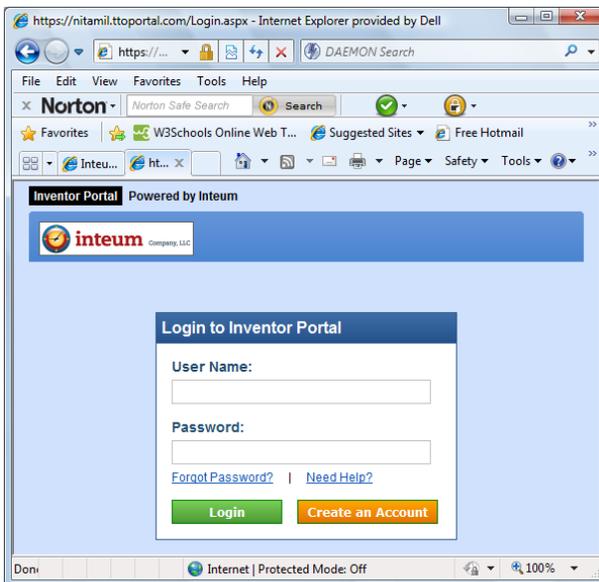


# Inventor Portal for Inventors

## Requesting an Account and Logging onto the Inventor Portal

The first step for inventors is to request an Inventor Portal account. To do so they will do the following:

1. In the web browser enter the URL of the technology transfer organization's Inventor Portal website as given to you by your technology transfer professional representative.
2. On the displayed Inventor Portal Login dialog click the [Create an Account] button.

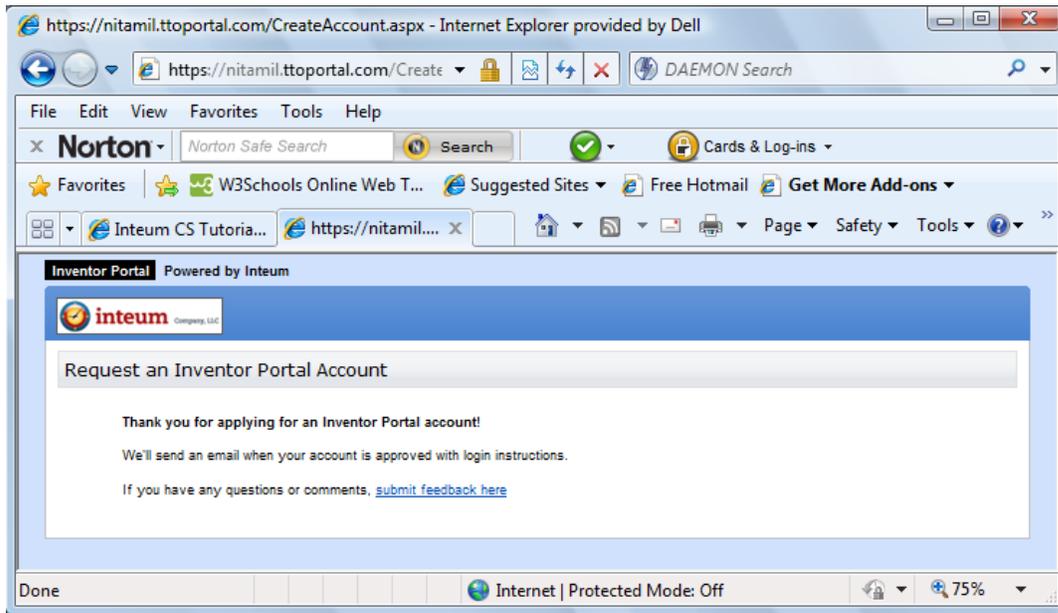


3. On the displayed Request an Inventor Portal Account dialog enter your information into the fields provided noting that the fields with an asterisk (\*) are required.

A screenshot of the 'Request an Inventor Portal Account' form. The form is titled 'Request an Inventor Portal Account' and includes a yellow callout box that says 'Request an Inventor Portal Account. Enter the information on this form to request an Inventor Portal Account. You will be sent an email with details on how to access the portal once your account is approved.' The form contains several input fields, some marked with an asterisk (\*) to indicate they are required. The fields are: User Name (\*), Password (\*), Email Address (\*), First Name (\*), Last Name (\*), Phone Number (\*), Job Title, Department, Address Line 1 (\*), Address Line 2, Address Line 3, City (\*), State (\*), Postal Code (\*), and Country (\*). A 'Request Account' button is located at the bottom left of the form. A note at the bottom left states '\* are required fields.'

4. Click the [Request Account] button.

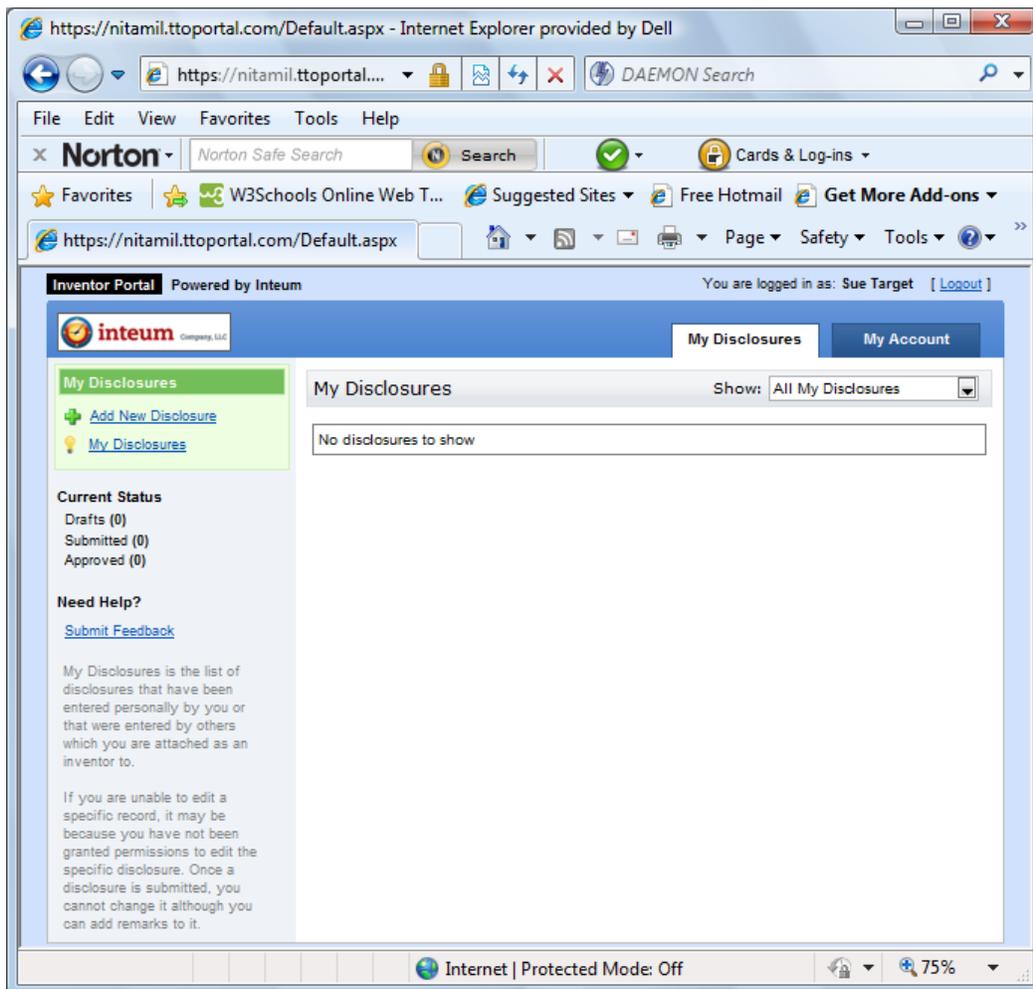
5. The following message will be displayed saying; “Thank you for applying for an Inventor Portal account! We’ll send an email when your account is approved with login instructions. If you have any questions or comments. [Submit feedback here](#)



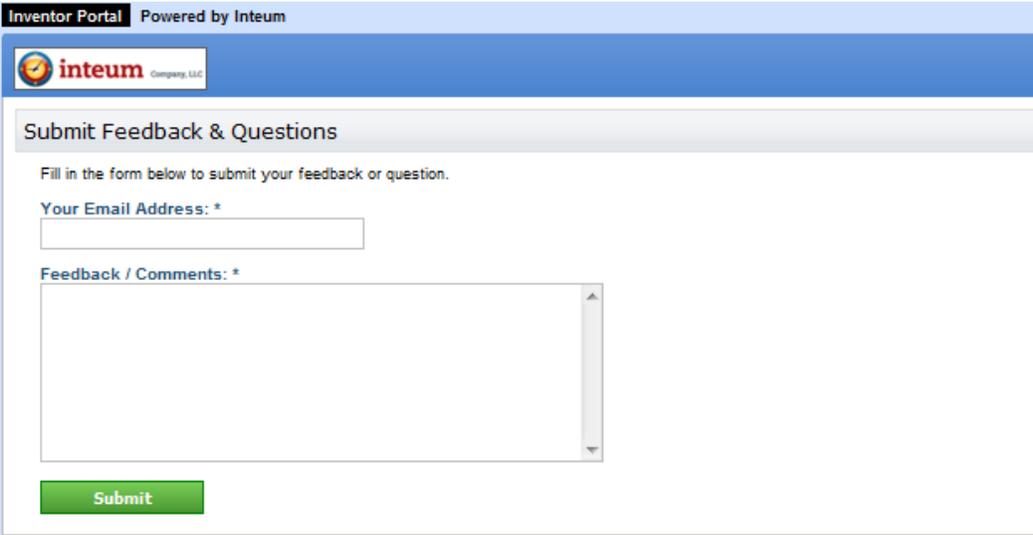
After submitting your request, an administrator will be notified. Once they have approved you as a user you can once again enter the Inventor Portal URL into your browser and log into the Inventor Portal using the User Name and Password you chose.

A screenshot of the 'Login to Inventor Portal' form. The form has a blue header with the text 'Login to Inventor Portal'. Below the header, there are two input fields: 'User Name:' with the text 'Andrew Barber' and 'Password:' with a masked password represented by seven dots. Below the password field, there are two links: 'Forgot Password?' and 'Need Help?'. At the bottom of the form, there are two buttons: a green 'Login' button and an orange 'Create an Account' button.

Once logged on, the Inventor Portal home page will be displayed as here followed by a table explaining the page.

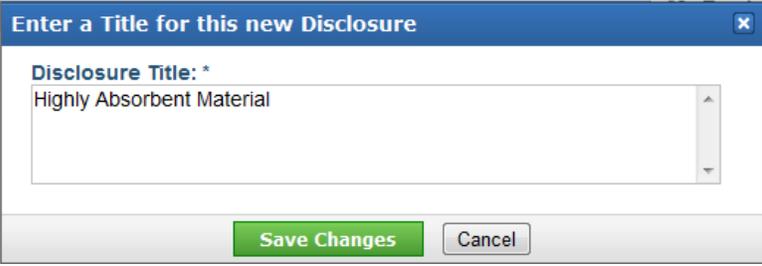


Area	What you can do
<b>My Disclosures Tab</b>	<p>Once you have created, edited and submitted inventor portal disclosures the My Disclosures tab will contain a list of the disclosures that have been created personally by you or that were created by others and you are listed as an inventor. All of your disclosures can be monitored and managed from this tab.</p> <p>On the left, click on <a href="#">Add New Disclosure</a> to enter data about a new disclosure or click on <a href="#">My Disclosures</a> to view the list of your disclosures. The Current Status displays your number of Drafts, Submitted and Approved disclosures.</p> <p>If you Need Help? Click on <a href="#">Submit Feedback</a>, enter your email address and any feedback or comments and click [Submit].</p>

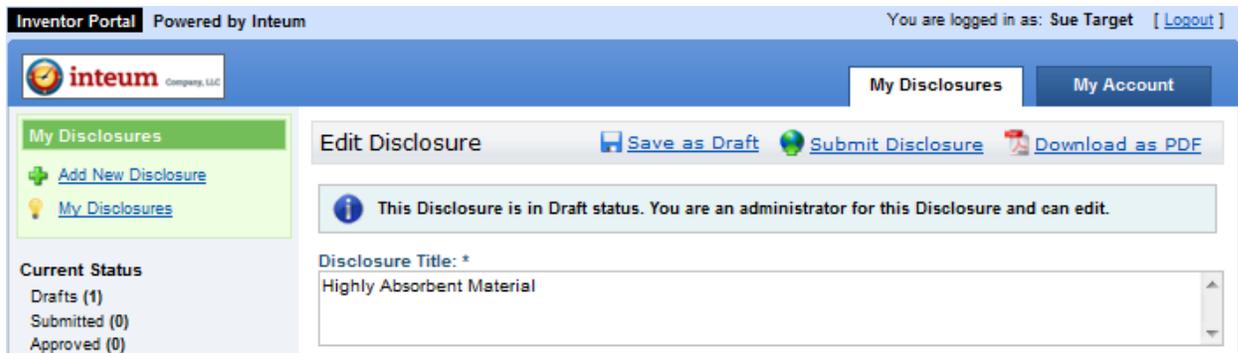
Area	What you can do
	 <p>On the top right, click the Show drop-down list to view All My Disclosures, My Draft Disclosures, My Submitted Disclosures or My Approved Disclosures.</p>
<b>My Account Tab</b>	Click on the My Account tab, click <a href="#">Edit Profile</a> to update your account information and click [Save Changes] or click Change Password to enter your Old Password, a New Password, a Confirm Password and click [Change Password].
[ <a href="#">Logout</a> ]	Click Logout on the top right of the Inventor Portal home page to log out of the site.

## Creating a New Inventor Portal Disclosure

1. To add a new disclosure, Click [Add New Disclosure](#) to display an “Enter a Title for this new Disclosure” dialog.

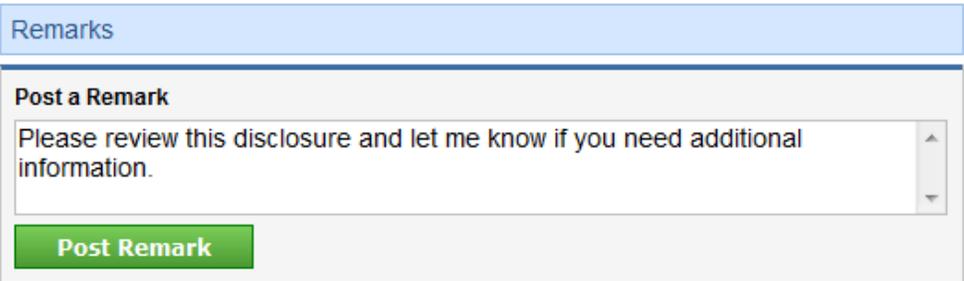


2. Enter the title of your new disclosure and click [Save Changes].
3. A new disclosure draft with the title you entered will be displayed stating you are an administrator for the disclosure and can edit it.



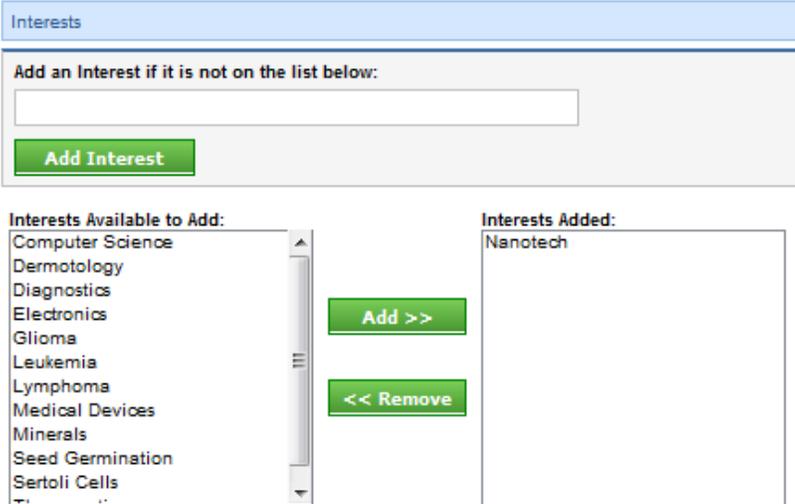
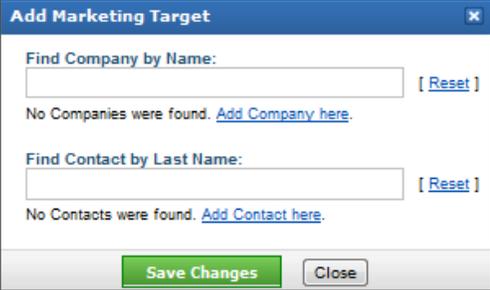
Note: As the author of the disclosure, you can edit it in the Inventor Portal but once you have submitted the disclosure, you can no longer edit it without further actions on the part of your technology transfer representative. Be sure you have thoroughly checked all the information before submitting your disclosure.

- On the left will be a list of tabs. This list will include standard Inteum C/S tabs (Inventors, Funding, Agreements, etc.), a Remarks tab for communicating with the technology transfer office, a Documents tab for uploading appropriate documents to the technology transfer office and any User Defined Fields (UDF) created by a technology transfer office administrator. Each tab will contain fields where the disclosure information may be entered. Since the Inventor Portal is fully-customizable, a technology transfer office administrator may have changed the tab names. The following table will list the standard and default UDF tabs (denoted by an \*) and their use.

Tab	Description for Use
<b>Remarks</b>	 <p>Enter a comment about the disclosure to be read by your technology transfer representative and /or other users who have been assigned as inventors for this disclosure and click [Post Remark].</p>
<b>Documents</b>	<p>The Documents tab allows documents of any file type pertinent to the disclosure to be uploaded. Click [Add Documents], browse to a file, add a description for the file if desired and click [Upload] to add a document to be submitted with the disclosure.</p>

Tab	Description for Use
	<div data-bbox="456 233 1047 564" data-label="Form"> </div> <p>The file will be displayed in the table.</p> <p>Note: Other users can download the file by clicking on the link in the File Name column or the file can be deleted by clicking [Delete] in the manage column.</p>
<p><b>Inventors</b></p>	<p>The Inventors tab displays the inventors associated with the disclosure.</p> <ol style="list-style-type: none"> <li>1. Click the Inventors tab and the name of the submitting inventor will be displayed by default.</li> <li>2. Click [Add Inventor] and enter the information for the new inventor on the Add Inventor dialog.</li> </ol> <div data-bbox="500 890 1149 1501" data-label="Form"> </div> <ol style="list-style-type: none"> <li>a. Required. Mark the Role &amp; Rights as either Administrator or View Only. Administrators can view and edit the disclosure. View Only allows viewing the disclosure and adding remarks and documents.</li> <li>b. Required. If the inventor has an Inventor Portal account, an Inteum C/S account or an associated contact entry in the technology transfer office's Inteum C/S database, you can search for them by entering their last name in the Find Inventor field and their information will be displayed below. If no information is found click <a href="#">Add Inventor here</a>, complete the fields as prompted and click [Save Changes].</li> <li>c. Optional. Enter the Inventor's Client Department.</li> </ol>

Tab	Description for Use
	<p>d. Required. Enter the Inventor's Significance</p> <p>e. Click [Save Changes] and the new inventor will be displayed on the Inventor's tab.</p>
<b>Funding</b>	<p>The Funding tab provides for entry of any sponsorship support received for the research that resulted in the invention being disclosed.</p> <p>1. Click [Add Funding] and enter the information on the Add Funding dialog.</p> <div data-bbox="501 478 1062 877" data-label="Form"> </div> <p>a. Required. Type in the beginning string of a funding institution's name and click to select a name from the displayed list of the available funding institutions or click <a href="#">Add Institution here</a> to add a new funding institution.</p> <p>b. Optional. Type in the beginning string of a principal investigator's last name and click to select a name from the displayed list of available principal investigators or click <a href="#">Add Investigator here</a> to add a new principal investigator.</p> <p>c. Option. Type in the Grant / Contract Number.</p> <p>d. Click [Save Changes] and the funding institution information as entered will be displayed on the Funding tab.</p>
<b>Interests</b>	<p>The Interest tab provides for specifying the keywords that pertain to the disclosure. The available lists of interests are those that are in the technology transfer office's Inteum C/S database but additional ones can be added to the list when applicable.</p> <p>1. Click the Interests tab and either highlight and [Add &gt;&gt;] to the Interests Added pane if in the available list or enter an interest in the field provided and click [Add Interest] to add the interest to the Interests Added pane.</p>

Tab	Description for Use
	
<p><b>Marketing Targets</b></p>	<p>The Marketing Targets tab provides for specifying companies that could have a potential interest in the invention being disclosed.</p> <ol style="list-style-type: none"> <li>Click [Add Marketing] and enter the information on the Add Marketing Target dialog.</li> </ol>  <ol style="list-style-type: none"> <li>Required. Type in the beginning string of a company's name and click to select a name from the displayed list of the available companies or click <a href="#">Add Company here</a> to add a new company.</li> <li>Required. Type in the beginning string of a contact's name and click to select a name from the displayed list of the available contacts or click <a href="#">Add Contact here</a> to add a new contact.</li> <li>Click [Save Changes] and the marketing target information as entered will be displayed on the Marketing Target tab.</li> </ol>
<p><b>Agreements</b></p>	<p>If the Agreement tab has been enabled on the Inventor Portal by the technology transfer office administrator, as agreement records are created and populated in the technology transfer office's Inteum C/S database that pertain to the disclosure, the Agreement ID, Title, Agreement Type, Agreement Status, Effective Date and Last Updated Date will be displayed so the inventor(s) can view the status of all related agreements.</p>
<p><b>Patents</b></p>	<p>If the Patent tab has been enabled on the Inventor Portal by the technology transfer office administrator, as patent records are created and populated in the technology transfer office's Inteum C/S database that pertain to the disclosure, the Patent Application Number, Patent Number, Internal ID, Title, Country, Patent Application Type, Patent Status, File Date, Issued/Granted Date, Last Date/Time Status Updated will be displayed so</p>

Tab	Description for Use
	the inventor(s) can view the status of all related patents.
Prior Art*	Enter in any know prior art related to this invention and the search parameters used to search for the prior art.
Prior Patents*	Enter in prior patent applications that have been filed related to the invention.
Products*	Mark Yes if any products have been made, written or tested and enter in the initial test date of the invention and any comments regarding the test.
Future Discl*	Mark the Yes checkbox if there are plans for a full or partial public disclosure regarding the invention in the future and enter a future disclosure date and future disclosure description.
Details Pg 1*	Enter in the problems the invention solves, novel and unusual features of the invention and disadvantages of the invention.
Description*	Enter in the conception date, first reduction to practice date and a concise description of the invention.
Public Discl*	Mark the Yes checkbox if there has been full or partial public disclosure regarding the invention, enter a disclosure date and disclosure description.
Details Pg 2*	Enter in the possible uses of the invention, future users of the invention and limitations to be overcome.

## Editing an Existing Inventor Portal Disclosure

If you don't have time to complete a disclosure you can click [Save as a Draft](#).

The screenshot shows the 'Edit Disclosure' interface in the Inventor Portal. At the top, it says 'Powered by Inteum' and 'You are logged in as: Sue Target [Logout]'. The main navigation includes 'My Disclosures' and 'My Account'. On the left, there's a sidebar with 'My Disclosures' (Add New Disclosure, My Disclosures) and 'Current Status' (Drafts (1), Submitted (0), Approved (0)). The main content area has 'Edit Disclosure' with three buttons: 'Save as Draft' (circled in red), 'Submit Disclosure', and 'Download as PDF'. Below the buttons, a message states: 'This Disclosure is in Draft status. You are an administrator for this Disclosure and can edit.' The 'Disclosure Title' field contains 'Highly Absorbent Material'.

When you are ready to log into the Inventor Portal again to add information to the disclosure it will be displayed in the My Disclosures list with the Status as Draft.

The screenshot shows the 'My Disclosures' list in the Inventor Portal. It includes the same sidebar as the previous screenshot. The main content area shows a table of disclosures. The table has columns for ID, Title, Entered By, Created, Status, and Manage. A dropdown menu for 'Show:' is set to 'All My Disclosures'. The table contains one entry: ID 09-002, Title 'Highly Absorbent Material', Entered By 'Sue Target', Created '10/5/2009', and Status 'Draft'. In the 'Manage' column, there is an 'Edit' link, which is highlighted with a red arrow.

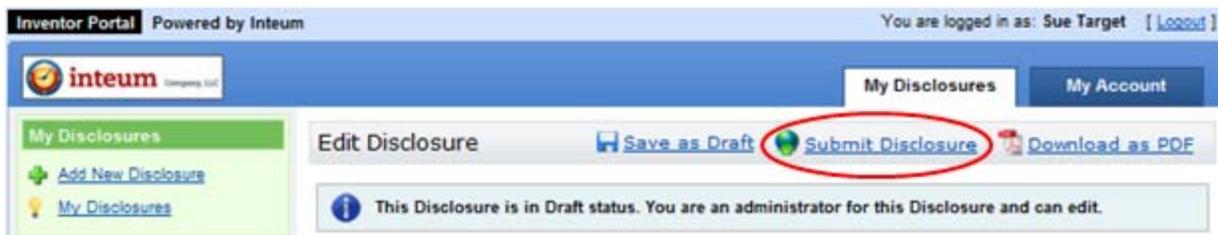
ID	Title	Entered By	Created	Status	Manage
09-002	Highly Absorbent Material	Sue Target	10/5/2009	Draft	<a href="#">Edit</a>

In the Manage column click on [Edit](#) to open and add any additional information to the disclosure.

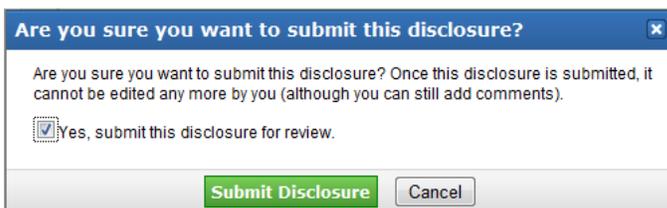
## Submitting an Inventor Portal Disclosure

After you have completed entering the information about the disclosure it can be submitted. To submit the disclosure:

1. Click [Submit Disclosure](#).



2. A prompt will be displayed stating "Are you sure you want to submit this disclosure? Once this disclosure is submitted, it cannot be edited any more by you (although you can still add comments)." Mark the "Yes, submit this disclosure for review." checkbox and click [Submit Disclosure].



Now that the disclosure has been submitted, the Current Status information in the left column reflects that 1 disclosure has been Submitted and the Status in the My Disclosures list of inventor portal disclosures indicates that the disclosure has been Submitted. Also, note that once the disclosure has been submitted, it cannot be edited, however the Manage column [View](#) can be clicked to review the disclosure and Remarks can still be added in the Remarks tab.



After an inventor portal disclosure has been submitted, a technology transfer administrator will be notified. If after review the disclosure submission is approved, you will be notified and the My Disclosures Status will change to Approved – Submitted.

Inventor Portal Powered by Inteum You are logged in as: Sue Target [Logout]

**My Disclosures** My Disclosures My Account

My Disclosures Show: All My Disclosures

ID	Title	Entered By	Created	Status	Manage
	Music Mania	Sue Target	10/7/2009	Draft	<a href="#">Edit</a>
09-002	Highly Absorbent Material	Sue Target	10/5/2009	Approved - Submitted	<a href="#">View</a>

**Current Status**  
 Drafts (1)  
 Submitted (0)  
 Approved (1)

Or, if the disclosure is rejected, its status reverts back to Draft, the Remarks tab can be reviewed to read an explanation for the rejection entered by the technology transfer administrator and [Edit](#) can be clicked to open and revise the disclosure information and then it can be re-submitted.

### Reviewing Submitted Inventor Portal Disclosures

Once the technology transfer administrator approves the submission of an inventor portal disclosure and its data has been uploaded into an Inteum C/S Inventor Portal Disclosure record, if the technology transfer administrator decides that more information is needed the Review Status can be changed from Approved to Editable on Inventor Portal, the record saved and synced to the Inventor Portal. The My Disclosures list will then display the Status as Draft – Submitted and the Manage column will again display Edit so that the disclosure can be opened, the Remarks reviewed and any necessary information added to the disclosure before re-submitting it.

Inventor Portal Powered by Inteum You are logged in as: Sue Target [Logout]

**My Disclosures** My Disclosures My Account

My Disclosures Show: All My Disclosures

ID	Title	Entered By	Created	Status	Manage
09-002	Highly Absorbent Material	Sue Target	10/5/2009	Draft - Submitted	<a href="#">Edit</a>
	Music Mania	Sue Target	10/7/2009	Draft	<a href="#">Edit</a>

**Current Status**  
 Drafts (2)  
 Submitted (0)  
 Approved (0)

After the technology transfer administrator again approves the submission of the inventor portal disclosure, syncs to upload the additional data into the Inteum C/S Inventor Portal Disclosure record and then changes the Status to Approved and again syncs to the Inventor Portal, the Status of the inventor portal disclosure will be displayed as Approved – Approved and once again it will be locked from editing except for the ability to add Remarks.

Inventor Portal Powered by Inteum You are logged in as: Sue Target [Logout]

My Disclosures My Account

My Disclosures Show: All My Disclosures

ID	Title	Entered By	Created	Status	Manage
	Music Mania	Sue Target	10/7/2009	Draft	<a href="#">Edit</a>
09-002	Highly Absorbent Material	Sue Target	10/5/2009	Approved - Approved	<a href="#">View</a>

Current Status  
Drafts (1)  
Submitted (0)  
Approved (1)

If the Patent and Agreement tabs have been enabled on the Inventor Portal by the technology transfer office administrator, the inventors can continue to log into the Inventor Portal to check the progress of the protection and licensing progress and view any ongoing Remarks.

- As patent records are created and populated in the technology transfer office's Inteum C/S database that pertain to the disclosure, the Patent Application Number, Patent Number, Internal ID, Title, Country, Patent Application Type, Patent Status, File Date, Issued/Granted Date, Last Date/Time Status Updated will be displayed on the Inventor Portal once a technology transfer administrator synchronizes to display any updated information. Note: It is the responsibility of the technology transfer administrator to synchronize on a frequent and regular basis so updated information is transferred to and from Inteum C/S and the Inventor Portal.
- And as agreement records are created and populated in the technology transfer office's Inteum C/S database that pertain to the disclosure, the Agreement ID, Title, Agreement Type, Agreement Status, Effective Date and Last Updated Date will be displayed once a technology transfer administrator synchronizes to display any updated information. Note: It is the responsibility of the technology transfer administrator to synchronize on a frequent and regular basis so updated information is transferred to and from Inteum C/S and the Inventor Portal.

## Printing Inventor Portal Disclosures

If the inventors would like a paper copy of their disclosures, a PDF version can be printed at any time by clicking on [View](#) to open the disclosure and clicking Download as PDF.

Inventor Portal Powered by Inteum You are logged in as: Sue Target [Logout]

My Disclosures My Account

My Disclosures Add New Disclosure My Disclosures

Current Status  
Drafts (1)  
Submitted (0)  
Approved (1)

Edit Disclosure [Download as PDF](#)

**This Disclosure has been approved and cannot be edited. You can still add Remarks.**

Invention ID: 09-002  
Disclosure Title: \*  
Highly Absorbent Material

## Logging Off Inventor Portal

To Logout of the Inventor Portal click [ [Logout](#) ] to the right of “You are logged in as: Name”

