ 51 ☐ 52 ☐ 53 ☐ 54 ☐ 55 ☐ 56 ☐ 57 ☐ 58 ☐ 59 ☐ 60 ☐ 61 ☐ 62 ☐ 63 ☐ 64 ☐ 65 ☐ 66 ☐ 67 ☐ 68 ☐ 69 ☐ 70 ☐ 71 ☐ 72 ☐ 73 ☐ 74 ☐ 75 ☐ 76 ☐ 77 ☐ 78 ☐ 79 ☐ 80 ☐ 81 ☐ 82 ☐ 83 ☐ 84 ☐ 85 ☐ 86 ☐ 87 ☐ 88 ☐ 89 ☐ 90 ☐ 91 ☐ 92 ☐ 93 ☐ 94 ☐ 95 ☐ 96 ☐ 97 ☐ 98 ☐ 99 ☐ 100

6. Which number is closest to 1000? Write it in my notebook.

Answers: ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12 ☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17 ☐ 18 ☐ 19 ☐ 20 ☐ 21 ☐ 22 ☐ 23 ☐ 24 ☐ 25 ☐ 26 ☐ 27 ☐ 28 ☐ 29 ☐ 30 ☐ 31 ☐ 32 ☐ 33 ☐ 34 ☐ 35 ☐ 36 ☐ 37 ☐ 38 ☐ 39

Submit a New Disclosure (cont.)

Conception and Other events (Section)

Fill out the basic information of your invention in the form, such as:

- Conception
- Public Disclosure or Sale



The screenshot shows the 'Invention Disclosure Submission Form' from ThermoFisher Scientific. The form is titled 'Invention Disclosure Submission Form' and includes a progress bar at the top. Below the title, there are instructions for users to fill out the form. The form is divided into sections: 'Notes on Questions' and 'Additional Details'. The 'Notes on Questions' section contains four numbered questions. The 'Additional Details' section contains three questions with radio button options. The form is currently in the 'Draft' state, as indicated by the 'Draft' button in the top right corner.

Note:

- Conception and Public Disclosure or Sale sections are mandatory.
- Conception - Provide when was the invention first conceived? And Has the invention reduced to practice? If so when and how information.
- Public Disclosure or Sale - Need to provide any sale or marketing activity occurred regarding this invention.
- This is the last page of the IDF, the user can Submit the form or Save As Draft.

ThermoFisher

SCIENTIFIC

INVENTION DISCLOSURE SUBMISSION FORM

1. Write an Overview:

1. The information provided in this section is confidential and should be kept confidential.

2. The information provided in this section is confidential and should be kept confidential.

3. The information provided in this section is confidential and should be kept confidential.

2. Additional Details:

2.1. Additional Details:

2.2. Additional Details:

2.3. Additional Details:

2.4. Additional Details:

2.5. Additional Details:

2.6. Additional Details:

2.7. Additional Details:

2.8. Additional Details:

2.9. Additional Details:

2.10. Additional Details:

3. Declaration:

3.1. Declaration:

3.2. Declaration:

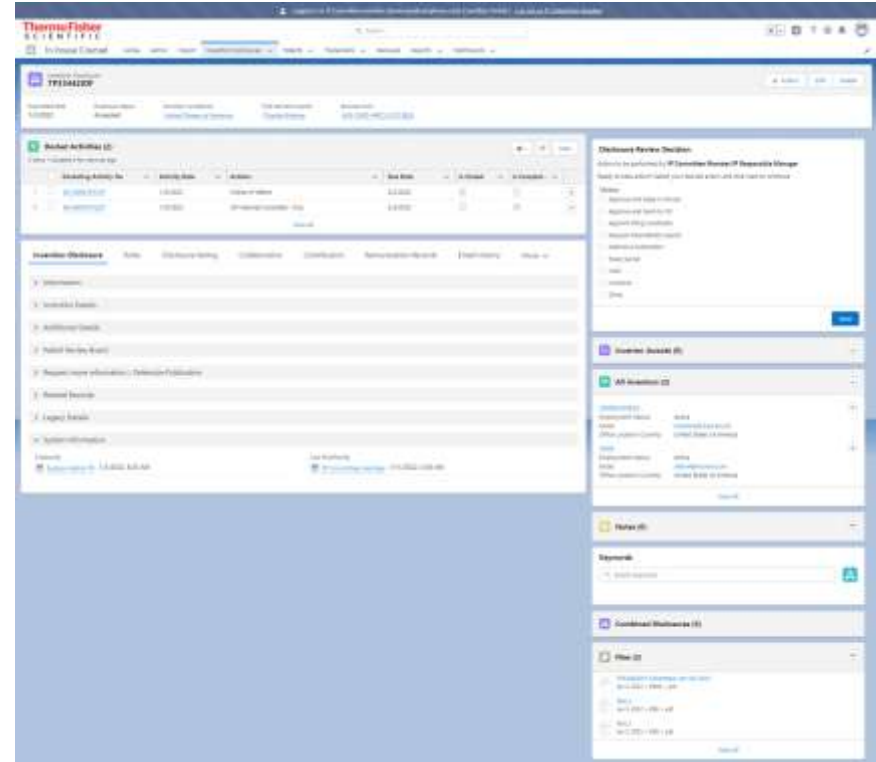
3.3. Declaration:



Invention Disclosure - Detailed View

Invention Disclosure Detailed View

Detailed view of the selected IDF will contain the all the information submitted by the inventor(s), the list of disclosure review decision options, inventors associated with the invention and the PDF copy of the IDF submitted



View Invention Disclosure- Detailed View contd.,

The invention disclosure contains information about the invention, questionnaires and related answers that the inventor(s) has provided while submitting a disclosure.

It also contains detailed information about the status, assigned reviewer(s), and other related information.


To reach this section, select the ***Invention Disclosure*** tab from the homepage.

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

Invention Disclosure TP33543IDF	
Submitted Date 1/11/2022	Disclosure Status Revision Requested
Invention Jurisdiction United States of America	First Named Inventor Charita Krishna
Business Unit AIG-CMD-AAT-CDETC Liverpool, NY (BU)	
Invention Disclosure	
Rules	Disclosure Rating
Collaboration	Contribution
Remuneration Records	Email History
More	
Information	
Docket No. TP33543IDF	Title MACHINE LEARNING POWERED USER AND ENTITY BEHAVIOR ANALYSIS
First Named Inventor Charita Krishna	Group AIG
Submitted Date 1/11/2022	Division CMD
Submitted By Allen Schwaiblmair	Business Unit AIG-CMD-AAT-CDETC Liverpool, NY (BU)
Re-Submission Date	Accepted Date
Re-submitted By	Client Date

Docket Activities

- At each stage of process, the IP Committee Member can track the progress of the submitted IDF through docket activities as listed below.
- The docket activities show below specify that the current ID has been deemed complete with no history of revision request by the previous reviewer.


Docket Activities (2)
2 items • Updated 11 minutes ago
⚙️
🔄
New

<input type="checkbox"/>	Docketing Activity No	Activity Date	Actions	Due Date	Is Closed	Is Complet...	
1	<input type="checkbox"/> DA-0000191319	1/3/2022	Notice of defect	3/2/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	▼
2	<input type="checkbox"/> DA-0000191320	1/3/2022	IDF deemed complete - Due	3/3/2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	▼


[View All](#)

View Invention Disclosure (cont.)




Roles

Some of the key fields in the **Invention Disclosure** Tab **Roles** Section include :

1. IP Associate
2. IP Coordinator
3. IP Committee Member
4. PRC Meeting (Assigned To)


Invention Disclosure Roles (3)

New

Invention Disclosure Role Name	Role	Person	Created Date	
IDR-13763	IP Associate	IP Associate	1/3/2022, 8:40 AM	
IDR-13805	IP Coordinator	IP Coordinator	1/4/2022, 8:10 AM	
IDR-13806	IP Committee member	IP Committee member	1/4/2022, 8:11 AM	

View All

View Invention Disclosure (cont.)

6

All the invention details provided for the different questions are displayed in the ***Description of Invention*** section.

> Information

> Invention Details

> Additional Details

> Patent Review Board

> Request more information / Defensive Publication

> Related Records

> Legacy Details

▼ System Information

Created By



[System Admin TF](#), 1/3/2022, 8:35 AM

Last Modified By



[IP Committee member](#), 1/11/2022, 3:50 AM

View Invention Disclosure (cont.)

Files

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



ID Inventors

This section displays all the additional inventors that were provided while submitting the Invention Disclosure. The Inventor can add additional Inventor names by clicking the down arrow on the right corner, and selecting the **New** option.



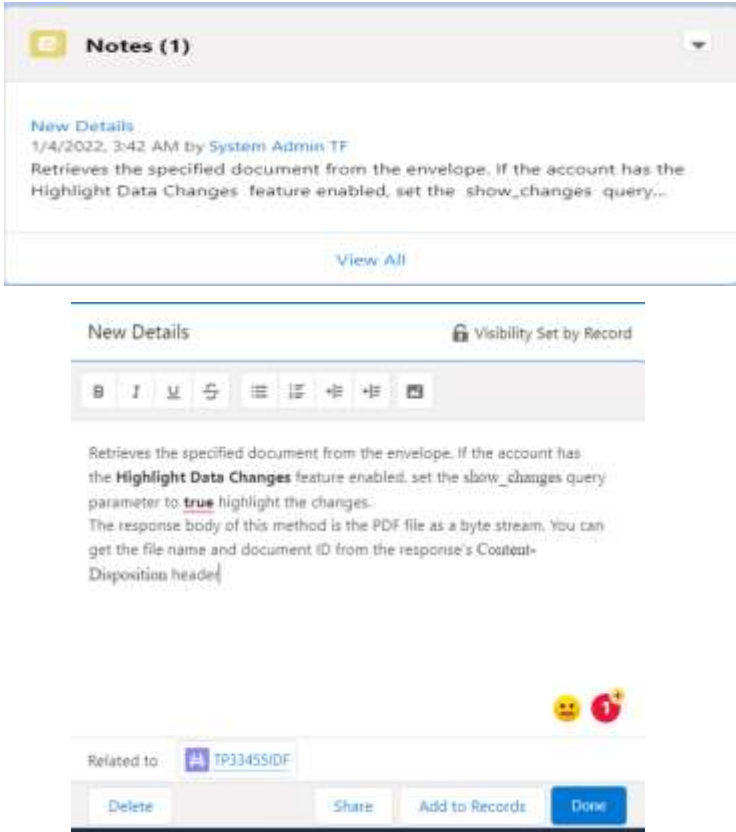
View Invention Disclosure (cont.)

Notes

This section allows you to add a note for this invention disclosure that will be available for counsel members and the reviewers. Similarly, the mentors, reviewer or counsel members can also add notes for a disclosure.

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

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



Change Assigned Business Unit

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

Confirm Group, Division and Business Unit.

Click on "Finish" to update the following details:

IDF Docket Number: **TP33526IDF**
 Group: **AIG**
 Division: **CMD**
 Business Unit: **AIG-CMD-AAT-GC/GCMS Milan (BU)**

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

1

Confirm Group, Division and Business Unit

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

Change: ☐

[Finish](#)

2

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

Change: ☒

Edit/Enter new values below.

* New Group:
 AIG

* New Division:
 CMD

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

...
 AIG-CMD-CMD Division Office
 AIG-CMD-Applied Technologies (BU)
 AIG-CMD-AAT-CIDTEC Liverpool, NY (BU)
 AIG-CMD-AAT-GC/GCMS Milan (BU)
 AIG-CMD-AAT-GC/GCMS Milan (BU)
 AIG-CMD-AAT-Milano, CC (Increase BU)
 AIG-CMD-AAT-Breast (BU)
 AIG-CMD-AAT-Laboratory Automation-Burlington, ON (BU)
 AIG-CMD-AAT-Automated Insulation-Langenscheidt (BU)
 AIG-CMD-AAT-Siemer TTA (BU)

Completeness Check

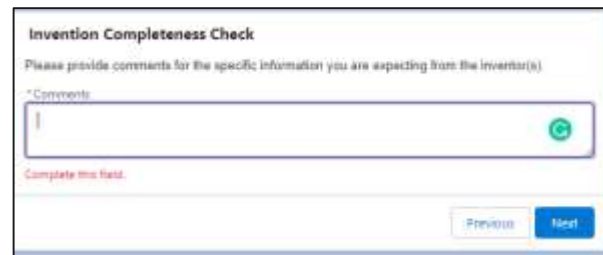
The submitted IDF can be reviewed for completeness of the submitted details. If selected Yes, then the IDF is deemed complete and moved to next action.

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


a



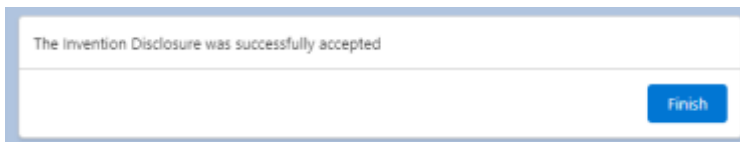
b



c



d




Post submission, there will be two docket activities which will be created related to completeness check.

1. Notice of Defect – which will be completed if the completeness check has failed.
2. IDF deemed complete Due – which will be completed if the completeness check has been successful.

	Invention Disclosure TP33526IDF				
Submitted Date 1/11/2022	Disclosure Status Submitted	Invention Jurisdiction United States of America	First Named Inventor: Chaitra Krishna	Business Unit AIG-CMD-AAI-CGPEC Liverpool, NY (BU)	
Docket Activities (2)					
2 items - Updated a few seconds ago					
<input type="checkbox"/> Docketing Act...	Activity Date	Actions	Due Date	Is Closed	Is Complet...
1 <input type="checkbox"/> DA-0000311028	1/11/2022	Notice of defect.	3/10/2022		
2 <input type="checkbox"/> DA-0000311030	1/11/2022	IDF deemed complete - Due	3/11/2022		
View All					

- If Completeness Check decision is taken as No, then an additional docket activity will be created to track the due date for the revision request. The inventor(s) should complete the resubmitted IDF as specified by the reviewer comments.


Invention Disclosure
TP33543IDF

Submitted Date

1/11/2022

Disclosure Status

Revision Requested

Invention Jurisdiction

[United States of America](#)

First Named Inventor

[Charita Krishna](#)

Business Unit

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

Docket Activities (3)

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

☐ Docketing ...

Activity Date

Actions

Due Date

Is Closed

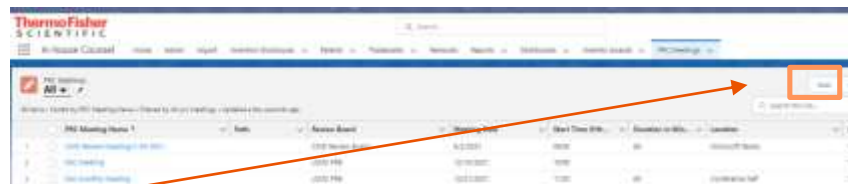
Is Completed

1.	<input type="checkbox"/>	DA-0000333834	1/16/2022	IDF revision due	2/13/2022	<input type="checkbox"/>	<input type="checkbox"/>	
2.	<input type="checkbox"/>	DA-0000311190	1/11/2022	Notice of defect	3/10/2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
3.	<input type="checkbox"/>	DA-0000311191	1/11/2022	IDF deemed complete - Due	3/11/2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

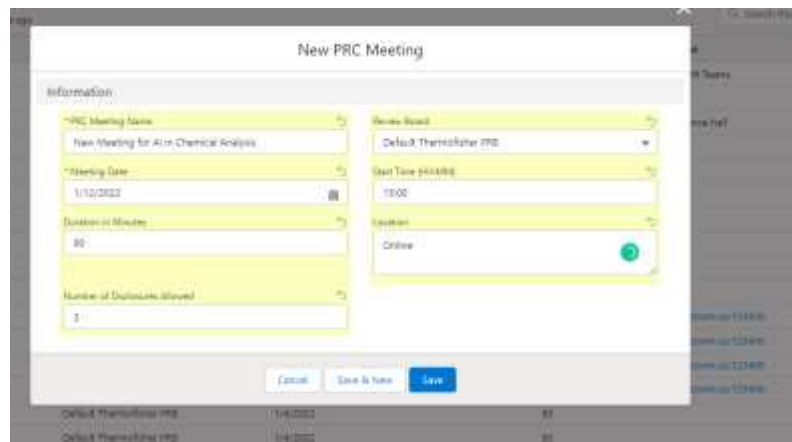
View All

Schedule PRC Meeting

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



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



New PRC Meeting

Information

*PRC Meeting Name: New Meeting for AI in Chemical Analysis

Review Board: Default ThermoFisher PRB

*Starting Date: 1/10/2022

Start Time (HH:MM): 15:00

Duration in Minutes: 30

Location: Online

Number of Duplicates Shown: 3

Buttons: Cancel, Save & Exit, Save

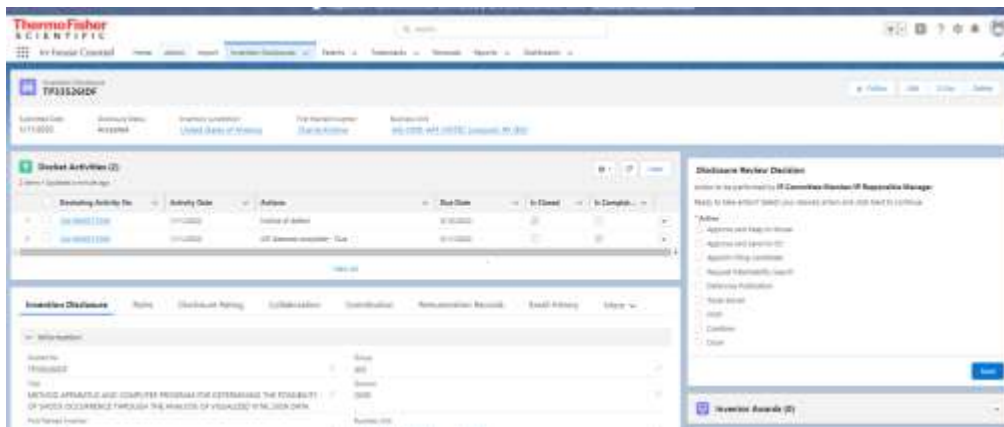
Once scheduled the user can select the Patent Board who will be leading the meeting.



Disclosure Review Decision

The list of Disclosure Review Decisions can be on the widget on the right. Here each decision once taken cannot be changed in future. And the reviewer can only make take one decision per disclosure except for the following exceptions:

1. Request Patentability Search
2. Hold



The screenshot displays the ThermoFisher Scientific IPM 3.6 interface. The main header shows the company logo and navigation tabs. The central area features a table titled 'Disclosure Review Decisions' with columns for 'Requesting Activity ID', 'Activity Date', 'Activity', 'Status', 'In Closed', and 'In Complete'. Below this table, there is a section for 'Disclosure Review Decision' with a list of activities and their corresponding review decisions. The right sidebar contains a 'Disclosure Review Decision' widget with a list of activities and their corresponding review decisions, including options for 'Approve and Sign-off', 'Approve and Sign-off (2)', 'Approve and Sign-off (3)', 'Approve and Sign-off (4)', 'Approve and Sign-off (5)', 'Approve and Sign-off (6)', 'Approve and Sign-off (7)', 'Approve and Sign-off (8)', 'Approve and Sign-off (9)', 'Approve and Sign-off (10)', 'Approve and Sign-off (11)', 'Approve and Sign-off (12)', 'Approve and Sign-off (13)', 'Approve and Sign-off (14)', 'Approve and Sign-off (15)', 'Approve and Sign-off (16)', 'Approve and Sign-off (17)', 'Approve and Sign-off (18)', 'Approve and Sign-off (19)', 'Approve and Sign-off (20)', 'Approve and Sign-off (21)', 'Approve and Sign-off (22)', 'Approve and Sign-off (23)', 'Approve and Sign-off (24)', 'Approve and Sign-off (25)', 'Approve and Sign-off (26)', 'Approve and Sign-off (27)', 'Approve and Sign-off (28)', 'Approve and Sign-off (29)', 'Approve and Sign-off (30)', 'Approve and Sign-off (31)', 'Approve and Sign-off (32)', 'Approve and Sign-off (33)', 'Approve and Sign-off (34)', 'Approve and Sign-off (35)', 'Approve and Sign-off (36)', 'Approve and Sign-off (37)', 'Approve and Sign-off (38)', 'Approve and Sign-off (39)', 'Approve and Sign-off (40)', 'Approve and Sign-off (41)', 'Approve and Sign-off (42)', 'Approve and Sign-off (43)', 'Approve and Sign-off (44)', 'Approve and Sign-off (45)', 'Approve and Sign-off (46)', 'Approve and Sign-off (47)', 'Approve and Sign-off (48)', 'Approve and Sign-off (49)', 'Approve and Sign-off (50)', 'Approve and Sign-off (51)', 'Approve and Sign-off (52)', 'Approve and Sign-off (53)', 'Approve and Sign-off (54)', 'Approve and Sign-off (55)', 'Approve and Sign-off (56)', 'Approve and Sign-off (57)', 'Approve and Sign-off (58)', 'Approve and Sign-off (59)', 'Approve and Sign-off (60)', 'Approve and Sign-off (61)', 'Approve and Sign-off (62)', 'Approve and Sign-off (63)', 'Approve and Sign-off (64)', 'Approve and Sign-off (65)', 'Approve and Sign-off (66)', 'Approve and Sign-off (67)', 'Approve and Sign-off (68)', 'Approve and Sign-off (69)', 'Approve and Sign-off (70)', 'Approve and Sign-off (71)', 'Approve and Sign-off (72)', 'Approve and Sign-off (73)', 'Approve and Sign-off (74)', 'Approve and Sign-off (75)', 'Approve and Sign-off (76)', 'Approve and Sign-off (77)', 'Approve and Sign-off (78)', 'Approve and Sign-off (79)', 'Approve and Sign-off (80)', 'Approve and Sign-off (81)', 'Approve and Sign-off (82)', 'Approve and Sign-off (83)', 'Approve and Sign-off (84)', 'Approve and Sign-off (85)', 'Approve and Sign-off (86)', 'Approve and Sign-off (87)', 'Approve and Sign-off (88)', 'Approve and Sign-off (89)', 'Approve and Sign-off (90)', 'Approve and Sign-off (91)', 'Approve and Sign-off (92)', 'Approve and Sign-off (93)', 'Approve and Sign-off (94)', 'Approve and Sign-off (95)', 'Approve and Sign-off (96)', 'Approve and Sign-off (97)', 'Approve and Sign-off (98)', 'Approve and Sign-off (99)', 'Approve and Sign-off (100)'. The bottom section shows a 'Disclosure Review Decision' table with columns for 'Requesting Activity ID', 'Activity Date', 'Activity', 'Status', 'In Closed', and 'In Complete'.

Request Patentability Search

The user can select the Request Patentability Search to reach out external vendors or law firms to perform search actions for the submitted invention.

They can also add any comments or instructions that the external agency must follow to perform the search function.

Disclosure Review Decision

Action to be performed by **IP Committee Member/IP Responsible Manager**

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

*** Choose Law Firm/Vendor**

- ☐ Law Firm
- ☐ Vendor

Previous Next

Defensive Publication

On selecting Defensive Publication, the ID will be sent to either Questal Ireland or Thermo Fisher internal to perform the necessary actions.

Disclosure Review Decision

Action to be performed by IP Committee Member/IP Responsible Manager

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—

—Select—

Questal Ireland Ltd

TFS - Internal

Previous

Next

Trade Secret

On Selecting Trade Secret, the inventors will lose all access to the submitted ID and the further process will continue as part of the Trademark module.

Disclosure Review Decision

Action to be performed by IP Committee Member/ IP Responsible Manager

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

*** Action**

- ☐ Approve and Keep in Issue
- ☐ Approve and Send to OIC
- ☐ Approve Filing Candidate
- ☐ Request Patentability Search
- ☐ Defensive Publication
- ☒ Trade Secret
- ☐ Hold
- ☐ Continue
- ☐ Close

Next

Disclosure Review Decision

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

Comments

Previous Next

Hold

On selecting Hold, the submitted ID will be put hold until the user can revisit the ID and redo the disclosure decision. They can also add any notes or comments on why the ID has been put on hold for future reference.

The user can see all the disclosure review decisions and the appropriate decision can be taken for the ID.

Disclosure Review Decision

Action to be performed by **IP Committee Member/IP Responsible Manager**

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

* Action

- ☐ Approve and Keep In-house
- ☐ Approve and Send to OIC
- ☐ 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](#)

Combine

If the submitted ID is any way related to any previously submitted ID record or patent, the user can select Combine option.

On selecting combine, the user can search for the related record by their docket number.

Disclosure Review Decision

Action to be performed by IP Committee Member/IP Responsible Manager

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

Search and select a parent disclosure to combine with

Previous

Next

Close

On selecting Close, the ID will be closed, and no further actions or decisions will be taken place for the same.

Disclosure Review Decision

Action to be performed by IP Committee Member/IP Responsible Manager

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

* Action:

☐ Approve and Keep in-house
 ☐ Approve and Send to QC
 ☐ 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

Approve and Keep In House

On selecting Approve and Keep In House, the submitted ID will be further submitted internally to create a associated patent shell record for further prosecution.

Disclosure Review Decision

Action to be performed by IP Committee Member/ IP Requestor Manager

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

*Action

- ☒ Approve and Keep In House
- ☐ Approve and Send to CIC
- ☐ Approve Filing Candidates
- ☐ Request Interimability Search
- ☐ Defer Patent Publication
- ☐ Track Local
- ☐ Hold
- ☐ Continue
- ☐ Close

Next

Disclosure Review Decision

*Filing Jurisdiction

United States of America

*Filing Type

Provisional

*Applicant

-- Select --

- ab Advanced Genetic Analysis Corporation
- abgen Limited
- abgen US Limited
- Accustar Cytometry Systems, Inc.
- Advanced Biotechnologies Limited
- Advanced Scientifics, Inc.
- affymetrix, Inc.
- Amgen, Inc.
- Angio Scientific Instruments Limited
- Applied Biosystems B.V. (Singapore Branch)
- Applied Biosystems Inc.
- Applied Biosystems Japan Ltd
- Applied Biosystems LLC
- Avocado Research Chemicals Limited
- B&B Advanced Systems
- B&B B.V.
- B&B B.V.
- Barnes Life Sciences LLC
- Biotechnology Sciences Ltd

Next

Approve and Send to OC

On selecting Approve and Send to OC, the ID record will be shared with selected Outside Counsel after filling in the following details:

1. First Filing Jurisdiction
2. Filing Type
3. OC Instructions:
 - a. Instruction for Case
 - b. Instruction for Outside Counsel
 - c. Target Filing Date

Here the user can select the type of law firm they want to prosecute the record selected and the drop down menu will show the associated law firms under each tier.



Disclosure Review Decision

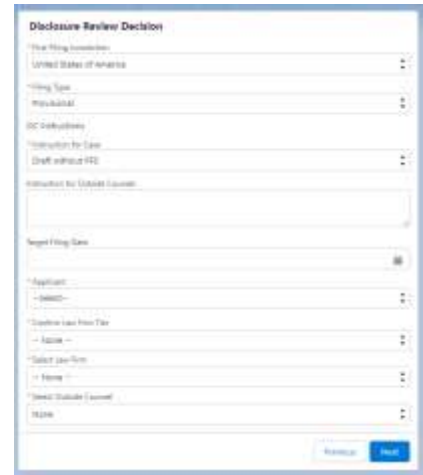
Action to be performed by IP Committee Member/IP Responsible Manager

Ready to make action? Select your desired action and click here to continue.

Action

- ☐ Approve and Send to OC
- ☒ Approve and Send to OC
- ☐ Approve Filing Jurisdiction
- ☐ Request Information/Case
- ☐ Deny Publication
- ☐ Deny Case
- ☐ Hold
- ☐ Continue
- ☐ Close

Next



Disclosure Review Decision

Filing Jurisdiction

United States of America

Filing Type

Individual

OC Instructions

Instruction for Case

Default without WFO

Instruction for Outside Counsel

Target Filing Date

Applicant

Default

Outside Law Firm Tier

None

Select Law Firm

None

Select Outside Counsel

None

Next

Approve and Appoint Filing Candidate

On selecting Approve and Appoint Filing Candidate, the user can assign the responsibility of deciding the type of post approval procedure to follow.

Post selecting this decision, the IP Associate must make a decision between choosing an internal counsel or an outside counsel for further prosecution.






Patents

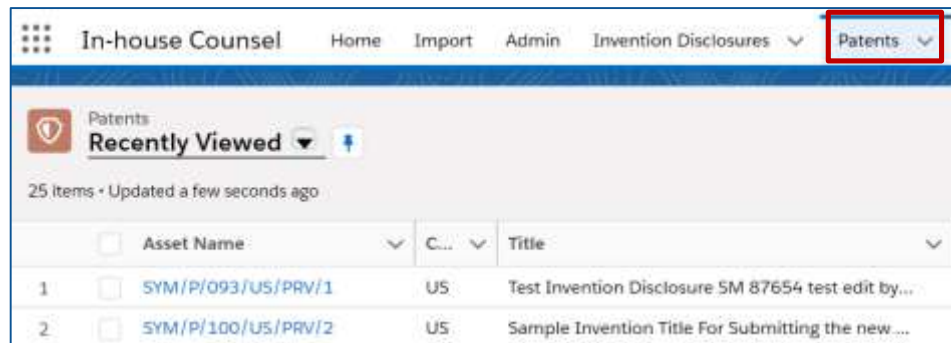
Patents

This section of the application allows you to manage the complete list of patent assets of your organization. From here, you can view, sort, and filter the list of records.

NOTE: Once the the disclosure is approved for filing (Status: **Closed-Approved for Filing**), a patent shell record is created in order to track the status of your record. Refer to [Shell Record](#) to learn more.

Select **Patents** tab from the homepage to access the patent list view.

This lists the entire patent records from your organization.



	Asset Name	C...	Title
1	SYM/P/093/US/PRV/1	US	Test Invention Disclosure SM 87654 test edit by...
2	SYM/P/100/US/PRV/2	US	Sample Invention Title For Submitting the new ...

1. Access Patent Records

- 1 Navigate to **Patent by Status** dashboard widget in the homepage and click **View Report** to see the complete list of patents in various statuses.
From the report detail page, select and open a patent.

- 2 Navigate to **Patents** tab and click the **Asset Name** to open a record from the page and view it.
See, [View an Patent](#) for more information.

Or



System Administra... Home Admin Import Invention Disclosures Patents Reports

Patents: Recently Viewed

50+ Items • Sorted by Asset Name • Updated a few seconds ago

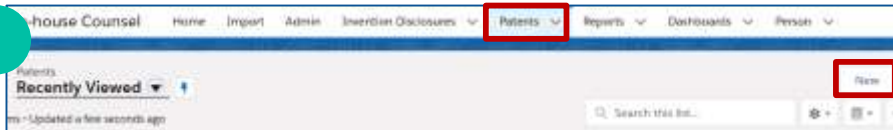
	Asset Name T	Co...	Title	Application No
1	SM/P/100001/AU/DIV/1	AU	INTRAVASCULAR TISSUE DISRUPTION	AU2016203340
2	SM/P/100001/AU/DIV/2	AU	INTRAVASCULAR TISSUE DISRUPTION	AU2018201235
3	SM/P/100001/AU/DIV/3	AU	INTRAVASCULAR TISSUE DISRUPTION	AU2018200228
4	SM/P/100001/AU/PCT/2	AU	INTRAVASCULAR TISSUE DISRUPTION	AU2011232335
5	SM/P/100001/EP/PCT/10	EP	INTRAVASCULAR TISSUE DISRUPTION	EP13741379.5
6	SM/P/100001/EP/PCT/4	EP	INTRAVASCULAR TISSUE DISRUPTION	EP11760236
7	SM/P/100001/JP/PCT/6	JP	Intravascular tissue disruption	JP2013501491
8	SM/P/100001/US/CIP/1	US	Intravascular Tissue Disruption	US13748374

2. Create/Add New Patent Record

This feature allows you to add a new patent to the portfolio. The following procedure shows how to add a new patent asset manually.

- 1 Click **New** option on the top-right corner of the Patents page to create a new patent record.

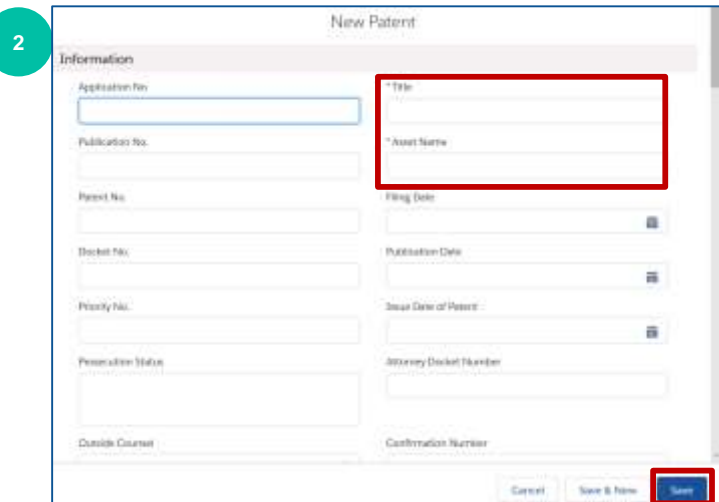
This action opens up a **New Patent** pop-up.



- 2 From the New Patent pop-up, fill out the required fields under different sections:

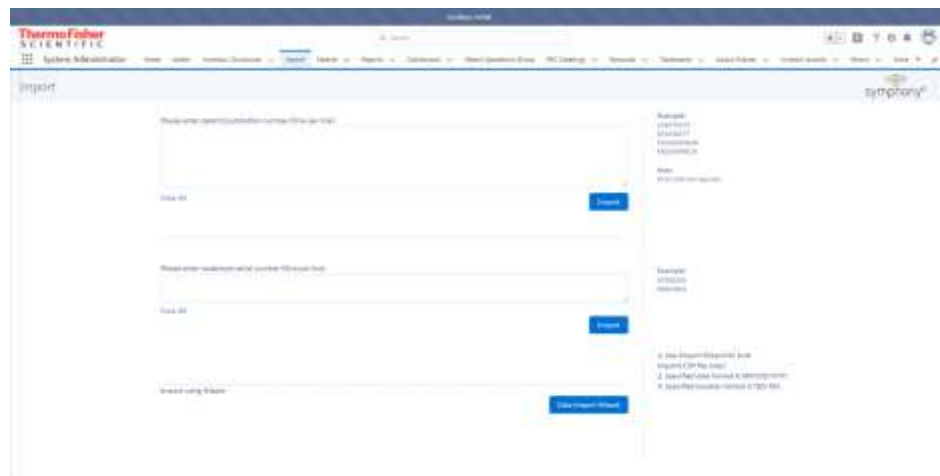
- Information
- Abstract

Note: The Title and Asset Name are mandatory. Then, click Save at the bottom of the pop-up to create a new patent record.



The screenshot shows the 'New Patent' pop-up form. The 'Information' section is highlighted. The 'Title' and 'Asset Name' fields are highlighted with a red box, indicating they are mandatory. Other fields include Application No., Publication No., Patent No., Draft No., Priority No., Prosecution Status, Outside Counsel, Filing Date, Publication Date, Issue Date of Patent, Attorney/Client Number, and Confirmation Number. The 'Save' button is highlighted at the bottom right.

The user can import any published patent with help of its associated number through Import.



3. View Patent (Asset Detailed View)

Click open a patent record from the **Patents** tab. Patent detailed view page displays the asset information in different sections as listed below:

a

[Bibliographic Information](#)

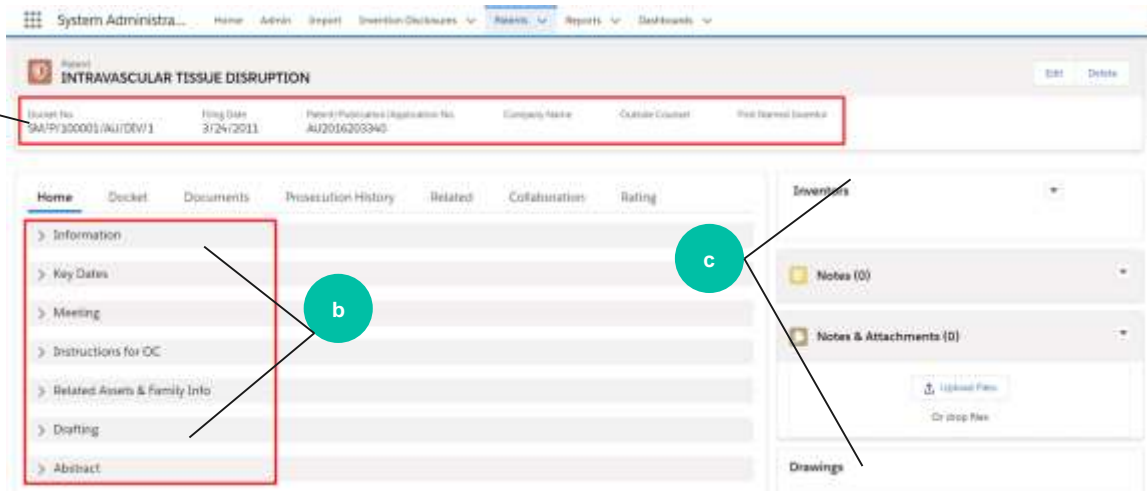
b

[Asset Details](#)

c

[Additional Widgets](#)

The above mentioned sections are discussed in upcoming slides.

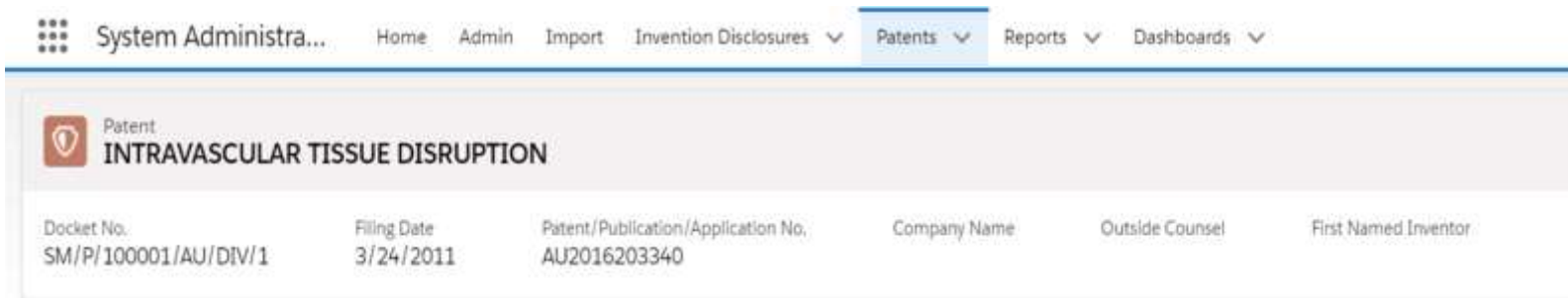


The screenshot shows the 'View Patent' page for 'INTRAVASCULAR TISSUE DISRUPTION'. The page is divided into three main sections: Bibliographic Information (a), Asset Details (b), and Additional Widgets (c). The Bibliographic Information section includes fields for Asset No., Filing Date, Patent/Publication Application No., Company Name, Outside Counsel, and Post Filing Document. The Asset Details section includes tabs for Home, Docket, Documents, Prosecution History, Related, Collaboration, and Rating, and a list of sections like Information, Key Dates, Meeting, Instructions for OIC, Related Assets & Family Info, Drafting, and Abstract. The Additional Widgets section includes Inventors, Notes (0), Notes & Attachments (0), Upload File, Drop File, and Drawings.

3.1. Bibliographic Information

The sub header of the asset detailed view page displays basic bibliographic information such as:

- Docket Number
- Filing Date
- Patent/Publication /Application Number
- Company Name
- Outside Counsel
- First Named Inventor



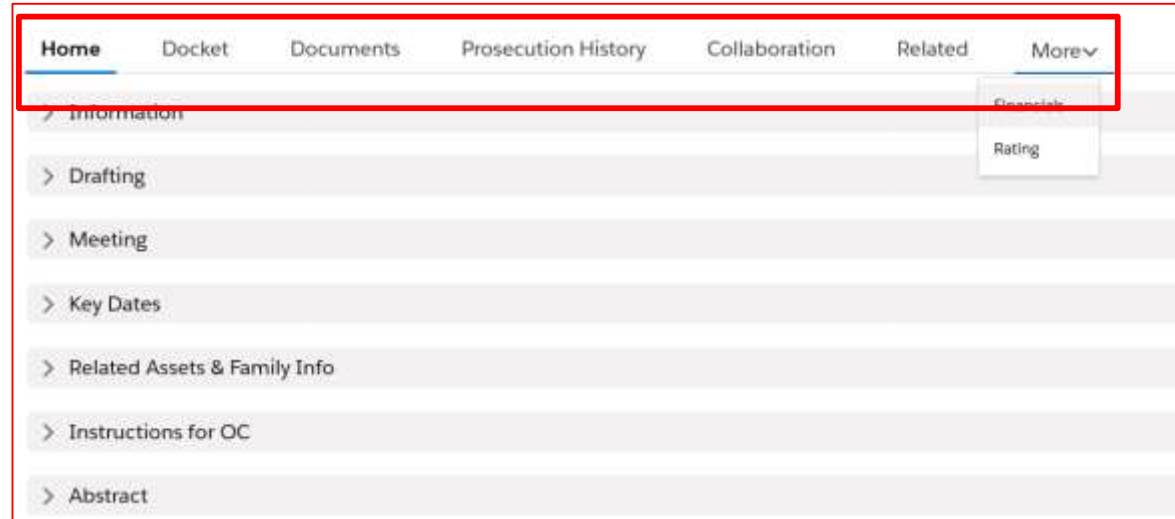
The screenshot shows the 'Patents' section of the Symphony IPM 3.6 interface. The navigation bar includes 'System Administra...', 'Home', 'Admin', 'Import', 'Invention Disclosures', 'Patents', 'Reports', and 'Dashboards'. The 'Patents' tab is selected. Below the navigation bar, the patent details for 'INTRAVASCULAR TISSUE DISRUPTION' are displayed. The details include the Docket No. (SM/P/100001/AU/DIV/1), Filing Date (3/24/2011), Patent/Publication/Application No. (AU2016203340), Company Name, Outside Counsel, and First Named Inventor.

Docket No.	Filing Date	Patent/Publication/Application No.	Company Name	Outside Counsel	First Named Inventor
SM/P/100001/AU/DIV/1	3/24/2011	AU2016203340			

3.2. Asset Details

The asset detail page displays important information about the asset in various tabs listed below.

- [Home](#)
- [Docket](#)
- [Documents](#)
- [Prosecution History](#)
- [Collaboration](#)
- [Related](#)
- [Rating](#)



3.2.1. Home

The **Home** tab is divided into different sections listed below:

Information

Application No.

Publication No.

Patent No.

Docket No.

Priority No.

Title

Sample Invention Title For Submitting Disclosure

Asset Name

SYM/P/100/US/PRV/2

Filing Date

Publication Date

Issue Date of Patent

- **Information**

This section displays the basic details of the asset such as Application/Publication/Patent Number, Title, Asset Name, Asset Type, Filing Country, Inventors and more.

3.2.1. Home (contd.)

Meeting

Meeting Summary

Reason to skip meeting

Added to Disclosure Meeting

☐

- Instruction for OC**

The Strategy meeting details such as if it was skipped then what is the reason or the summary of it on its completion that is entered by the Inhouse Counsel is displayed.

Key Dates

Effective Filing Date

Prosecution Status Date

Priority Dates

Earliest Priority Date

Expiration Date

- Key Dates**

This section displays the important dates such as **Effective Filing Date** and **Allowance Date** related to the asset.

3.2.1. Home (contd.)

Related Assets & Family Info

Cloned From

Base Invention Disclosure

Family ID

Export Control

- Related Asset & Family Info**

This section displays the asset family information and the base invention disclosure information.

Instructions for OC

Target Filing Date

Instruction for case

Instructions for Outside Counsel

- Instruction for OC**

This section displays the instructions given to the Outside Counsel and the Inside Counsel while submitting it for review and filing.

Abstract

Abstract

- Abstract**

This section displays the abstract of the invention..

3.2.1. Home (contd.)

Personal Details

Personnel Details

ROLE	NAME	EMAIL	TELEPHONE	COMMENTS
Primary Inventor				
Inventor(s)				
Current Assignee				
Attorney				
Examiner(s)				
Law Firm Agent				
Outside Counsel				
In-house Counsel				

Specification

[Claims | Specification \(Link to RTO\)](#)

Claims [Update | Refresh Claims](#)

Specification [Update](#)

Patent Family

DOCKET NO	FAMILY MEMBERS	FILING DATE	STATUS	CASE TYPE	ISSUE DATE OF PATENT
	US3172311GP				
5M/PI00001/US/PV/1	US61317231	2010-03-24	Expired	Provisional	
	US3244811GP				
5M/PI00001/US/UTL/1	US201113071436A	2011-03-24	Issued	Utility Non-Provisional	2014-09-23

- **Personal Details section** displays the details of all the personnel involved with the patent.

- **Specification & Patent Family sections display** the Claims, Specification updates and the Asset family details of the related patents.

Docket

This section displays all the docketing activities that are created with reference to the office actions from the USPTO. Symphony uses the document codes from the USPTO and the docketing rules to automatically create a docketing activity. The **Docket** tab also automatically de-dockets an existing event based on the document code received from the USPTO.

This feature allows you to add a docketing event manually based on the document code and docketing rule.

The dockets are created as an event with the below listed information:

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

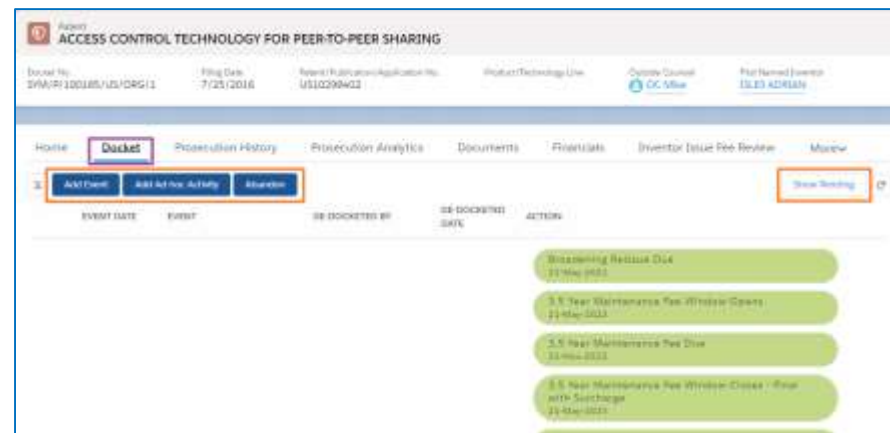


EVENT DATE	EVENT	DE-DOCKETED BY	DE-DOCKETED DATE	ACTION
10-Jan-2019	Non-Final Rejection			Non-Final Office Action Response Due 18-Apr-2019 13-May-2019 10-Jun-2019 10-Jul-2019
12-Oct-2019	Ad hoc Activity - 20...			
05-Oct-2019	Non-Final Rejection	Amendment/Req Recn...	19-Oct-2019	Broadening Reissue Due 07-Aug-2020

3.2.2. Docket (cont.)

The docketing and de-docketing activities are created automatically depending on the status of certain office-action tasks. You can also add docketing events manually through the below options:

- Add Event
- Add Ad hoc Activity



NOTE:

- Docketing activities are fully automatic and de-docketing activities are partially automatic for US records.
- Docketing and de-docketing activities are manual for foreign records.

Documents Purging

Symphony will automatically purge all bibliography information unless its on Litigation on Hold for all the expired/abandoned patent family members 6 years after the youngest family member has expired.

- a. Docket activity as reminder 80 days after life + 6 years date

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

- i. All documents in the Document
- ii. All emails in the Collaboration
- iii. All documents in Files object;
- iv. All documents in IFW tab(optic
- v. All comments in Rating object
- vi. All Notes

Examiner Name


International Filing Decision

Pending Status Date

4/7/2022

Litigation on Hold

☐

IP Rights Reassignment 

☐

Show (\$16 GAEI) message 

☐

First Issued in the family

EVENT DATE	EVENT	DE-DOCKETED BY	DE-DOCKETED DATE	ACTION
05-15-2022	Latest Patent family member expired			
Documents Purging Due (Family Expired) - Reminder				
Documents Purging Due (Family Expired)				

Auto Docket and Auto De-docket

Auto Docket

Auto docketing creates a new activity for any upcoming filing deadline, legal document/action request based on the document code received from USPTO.

Auto De-Docket

Auto de-docket creates a new activity based on a docketing activity. When a docket action is complete the de-dockete activity marks it complete and an activity is created in the Docketing tab.

Home	Docket	Prosecution History	Prosecution Analytics	Documents	Financials	Invents
Add Event	Add Ad Hoc Activity	Abandon				
EVENT DATE	NEXT DUE DATE	FINAL DUE DATE	ACTION			
21-May-2019	21-May-2021	21-May-2021	Broadering Reissue Due			
21-May-2019	21-May-2022	21-May-2022	3.5 Year Maintenance Fee Window Opens			
21-May-2019	21-May-2022	21-Nov-2022	3.5 Year Maintenance Fee Due			
21-May-2019	21-May-2023	21-May-2023	3.5 Year Maintenance Fee Window Closes - Final with Surcharge			
21-May-2019	21-May-2026	21-May-2026	7.5 Year Maintenance Fee Window Opens			
21-May-2019	21-Nov-2026	21-Nov-2026	7.5 Year Maintenance Fee Due			

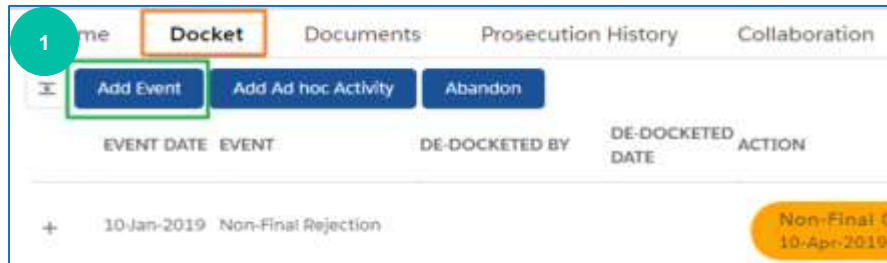
a. Add an Event

This feature allows you to add a new docket activity manually. You can create a new docket activity based on the list of document codes available in the application.

Follow the steps below to add a new event to the docket:

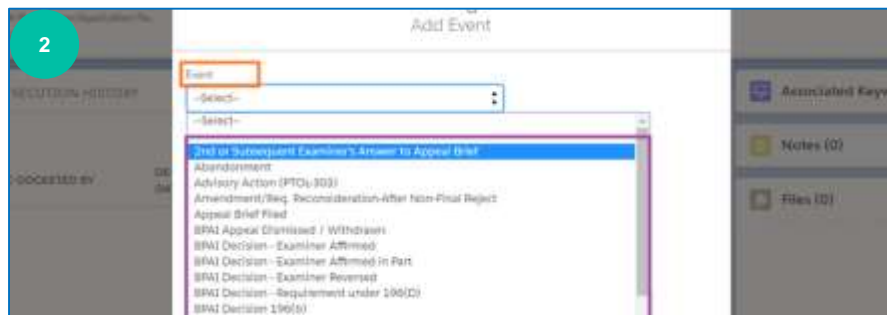
- 1 Open a patent record, navigate to **Docket** tab in the asset detailed view page and click the **Add Event** button to add a new event.

This action opens up an **Add Event** pop-up.



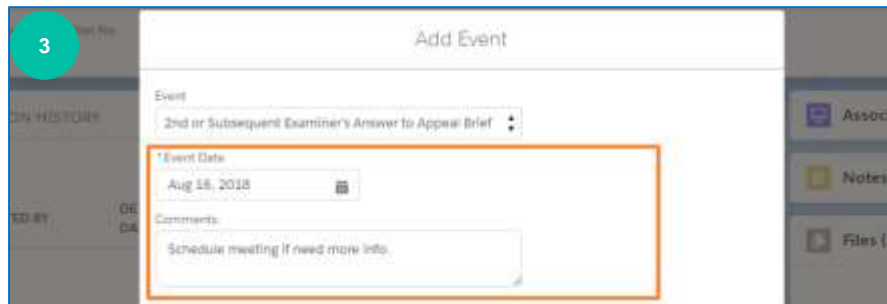
- 2 From the **Add Event** pop-up, choose an office action from the **Event** drop-down.

Note: According to the Asset Type, Case Type and Jurisdiction the events will be listed.



3

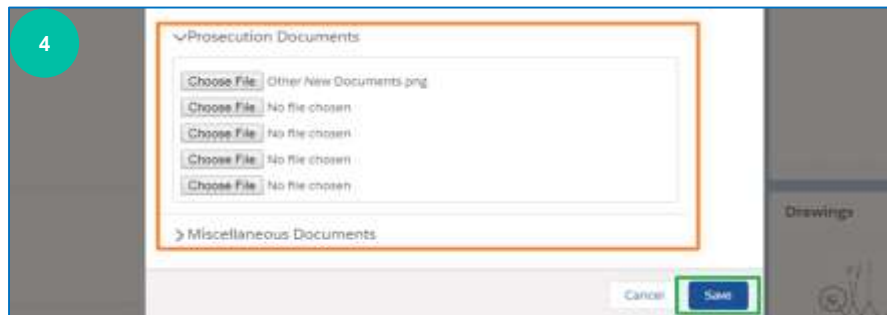
Choose an **Event Date** and add **Comments** if necessary.



4

Upload any attachments under the **Prosecution Document and Miscellaneous Documents** section based on the requirement (Optional).

Click **Save** to create a new event.



5

The save function creates a new docket activity under the **Docket** tab, displayed based on the event target date.



EVENT DATE	EVENT	DE DOCKETED BY	DE DOCKETED DATE	ACTION
10-Aug-2018	2nd or Subsequent Ex...			

b. Create Ad-hoc Activity

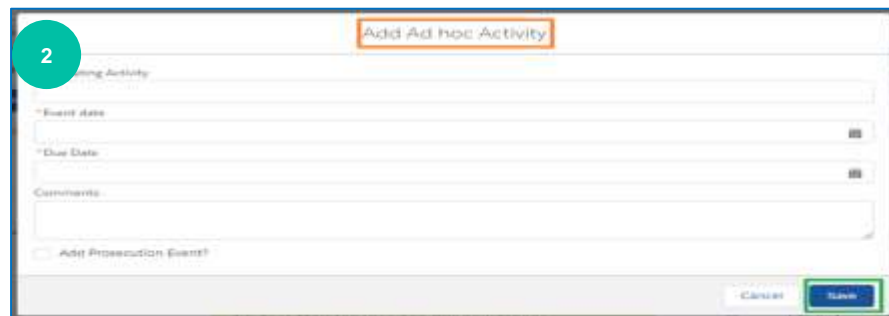
This feature allows you to create an event or alerts within the application manually without using any document code or docketing rule.

Follow the steps below to add a new event to the docket:

- 1 Open a patent record, navigate to **Docket** tab in the asset detailed view page and click the Add Ad hoc Activity button to add a new event.

This action opens up an **Add Ad hoc Activity** pop-up.

- 2 From the **Add Ad hoc Activity** pop-up, fill-out the necessary fields and click Save to create a new **Ad hoc Activity**.



b. Create Ad-hoc Activity (cont.)

3

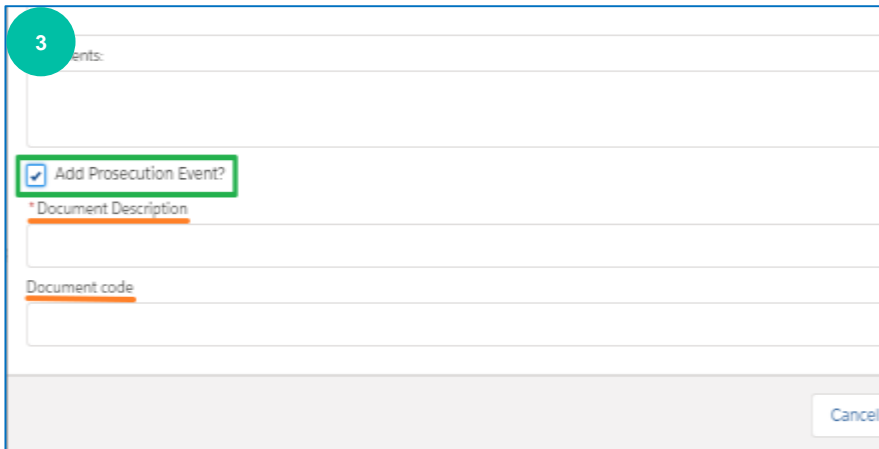
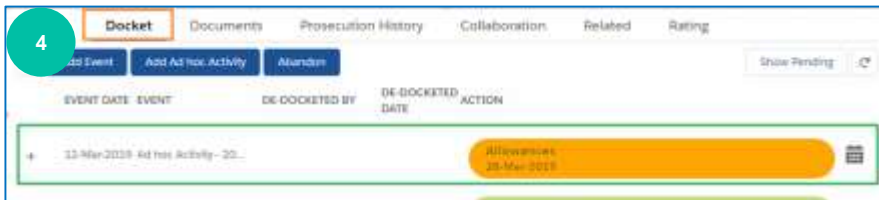
From the **Add Ad hoc Activity** pop-up, enable the **Add Prosecution Event?** option to create a prosecution record under the **Prosecution History** tab.

Fill out **Document Description** (mandatory field) and **Document Code** (optional field) fields to create a prosecution record with a name and relevant document code.

NOTE: This step is optional. You can enable this option if you want to create a record under the **Prosecution History** tab.

4

The save function creates a new docket activity under the **Docket** tab, displayed based on the event target date.

c. De-docket an Activity

This feature allows you to manually de-docket an existing docket.

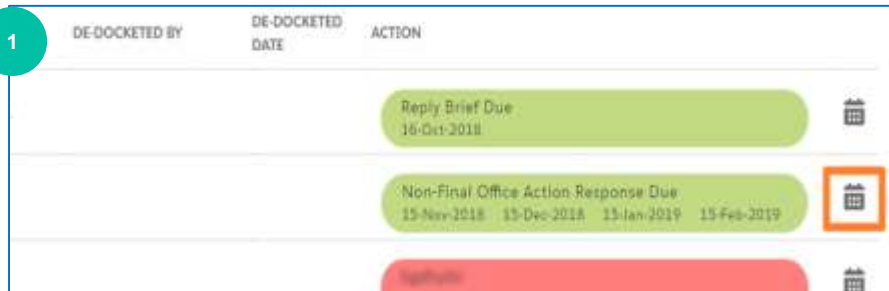
There are three ways you can de-docket an activity.




1. Usually, the de-docket activity happens automatically based on the document code received during the IFW data sync.
2. Use the Pending option to see the activity that has either missed during IFW sync to de-docket or if you have missed a due date. See [Show Pending](#) for the details
3. By clicking the Calendar option in the Docket details. This is explained in the following steps.

One way to manually de-docket an existing docket is by clicking the Date in the Docket details.

1. Navigate to **Docket** tab in the asset detailed view page, scroll through the list of dockets and click the **calendar icon** next to the docket's **ACTION** column to de-docket an event.

This action opens up an **Add De-Docket Activity** pop-up.

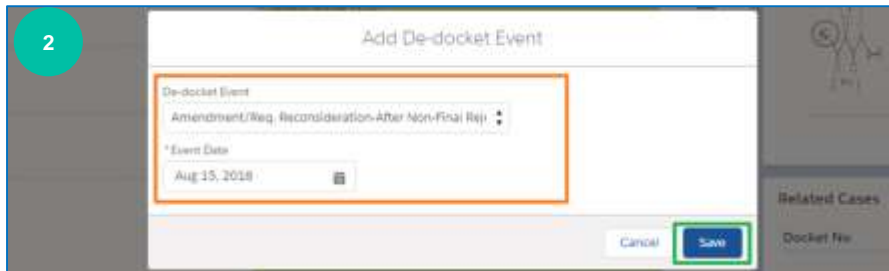


DE-DOCKETED BY	DE-DOCKETED DATE	ACTION
		<div>Reply Brief Due</div> <div>16-Oct-2018</div> 
		<div>Non-Final Office Action Response Due</div> <div>15-Nov-2018 15-Dec-2018 15-Jan-2019 15-Feb-2019</div> 
		<div>Settlement</div> 

c. De-docket an Activity (cont.)

- From the **Add De-Docket Activity** pop-up, choose a **De-docket Event** and **Event Date**.

Then, click **Save** to add a de-docket event against a docket event.



- A successfully de-docketed event is marked with a **Checkbox** icon and displayed in the **DOCKET** tab.



EVENT DATE	EVENT	DE-DOCKETED BY	DE-DOCKETED DATE	ACTION
15-Aug-2018	2018 Subsequent Ex...			Reply Brief Due 18-Jul-2018
15-Aug-2018	Non-Final Rejection			
	Amendment/Req. Recons...		15-Aug-2018	Non-Final Office Action Response Due...
15-Aug-2018	Office Action / OI			

d. Abandon

This feature allows you to abandon the patent record.

NOTE: Abandoning is a irreversible process and it also changes the patent status to **“Abandoned”**.

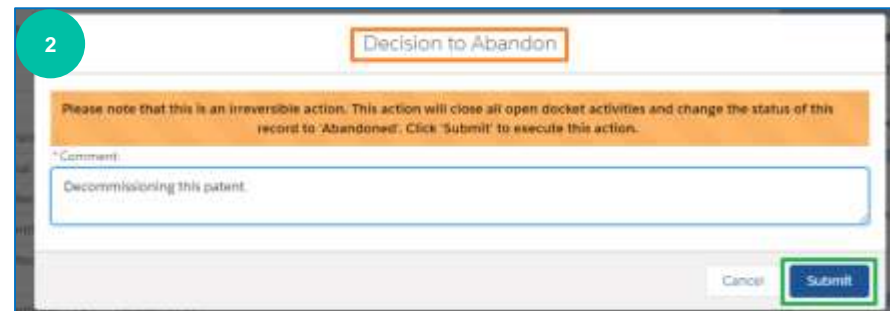
Follow the steps below to abandon a patent:

1. Navigate to **Docket** tab in the asset detailed view and click the **Abandon** button.

This action opens up an **Decision to Abandon** pop-up.



2. Fill out the relevant information in the **Comment** section of the **Decision to Abandon** pop-up and click **Submit**.



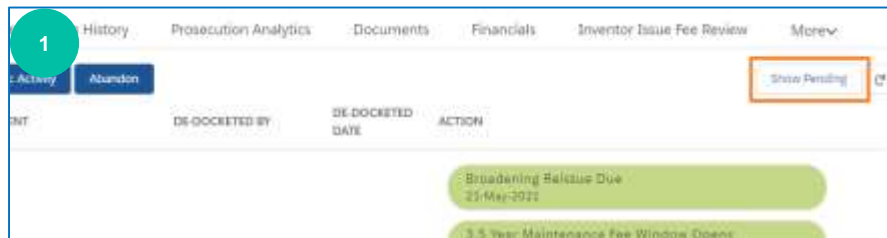
e. Show Pending Events

This feature allows you to see the list of docketing activities that are due or pending.

Follow the steps below to see pending events:

1

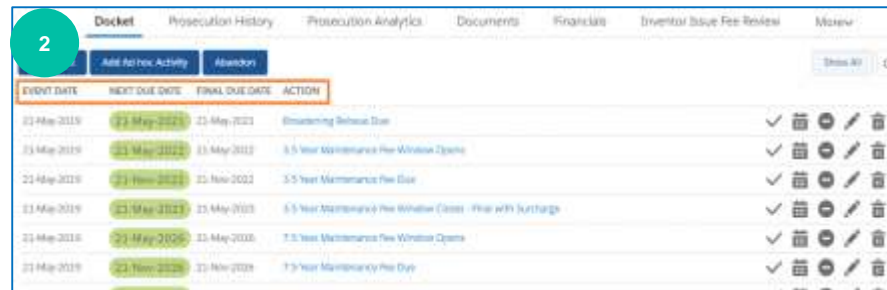
From the **Docket** tab, click the **Show Pending** option to view the list of pending events.



2

The pending section displays the following information for an event:

- Event Date
- Next Due Date
- Final Due Date
- Action



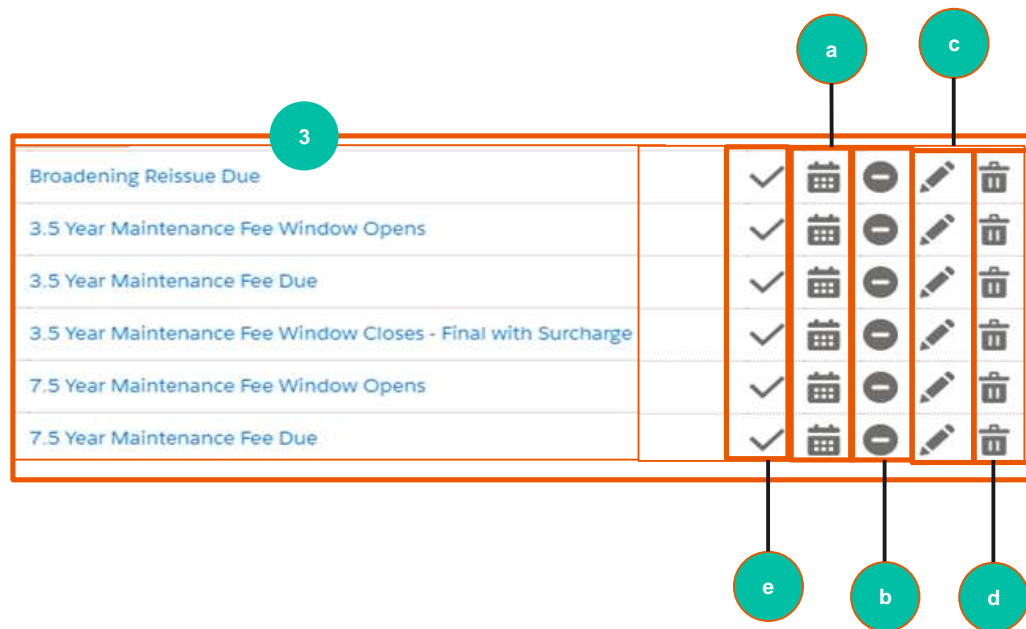
e. Show Pending Events (cont.)

3

From the pending section, you can also perform the following actions:

- [Add Related Event](#)
- [Decision not to pursue](#)
- [Edit Activity](#)
- [Delete Activity](#)
- [Verify](#)

Follow the topics below to learn more about the action under **Show Pending** section.



Broadening Reissue Due	✓	📅	⊖	✎	🗑️
3.5 Year Maintenance Fee Window Opens	✓	📅	⊖	✎	🗑️
3.5 Year Maintenance Fee Due	✓	📅	⊖	✎	🗑️
3.5 Year Maintenance Fee Window Closes - Final with Surcharge	✓	📅	⊖	✎	🗑️
7.5 Year Maintenance Fee Window Opens	✓	📅	⊖	✎	🗑️
7.5 Year Maintenance Fee Due	✓	📅	⊖	✎	🗑️

i. Add Related Event

This action will de-docket an existing docketing activity. You can perform a manual de-docket using this feature.

1 From the pending section, click the **Add Related Event** icon to de-docket an event.

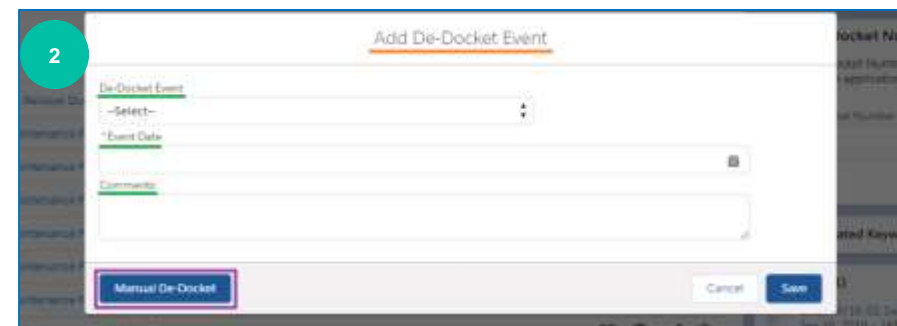
This action opens up an **Add De-Docket Event** pop-up.




23-Oct-2021	Broadening Reissue Due				
23-Oct-2022	3.5 Year Maintenance Fee Window Opens				
23-Apr-2023	3.5 Year Maintenance Fee Due				
23-Oct-2023	3.5 Year Maintenance Fee Window Closes - Final with Surcharge				
23-Oct-2026	7.5 Year Maintenance Fee Window Opens				
23-Apr-2027	7.5 Year Maintenance Fee Due				


2 From the **Add Related Event** pop-up, select a **De-Docket Event**, choose an **Event Date** (mandatory field) and enter necessary **Comments**.


Then, select **Manual De-Docket** option to de-docket an event





Add De-Docket Event

De-Docket Event
 -Select- 

*Event Date 

Comments 

Manual De-Docket  

ii. Decision Not to Pursue

This action closes an existing docketing activity and marks *Decision Not to Pursue*.

1 From the pending section, click the **Decision Not to Pursue** icon to close an existing event.

This action opens up an **Decision not to pursue** pop-up.

1	23-Oct-2021	Broadening Reissue Due				
2022	23-Oct-2022	3.5 Year Maintenance Fee Window Opens				
2023	23-Apr-2023	3.5 Year Maintenance Fee Due				
2023	23-Oct-2023	3.5 Year Maintenance Fee Window Closes - Final with Surcharge				
2026	23-Oct-2026	7.5 Year Maintenance Fee Window Opens				

2 From the **Decision not to pursue** pop-up, enter necessary **Comments**.

Then, click **Submit** option to discontinue/close an event.

2

Decision not to pursue

Docketing Activity

Broadening Reissue Due

Comments:

Cancel Submit

iii. Edit Activity

This action allows you to edit or update an existing docketing activity.

1 From the pending section, click the **Edit Activity** icon to edit/update an existing event.

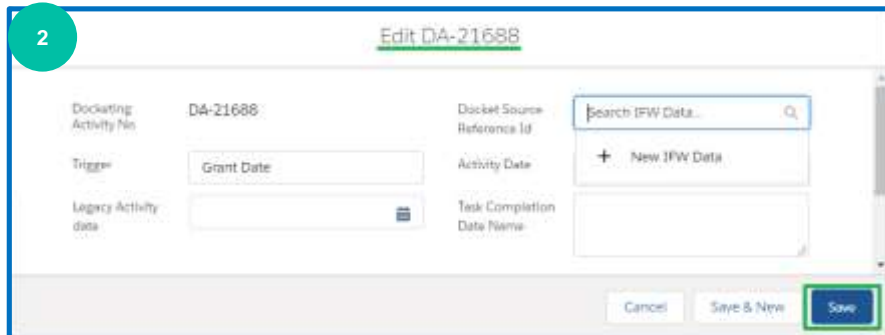
This action opens up an **Edit** pop-up.



2023	23-Oct-2022	3.5 Year Maintenance Fee Window Opens				
2023	23-Apr-2023	3.5 Year Maintenance Fee Due				
2023	23-Oct-2023	3.5 Year Maintenance Fee Window Closes - Final with Surcharge				
2026	23-Oct-2026	7.5 Year Maintenance Fee Window Opens				
2027	23-Apr-2027	7.5 Year Maintenance Fee Due				

2 From the **Edit** pop-up, edit or update the necessary fields for an existing event.

Then, click **Save** option at the bottom of the pop-up to update the event details.



Edit DA-21688

Docketing Activity No	DA-21688	Docket Source Reference Id	<input type="text" value="Search IPW Data..."/>
Trigger	<input type="text" value="Grant Date"/>	Activity Date	<input type="text" value="+ New IPW Data"/>
Legacy Activity data	<input type="text"/>	Task Completion Date Name	<input type="text"/>

iv. Delete Activity

This action allows you to delete an existing docketing activity.

1

From the pending section, click the **Delete Activity** icon to edit/update an existing event.

This action opens up an **Delete Record** pop-up.

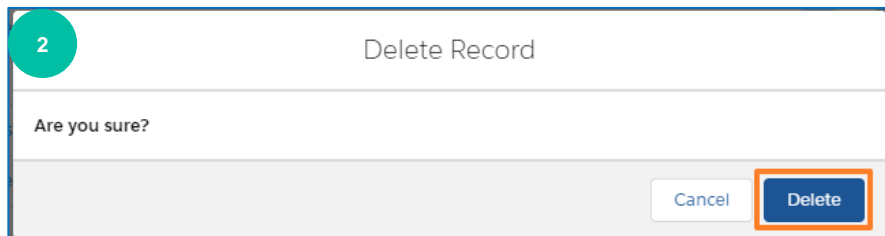


23-Oct-2022	3.5 Year Maintenance Fee Window Opens				
2023 23-Apr-2023	3.5 Year Maintenance Fee Due				
2023 23-Oct-2023	3.5 Year Maintenance Fee Window Closes - Final with Surcharge				
2026 23-Oct-2026	7.5 Year Maintenance Fee Window Opens				
2027 23-Apr-2027	7.5 Year Maintenance Fee Due				

2

From the **Delete Record** pop-up, click **Delete** to delete the event.

Or, click **Cancel** abort the process.



Delete Record

Are you sure?

Cancel
Delete

v. Verify Activity

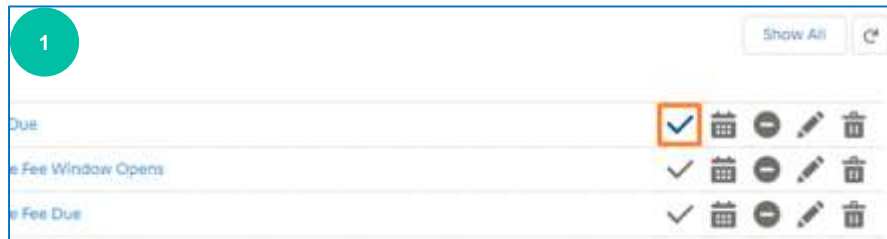
This action allows you to verify an existing docketing activity.

1

From the pending section, click the **verify** icon to verify an existing event.

This action opens up an **Verification of Auto-Docket** pop-up.

1



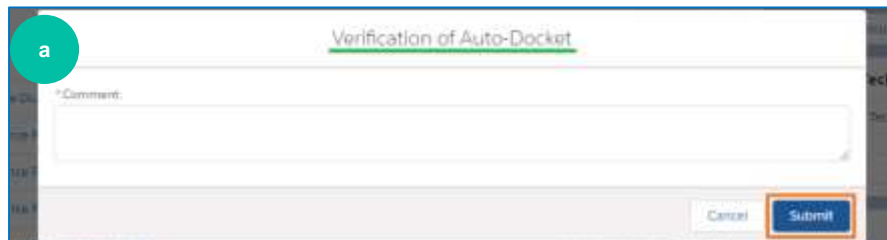
2

From the **Verification of Auto-Docket** pop-up:

a

Fill-out necessary comments. Then, click **Submit** to mark this activity as verified.

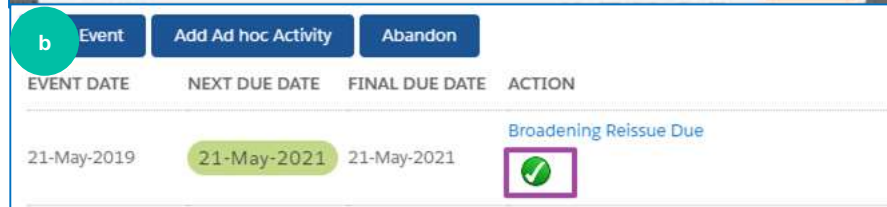
a



b

This action will mark an activity verified and a **verified icon** will be displayed next to the activity.

b



3.2.3. Prosecution History

The Prosecution History tab displays the entire history and the related prosecution information of an asset in a tabular form. The prosecution history table contains the following information:

- MAILROOM DATE
- DOC. DESCRIPTION
- DOCUMENT CODE
- PTO DOCUMENT

Home	Docket	Documents	Prosecution History	Related	Rating
MAIL ROOM DATE	DOC. DESCRIPTION	DOCUMENT CODE	PTO DOCUMENT		
Jun 30, 2020	Test				
Jun 30, 2020	Provisional Cover Sheet (SB16)	TR.PROV			
Last synced date :				Refresh	Sync IFW
				Application Mapping	

3.2.3. Prosecution History (cont.)

From the **Prosecution History** tab, you can also perform the following actions:

- **Refresh**








This option updates the data for the existing prosecution history.

- **Sync IFW**

This option manually syncs the IFW data from the MaxVal server to Symphony database.

- **Application Mapping**

This option manually syncs the updated prosecution history information from the PTO server to MaxVal server for this record.

APP.FILE.REC	
ABST	
SPEC	
CLM	
DRW	
ADS	
OATH	
WFEE	
N417	
<div> <div>Last synced date : Jun 24, 2019</div> <div> <div>Refresh</div> <div>Sync IFW</div> <div>Application Mapping</div> </div> </div>	

Other Related Patents

The user can select multiple non family patents in the Other Related Patents.

Other Related Patents

TP108

- TP108318EMPR12 (Fluorometer)
- TP108396USCON1 (Glycoprotein-toxic payload conjugates)
- TP108432USORG1 (ROTATING SAMPLE HOLDER FOR RANDOM ANGLE SAMPLING IN TOMOGRAPHY)
- TP108961USUPL1 (DEVICES AND METHODS FOR DETECTING ELEMENTS IN A SAMPLE)
- TP108171USORG1 (Method and apparatus for the planarization of surfaces)
- TP108824USCON2 (PROGNOSTIC ASSAY FOR SQUAMOUS CELL LUNG CARCINOMA)
- TP108138USORG1 (METHOD OF MANUFACTURING A CHARGED PARTICLE DETECTOR)

Related Patents (6+)

Docket No.	Application Number	Filing Date	Title
TP108318EMPR1	EM007408285-0001	12/16/2019	Fluorometer
TP108824WCON1	PCT/US2014/026724	3/13/2014	PROGNOSTIC ASSAY FOR SQUAMOUS CELL L
TP108164KORG1	KR1019-79288	7/2/2019	TRAINING AN ARTIFICIAL NEURAL NETWORK...
TP108623AKORP1	KR1020-18020	3/14/2020	FOCUSED ION BEAM IMPURITY IDENTIFICATL...

3.2.4. Related

The **Related** tab allows you to add related cases for the record and also enables you to perform foreign filing process such as:

- **Foreign Case**

This application type allows filing an application in different countries. To file a foreign case, refer Add Foreign Case.

- **Continuation**

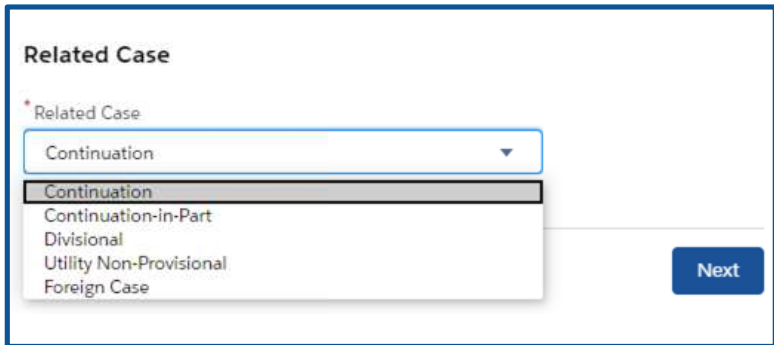
Continuation application is filed in order to pursue additional claims to an invention in an earlier application i.e. the parent application.

- **Continuation In-part**

This application type is filed when the application contains subject matters that are not disclosed in the parent application.

- **Divisional**

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



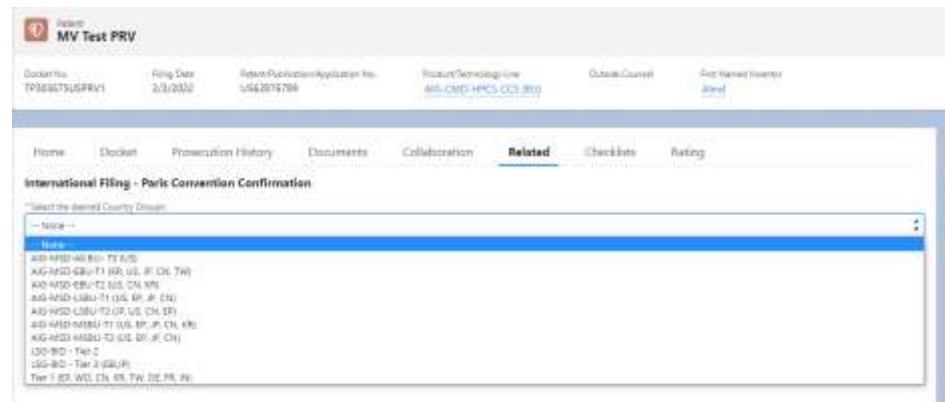
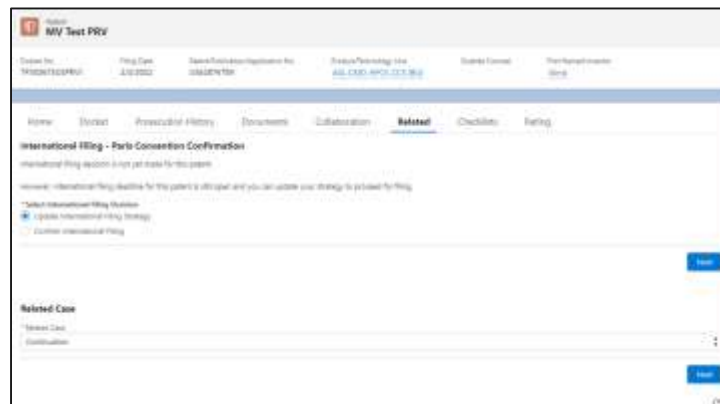
The screenshot shows a web interface titled "Related Case". Below the title is a dropdown menu with a red asterisk icon and the label "Related Case". The dropdown is open, showing a list of options: "Continuation", "Continuation-in-Part", "Divisional", "Utility Non-Provisional", and "Foreign Case". The "Continuation" option is highlighted with a grey background. To the right of the dropdown is a blue button labeled "Next".

International Filing Strategy

The user can view the widget for international filing Strategy under Related tab.

Post selecting to go ahead with the international filing strategy and select the country group to be assigned for the selected patent.

Note: The above widget will be visible only for the newly created cases in Symphony not for pre existing legacy cases .



Documents



The Documents section displays the list of document communications and transactions between In-House/Outside Counsel members and System Administrator. This tab also displays the information requests or necessary actions against filing an asset. This feature also allows you to upload any document for review or clarification by selecting the **Upload** button.

NOTE: The **Upload** button is available for a user based on your organizational requirements.

[Home](#)
[Docket](#)
[Documents](#)
[Prosecution History](#)
[Related](#)
[Rating](#)

[Show All](#)
[Show Pending Actions](#)
[Upload](#)

My Documents

LAST MODIFIED	DOCUMENT #	VERSION	DOCUMENT TYPE	ATTACHMENTS	RESPOND BY DATE	STATUS
6/29/2020, 08:54 PM	[APP-0001]	Initial	Application Draft			Draft 
6/29/2020, 08:54 PM	[CLD-0001]	Final	Claims Draft		2020-06-30	Final Version Uploaded 

Documents (cont.)

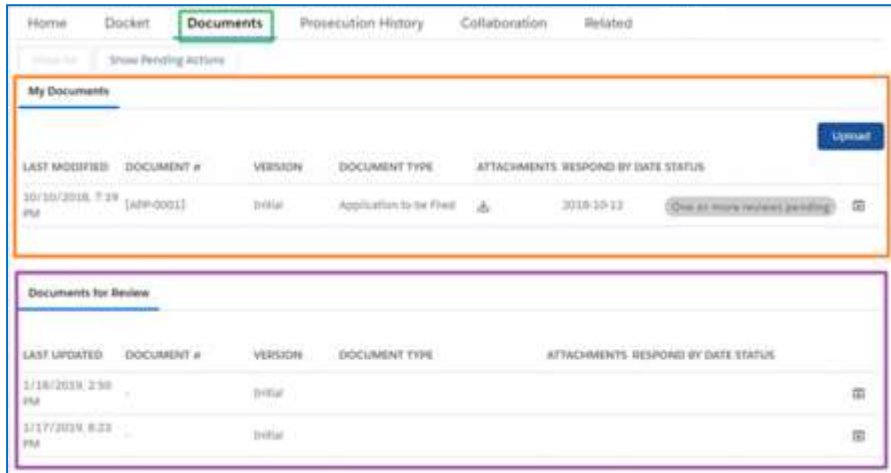
The **Documents** tab displays all the documents sent for review under the two categories listed below:

- **My Documents**

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

- **Documents for Review**

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



The screenshot shows the 'Documents' tab selected in the top navigation bar. Below the navigation bar, there are two main sections: 'My Documents' and 'Documents for Review'. The 'My Documents' section contains a table with one row of data. The 'Documents for Review' section contains a table with two rows of data. Both tables have columns for 'LAST MODIFIED', 'DOCUMENT #', 'VERSION', 'DOCUMENT TYPE', 'ATTACHMENTS', 'RESPOND BY DATE', and 'STATUS'. The 'My Documents' section also has an 'Upload' button in the top right corner.

LAST MODIFIED	DOCUMENT #	VERSION	DOCUMENT TYPE	ATTACHMENTS	RESPOND BY DATE	STATUS
10/10/2018, 7:29 PM	[APP-0001]	Initial	Application to be Filed		2018-10-12	One or more reviews pending

LAST UPDATED	DOCUMENT #	VERSION	DOCUMENT TYPE	ATTACHMENTS	RESPOND BY DATE	STATUS
1/18/2019, 2:50 PM		Initial				
1/17/2019, 8:23 PM		Initial				

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

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

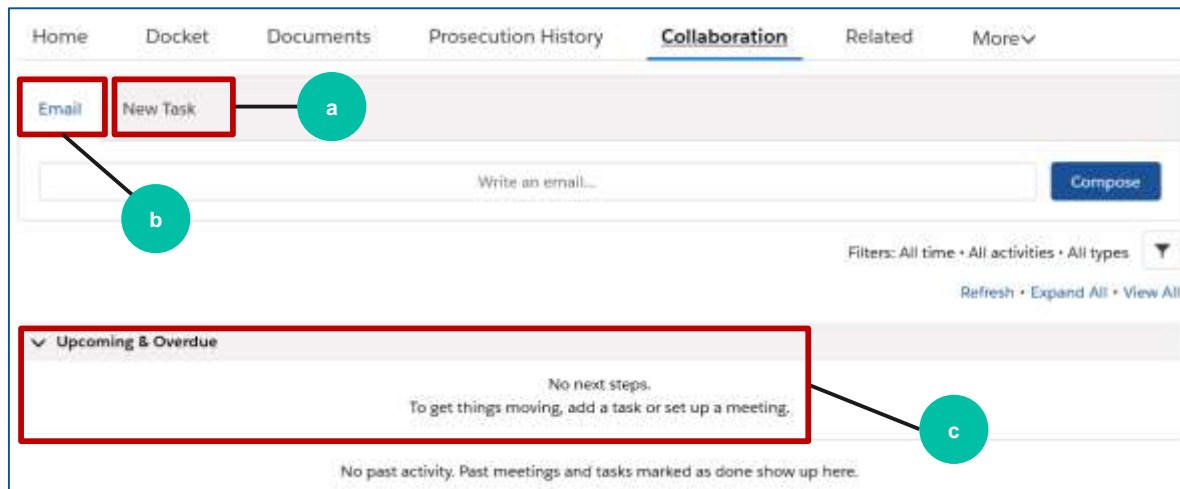
In version history you can see :

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

Correspondence

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

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



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

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

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

The **Rating** tab allows the In-house Counsel to rate the patent.

Click **Next** button to add a rating. Once the ratings are provided the system will create the weighted average rating.

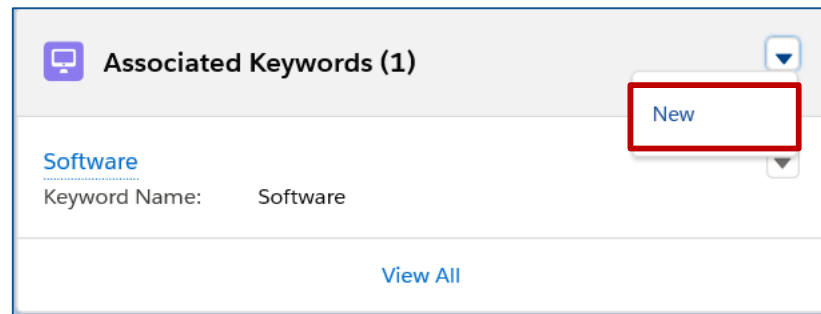
[illegible]

Additional Widgets

The patent detailed view page also displays other information related to the asset on respective widgets available on the right side of the page. Follow the topics below to learn more about the widgets.

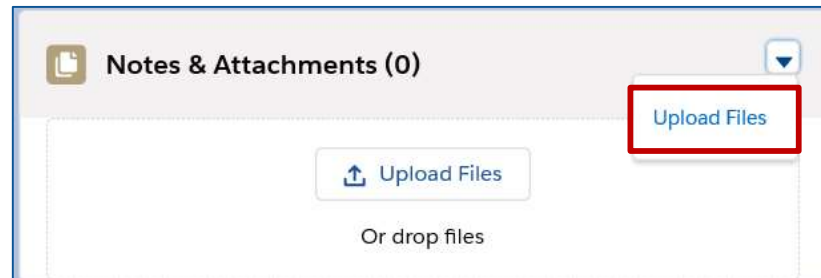
Keywords

This section displays the list of keywords that are used to tag an asset. Tagging an asset with one or more keywords allows the user to easily sort or filter out assets using the tagged keyword. This section also allows you to add a new keyword to the patent by selecting the down-arrow on the top right corner and choosing **New** option.



Files

This widget displays any attached documents or images related to the asset. It also allows you to add new files to the asset by selecting the down-arrow on the top-right corner and choosing **Upload Files** option or drag and drop your files here to upload.



Additional Widgets (cont.)

Notes

This section allows you to add a note for this invention disclosure that will be available for counsel members and the inventors. Similarly, the reviewer or an inventor can also add notes for a disclosure.

Apart from the general notes for the disclosure, this section also displays the Disclosure Action and responses from respective parties.



Notes (3+)

- Disclosure Rejected by PPA - 2021-04-28
4/28/2021, 8:23 AM by Shifamed IP
- Hold by IC - 2021-04-28
4/28/2021, 8:21 AM by Shifamed IP
- Request Patent Search Review - 2021-04-28
4/28/2021, 8:19 AM by Outside Counsel
NOC

[View All](#)

ID Inventors

This widget displays the list of additional inventors for the invention disclosure.

You can also add new inventors to the disclosure. Click the **down-arrow** on the **top-right corner** of the widget to add new inventor.



ID Inventors (1)

[Test Inventor 1](#)

Inventor Name:	Test Inventor 1
Email:	rajath.r@maxval.com

[View All](#)


New

Edit/Update a Patent Record

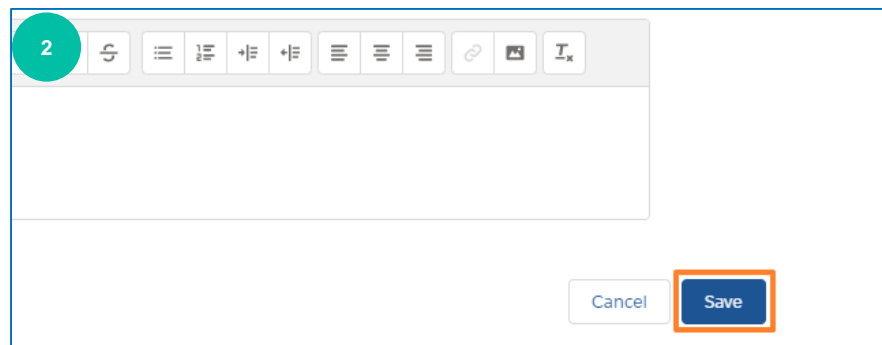
This section describes how to edit/update fields in an existing matter.









1 Click and open a record from the record list view page, click the **edit** icon next to any field available in the record. This action will allow you to edit the list of fields available in the record.

2 Once you have edited necessary information, click **Save** to update the changes.



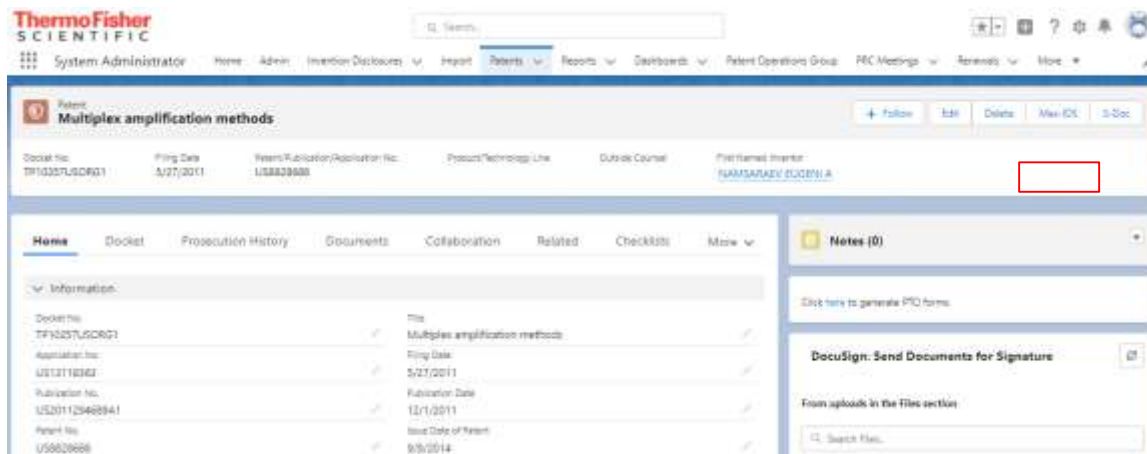
Information	
Application No.	AU2016203340
Filing Date	3/24/2011
Publication No.	
Publication Date	
Patent No.	AU2016203340
Issue Date of Patent	3/6/2018
Title	INTRAVASCULAR TISSUE DISRUPTION
Docket No.	SM/PI 100001/AU/CIV/1
Company Name	
Confirmation Number	
Group Art Unit	
Status	Abandoned



Max-IDS

The user can add access Max-IDS to check prior art details if the selected patent record has a Max-IDS record ID associated with it. To open the Max-IDS record, the user can click on Max-IDS button on the right hand corner of the patent detailed view.



The screenshot displays the ThermoFisher Scientific IPM interface. The top navigation bar includes the ThermoFisher Scientific logo, a search bar, and various user roles and settings. The main content area shows a patent record for "Multiplex amplification methods". The record details include the Social No. (TF10327USD01), Filing Date (5/27/2011), Patent/Publication/Application No. (US823968), Product/Technology Line, Outside Counsel, and the Inventor (RAMSARAY, EUGENIA). A red box highlights the "Max-IDS" button in the top right corner of the record details section. Below the record details, there is a "Home" tab and a "Docket" section. The "Docket" section contains a table with columns for "Docket No.", "Title", "Filing Date", "Publication Date", and "Issue Date of Patent". The table lists several docket entries, including "TF10327USD01", "US1111092", "US2011254889A1", and "US823968". The right sidebar contains a "Notes (0)" section and a "DocuSign: Send Documents for Signature" button.

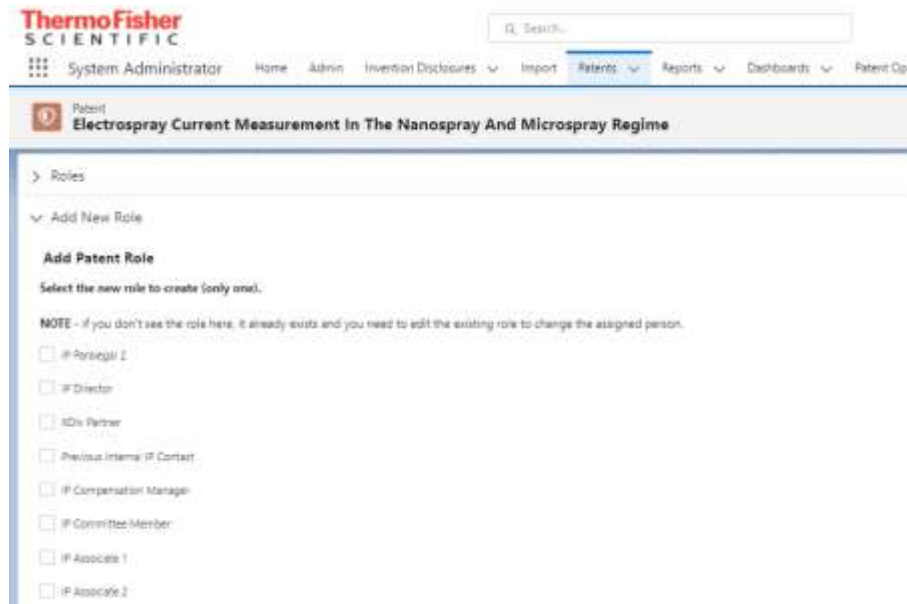
Docket No.	Title	Filing Date	Publication Date	Issue Date of Patent
TF10327USD01	Multiplex amplification methods	5/27/2011	12/1/2011	9/3/2014
US1111092				
US2011254889A1				
US823968				

Post clicking the button, the user can view the related records and references associated with the selected patent record

[illegible]

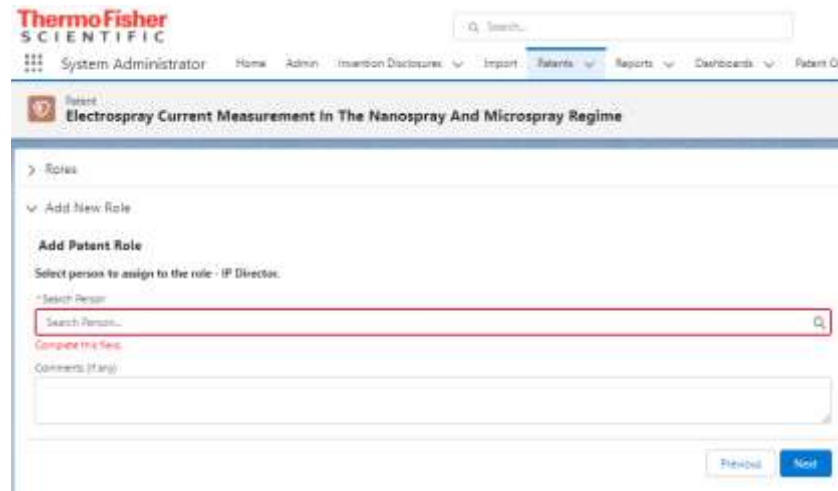
Roles

The user can see the list of roles associated with the selected patent record by clicking on the Roles dropdown.



Add Roles

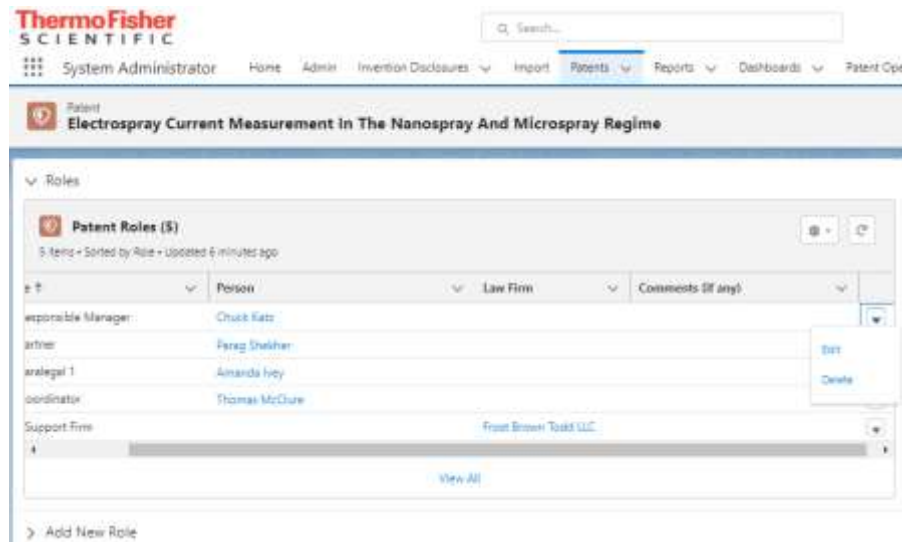
The user can add new roles to the selected record by clicking on Add New Role and assign it by searching through person record.



The screenshot shows the ThermoFisher Scientific IPM 3.6 interface. The top navigation bar includes a search bar, a user profile icon, and a menu with options: System Administrator, Home, Admin, Invention Disclosures, Import, Patents, Reports, Dashboards, and Patent Op. The main content area is titled 'Patent' and 'Electrospray Current Measurement In The Nanospray And Microspray Regime'. Below this, there is a section for 'Roles' with a sub-section 'Add New Role'. The 'Add Patent Role' section prompts the user to 'Select person to assign to the role - IP Director'. It features a search bar labeled 'Search Person...' with a magnifying glass icon. Below the search bar, there is a red text prompt 'Complete this field.' and a text area for 'Comments (if any)'. At the bottom right, there are 'Previous' and 'Next' buttons.

Edit and Delete Roles

User can also edit or delete the roles previously assigned either manually or automatically by clicking on the dropdown menu on extreme right hand corner dropdown and select the action they want to perform for the selected role



ThermoFisher SCIENTIFIC

Search...

System Administrator Home Admin Invention Disclosures Import **Patents** Reports Dashboards Patent Cite

Patent
Electrospray Current Measurement In The Nanospray And Microspray Regime

Roles

Patent Roles (5)
5 items • Sorted by Role • Updated 6 minutes ago

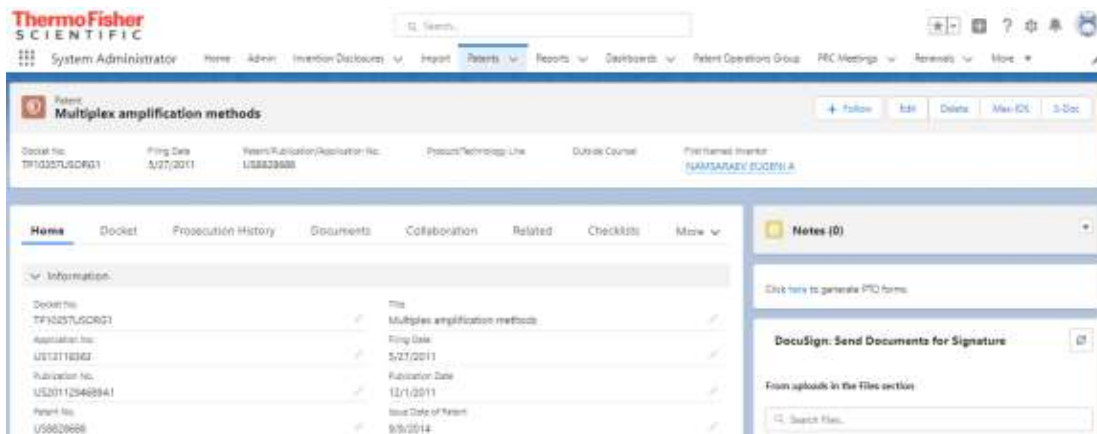
	Person	Law Firm	Comments (if any)
responsible Manager:	Chuck Katz		
attorney	Priya Shukla		
attorney 1	Amanda Ivey		
coordinator	Thomas McClure		
Support Firm		Frost Brown Todd LLC	

View All

> Add New Role

S-Docs

Create or edit templates and checklists that help the user to navigate the patent module.

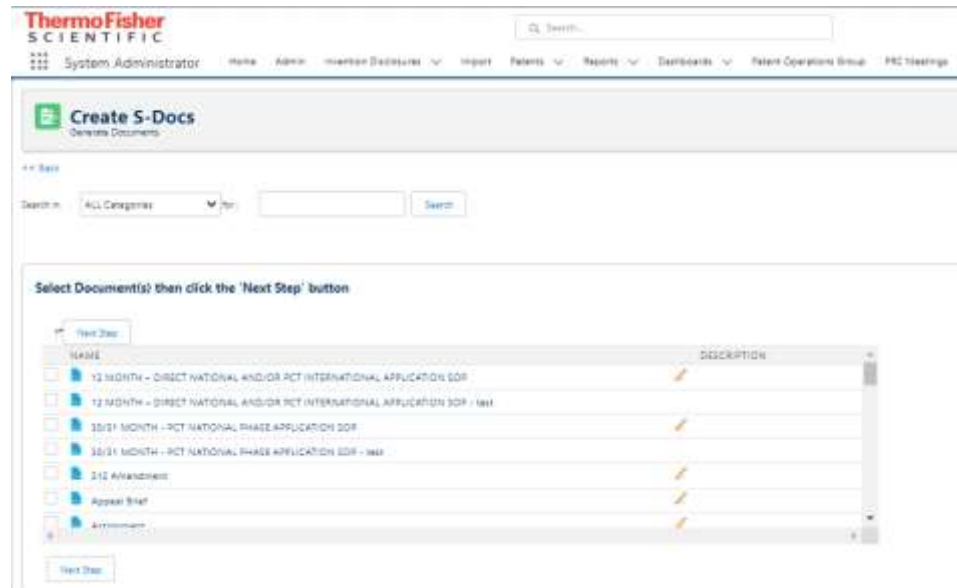


The screenshot displays the ThermoFisher Scientific S-Docs interface. The top navigation bar includes a search bar and various menu items like System Administrator, Home, Admin, Invention Disclosures, Import, Patents, Reports, Dashboards, Patent Operations Group, REC Meetings, Advanced, and More. The main content area shows a patent record for "Multiplex amplification methods". The record includes fields for DocId No. (TF10337USC001), Filing Date (5/27/2011), Patent/Publication/Application No. (US8828688), Product/Technology Line, Date of Counsel, and First Named Inventor (SAMANTHA EV. SUGRIS). Below the record, there is a tabbed interface with tabs for Home, Docket, Prosecution History, Documents, Collaboration, Related, Checklists, and More. The Home tab is active, showing a table of information. The table has columns for DocId No., Application No., Publication No., Patent No., Filing Date, Publication Date, and Issue Date of Patent. The table contains one row of data. On the right side, there is a Notes section with a "Notes (0)" header and a "Click here to generate PDF forms" link. Below the notes, there is a "DocuSign: Send Documents for Signature" section with a "From uploads in the Files section" link and a search bar.

DocId No.	Application No.	Publication No.	Patent No.	Filing Date	Publication Date	Issue Date of Patent
TF10337USC001	US12110362	US2011294889A1	US8828688	5/27/2011	12/1/2011	9/9/2014

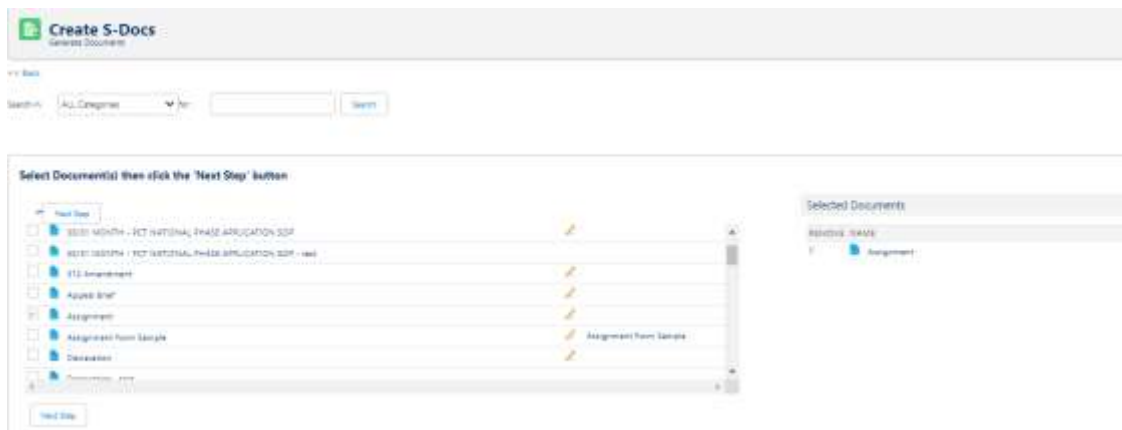
S-Doc

Post clicking the S Doc button the user can view the list of documents that can aid in their patent prosecution process



Selecting a File in S-Doc

Post selecting the document(s), the user can select the next option to move to further steps.



Selected S-Doc Document

The user can view and download the selected document (Click on "<< Back" to navigate to the patent record)


Create S-Docs
View Document(s)

[<< Back](#)

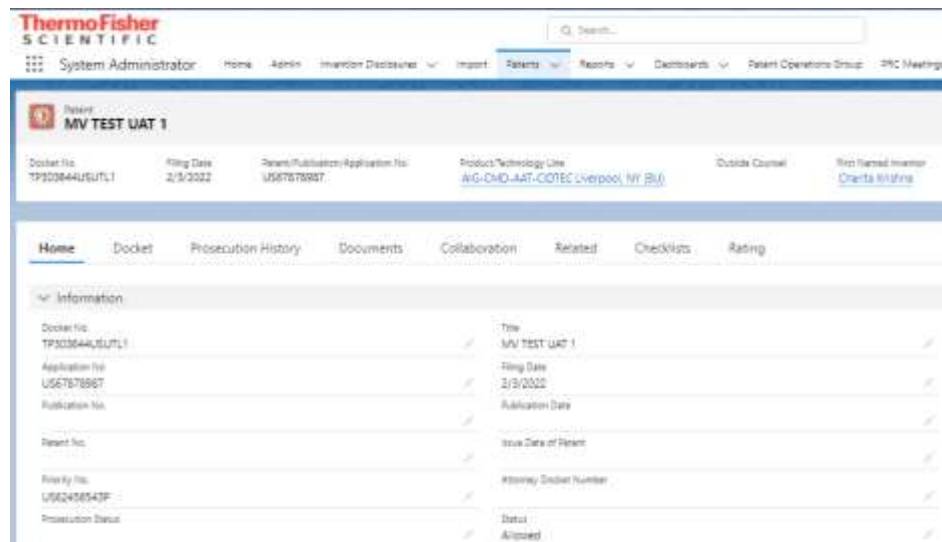
View Document(s)

The following S-Docs have been created

VIEW	EDIT	DOCUMENT NUMBER	DOCUMENT NAME	COMMENTS	STATUS	CREATED BY	CREATED ON
		ED-001	Assignment	Add	Generated	System Admin TF	2/3/2022 11:38 AM

NOA Checklist

The user can access NOA checklist when the selected patent's status to **Allowed**.



The screenshot displays the ThermoFisher Scientific IPM 3.6 interface. The top navigation bar includes links for System Administrator, Home, Admin, Invention Disclosure, Import, Patents, Reports, Dashboards, Patent Operations Group, and PNC Meetings. A search bar is located on the right. The main content area shows the details for a patent titled "MV TEST UAT 1". The patent information includes Docket No. TP303644LJUTL1, Filing Date 2/3/2022, Patent/Publication/Application No. US67878967, Product/Technology Line AG-DMD-AAT-COTEC Liverpool NY BU, Outside Counsel, and Firm/Named Inventor Clients Winlab. Below the patent information, there is a tabbed interface with tabs for Home, Docket, Prosecution History, Documents, Collaboration, Related, Checklists, and Rating. The "Checklists" tab is selected, showing a table of information for the patent.

Information	
Docket No. TP303644LJUTL1	Title MV TEST UAT 1
Application No. US67878967	Filing Date 2/3/2022
Publication No.	Publication Date
Parent No.	Issue Date of Parent
Priority No. US62456543F	Attorney Docket Number
Prosecution Status	Status Allowed

NOA Checklist–Paralegal

The NOA checklist should be filled by both Paralegal and the Attorney associated with the patent.

NOA Checklist - Paralegal

- ☐ All Bibliographic Info in the header is accurate
- ☐ Declaration(s) for all inventors signed and filed
- ☐ Assignment(s) for all inventors signed and recorded
- ☐ Drawings are in order
- ☐ Sequence Listing accepted
- ☐ Allowed claims saved to FTF in Word format
- ☐ IDS - All SB08 refs initiated by Examiner
- ☐ IDS - All art from US and foreign counterparts cited
- ☐ IDS - Double-check MaxiDS for uncited art

Other issues? Describe:

Next

NOA Checklist - Paralegal

☒ All Bibliographic Info in the header is accurate

Add Comments? 

Comments

- ☐ Declaration(s) for all inventors signed and filed
- ☐ Assignment(s) for all inventors signed and recorded
- ☐ Drawings are in order
- ☐ Sequence Listing accepted
- ☐ Allowed claims saved to FTF in Word format
- ☐ IDS - All SB08 refs initiated by Examiner
- ☐ IDS - All art from US and foreign counterparts cited
- ☐ IDS - Double-check MaxiDS for uncited art

Other issues? Describe:

Next

NOA Checklist- Attorney

Only after it has been filled by both the Paralegal and the Attorney, a NOA checklist will be created.

Paralegal Submission

(For reference only - will not update)

- ☒ All Bibliographic Info in the header is accurate
- ☐ Declaration(s) for all inventors signed and filed
- ☐ Assignment(s) for all inventors signed and recorded
- ☒ Drawings are in order
- ☐ Sequence Listing accepted
- ☐ Allowed claims saved in Word format
- ☐ IDS - All SB08 refs initiated by Examiner
- ☐ IDS - All art from US and foreign counterparts cited
- ☐ IDS - Double-check MaxiDS for uncited art

Any other issues:

Attorney Submission

(For Submission - Attorney submission will be updated)

- ☐ Allowed claims match most recent amendment(s)
- ☐ No amendment(s) to specification or claims needed
- ☐ Inventorship is correct for allowed claims
- ☐ Non-publication Request was filed
- ☐ Government has rights in invention
- ☐ Will Thermo Fisher pay maintenance fees?
- ☐ If allowed before 12-month date, confirm if PCT is needed
- ☐ Notify inventors of allowance & duty of disclosure
- ☐ Are commercial product(s) covered by claims?
- ☐ Decision on continuing/divisional application
- ☐ Reply to Examiner's Amendment/Reasons for Allowance
- ☐ Issue fee to be paid; if so, when?

Next

Paralegal Submission

(For reference only - will not update)

- ☒ All Bibliographic Info in the header is accurate
- ☐ Declaration(s) for all inventors signed and filed
- ☐ Assignment(s) for all inventors signed and recorded
- ☒ Drawings are in order
- ☐ Sequence Listing accepted
- ☐ Allowed claims saved in Word format
- ☐ IDS - All SB08 refs initiated by Examiner
- ☐ IDS - All art from US and foreign counterparts cited
- ☐ IDS - Double-check MaxiDS for uncited art

Any other issues:

Attorney Submission

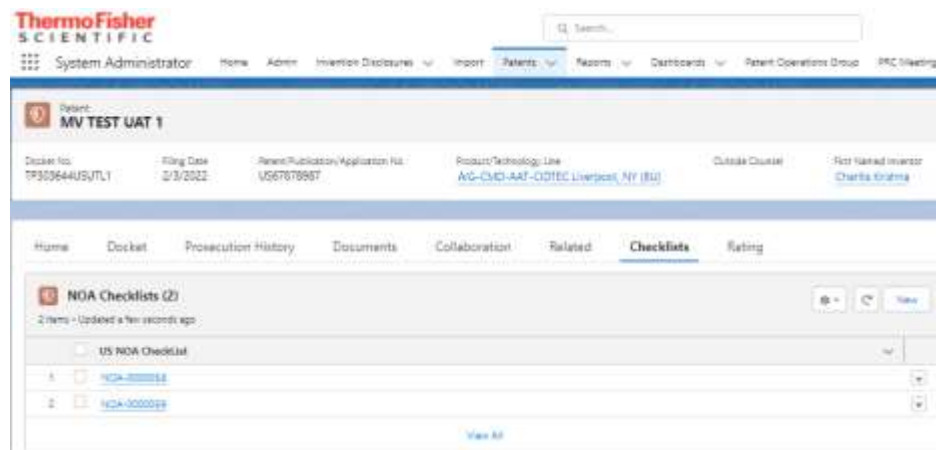
(For Submission - Attorney submission will be updated)

- ☒ Allowed claims match most recent amendment(s)
- Add Comments? ☐
- ☐ No amendment(s) to specification or claims needed
- ☐ Inventorship is correct for allowed claims
- ☐ Non-publication Request was filed
- ☐ Government has rights in invention
- ☐ Will Thermo Fisher pay maintenance fees?
- ☐ If allowed before 12-month date, confirm if PCT is needed
- ☐ Notify inventors of allowance & duty of disclosure
- ☐ Are commercial product(s) covered by claims?
- ☐ Decision on continuing/divisional application
- ☐ Reply to Examiner's Amendment/Reasons for Allowance
- ☐ Issue fee to be paid; if so, when?

Next

View NOA Checklist

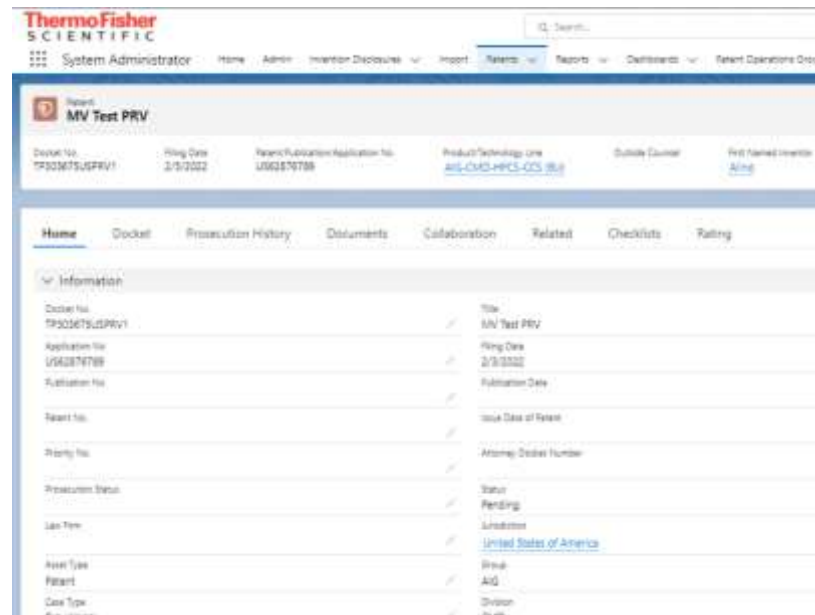
The updated NOA checklist record can be viewed under the checklist tab.



The screenshot displays the ThermoFisher Scientific IPM 3.6 interface. The top navigation bar includes a search bar and a menu with options: System Administrator, Home, Admin, Invention Disclosures, Import, Patents, Reports, Dashboards, Patent Operations Group, and PRC Meetings. The 'Patents' tab is selected, showing a patent titled 'MV TEST UAT 1'. Below the patent title, key information is displayed: Docket No. (TP303644US/UTL1), Filing Date (2/3/2022), Patent/Publication/Application No. (US67878987), Product/Technology Line (AvG-CMCI-AAT-COTEC Livercell, NY (IL)), Outside Counsel, and First Named Inventor (Charles Kratma). The 'Checklists' tab is selected, showing a list of NOA Checklists. The list includes a checkbox for 'US NOA Checklist' and two entries: '1. NCA-000001' and '2. NCA-000002'. A 'View All' link is visible at the bottom right of the checklist list.

Provisional Conversion

The user can view Patent Provisional Conversion widget if they selected patent is the Case type-Provisional, and the Status - Pending.



The screenshot displays the ThermoFisher Scientific IPM 3.6 interface. The top navigation bar includes links for System Administrator, Home, Admin, Invention Disclosure, Import, Patents, Reports, Dashboards, and Patent Operations Global. A search bar is located on the right. The main content area shows the 'MV Test PRV' patent details. The patent information is organized into a table with columns for Document No., Filing Date, Patent/Publication Application No., Product/Technology Line, Outside Counsel, and First named inventor. The table contains the following data:

Document No.	Filing Date	Patent/Publication Application No.	Product/Technology Line	Outside Counsel	First named inventor
TP303675USPRV1	2/3/2022	US6876788	AIG-CHS-HPCS-GCS (U)		Aig

Below the table, there is a section for 'Information' with a list of fields and their values:

Field	Value
Document No.	TP303675USPRV1
Title	MV Test PRV
Application No.	US6876788
Filing Date	2/3/2022
Publication No.	
Publication Date	
Report No.	
Issue Date of Report	
Priority No.	
Attorney Order Number	
Prosecution Status	Pending
Status	Pending
Case Type	Provisional
Location	United States of America
Asset Type	Patent
Group	AIG
Case Type	Provisional
Division	PLM

Patent Provisional Conversion

The user can take three different decisions based the action required to be performed for the selected patent. The following three actions can be performed:

1. Convert
2. Combine
3. Close

Provisional Conversion Decision

Provisional Conversion Reminder - **August 3, 2022**

Provisional Conversion Due - **November 3, 2022**

Decision

- ☐ Convert
- ☐ Combine
- ☐ Close

Decision Comments

[Next](#)

Provisional Patent Conversion - Convert

By selecting convert, the user can convert the selected provisional patent to other types of patent application other than provisional.

Provisional Conversion Decision

Provisional Conversion Reminder - **August 3, 2022**

Provisional Conversion Due - **November 3, 2022**

Decision

- ☒ Convert
- ☐ Combine
- ☐ Close

*Conversion Approach

- ☒ Convert this provisional (*TP303675USPRV1*) alone

Decision Comments

Next

Patent Provisional Conversion- Combine

The user can combine the selected patent to pre existing patent by selecting the combine option. Post selecting combine, the user can search for related patent to be combined with the present provisional patent.

Provisional Conversion Decision

Decision: **Combine**

Select the Provisional record to Combine


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

Provisional Conversion Decision

Provisional Conversion Reminder - **August 3, 2022**

Provisional Conversion Due - **November 3, 2022**

Decision

☐ Convert

☒ **Combine**

☐ Close

Decision Comments

[Next](#)

Patent Provisional Conversion- Close

In case the users want to close the filled provisional conversion, they can select Close and add any additional comments for reference.

Provisional Conversion Decision

Provisional Conversion Reminder - **August 3, 2022**

Provisional Conversion Due - **November 3, 2022**

Decision

- ☐ Convert
☐ Combine
☒ Close

Decision Comments

Next



Inventor Awards

Inventor Awards

The Inventors Awards tab displays the list of awards granted to the inventors based on the organization's award policy. The award policy allows you to trigger awards to the inventors based on the stages of the disclosure or an asset in your portfolio. 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 Award – Detailed View

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

- Details
- Related

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.

Award Policy

Awards Policies The Award Policies section allows you to view the list of award policies as well as create and configure new award policies for your organization.

Generate Awards for Inventions This feature allows you to generate awards for the list of inventions in the portfolio that are applicable to receive awards. Awards for an invention are automatically generated at a predefined time every day based on the configured rule of an organization. The updated information will be available in the AWARDS module.

Note: The availability of the Awards module is based on your organization configuration.

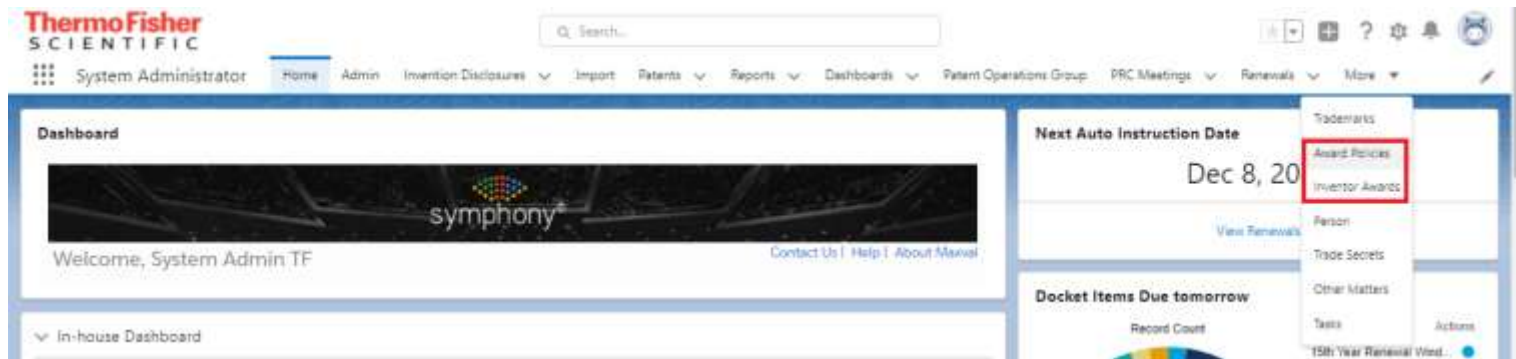
Generate Awards for Patents This feature allows you to generate the awards for the list of patents in the portfolio that are applicable to receive awards. Awards for patents are automatically generated at a predefined time every day based on the configured rule of an organization. The updated information will be available in the Awards module.

Note: The availability of the Awards module is based on your organization's configuration.

View Awards Module

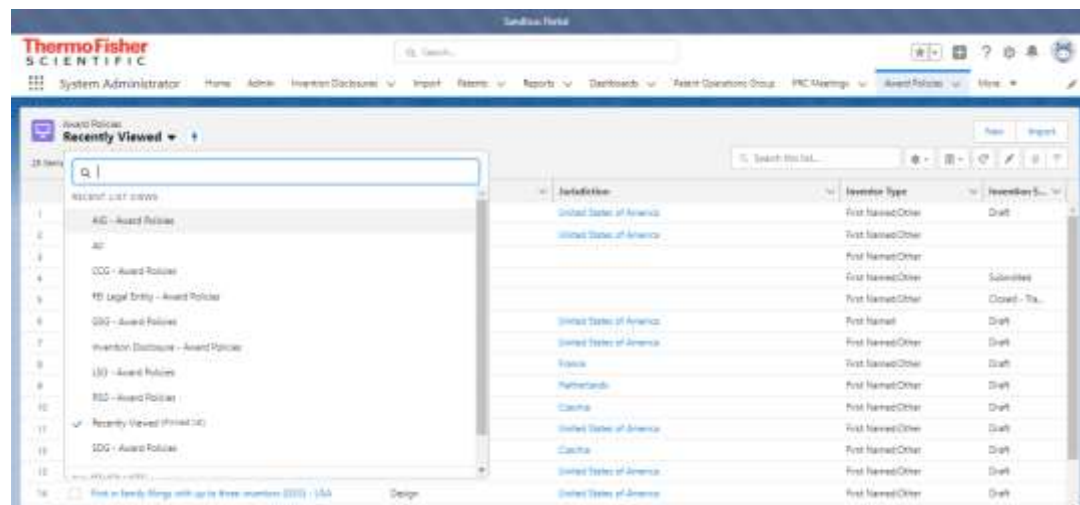
User can access award related modules from the dashboard under the following :

- Award Policies
- Inventor Awards



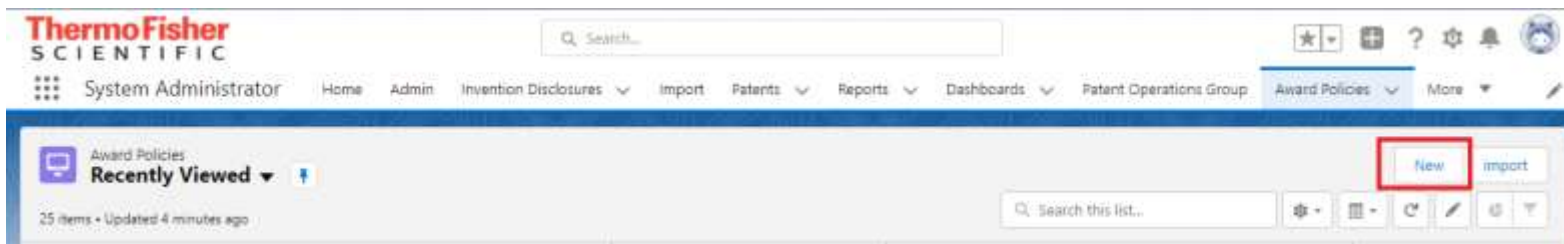
Award Policies

User can access the award policies and filter them based on specific policies in the listview of **Award Policies** module.



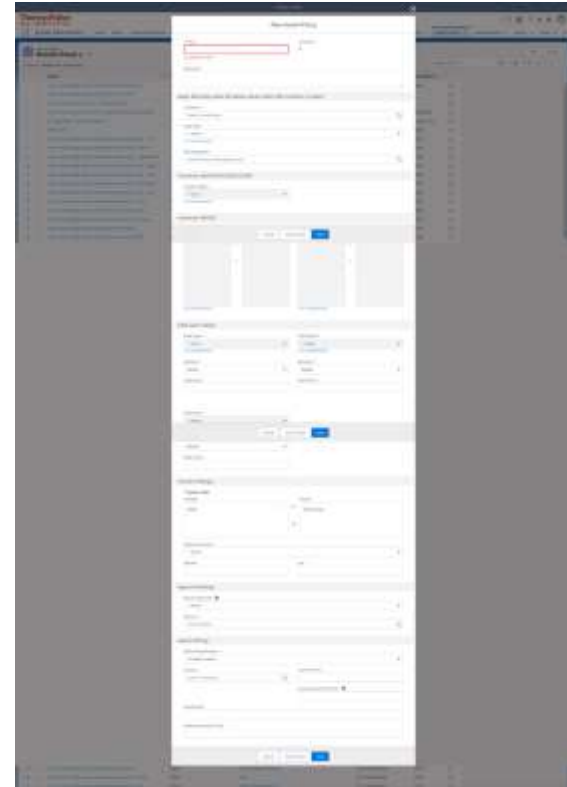
Create New Award Policy

User can click on **New** to create a new award policy as shown below.



New Award Policy Record

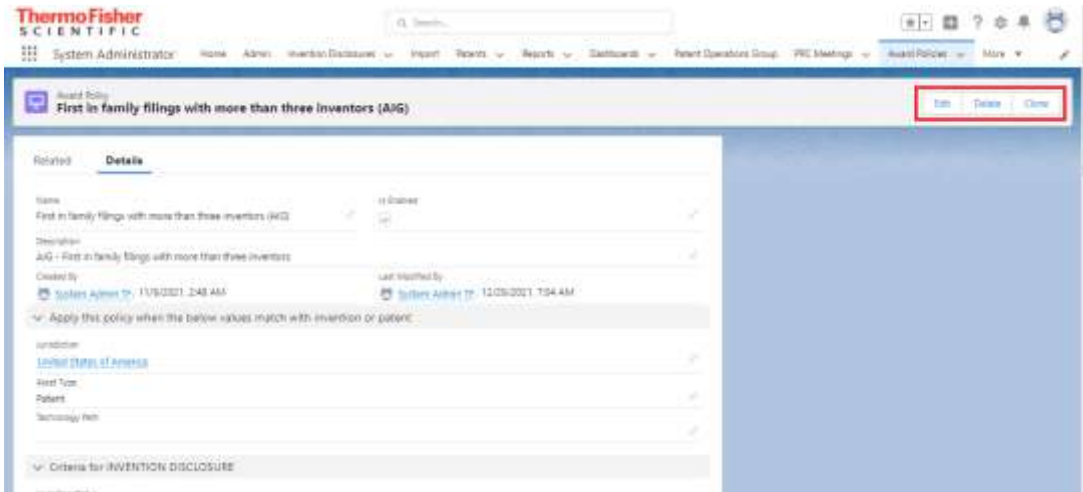
Post clicking New, the user can create a award policy by filling in the information required.



Award Policy Detailed View

The User see the created award policy record by clicking on the docket ID .

They can edit the information and can also clone and delete as needed.

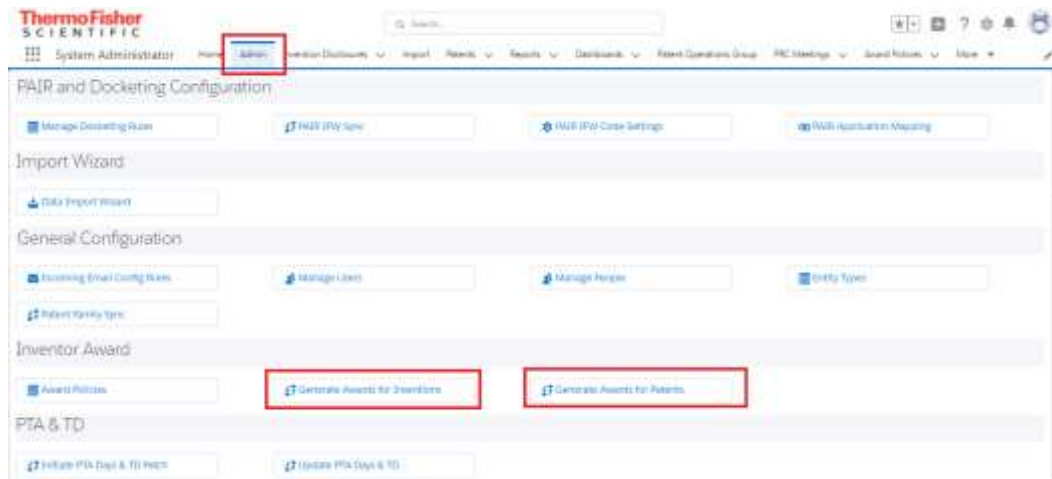


Manual Award Generation

All the award policies created will run everyday automatically by the system.

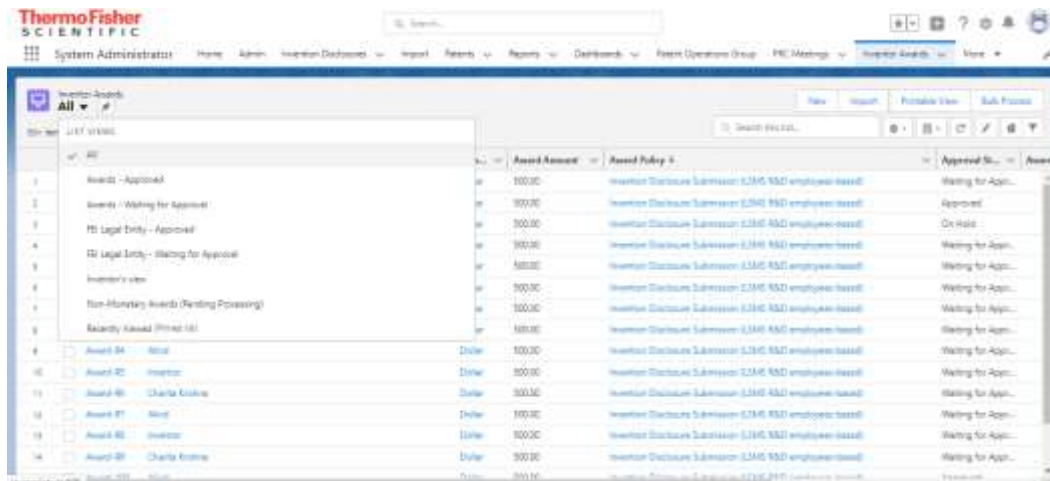
Incase the user wants to generate the award policy manually under Admin tab and select either

1. Generate Awards for Inventions
2. Generate Awards for Patents



Inventor Awards

The user can filter inventor awards assigned to different ID based on their approval status.

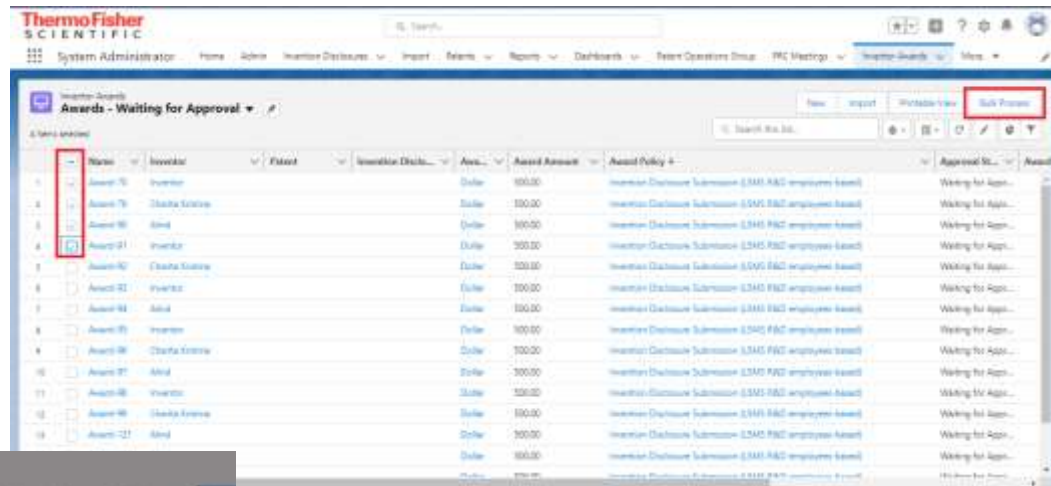


ID	Award Name	Award Policy	Approval Status
1	Awards - Approved	Inventor Disclosure Submission (L3M5 R&D employee-based)	Waiting for Appl...
2	Awards - Waiting for Approval	Inventor Disclosure Submission (L3M5 R&D employee-based)	Approved
3	PE Legal Entity - Approved	Inventor Disclosure Submission (L3M5 R&D employee-based)	On Hold
4	PE Legal Entity - Waiting for Approval	Inventor Disclosure Submission (L3M5 R&D employee-based)	Waiting for Appl...
5	Inventor's view	Inventor Disclosure Submission (L3M5 R&D employee-based)	Waiting for Appl...
6	Non-Monetary Awards (Pending Processing)	Inventor Disclosure Submission (L3M5 R&D employee-based)	Waiting for Appl...
7	Research Award (Printed)	Inventor Disclosure Submission (L3M5 R&D employee-based)	Waiting for Appl...
8	Award 8A - Award	Inventor Disclosure Submission (L3M5 R&D employee-based)	Waiting for Appl...
9	Award 8B - Award	Inventor Disclosure Submission (L3M5 R&D employee-based)	Waiting for Appl...
10	Award 8C - Award	Inventor Disclosure Submission (L3M5 R&D employee-based)	Waiting for Appl...
11	Award 8D - Award	Inventor Disclosure Submission (L3M5 R&D employee-based)	Waiting for Appl...
12	Award 8E - Award	Inventor Disclosure Submission (L3M5 R&D employee-based)	Waiting for Appl...
13	Award 8F - Award	Inventor Disclosure Submission (L3M5 R&D employee-based)	Waiting for Appl...
14	Award 8G - Award	Inventor Disclosure Submission (L3M5 R&D employee-based)	Waiting for Appl...
15	Award 8H - Award	Inventor Disclosure Submission (L3M5 R&D employee-based)	Waiting for Appl...

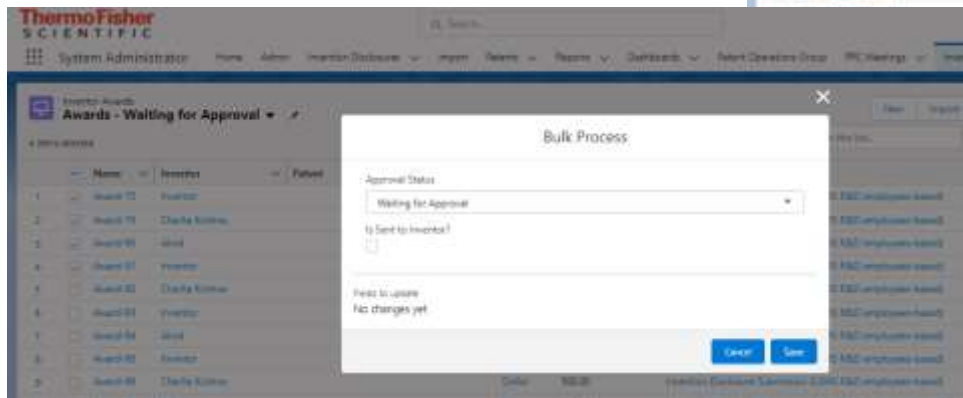
Bulk Process

The user can select multiple inventor awards and select **Bulk Process** the process to change the status of award approval.

Post selecting Bulk Process, the user can decide the status action to change for the inventor awards.



ID	Name	Inventor	Status	Invention Disclosure	Award Amount	Award Policy	Approval Status	Award
1	Award 75	Inventor	Pending	Invention Disclosure Submission (SAS R&D employee award)	\$100.00	Invention Disclosure Submission (SAS R&D employee award)	Waiting for Appr...	Award
2	Award 76	Charles Korman	Pending	Invention Disclosure Submission (SAS R&D employee award)	\$100.00	Invention Disclosure Submission (SAS R&D employee award)	Waiting for Appr...	Award
3	Award 77	Alind	Pending	Invention Disclosure Submission (SAS R&D employee award)	\$100.00	Invention Disclosure Submission (SAS R&D employee award)	Waiting for Appr...	Award
4	Award 81	Inventor	Pending	Invention Disclosure Submission (SAS R&D employee award)	\$100.00	Invention Disclosure Submission (SAS R&D employee award)	Waiting for Appr...	Award
5	Award 82	Charles Korman	Pending	Invention Disclosure Submission (SAS R&D employee award)	\$100.00	Invention Disclosure Submission (SAS R&D employee award)	Waiting for Appr...	Award
6	Award 83	Inventor	Pending	Invention Disclosure Submission (SAS R&D employee award)	\$100.00	Invention Disclosure Submission (SAS R&D employee award)	Waiting for Appr...	Award
7	Award 84	Alind	Pending	Invention Disclosure Submission (SAS R&D employee award)	\$100.00	Invention Disclosure Submission (SAS R&D employee award)	Waiting for Appr...	Award
8	Award 85	Inventor	Pending	Invention Disclosure Submission (SAS R&D employee award)	\$100.00	Invention Disclosure Submission (SAS R&D employee award)	Waiting for Appr...	Award
9	Award 86	Charles Korman	Pending	Invention Disclosure Submission (SAS R&D employee award)	\$100.00	Invention Disclosure Submission (SAS R&D employee award)	Waiting for Appr...	Award
10	Award 87	Alind	Pending	Invention Disclosure Submission (SAS R&D employee award)	\$100.00	Invention Disclosure Submission (SAS R&D employee award)	Waiting for Appr...	Award
11	Award 88	Inventor	Pending	Invention Disclosure Submission (SAS R&D employee award)	\$100.00	Invention Disclosure Submission (SAS R&D employee award)	Waiting for Appr...	Award
12	Award 89	Charles Korman	Pending	Invention Disclosure Submission (SAS R&D employee award)	\$100.00	Invention Disclosure Submission (SAS R&D employee award)	Waiting for Appr...	Award
13	Award 90	Alind	Pending	Invention Disclosure Submission (SAS R&D employee award)	\$100.00	Invention Disclosure Submission (SAS R&D employee award)	Waiting for Appr...	Award



Bulk Process

Approval Status

Waiting for Approval

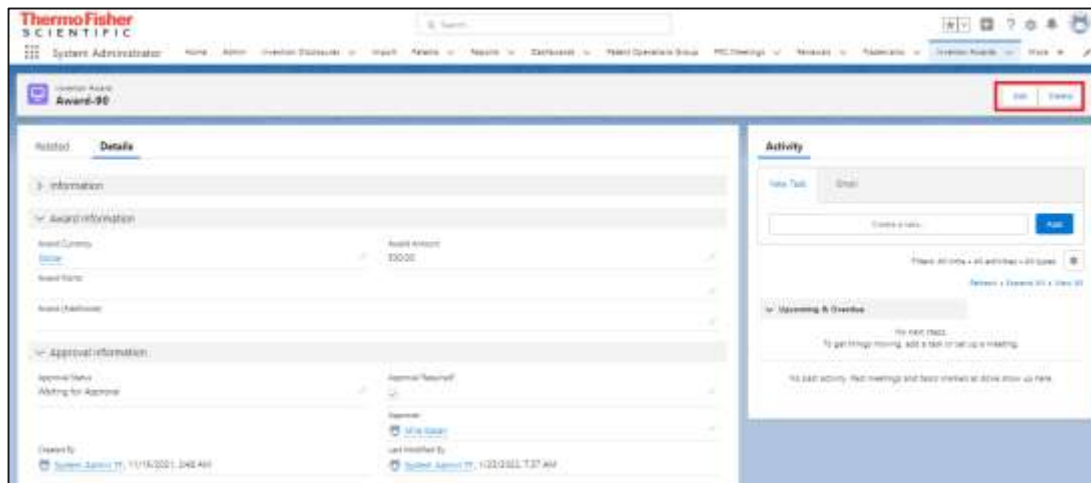
Is Sent to Inventor?

First to update
No changes yet

Cancel Save

Individual Award Edit

Post approval, the user can select the award record to edit or clone the details mentioned.



The screenshot displays the 'Award-90' record in the ThermoFisher Scientific System Administrator. The interface is divided into two main sections: 'Details' and 'Activity'.

Details Section:

- Information Tab:**
 - Award Currency:** USD
 - Award Amount:** 1000
 - Award Name:**
 - Award Address:**
- Approval Information Tab:**
 - Approval Status:** Waiting for Approval
 - Approval Reason:** None
 - Created By:** System Administrator, 11/15/2021 1:40 AM
 - Last Modified By:** System Administrator, 11/15/2021 1:40 AM

Activity Section:

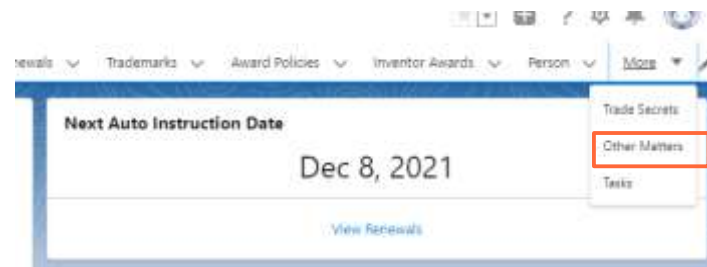
- Activity List:** A table with columns for 'Activity Name', 'Status', and 'Action'. The 'Clone' button is highlighted in a red box.
- Activity Summary:** Shows a total of 1000 items, with 1000 items in the 'Waiting for Approval' status.
- Activity Details:** A table showing the details of the activity, including the 'Activity Name', 'Status', and 'Action'.



Other Matters

Other Matter Record

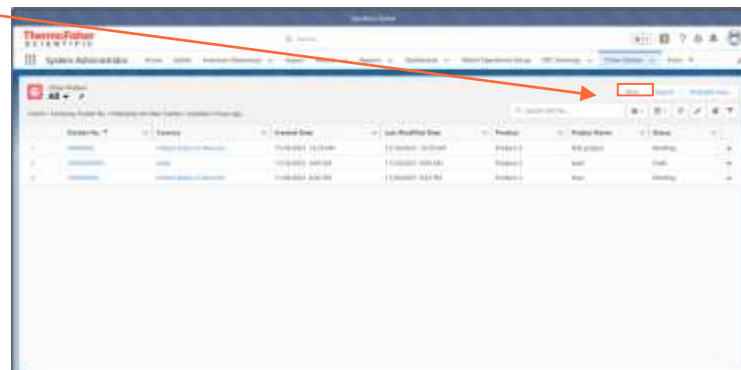
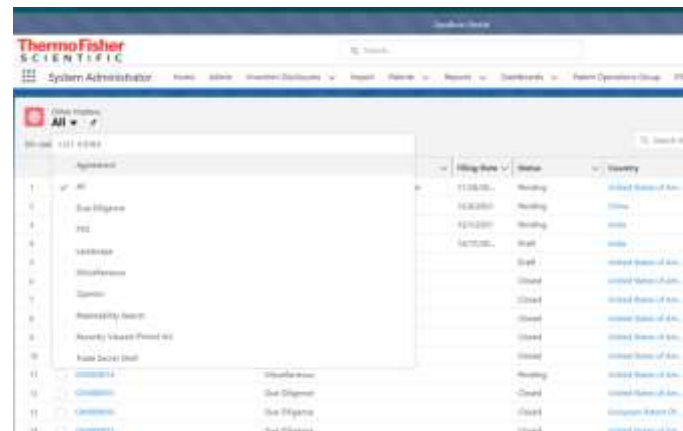
User can navigate to Other Matters module from the dropdown menu under More.



List View

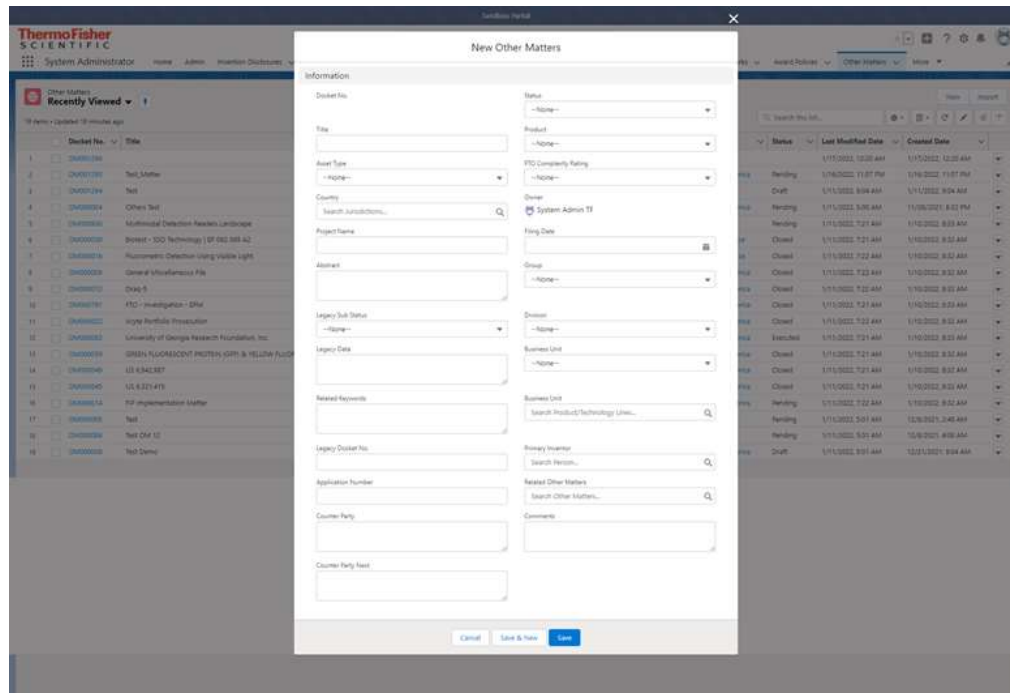
The drop down menu contains the **List view** of the other matters record. It can be filtered by different Asset Value types.

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



Create a New Other Matter Record

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



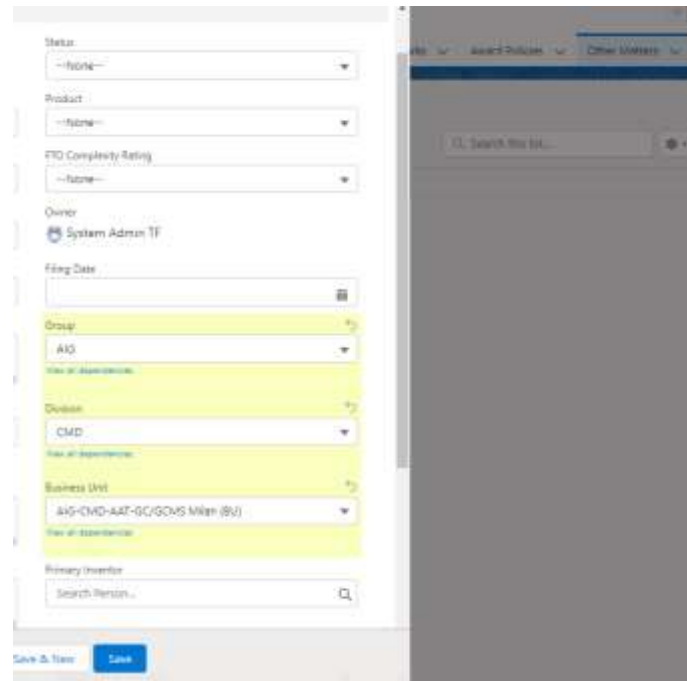
The screenshot displays the ThermoFisher Scientific System Administrator interface. On the left, a sidebar shows a list of 'Recently Viewed' records with columns for 'Docket No.' and 'Title'. The main area is titled 'New Other Matters' and contains a form with the following fields:

- Docket No.:** A text input field.
- Title:** A text input field.
- Asset Type:** A dropdown menu with 'None' selected.
- Country:** A dropdown menu with 'None' selected.
- Project Name:** A text input field.
- Abstract:** A text input field.
- Legacy Sub Status:** A dropdown menu with 'None' selected.
- Legacy Date:** A text input field.
- Related Keywords:** A text input field.
- Legacy Docket No.:** A text input field.
- Application Number:** A text input field.
- Counter Party:** A text input field.
- Counter Party Note:** A text input field.
- Status:** A dropdown menu with 'None' selected.
- Product:** A dropdown menu with 'None' selected.
- FTO Compliance Rating:** A dropdown menu with 'None' selected.
- Owner:** A dropdown menu with 'System Admin TF' selected.
- Filing Date:** A text input field.
- Group:** A dropdown menu with 'None' selected.
- Docket:** A dropdown menu with 'None' selected.
- Business Unit:** A dropdown menu with 'None' selected.
- Business Unit:** A text input field.
- Primary Inventory:** A text input field.
- Search Person:** A text input field.
- Search Other Matters:** A text input field.
- Comments:** A text input field.

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

Add Group, Division and Business Unit in Other Matter

The users can categorize the Other Matter record with Group, Division and Business Unit.

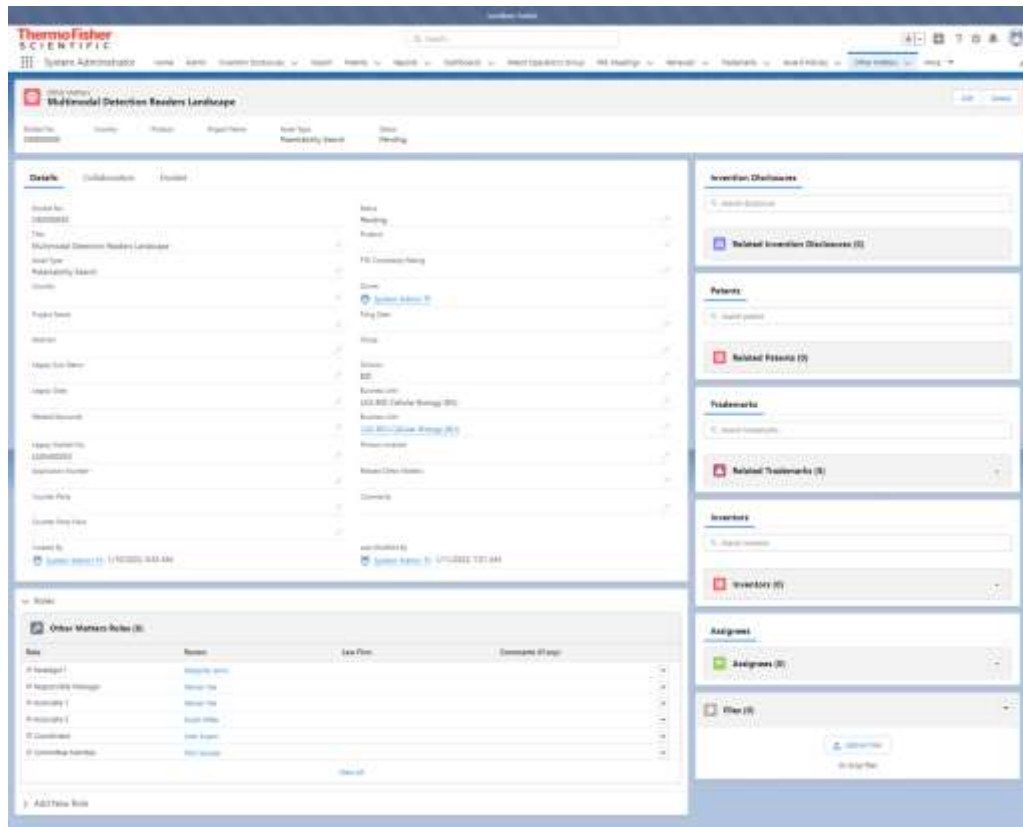


The screenshot displays the 'Add Group, Division and Business Unit in Other Matter' form. The form is divided into two panels. The left panel contains the following fields:

- Status: --None--
- Product: --None--
- FTD Complexity Rating: --None--
- Owner: System Admin TF
- Filing Date: [Calendar icon]
- Group: AIG
- Division: CMD
- Business Unit: AIG-CMD-AAT-GC/GCMS Milan (BU)
- Primary Inventor: Search Inventor...

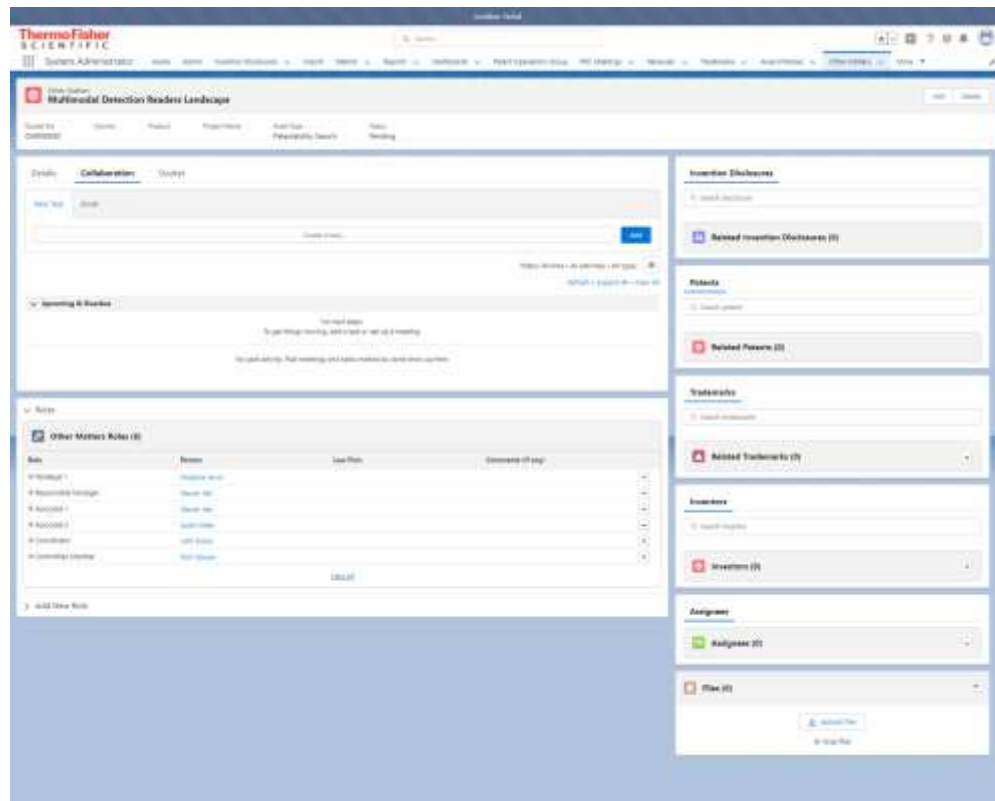
The right panel shows a search bar with the text 'AIG, Search this list...' and a list of results below it. At the bottom of the left panel are 'Save & Close' and 'Save' buttons.

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



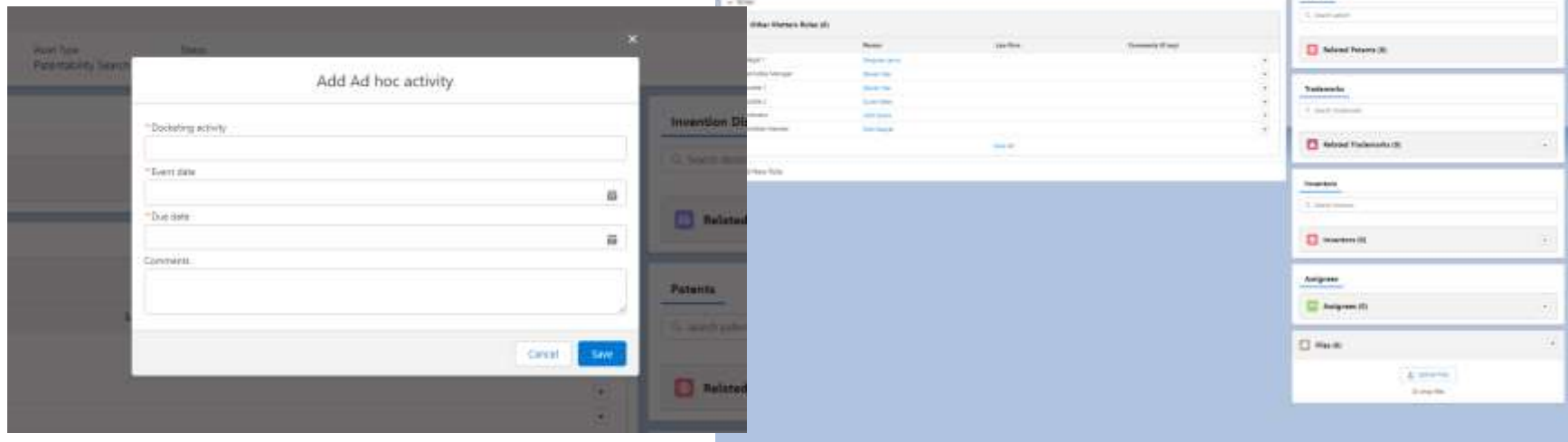
Collaboration

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



Docket Activity

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



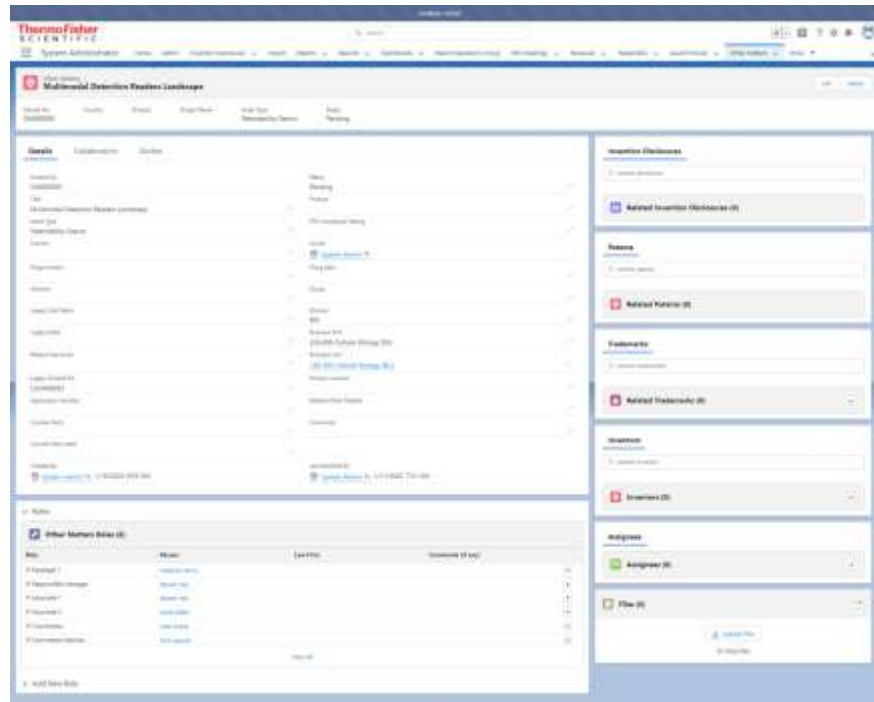
Add Associated Records and Users

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

1. Invention Disclosure
2. Patent
3. Trademark

They can also add users who are :

1. Inventors
2. Assignees



1

2

3

4

5

Roles

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

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





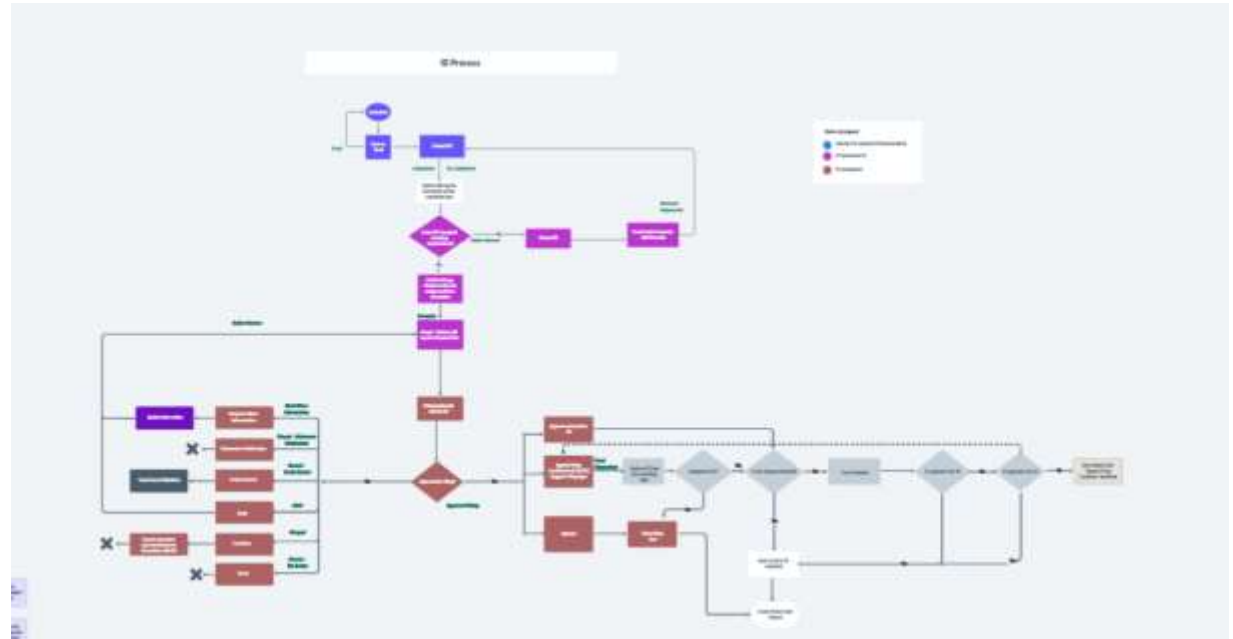
Appendix

1. ID status
2. ID Workflow
3. Roles and Permissions Matrix

Appendix

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

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



Roles and Permissions Matrix

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



Thank you.

