

Expedite your trademark practice with the
WK Trademark Navigator™

WK Trademark Navigator™

Reference Guide

May 2014

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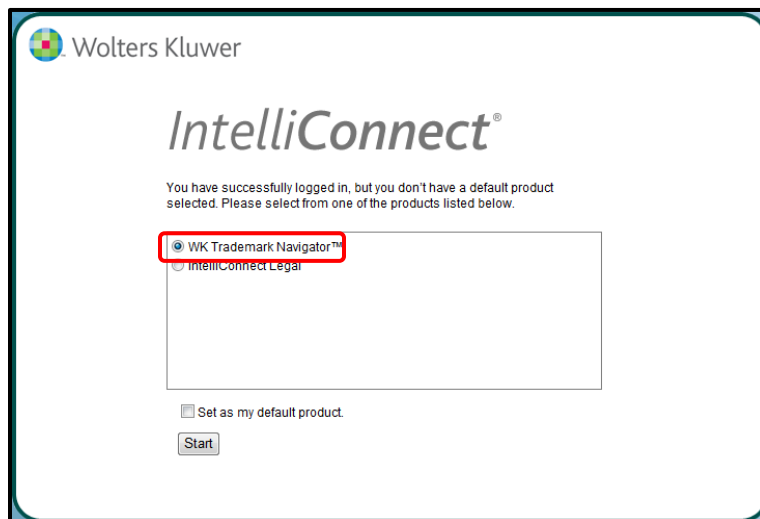
Introduction

WK Trademark Navigator™ (WKTN) will streamline your trademark prosecution practice by providing you with in-depth expert content, analysis and strategy guides that you can't find anywhere else. Regardless of where you are in the process - research, application process, appeal or foreign registration - you'll find exactly what you need in this single integrated resource.

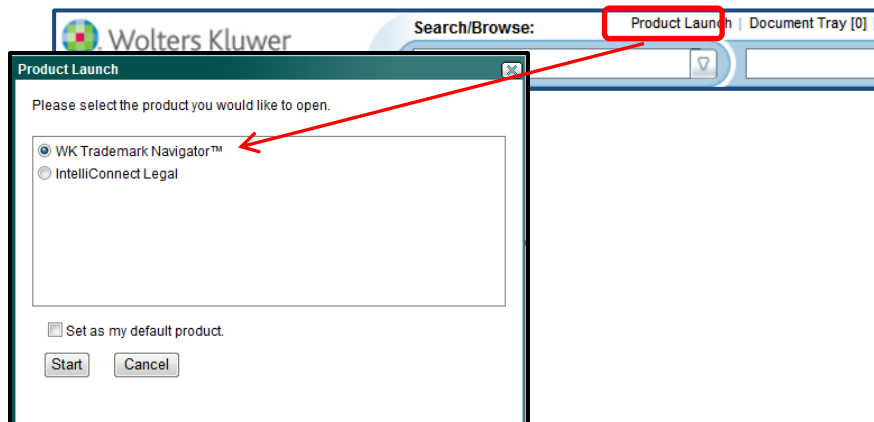
Access WK Trademark Navigator™

- **Login to IntelliConnect** - <http://intelliconnect.cch.com> - and access WKTN via:

Option 1 - Initial Login: Choose **WK Trademark Navigator™** from Product Selector prompt and click **Start**. For some customers, the Product Selector prompt may be automatic when subscription includes both regular IntelliConnect and the **WK Trademark Navigator™**. *Optional: select a default product to skip this step in future logins.*

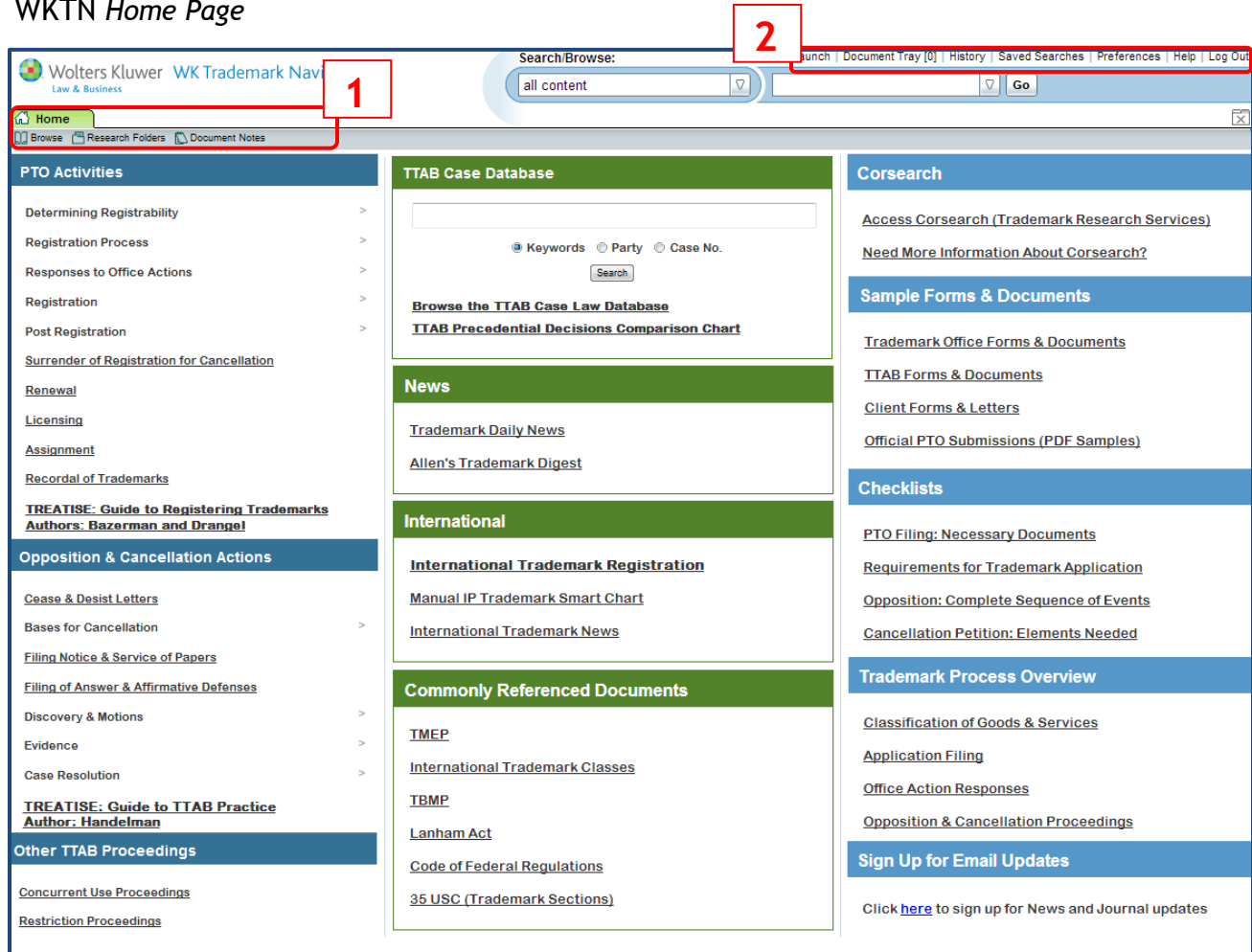


Option 2 - Product Launch command: Within IntelliConnect, click 'Product Launch' command, choose **WK Trademark Navigator™**, and click Start.



WK Trademark Navigator™ website

WKTN Home Page



Commands - various commands and functionality available via different toolbars.

1. **Home tab and gray Toolbar**
 - Return to WKTN Home page
 - **Browse** through content using an expandable/collapsible menu
 - Save links to items in **Research Folders** for easy access in future
 - Access your **Document Notes**

2. **System commands:** Product Launch, Document Tray, History, Saved Searches, Preferences, Help and Logout.

Topics - The left-hand side of the WK Trademark Navigator provides a topical organization that will help you zero in on a specific topic and/ or subtopic. Links will take you directly to expert analysis so that you can get answers quickly and streamline your research. This topical organization allows you to manage your Trademark practice in a more productive and efficient manner.

The screenshot shows the 'Topics' sidebar with three main sections highlighted in red boxes: 'PTO Activities', 'Opposition & Cancellation Actions', and 'Restriction Proceedings'. The 'PTO Activities' section includes links for Determining Registrability, Registration Process, Responses to Office Actions, Registration, Post Registration, Surrender of Registration for Cancellation, Renewal, Licensing, Assignment, and Recordal of Trademarks. Below these is a treatise link: 'TREATISE: Guide to Registering Trademarks Authors: Bazerman and Drange!'. The 'Opposition & Cancellation Actions' section includes Cease & Desist Letters, Bases for Cancellation, Filing Notice & Service of Papers, Filing of Answer & Affirmative Defenses, Discovery & Motions, Evidence, and Case Resolution. Below this is another treatise link: 'TREATISE: Guide to TTAB Practice Author: Handelman'. The 'Other TTAB Proceedings' section includes Concurrent Use Proceedings and Restriction Proceedings.

PTO Activities - provides insightful explanations of the proper procedures for handling virtually any issue that may arise during trademark prosecution, includes detailed analysis, guidance, forms, and documents—to help correctly file applications, amend applications, or respond to examining attorneys' refusals.

Treatise: click into treatise to see all content from the treatise

Opposition & Cancellation Actions - will take you step-by-step through the basics of practicing before the Trademark Trials and Appeals Board. Guidance is provided in the areas of motion practice, discovery, summary judgment, and appeals and settlement structures, among others.

Hover or click main topics with arrows to view fly-out with links into sub-topics

Topics into treatise

Click a topic or sub-topic to link into treatise

A fly-out menu for 'Discovery & Motions' is shown, containing three sub-topics: 'Conference', 'Depositions', and 'Discovery Requests'.

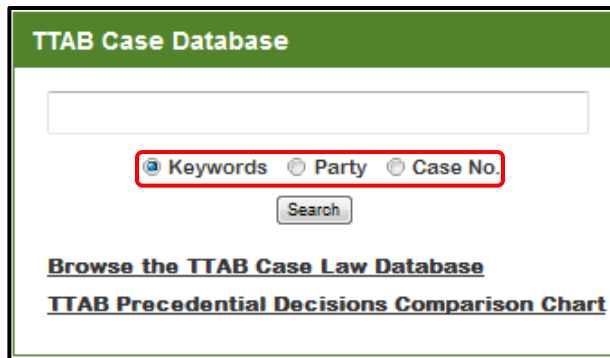
Other TTAB Proceedings - provides details of other proceedings that often come up in practice before the TTAB, includes concurrent use proceedings and restriction proceedings.

The screenshot shows the 'Guide to TTAB Practice - Handelman, §15.01, OVERVIEW OF SECTION 18' page. The left sidebar contains a table of contents with chapters 13 through 20. Chapter 15, 'RESTRICTION PROCEEDINGS UNDER LANHAM ACT SECTION 18', is expanded to show sub-sections §15.01 through §15.05. The main content area shows the title, a 'Last Updated: 4/2014' date, and the beginning of the text for Section 18 of the Lanham Act, which discusses the Board's authority to limit or modify goods and services in inter partes proceedings.

TTAB Case Database

This repository contains full-text versions of all decisions issued by the Trademark Trial & Appeal Board since 1993. This database includes decisions designated by the TTAB as precedential and not precedential.

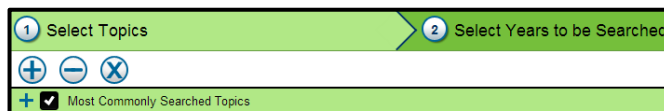
Search: This database can be searched by Keyword, Party and/or Case No.



Browse: This database can be browsed/searched by year going back to 1993.

TTAB Precedential Decisions Comparison Chart: creates charts organized by topics you select and year going back to 2007. Charts include links to the full text of the case, the case disposition, the goods/services and mark at issue, so that you can quickly determine whether you need to look at the full text of the case, which is only a click away.

1. Select Topic(s)



2. Then Select Years to be Searched (previous 7 years)



3. View Search Results

Case Name	Result	Goods/Services at Issue	Marks at Issue	Year
In re Hitachi High Technologies Corp., S.N. 79110412, 109 USPQ2d 1769 (TTAB 2014), February 21, 2014. Kumiko Ide of Westerman Hattori Daniels & Adrian, LLP for appellant; Susan B. TMEQ, Quinn, [Ritchie], and Hightower Administrative Trademark Judges (15 pages).	Refusal to register affirmed [precedential]	liquid chromatography apparatus and parts thereof in International Class 9	OPTICROSS (in standard character form)	2014
Lincoln National Corporation v. Kent, Opp. No. 91192939 and 91194917, (TTAB, February 21, 2014). Jonathan Barnes & Thornburg LLP for opposer; Anderson, pro se for applicant; Quinn Hightower, Administrative Trademark Judges.		"for numerous goods and services not identified and classified in 11 international classes, including International Classes 35 and 36"		2014
Weider Publications, LLC v. D & D Beauty Care	Opposition sustained [precedential]	"beauty salon services; day spa services"		2014

News

Trademark Daily News includes federal court and TTAB decisions, news from the Trademark Office, and legislative activities in the trademark field. Sign up for Daily Wrap Ups to receive summaries of trademark developments with links official documents.

Delivery is available via email and RSS feeds. (click title for sign up option in Browse).



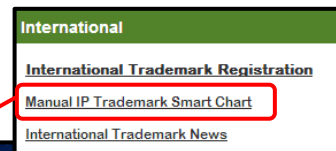
Allen's Trademark Digest is a monthly digest of precedential and non-precedential trademark decisions from the Trademark Trial & Appeal Board; includes final, interlocutory and petition decisions. Receive this publication via email and/or RSS feed by clicking [here](#) under Sign Up for Email Updates in the lower right-hand corner of your home screen.



International

International Trademark Registration includes Trademark content from the *Manual of Industrial Properties*/MIP (Brown Books), which gives you access to the most comprehensive guidance on registration procedures from more than 230 jurisdictions/countries, changing regulations, expert commentary and more.

Manual IP Trademark Smart Chart quickly compare specific topics regarding the registration requirements of multiple countries.



CCH Smart Charts™

Manual IP Trademark Smart Chart

1 Select Topics → 2 Select Jurisdictions → 3 Results

— Registrable / Not Registrable > Registrability of associated marks

Topic	Jurisdiction	Answer	UpToDateAsOf	Citation
Registrability of associated marks	Dominica	No	February 2014	Associated marks
Registrability of associated marks	Fiji	Yes (For United Kingdom re-registrations see chapter 'United Kingdom')	January 2014	Associated marks

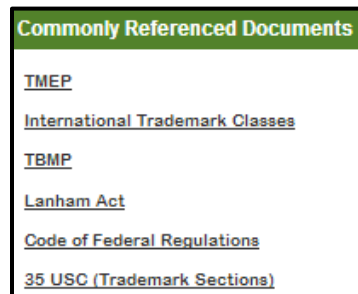
+ Registrable / Not Registrable > Registrability of certification marks

International Trademark News includes weekly international trademark legal developments. Receive this publication via email and/or RSS feed by clicking [here](#) under Sign Up for Email Updates in the lower right-hand corner of your home screen.



Commonly Referenced Documents -

go-to resources most commonly referenced in the practice of trademark prosecution, includes Trademark Manual of Examining Procedure (TMEP), International Trademark Classes, Trademark Trial and Appeal Board Manual of Procedure (TBMP), the Lanham Act, Trademark Regulations and Trademark Laws.



Corsearch Link - (subscription required) offers an array of brand protection tools that enable you to uncover and stop instances of online infringement.

Sample Forms & Documents - includes over 160 customizable forms, samples of every form or document needed for PTO/TTAB practice, client correspondence documents and substantive sample arguments and clauses.

Checklists - these workflow checklists help you keep track of every step in the application, cancellation and opposition processes, including appeals.

Trademark Process Overview - these reference guides provide in-depth insight in key procedural areas. Use to advance the examination of an application, overcome any refusal of registration and strengthen the applicant's position on appeal.

Sign Up for Email Updates - sign up for *Allen's Trademark Digest's* monthly publication and *International Trademark News* via email and/or RSS feed by clicking [here](#) under Sign Up for Email Updates.

1. Check boxes
2. Click Add
3. Check Deliver my Newsletters & Report Letters to the Email address above box
4. Click Apply Changes

Corsearch

[Access Corsearch \(Trademark Research Services\)](#)

[Need More Information About Corsearch?](#)

Sample Forms & Documents

[Trademark Office Forms & Documents](#)

[TTAB Forms & Documents](#)

[Client Forms & Letters](#)

[Official PTO Submissions \(PDF Samples\)](#)

Checklists

[PTO Filing: Necessary Documents](#)

[Requirements for Trademark Application](#)

[Opposition: Complete Sequence of Events](#)

[Cancellation Petition: Elements Needed](#)

Trademark Process Overview

[Classification of Goods & Services](#)

[Application Filing](#)

[Office Action Responses](#)

[Opposition & Cancellation Proceedings](#)

Sign Up for Email Updates

Click [here](#) to sign up for News and Journal updates

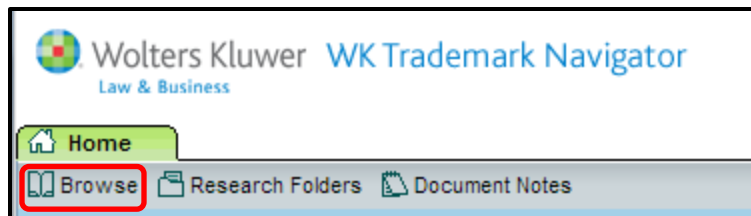
Allen's Trademark Digest

International Trademark News

Deliver my Newsletters & Report Letters to the Email address above.

Browse

From the Home tab, click Browse to open all content in an expandable/collapsible menu.



TIP: Use Titles A-Z to view and/or search publications and databases.

TIP: Click diamond next to a publication to add it to My Favorites for fast access in future.

Browse: Click titles or plus expanders to Browse the expandable/collapsible menu and drill down through topics to locate desired content.

Federal Laws (TTAB), 35 U.S.C. Sec. 41. Patent fees; patent and trademark search systems

(a) The Director shall charge the following fees:

(1)(A) On filing each application for an original patent, except in design or plant cases, \$690.

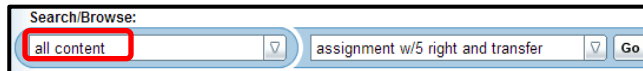
(B) In addition, on filing or on presentation at any other time, \$78 for each claim in independent form which is in excess of 3, \$18 for each claim (whether independent or dependent) which is in excess of 20, and \$260 for each application containing a multiple dependent claim.

(C) On filing each provisional application for an original patent, \$150.

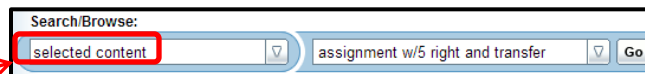
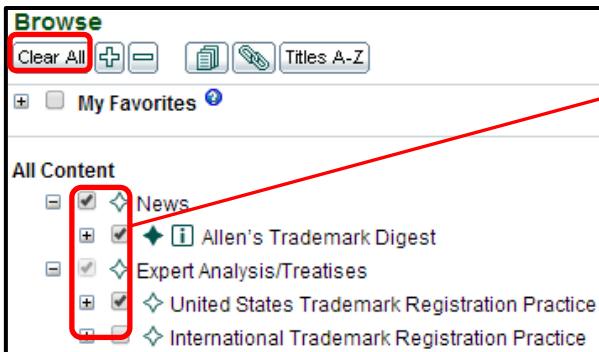
Searching - Find documents that contain keyword(s) across all content or within a specified scope.

Set the scope of your search 2 ways:

- Leave search scope set to default “all content” to search everything within WK Trademark Navigator.



- Check/uncheck boxes within Browse menu to search the “selected content”.



TIP: Use ‘Clear All’ command to remove all checkmarks and return scope to ‘all content’.

Search Results

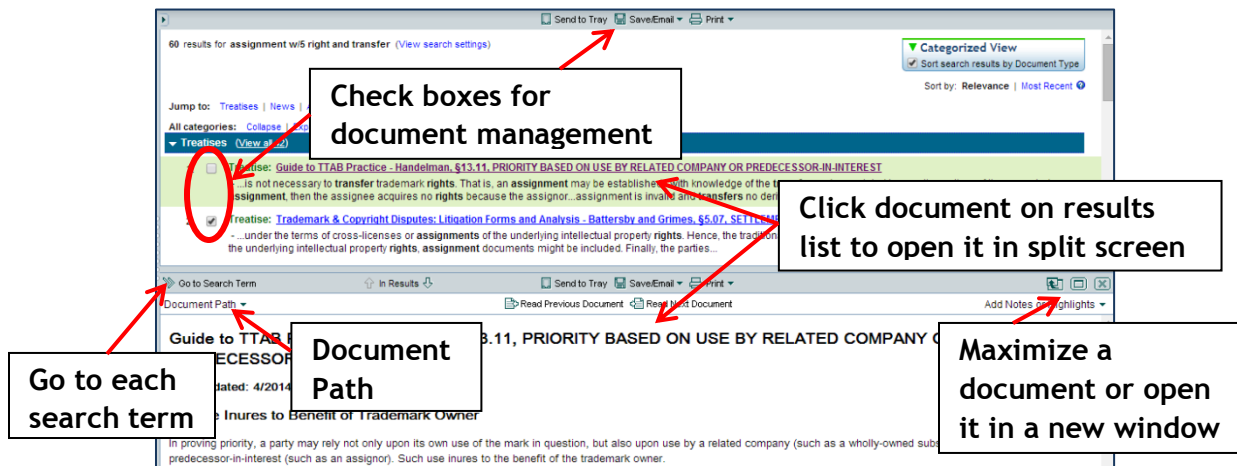
Filters to narrow your results

View results in Categorized, Relevance or Most Recent Order

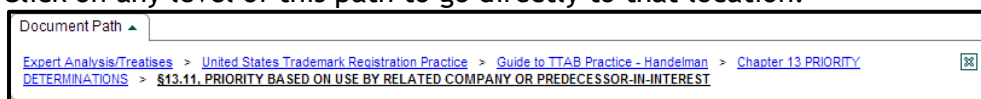
Categorized View: Top 3 results for each Document Type

- **Search Tabs:** Each new search appears on its own tab. Up to 10 tabs can be displayed.
- **Results per page:** At the bottom of the results list, you can change the number of items per page (10, 25, 50, 100, 200) and navigate between pages of results.
- **Thesaurus terms:** Click **View Search Settings** (*top of search results*) to view synonyms automatically included in your search.
- Reference Appendix, page 11, for **Search Tips**.

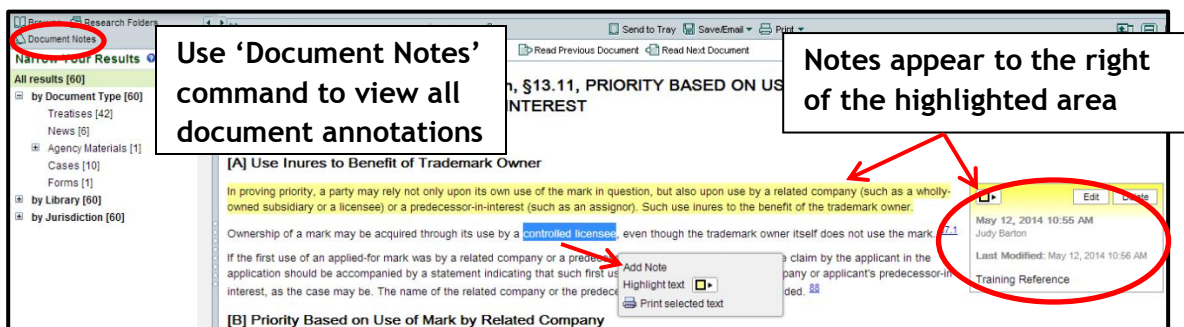
Viewing Documents



- **Document Path** - displays the location of this document within the Browse menu topics. Click on any level of this path to go directly to that location.



- **Notes and Highlights** - Add personal comments by highlighting text then clicking 'Add Note' or 'Highlight text' in the pop-up menu.



Saving Your Findings



- **Send to Tray:** Temporary storage of up to 50 documents. Access using 'Document Tray'.
- **Save/Email**
 - **Save:** Download a document or selected items as **text** or a **PDF**.
 - **Save link:** copies the document link (URL) so you can paste it elsewhere.
 - **Email:** send as Links, attached PDF, or Text within the email.
 - **Save search:** *On the Search Results list*, save the search scope and expression. Access via 'Saved Searches' command.
 - **Research Folders:** save documents. Access 'Research Folders' via the command in *Toolbar*. Documents in research folders will automatically be updated.
- **Print:** as **text** or **PDF** format. To print a section within a document, highlight text then click the printer icon that appears in the pop-up menu.

Appendix: Search Tips

Search Phrase: By default, IntelliConnect processes searches as an “AND” search if you enter several words. We recommend doing a simple word(s) search and then filter and/or search within the results. If you wish to use a Boolean operator such as “OR” or a proximity connector such as “w/20,” IntelliConnect will recognize those connectors and will process them accordingly. All search expressions will be evaluated to see if they contain a Boolean connector and, if so, those connectors will be handled using a standard operating logic. IntelliConnect automatically searches for both singular and plural forms of search terms, unless the search expression is a term of art.

Boolean Operators and Proximity Connectors (in order of precedence):

spaceimplicit “and” between words if not in a quoted phrase.
 or.....officer *or* director
 w/n.....security w/5 defin*
 w/20.....”rule 506” w/20 exempt* (w/sen = w/20)
 w/80.....”audit committee” w/80 controls (w/par = w/80)
 p/n.....property p/2 tax (p = preceding)
 and.....churning *and* rule 10b-5
 not.....rico *not* Puerto

- If **multiple proximity connectors** (w/n, p/n) are used in a search expression, they are processed from RIGHT to LEFT.
- If using a **proximity connector**, you must enter the connector ‘and’ between words where needed (a space will no longer be an implicit ‘and’).
- **Parenthesis** can be used to override the order of precedence
- **Use quotation marks to force a phrase:** “*reasonable and proportional*” (‘and’ is now a search term and not a Boolean operator). **Note: using quotations will turn off the Thesaurus for the quoted phrase, unless it is a term of art, e.g., “nursing facility”**

Wildcards: asterisk (*) and the question mark (?)

Use an asterisk “*” to indicate multiple letters (truncate a word), e.g., requir* for require, required, requiring. Cap*tion for caption, capitalization, capitalisation. Entering just an asterisk in the search expression will retrieve everything in the search scope.

Use a “?” in place of a single character, e.g., r?n for *run, ran*. Also, b??n for *barn, born, burn* but it would not find *ban, ben, bin, bon, bun, brain, bison*. You can also use the “?” to find only the singular or plural form of a word during a search, e.g., se?urity will retrieve just the singular form of word.

Terms of Art:

Some acronyms and multiple word phrases are automatically recognized as “terms of art” and will have synonyms substituted during a search even if they are in quotes or the Thesaurus is turned off. For example: *snf, nursing facility, charitable contribution*. Some terms of art do not automatically include singular/plural forms.