# Symphony IPMS v3.6

## User Guide - Business User

Last Updated: October 2022

## About the Document

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

The User Guide enables the Business Users of an organization to manage the lifecycle of a Trademark through Symphony. This includes coordinating the workflows for creating a search project, Giving the instruction for search, Mark record access, and Trademark record access, provide recommendations for dispute and opposition.

**Note**: Terms like TM Business User/Business User/Product manager are used interchangeably to reflect the functions performed by a Business User profile.

## Revision History

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

# Table of Contents

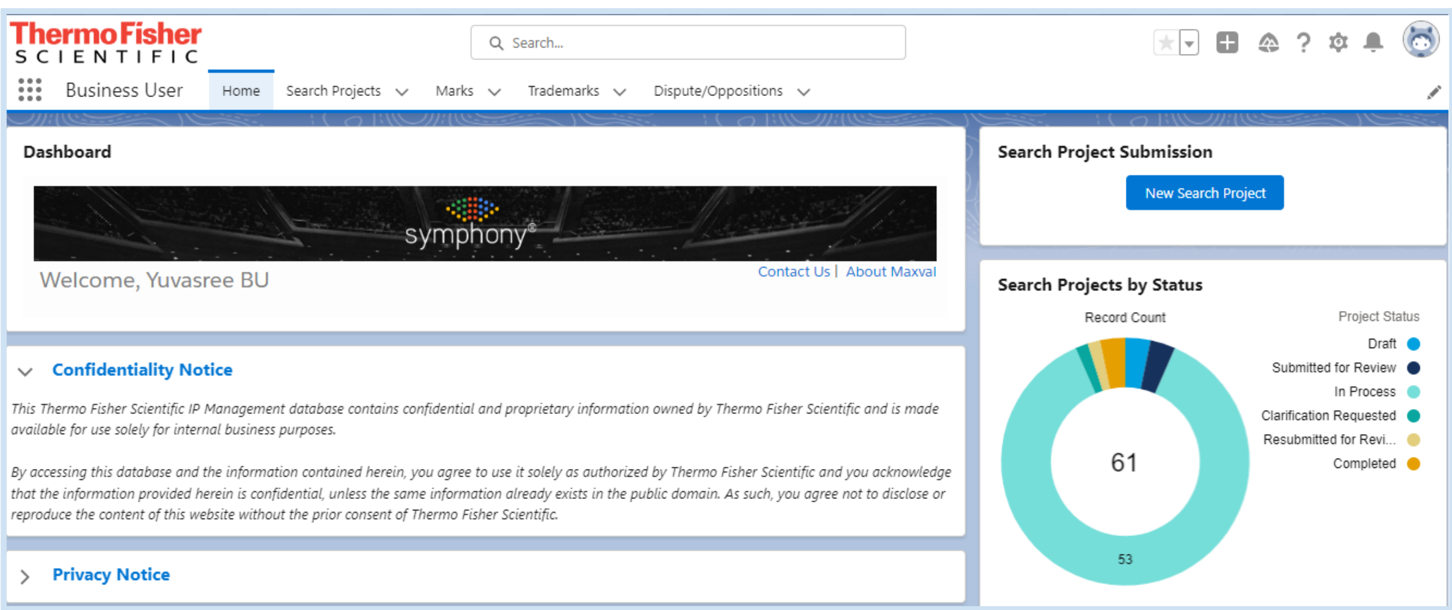
# Introduction

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

Symphony allows Business user to create a search project, Giving instructions for search, Mark record access, and Trademark record access, and providing recommendations for dispute and opposition.

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

- Home
- Search projects
- Mark
- Trademark
- Dispute and Opposition



# Home

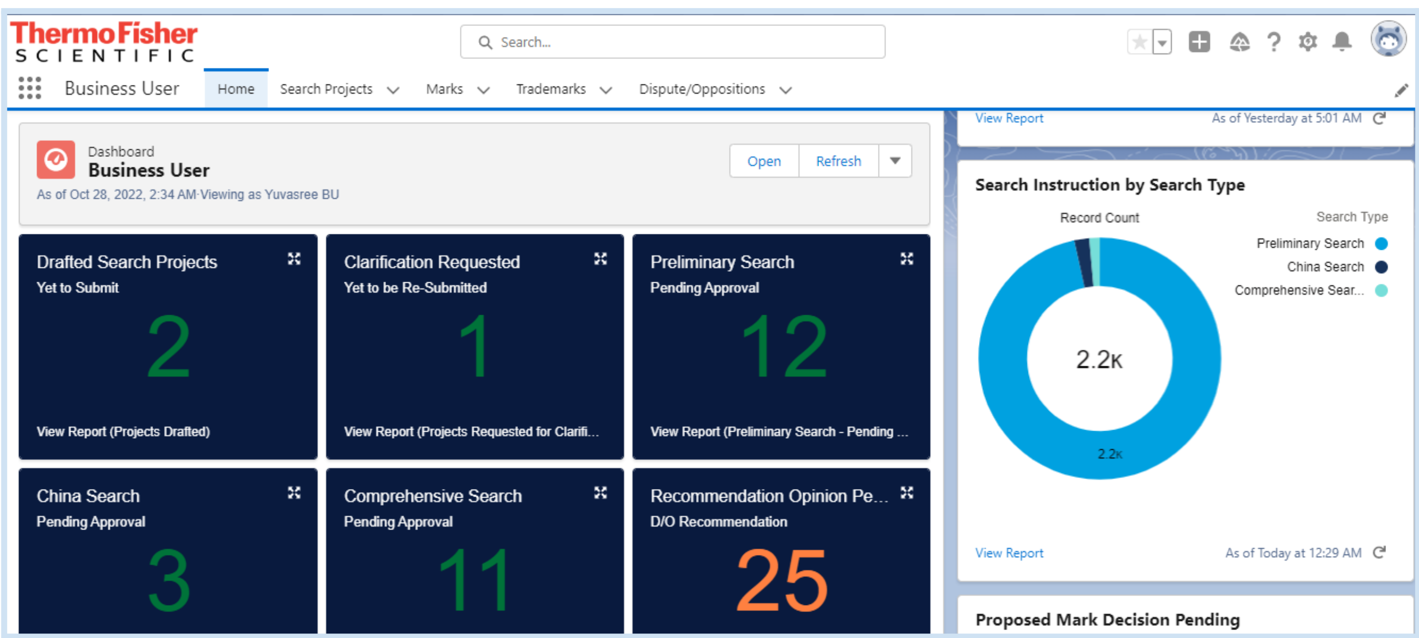
The ‘Home’ button leads the Business User to the homepage that displays a snapshot of all the records within the portfolio. The homepage is set for the organization and cannot be modified by individual users.

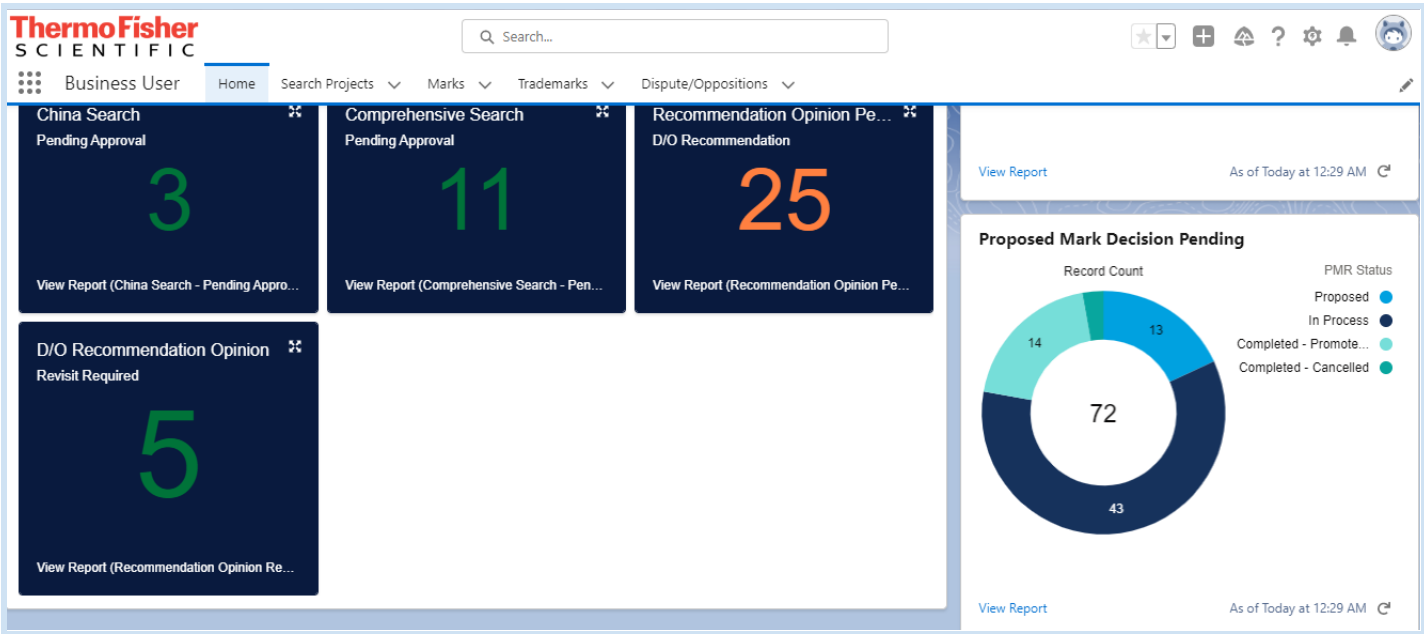
Business Users can access the following from the homepage:

a. Dashboards
b. Reports
c. Search Project Submission

## A. Dashboards

The Business User can access the dashboards on their homepage with different graphs and status updates for Drafted search projects, Clarification requested, Preliminary search, China search, comprehensive, Recommendation opinion pending, Dispute and opposition recommendation etc. These dashboards are dynamic and change as per the logged-in user.





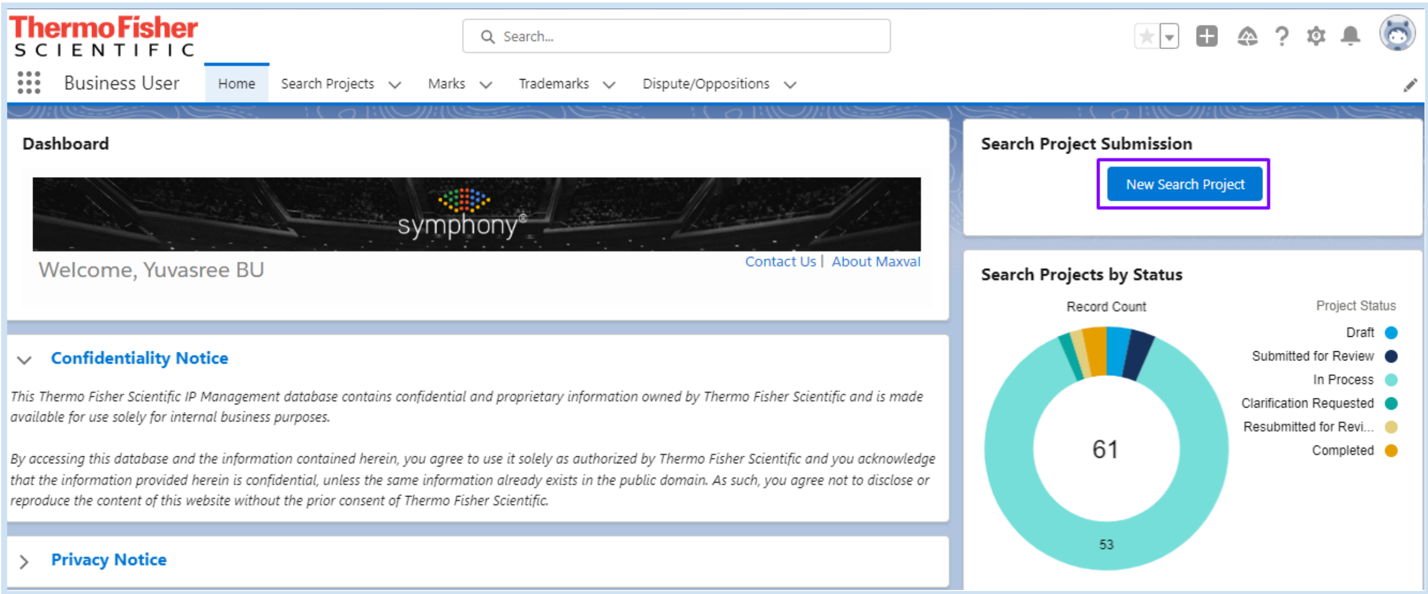

## B. Reports

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

1. Search Projects by Status
2. Search Instruction by Search Type
3. Proposed Marks decision pending.

## C. Search Project Submission

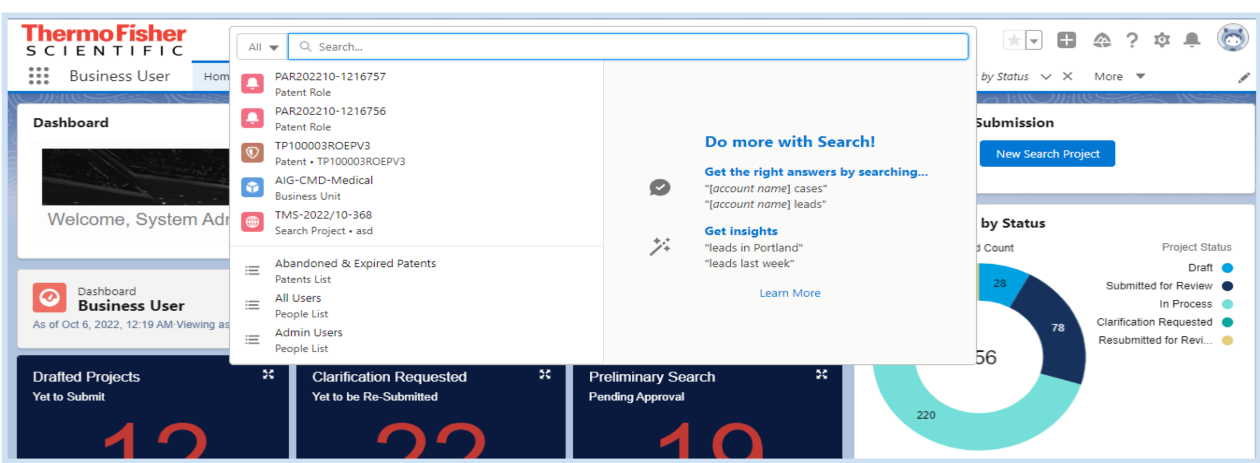
Business users can click on “**New search project**” and fill out the search request form by filling up the details.



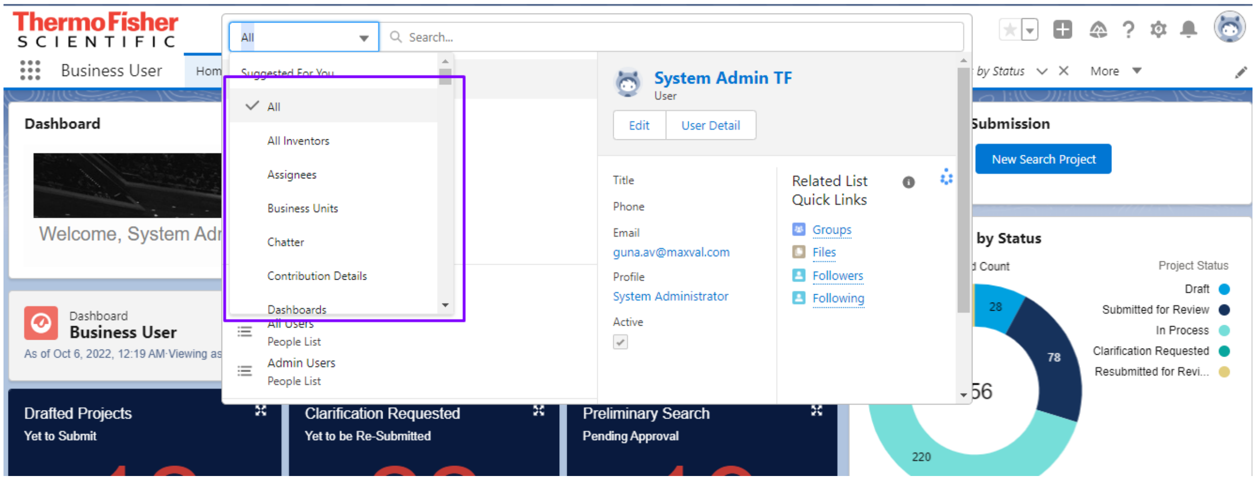

# Global Search

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

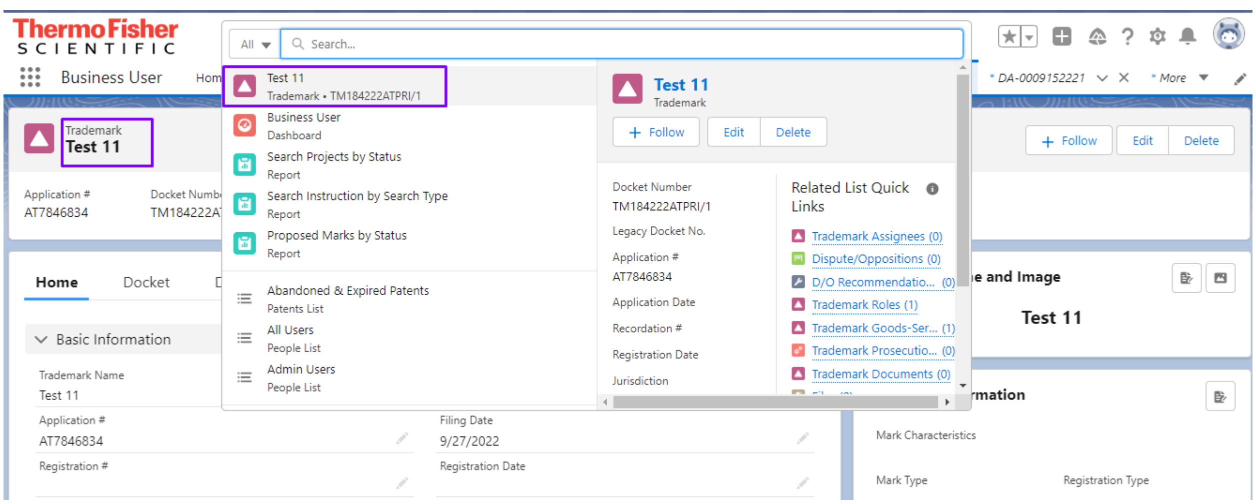
1. Provide the File number/keywords in the global search box. Note that the Symphony docket number, the legacy docket number, the Proposed Mark Ref., Trademark No., etc. are all searchable in this search box.




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

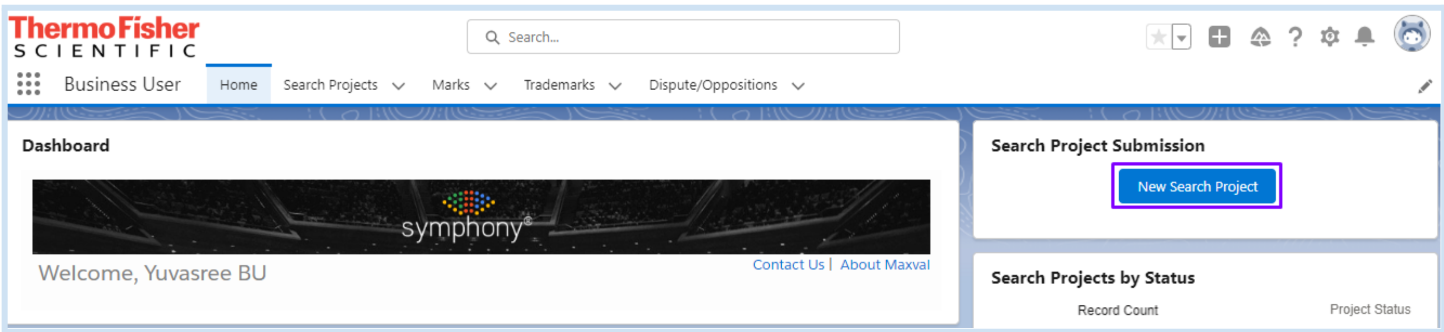



3. Once the input is provided, wait for the search results.

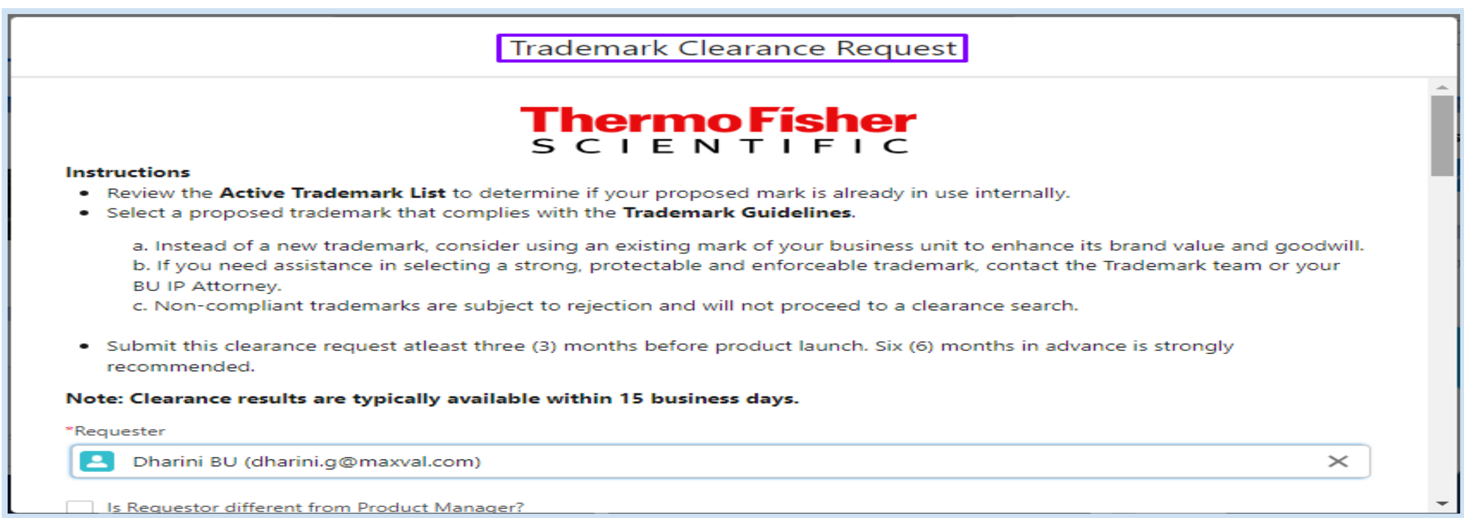


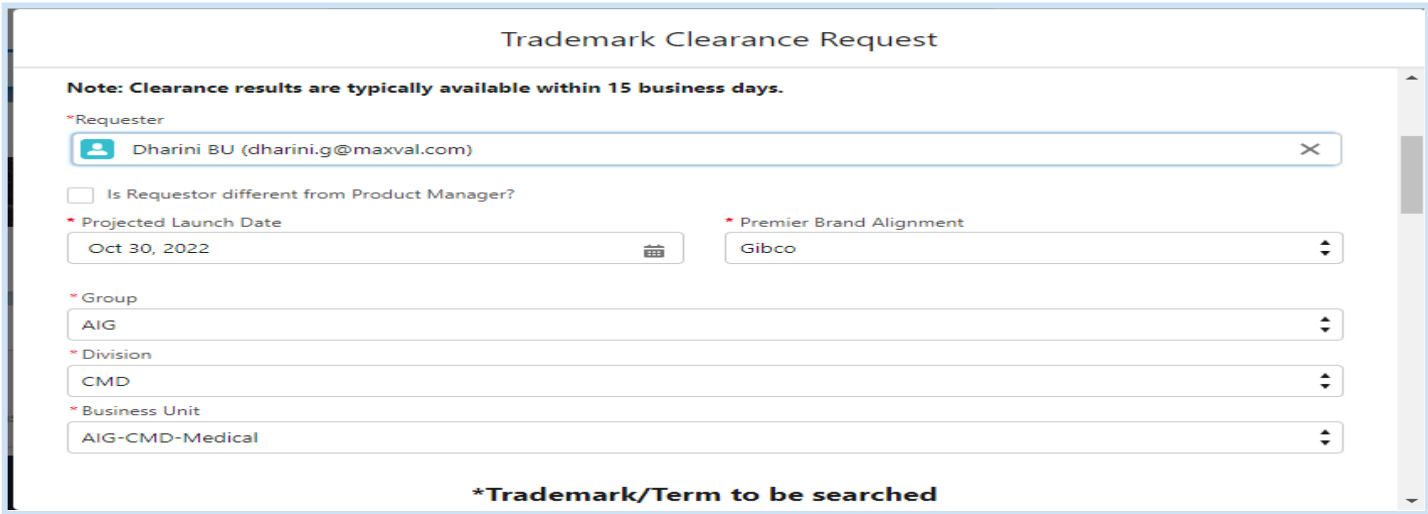
# Search Project

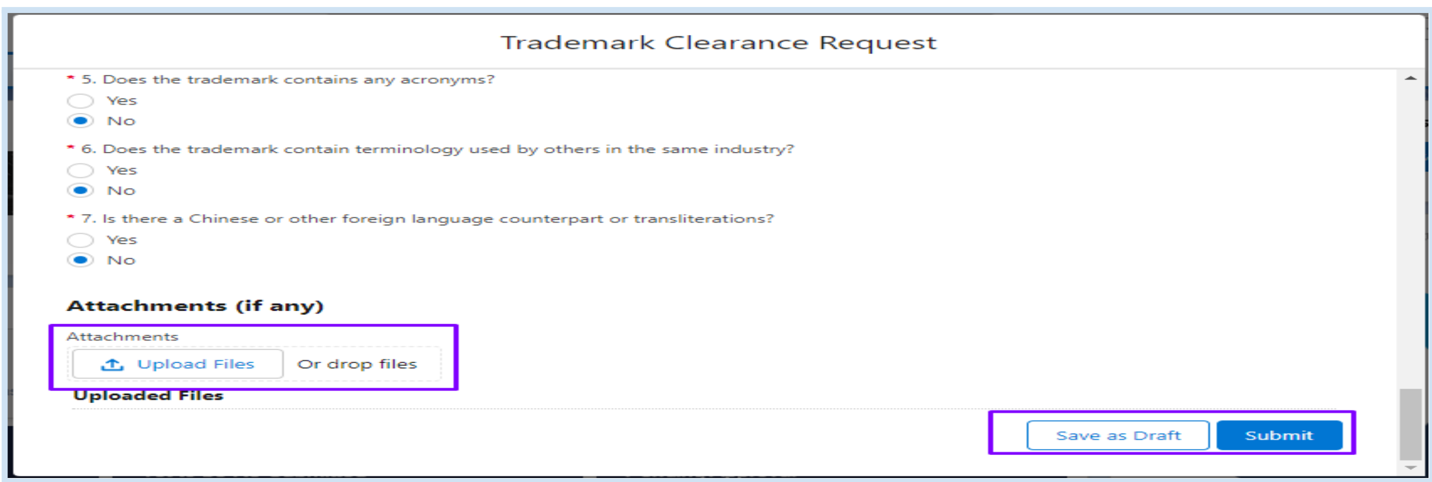
The section allows Business Users to create a “**New search project**”, Business users can access this section from the “**Home**” Tab, It’s the right-top corner button of the home page.




Once the business user clicks on the button, the Trademark clearance request form will pop up, user can fill the form and add the attachment to it and “**Save as Draft**” or “**Submit**” the form for paralegal review.

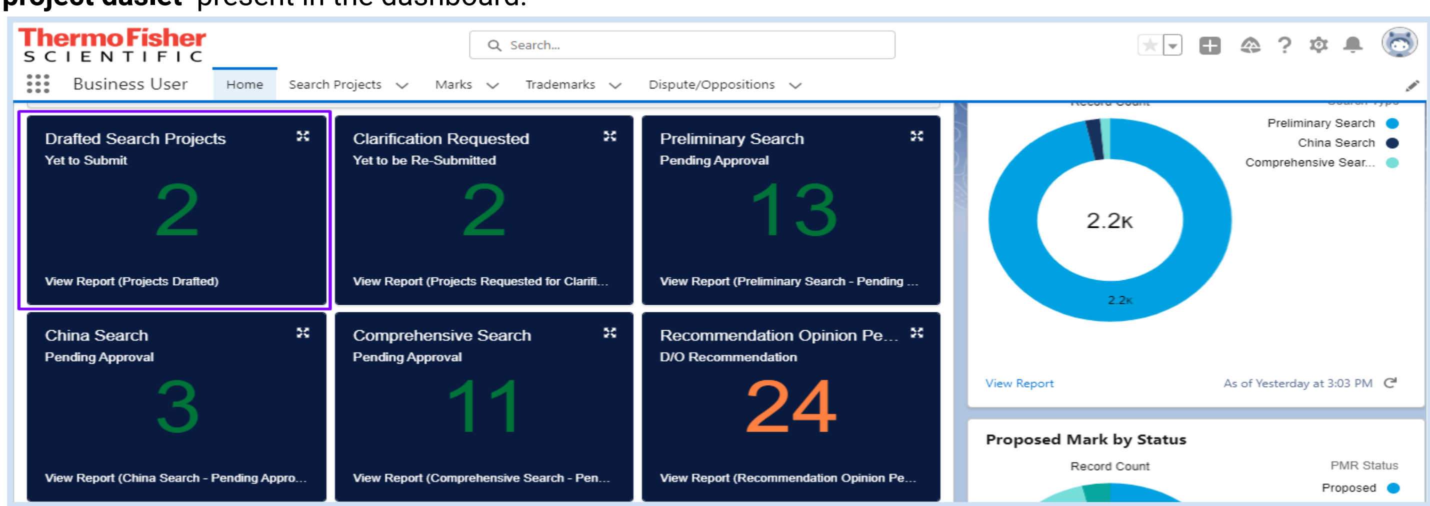




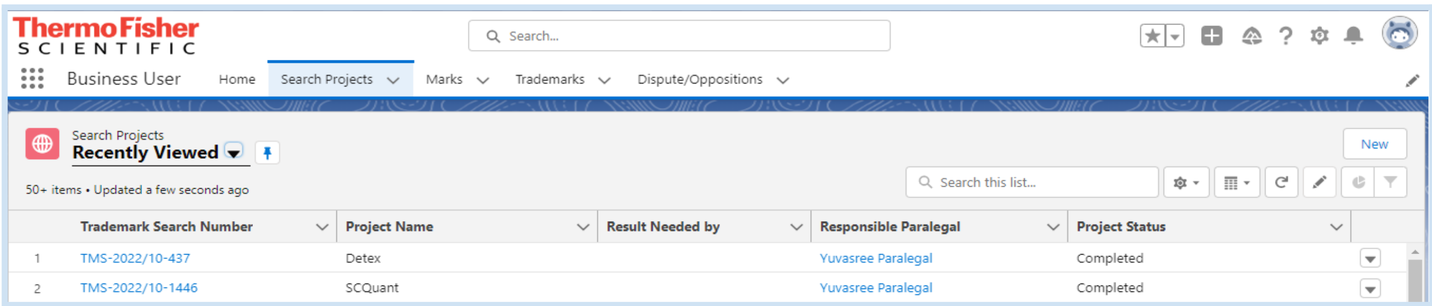

## Draft Search Project

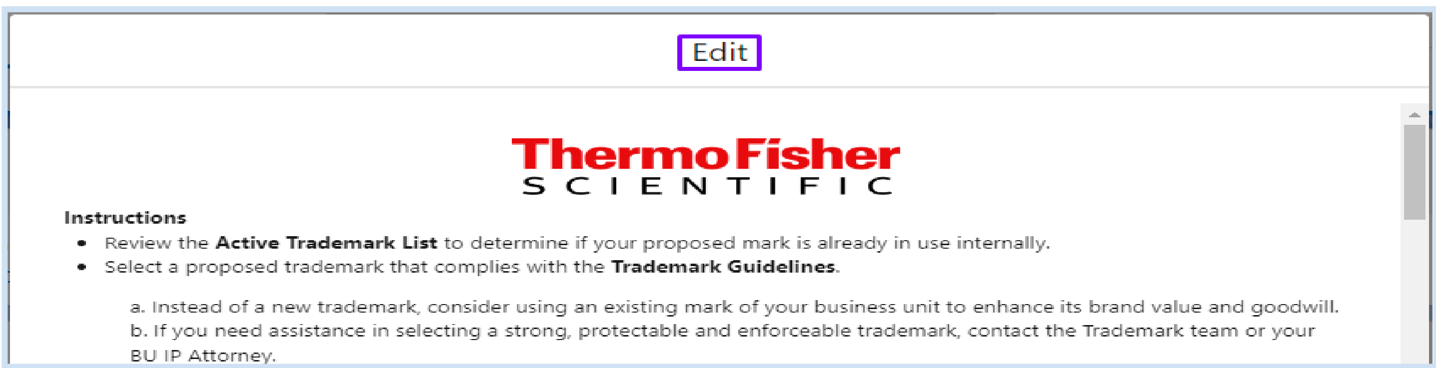
Business user can save the search request form as a draft, and can access the form later from the **'Drafted search project daslet'** present in the dashboard.

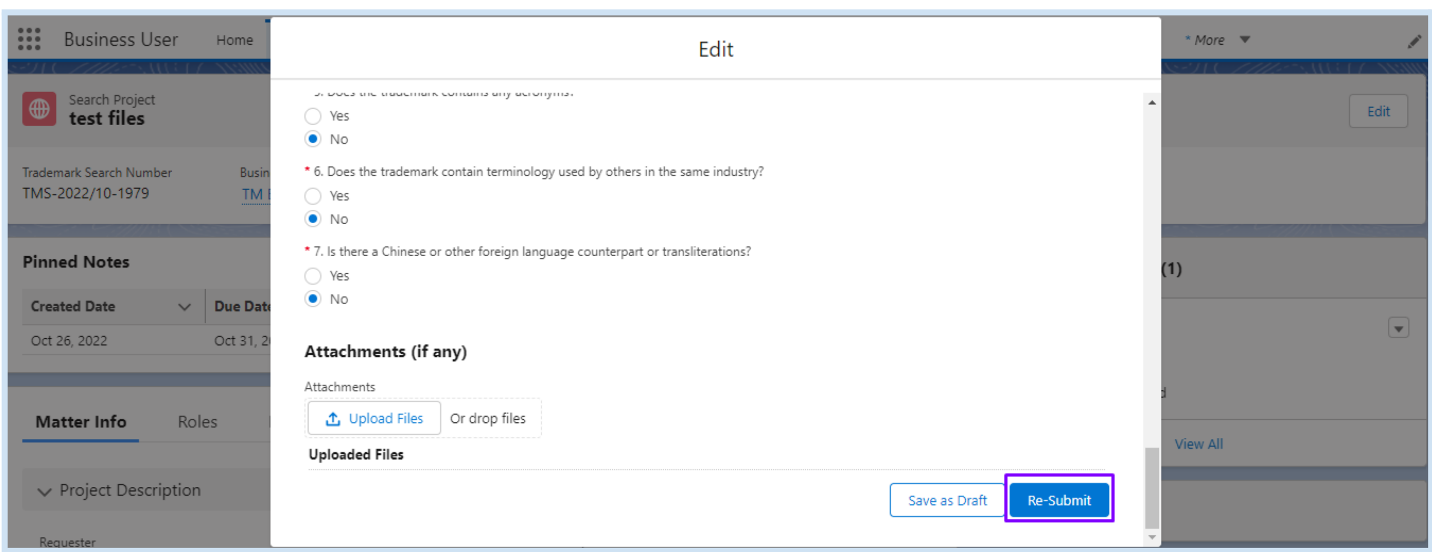


Also Business user can access the drafted search project from “List View” so that he/she can update the form and submit it.

**List View**




Once the search request form is Re-submit by the Business user.

*****Note:** An email should be triggered to the TM IP Responsible manager, and TM IP Paralegal for informing search project submission.*

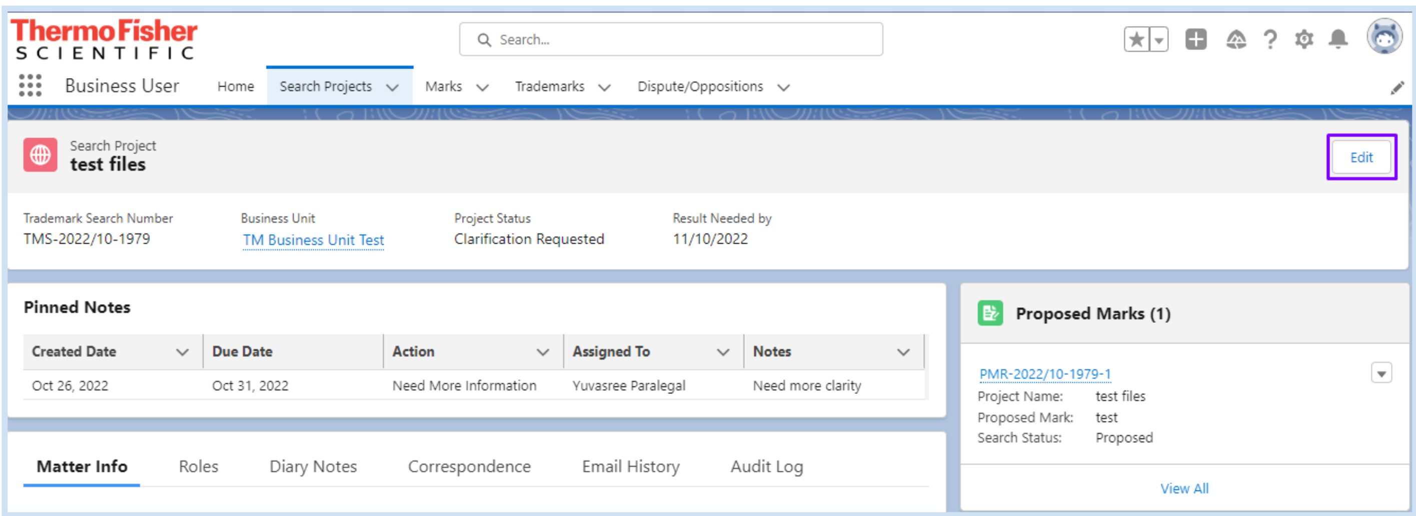
This form goes to the paralegal for review and if the paralegal requires more clarification, he/she can re-send this form to the Business user for asking the required information.

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

## Clarification Requested

Once the Business user receives the email and the record link, he/she can click on the link and update the search request form as per the paralegal's request.

The business user can go to the "**Edit**" button on the top right corner, update/provide the required information, and re-submit the form for paralegal review.

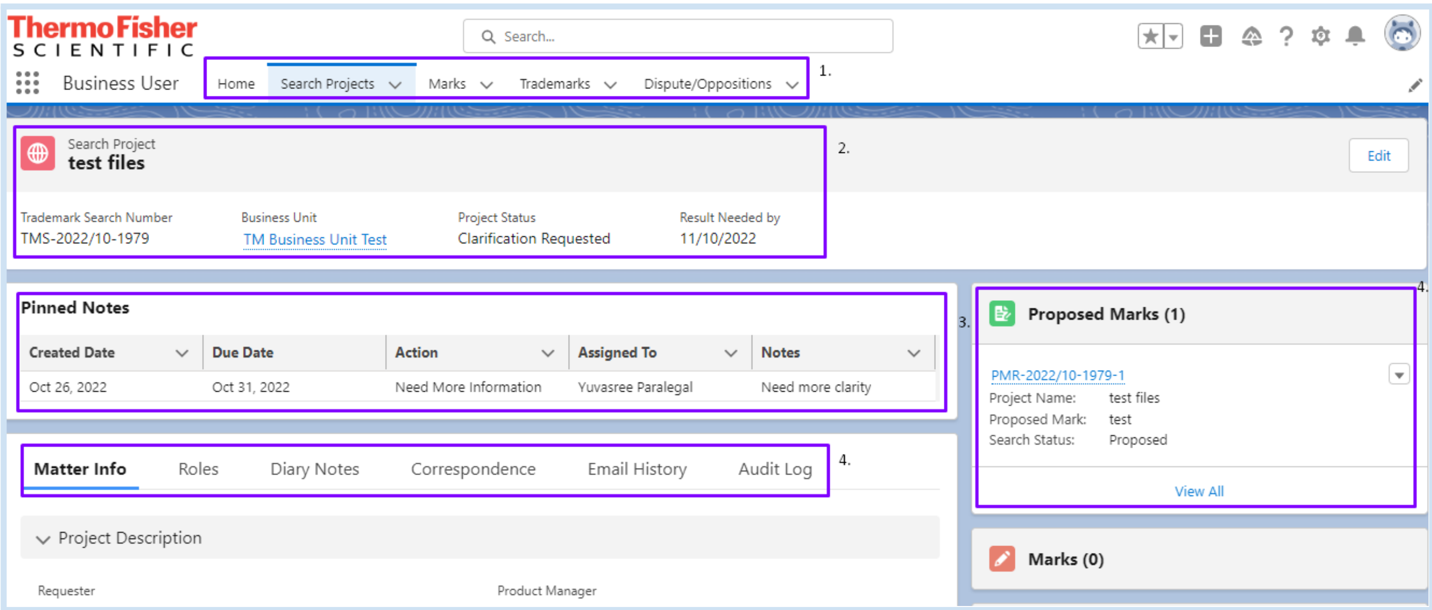



****Note:** An email should be triggered to the Business user, TM IP Responsible manager and TM IP Paralegal for informing search request form re-submission.*

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

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

# Page Layout



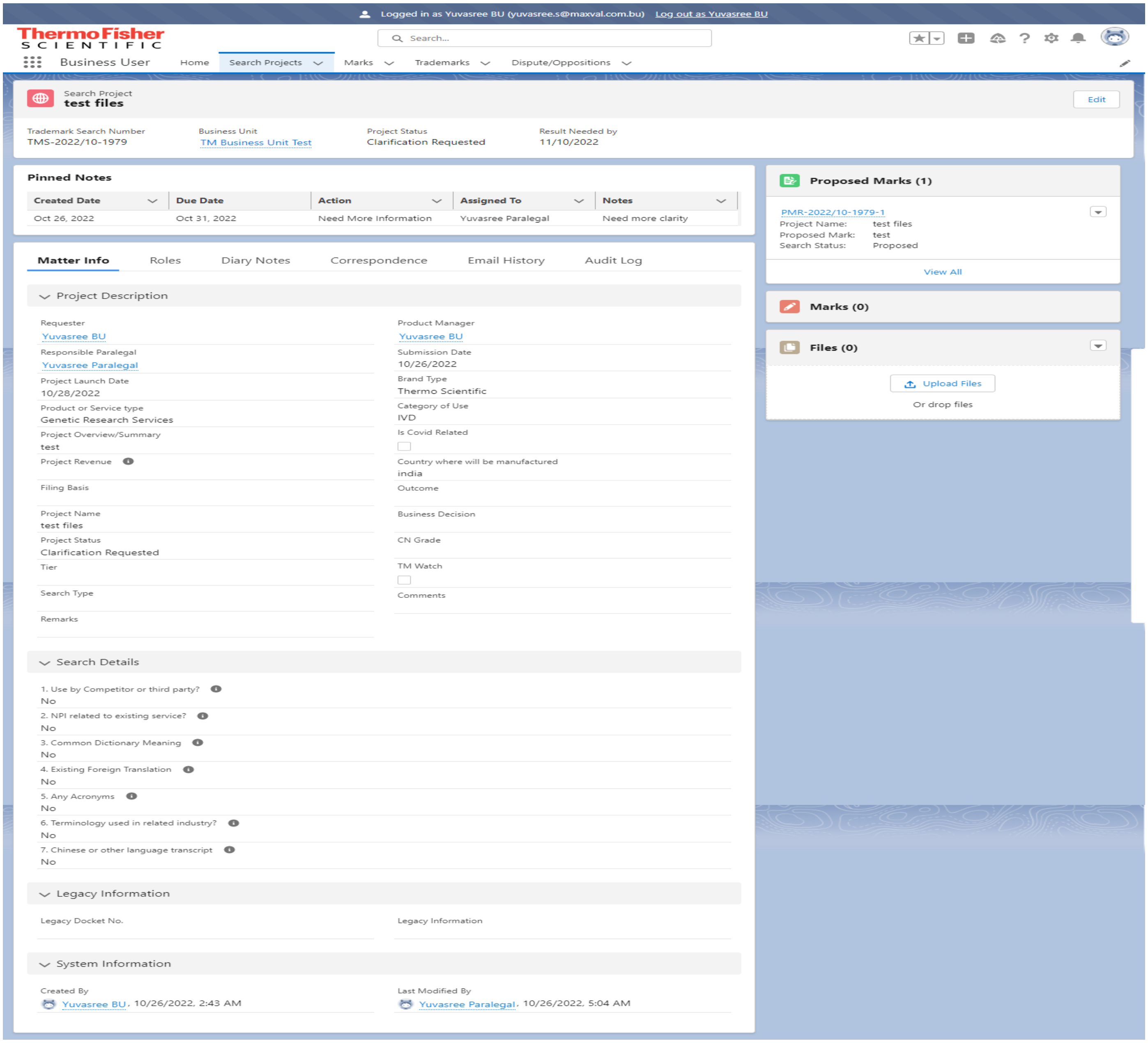

i. **Tabular View:** In the asset page at the top all the tabs are arranged in the sequence where the Business user can access any record from there. It consists of Home, Search project, Mark, Trademark, Dispute, and opposition.

ii. **Compact layout:** In the top Business user can see the Project Name, Trademark search number, Business unit, Project status, Brand type, Result needed by.

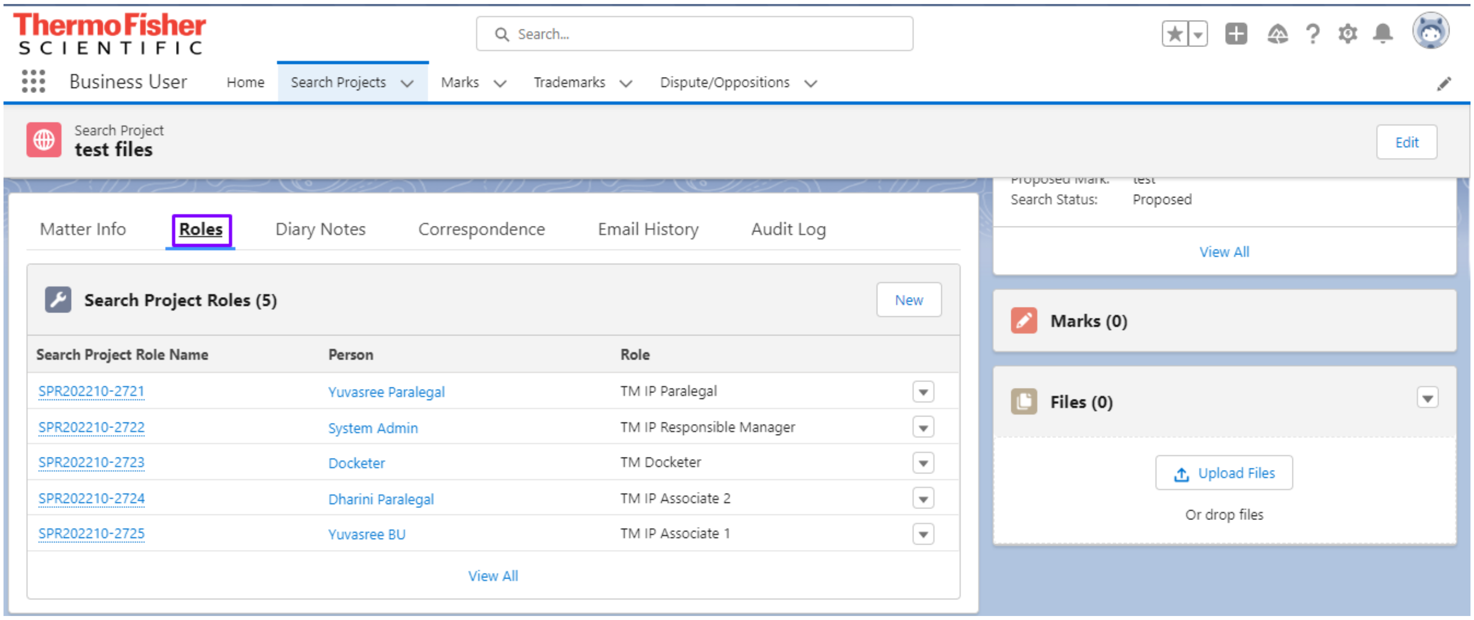
iii. **Pinned Notes:** This section tells the user about the activity/action performed along with the created date and due date with an assigned user.

iv. **Tabular View:** This section includes Matter info, Roles, diary Notes, Correspondence, Email History, and Audit Log.

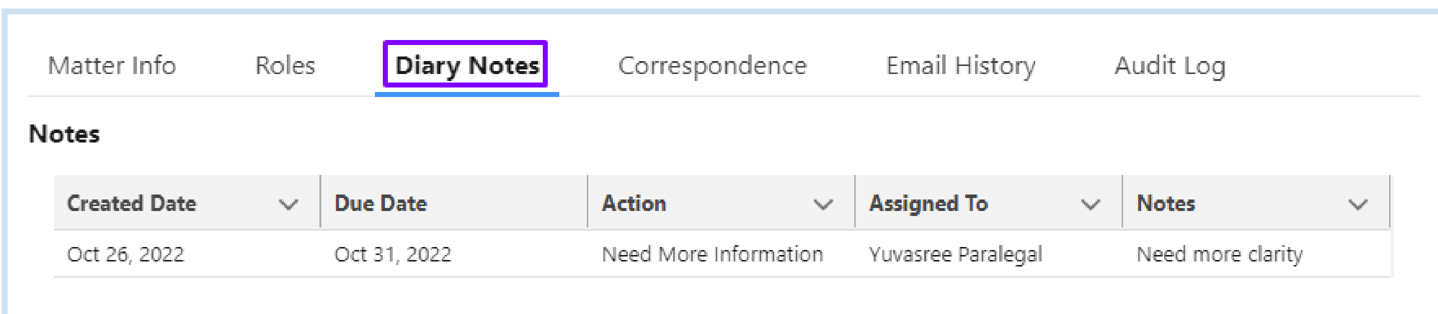
- **Matter Info:** This section includes matter-related information; tell us about the project description, search details, and system information.



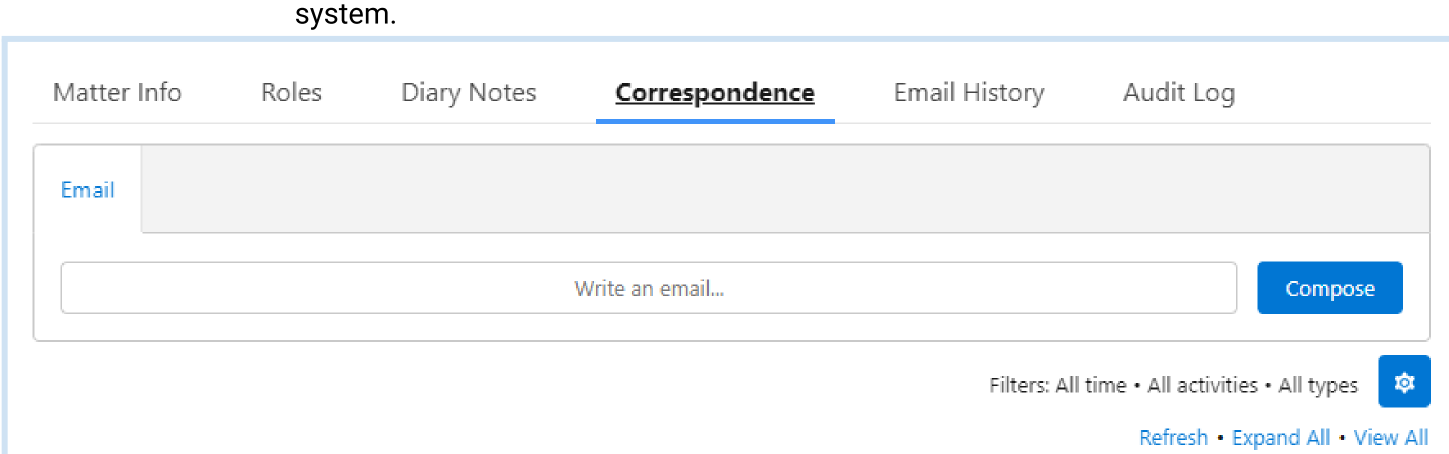

- **Roles:** Provide the information on the key stakeholder for that matter, and the user can add a new role for that matter.



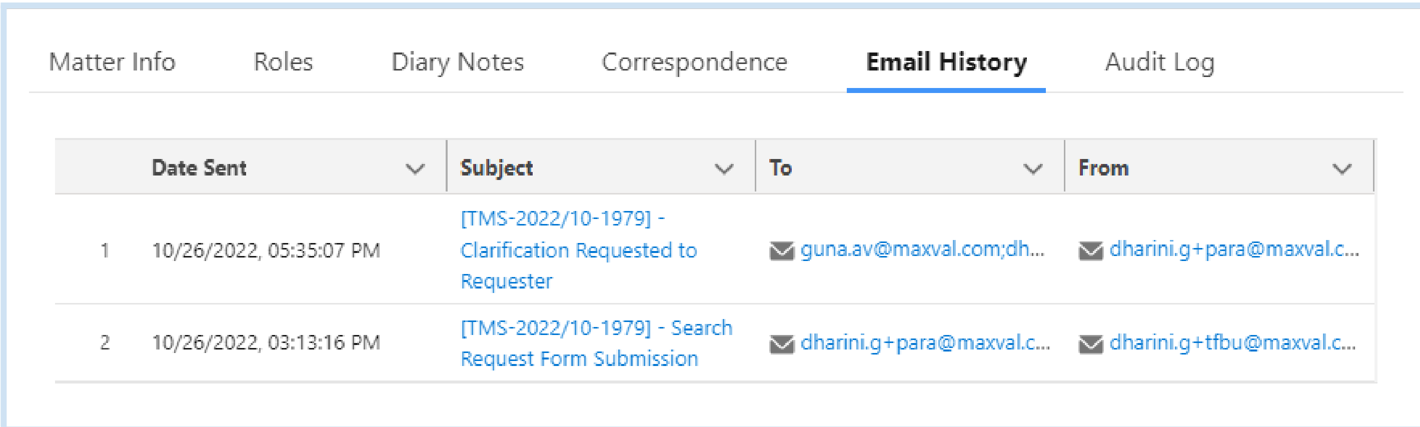

- **Diary Notes:** This section allows the user to read the notes related to that matter.



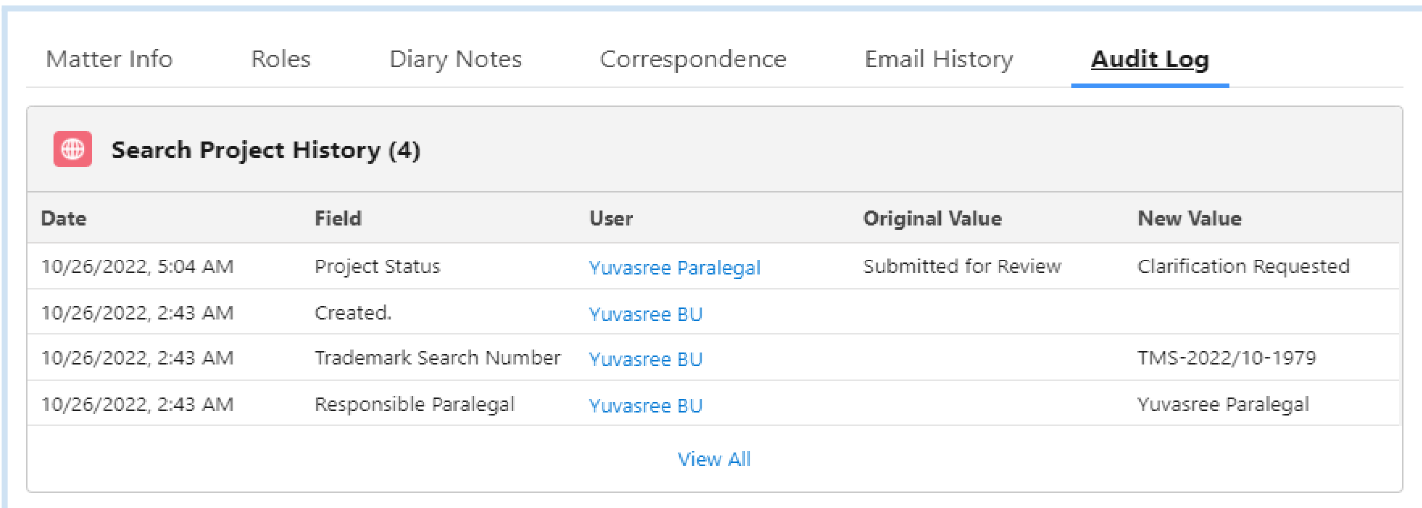

- **Correspondence:** This section allows the user to communicate within and outside the system.



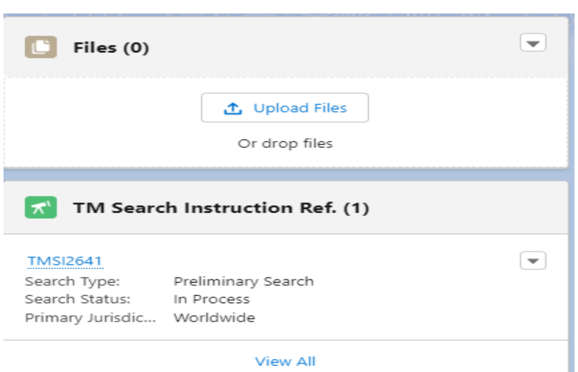

- **Email History:** This section allows the user to track all the history of correspondence.

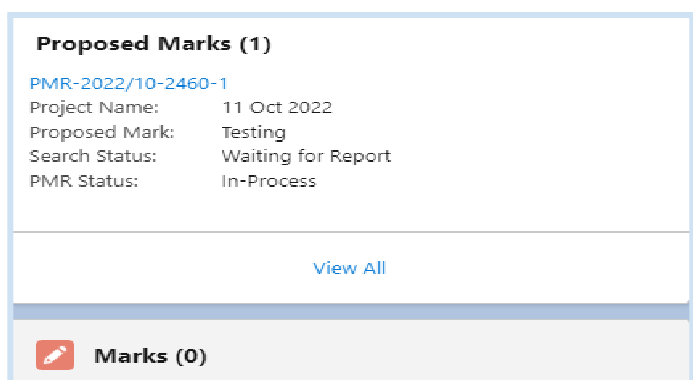



- **Audit Log:** This section allows the user to track the entire log that happens in the system for that matter.




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



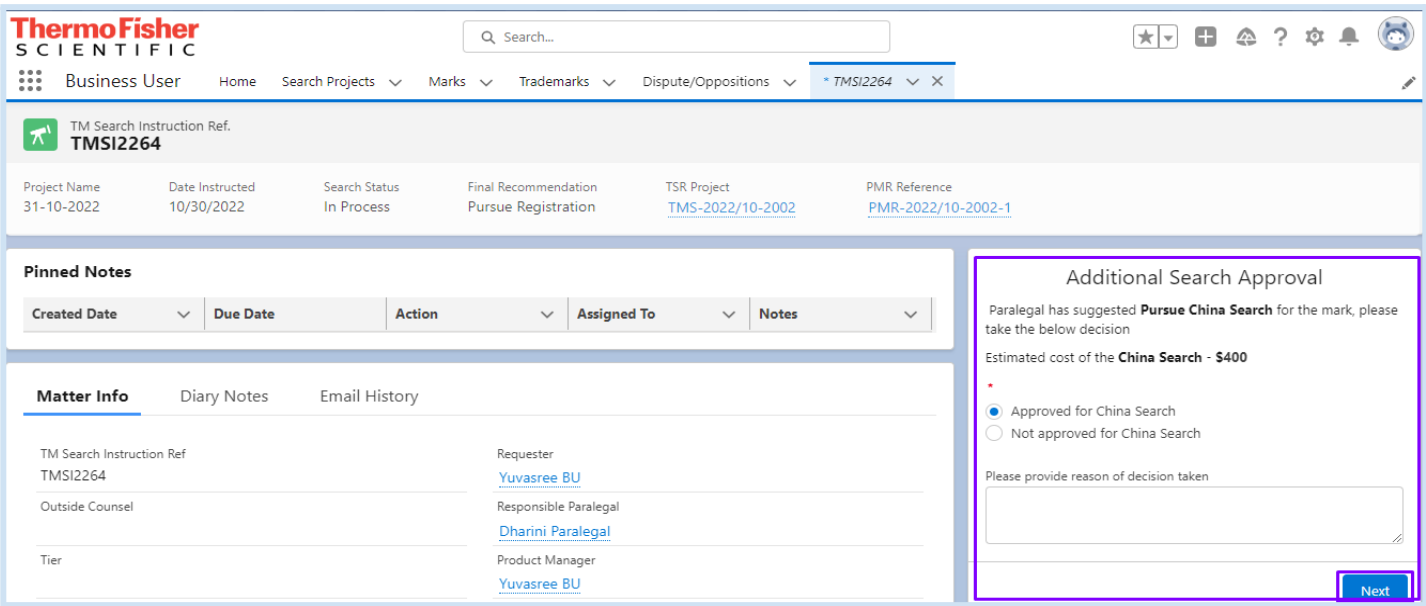



# TM Search Instruction Ref.

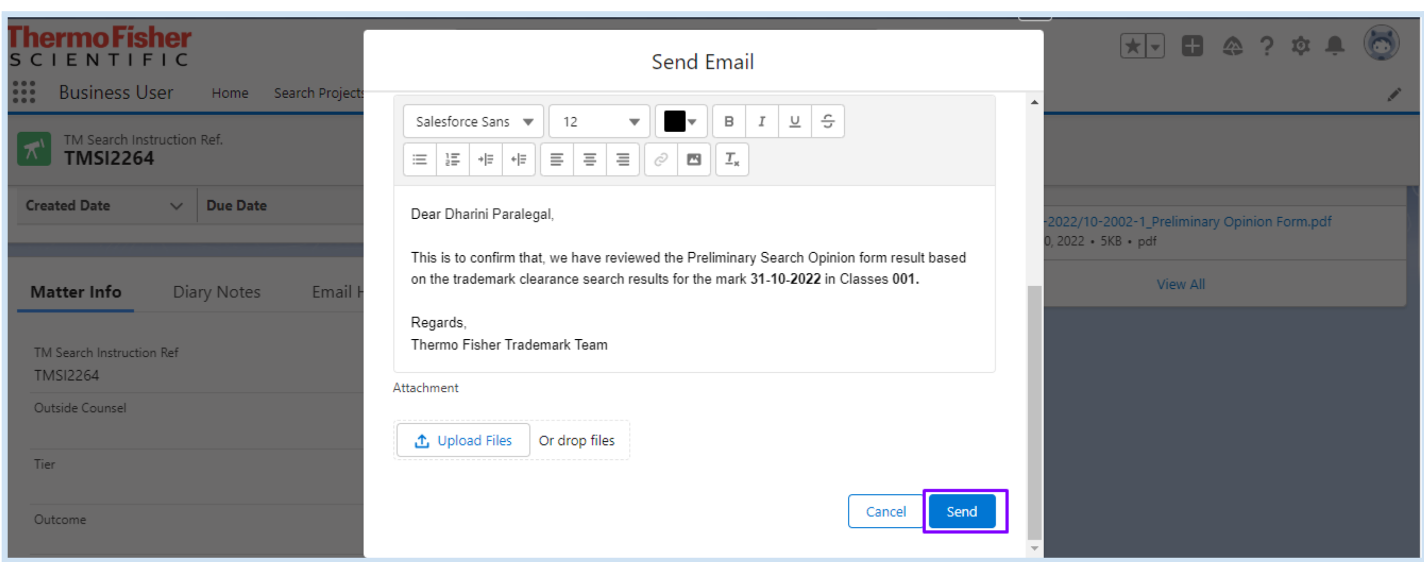
Once the Business user re-submits the search request form, the paralegal reviews it and approves it to proceed with instruct search. Paralegal selects the jurisdiction and assign the instruct search either to 'self' or 'other paralegal'.

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

Business User reviews the Preliminary search result and gives additional approval for the next search by using right hand side widget in TM search instruction record.




****Note:** An email should be triggered to the TM IP Responsible manager and TM IP paralegal to informing about preliminary search approval.*

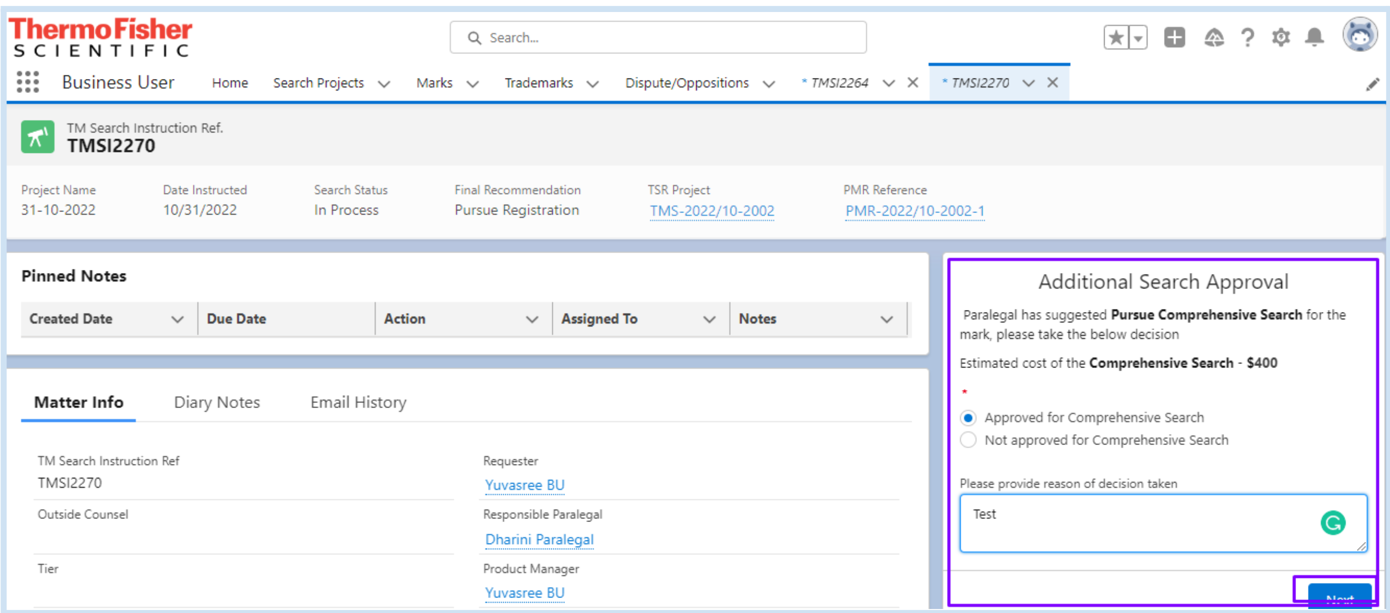


Once the paralegal receives the email along with the record link attached to it, he/she will instruct the Outside counsel (OC) to conduct the china search.

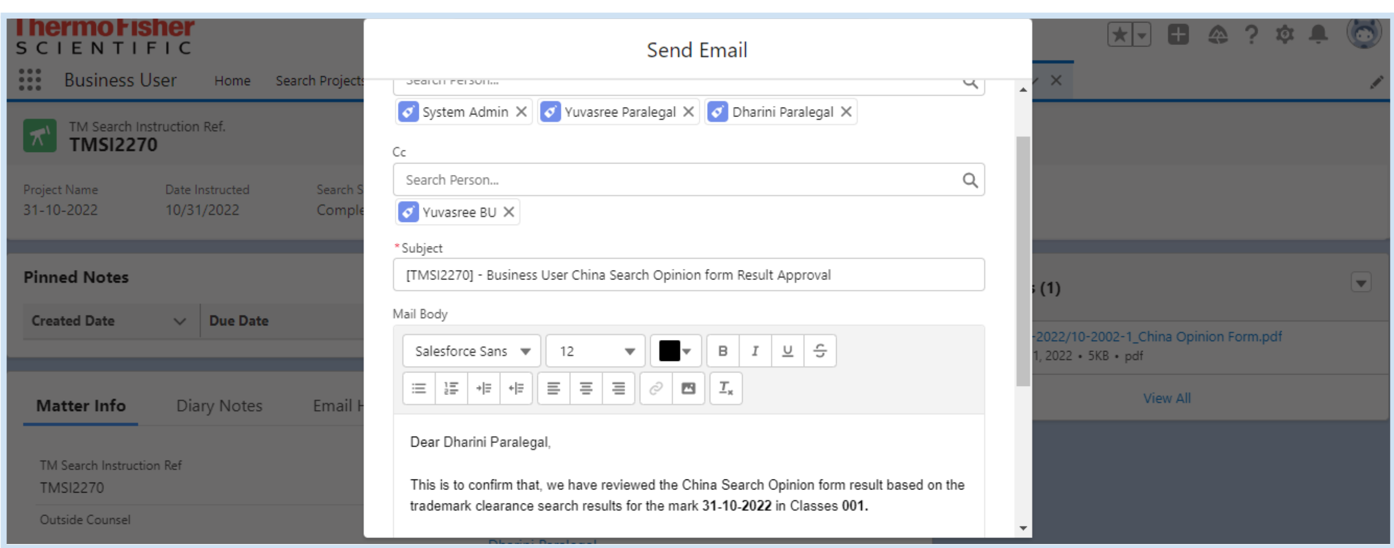
Once the paralegal received the results for the china search from outside counsel, paralegal fills the china search opinion form and submits it for Business user approval.

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

The Business user receives the email along with the record link attached to it, he/she reviews the search result and gives approval for the next suggested search (Comprehensive) from the additional search approval widget in TM search Instruction.




****Note:** An email should be triggered to the TM IP Responsible manager and TM IP paralegal to informing them about china search approval.*

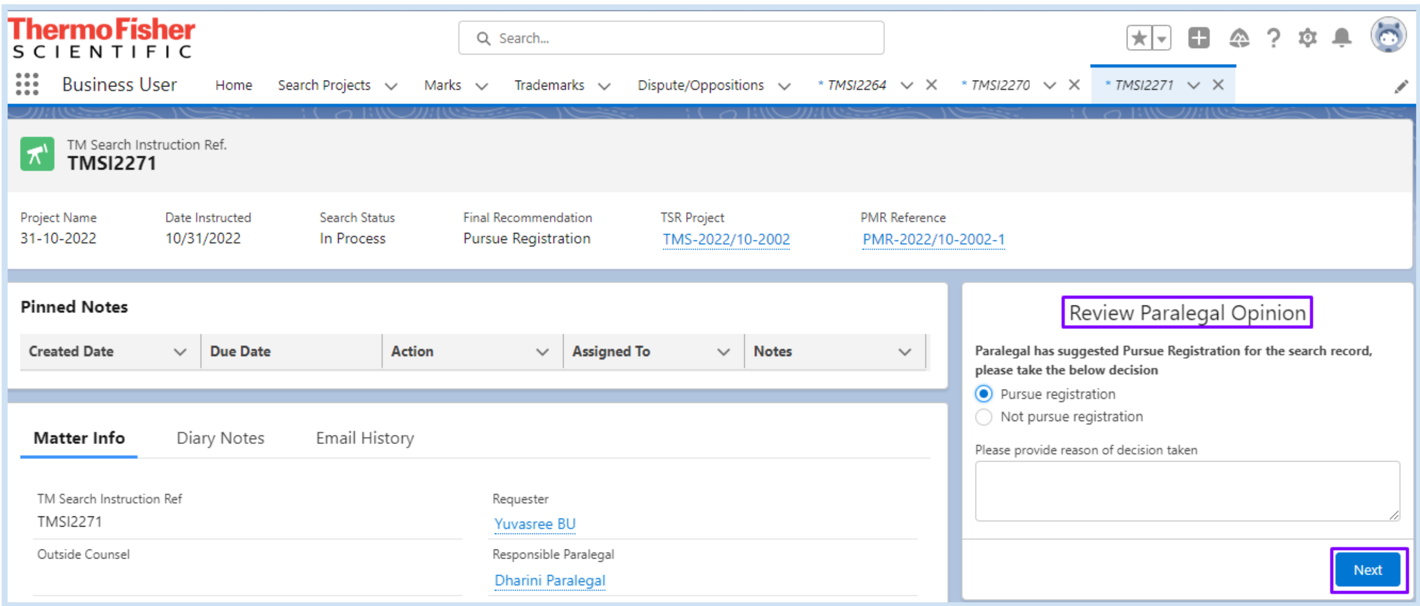


Once the paralegal receives the email along with the record link attached to it, he/she will instruct the Outside Vendor (OV) to conduct the comprehensive search.

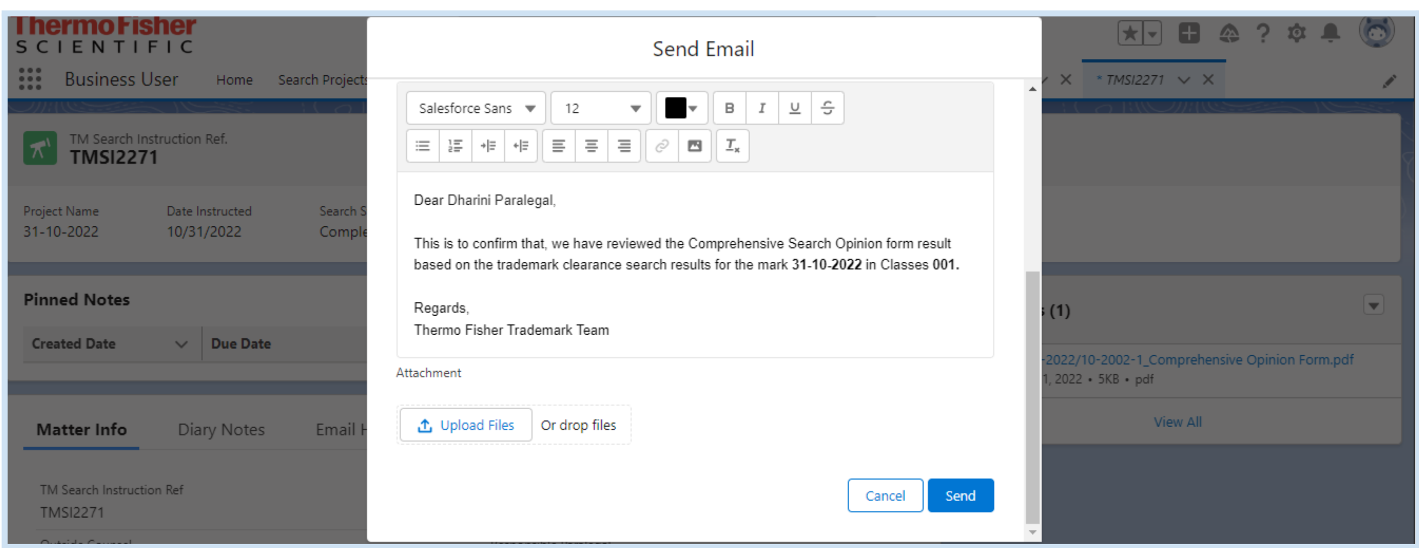
Once the paralegal received the results for the comprehensive search from outside counsel, paralegal fills the comprehensive search opinion form and submits it for Business user approval.

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

Once the Business user receives the email along with the record link attached to it, he/she reviews the search result and gives the approval to pursue registration or not based on the overall search result.



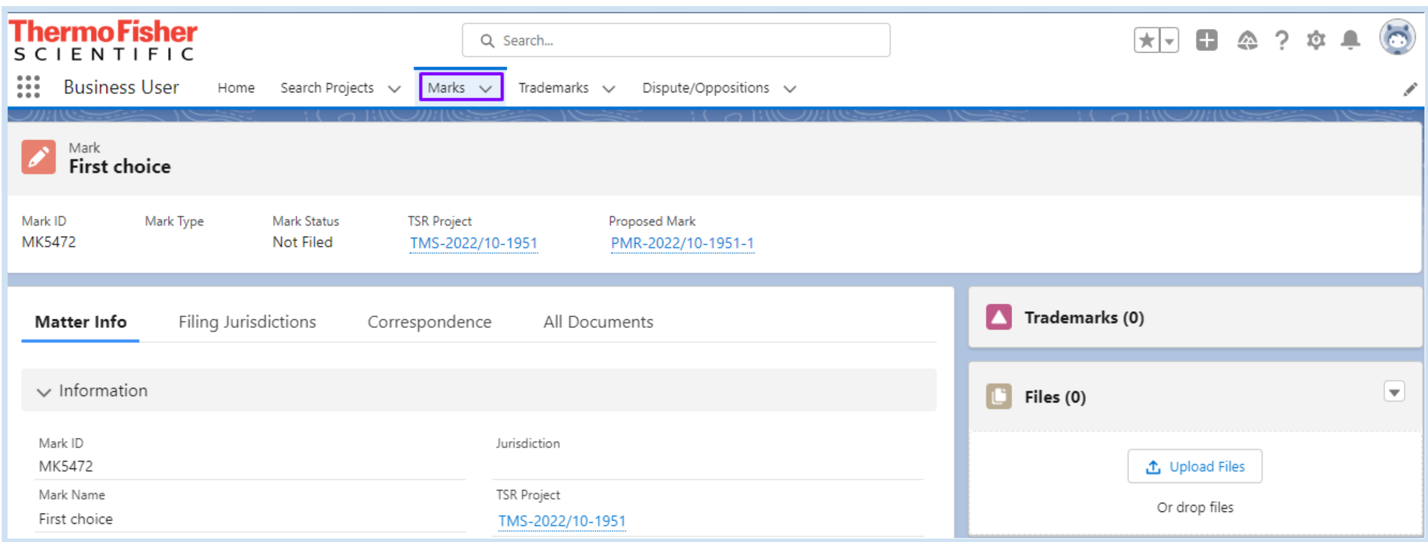

****Note:** An email should be triggered to the TM IP Responsible manager and TM IP paralegal to informing about comprehensive search approval.*



All searches are conducted and the result is reviewed by the Business user, the Paralegal can make a decision on whether to promote a proposed mark to Mark or close the proposed mark based on the search result.

# Mark

Once the mark has been created by the paralegal, Mark record can be accessed through the "**Mark tab**" in the list view as well.




# Trademark

The Business user can access the trademark record created by paralegal through the trademark tab and can view the associated record under the matter info tab.

Logged in as Yuvasree BU (yuvasree.s@maxval.com.bu) Log out as Yuvasree BU

ThermoFisher SCIENTIFIC

Search...

Business User | Home | Search Projects | Marks | Trademarks | Dispute/Oppositions

Trademark
## Test Trademark

| Application Number | Docket Number | Jurisdiction | Case Type | Business Unit | Internal Status |
|---|---|---|---|---|---|
| 444343434 | TM178824USPRI/1 | United States of America | Primary | TM Business Unit Test | Proposed |

Matter Info | Roles | D/O Recommendation | Related | Prosecution History | More

### Basic Information

| | |
|---|---|
| Trademark Name<br>Test Trademark | Publication Date |
| Application Number<br>444343434 | Publication Number |
| Filing Date<br>9/27/2022 | Internal Status<br>Proposed |
| Registration Date | Firm Case # |
| Registration Number | First Use in Commerce Date |
| Asset Type<br>Trademark | Priority Date |
| Case Type<br>Primary | Parent Renewal Date |
| Jurisdiction<br>United States of America | Business Unit<br>TM Business Unit Test |
| Product Manager<br>Yuvasree BU | Group<br>AIG |
| Requester<br>Yuvasree BU | Division<br>CMD |
| First Use Date | Goods/Services at Time of Filing |
| Last Renewal Date | Goods/Services at Time of Registration |
| Next Renewal Date | International Class(es) |
| International Patent Office URL<br>TSDR | Legacy Docket No. |
| U.S Class(es) | Docket Number Family ID<br>178,824 |
| Docket Number<br>TM178824USPRI/1 | Project Launch Date |
| Legacy Information | Site of Manufacturing |
| Priority Number | TM Watch |
| Specimen | Abandoned Date |
| In-Licensed | Outcome |
| Tier | Business Decision |
| CN Grade | Remarks |
| Premier Brand | Allowance Date |
| Legacy BU | |

### Status

| | |
|---|---|
| International Patent Office Status | International Patent Office Status Date |

### Personnel

| | |
|---|---|
| Internal Counsel | Internal Paralegal |
| Firm Attorney | Law Firm |
| Business Contact | Outside Counsel |

### Examiner Details

| | |
|---|---|
| Examiner Name | Examiner Law Office |

### Parent Information

| | |
|---|---|
| Parent Application # | International Registration Number |
| Parent Registration # | Parent Registration Date |
| Created By<br>System Admin TF, 10/11/2022, 4:05 AM | Last Modified By<br>Yuvasree Paralegal, 10/26/2022, 10:52 PM |

**Mark Name and Image**

**Test Trademark**

**Mark Information**

Mark Characteristics

Mark Type | Registration Type

Colors Claimed

Description of Design Mark

Translation

**Diary Notes (0)**

**Goods and Services**

**Files (0)**

Upload Files

Or drop files

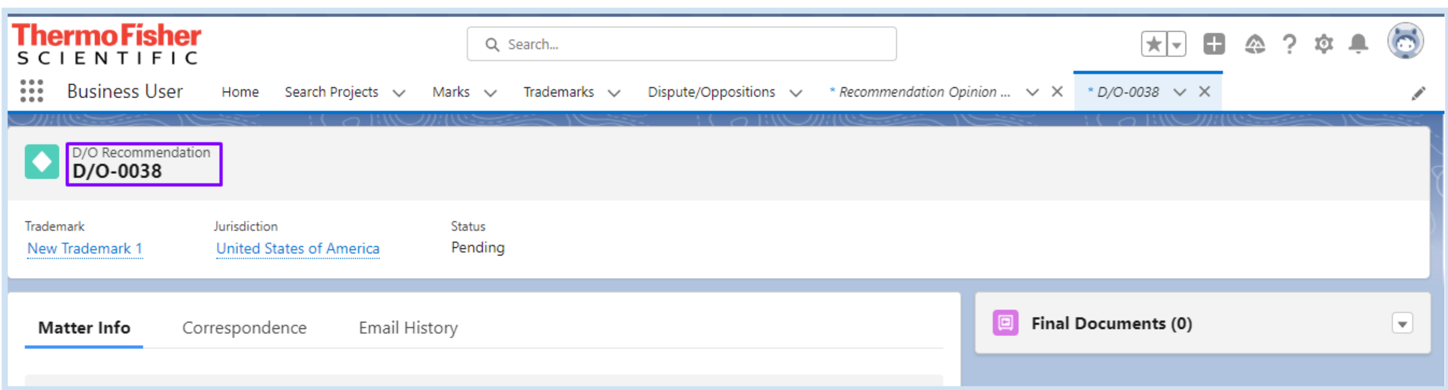
# Dispute and Opposition

The trademark record is created, the paralegal can go to the 'Dispute and Opposition Recommendation section' in the trademark record and click on the 'Request button' to create a new D/O recommendation.

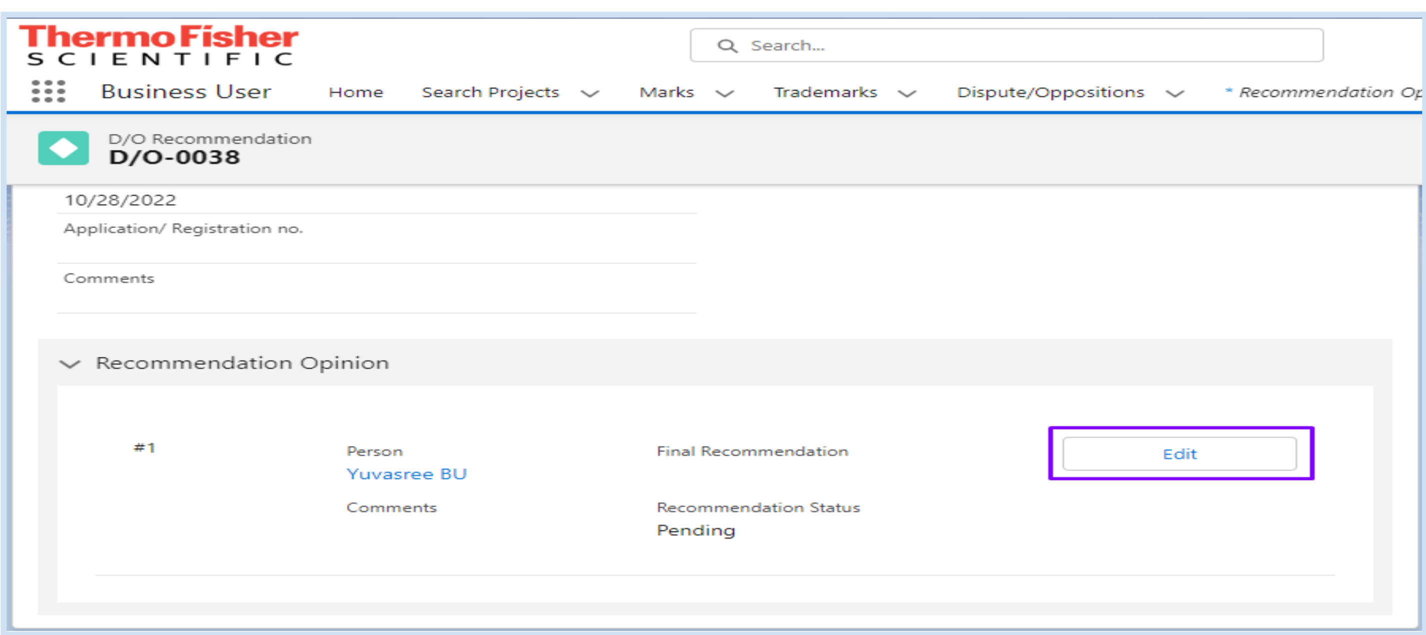
Once the Paralegal has submitted all the details and clicked **'Request'**, the Product Manager/Business user from whom the recommendation has requested will receive an email, and parallelly Dispute and opposition recommendation record is created that serves as a notification for a new D/O recommendation request.

*****Note:** An email is triggered to the Business user/Product manager requesting the Dispute and opposition recommendation.*

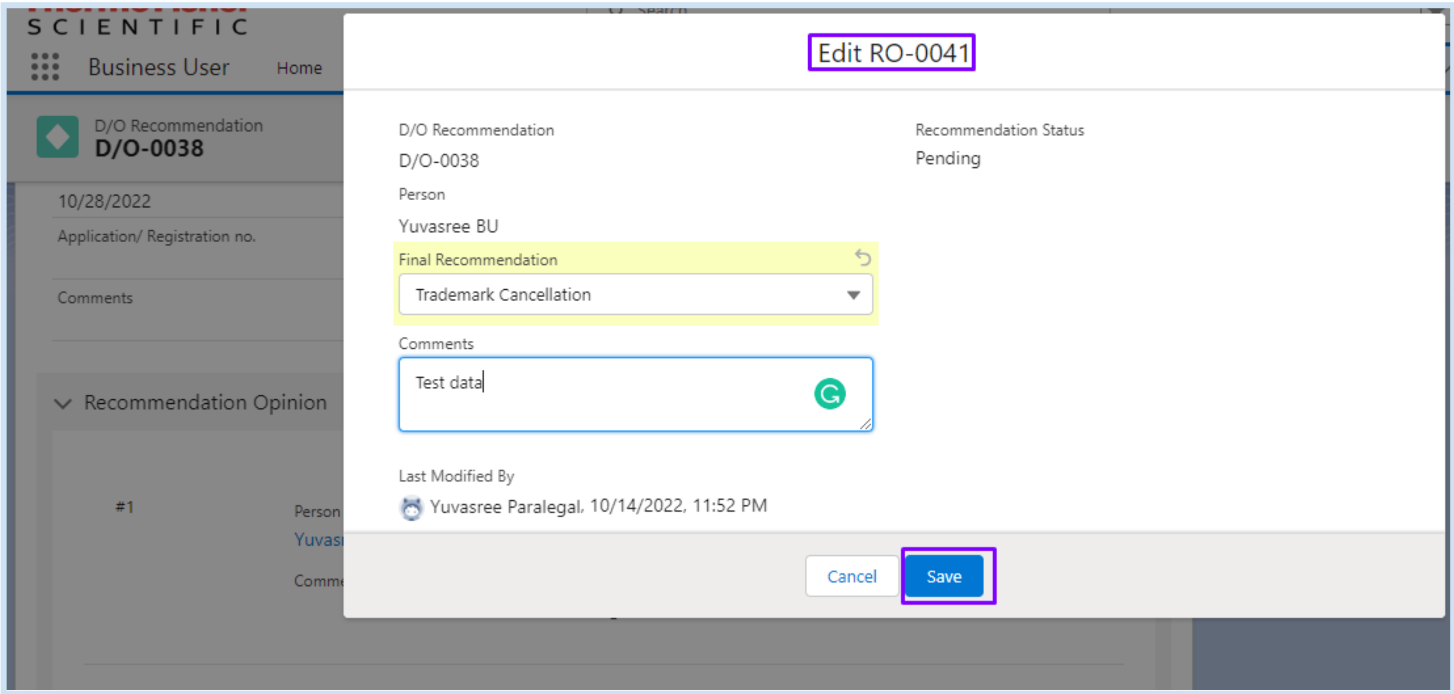
Once the business user receives the Email he/she can see all the details related to **(D/O recommendation, documents attached, and person associated)** from which the recommendation was asked, by clicking the link attached to the email itself.



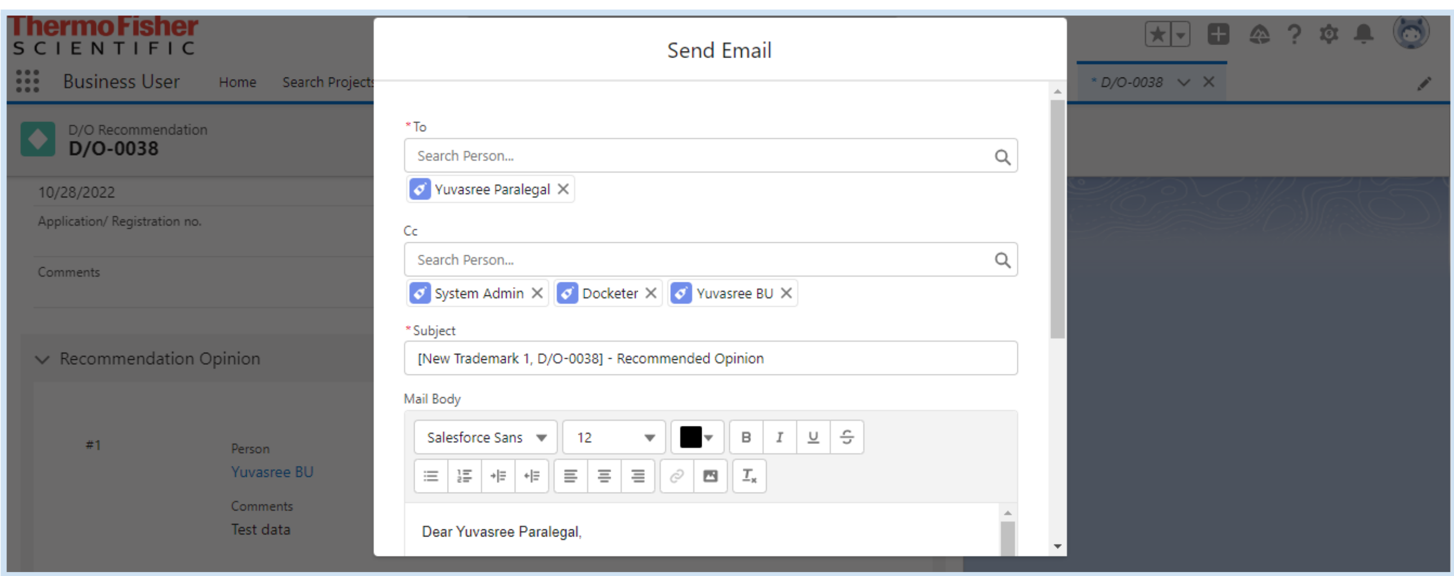

The Business user can '**Edit**' his/her recommendation by clicking the '**Edit**' button.



Once the detail is filled in, click on the **‘Save’** button, and will update the status to Complete.




****Note:** An email should be triggered to the TM IP paralegal when the Business user/product manager submits his recommendation opinion for the dispute and opposition.*




The business user can revisit his/her decision and edit the record for a final recommendation after the Email notification is received. However, once the ‘**Is Final Answer**’ box is checked and the Product Manager clicks **Save,** then no more changes can be made by the Business user.

****Note:** Only when the Docketer/Sys Admin can uncheck the box so that the Product Manager/Business user can edit* *their answer.*

After the Business user made his final recommendation and clicked ‘**Save’,** the paralegal can submit his/her final recommendation associated with the Dispute and opposition.

Once the paralegal made his/her final decision, docketer can create a new dispute and opposition record.
Also docketer can close dispute and opposition by dispute closure checklist available in D/O record.