

INVENTOR PORTAL USER GUIDE

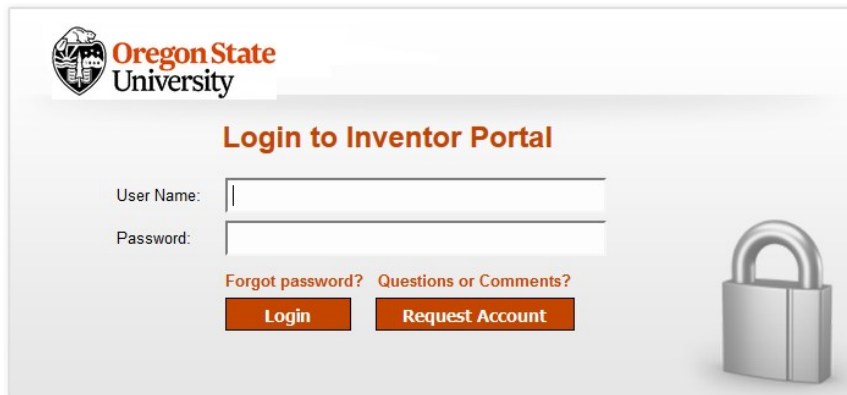
The OSU Inventor Portal enables University inventors to complete and submit invention disclosures online. After the Advantage team review, inventors may sign disclosures via DocuSign.

This guide should answer many questions you may have about using the Inventor Portal.

Please contact Susan Tillitt at 541-737-1732 or susan.tillitt@oregonstate.edu or Claire Schrodt at 541-737-0705 claire.schrodt@oregonstate.edu with any further questions.

Request Account

1. Access Inventor Portal at <https://osu.inteum.com/osu/InventorPortal/>
2. Click **Request Account**.
3. Enter your email address and the CAPTCHA in the next screen and click **Submit**.



4. You will receive an email with a **link** to the Inventor Portal. Click on the link and enter your user name and password - please note that the Inventor Portal is **NOT** part of the OSU universal login system.
5. You will be taken to a page titled "Create Account" where you will be asked to complete a new contact record or to select an existing record as applicable.
6. An Inventor Portal Administrator will review your request and you will receive an email notification when your account has been approved. (Requests are processed Monday through Friday, 8:00 a.m. to 5:00 p.m.)

Dashboard

When you log in, Inventor Portal will open on the Dashboard. The Dashboard allows you to navigate your profile and disclosure information. Click the buttons on the **left** to navigate between:

- **Dashboard** – View recent activity on your draft or submitted disclosures.
- **Disclosures** – View a list of all your disclosures and click on each to see individual details.
- **Add New Disclosure** – Create a new disclosure and submit to Advantage when complete.
- **Edit Profile** – Reset your password or update your contact information (keeping your info current ensures effective communication about your portfolio.)

Click the **numbers** on the **right** to filter and view:

- **Draft Disclosures**
- **Disclosures Ready for Advantage Manager Review**

Oregon State University

Logged in as: **Benny Beaver**
[Logout](#)
[Feedback](#)

Dashboard

Welcome to Oregon State University Inventor Portal Dashboard.

Click **Disclosures** on the left to view your existing disclosures.
Click **Add New Disclosure** to prepare a new invention disclosure for submission.
Click **Edit Profile** to update your info or change your password.

Remember to Save your work frequently.

Recent Activity

No recent activity to display.

Draft Disclosures 17

Disclosures Ready For Advantage Manager Review 2

[Delete All Recent Activities](#)

Creating and Submitting a New Invention Disclosure through the Inventor Portal

To enter an invention disclosure in Inventor Portal, you will need to provide the following information (the more complete your disclosure, the better we are able to assess it):

- A non-confidential **Disclosure Title**
- A **Detailed Description** of the invention needs to be in sufficient detail so that someone in your field or a closely related field of your invention will be able to make and use it. The components of the detailed description section include:
 - What did you make? Explain what you made and include what purpose the invention is intended to serve.
 - How is it made? This should be a functional and structural description of the invention. Include drawings, charts, supplemental data, etc. if relevant for explaining how the invention is made. Include any potentially different materials, sizes, methods of operation, and other forms which the invention can take.
 - When did you first make it? This includes first conception date, and if you built and/or tested, the date first built/tested.
 - What problem(s) does this invention solve? List all potential problems this invention may solve, including uses potentially outside of the current field of invention.
 - Are there any novel or unusual features? List anything that distinguishes this invention from known products or inventions.
 - What are possible uses for this invention? List all conceivable uses for this invention, including potential uses outside of the immediate field of invention.
 - Are there any potential obstacles to development of this invention? List any conceivable barrier to development including prohibitive cost of production, rare materials needed, lack of existing market, etc.
- **Public Disclosure** – A public disclosure is any non-confidential communication of the invention. This includes journal publications, public presentations, conference abstracts or proceedings, poster presentations, hanging a poster in your building, thesis/dissertation defenses, disclosure to any non-OSU employees (including undergraduates!), sharing white papers, etc. If you have any questions about what constitutes a public disclosure, please contact a Licensing Manager. There is a legal obligation to disclose any known public disclosures of the invention to the United States Patent and Trademark Office. Failure to disclose can result in a loss of patent rights.
- **Future Public Disclosure** – knowing about planned disclosures helps Advantage prepare for Intellectual Property protection strategies
- **Related Patents** – To the best of your knowledge, please identify any related Patent Applications, Patents, or Publications.
- **Competition** – Are there any known products or technologies that will compete with this invention?
- **Products** – Have the products been made, written, or tested?

- **Contributors** - Name, email, and company of co-contributors. If co-contributor is not an OSU affiliated, select "Non-OSU Inventor" on the role type drop-down list.
- **Funding** – If the invention was created or first reduced to practice under any formal sponsored research funding, please list the funding agency, Principal Investigator, and Grant/Contract No. If there was no funding, you will be asked to search and select "No Funding", then save changes.
- **Documents** – Please add any concise documentation that specifically describes your invention, including a detailed technical description highlighting important inventive features, supporting supplemental data, examples, and figures. Word document or similar editable format preferred. For example, draft manuscripts, technical reports, white papers, etc., can be helpful. Please do NOT attach documents with extensive content that is not directly related to the invention, such as full theses and dissertations.
- **Interests** – keywords can be added to help the public search for the non-confidential summary of available technologies on the [OSU Technology Publisher](#) (Note: Only patent pending inventions are published on the Technology Publisher.)
- **Remarks** – notes to Advantage Manager or pertinent information that is not captured in the details above can be added here.

Note: The above fields are specific to the Invention Disclosure form. Some fields may vary depending on the specific disclosure type you are using. **Biological Materials Disclosure, Copyright Content Disclosure, Plant Variety Disclosure, or Software and Digital Media Disclosure** will require different fields relevant to their specific disclosure type.

Add New Disclosure

1. When you click **Add New Disclosure**, you will be prompted to enter a non-confidential title and select a disclosure type from a drop-down list: **Invention Disclosure, Biological Materials Disclosure, Copyright Content Disclosure, Plant Variety Disclosure, or Software and Digital Media Disclosure** (each form has slightly different questions relevant to nature of the disclosure type). **NOTE: Click Save as Draft while working since the site does not autosave and your browser may not prompt you to save your work if you leave the page.**
2. At any time, click **Save as Draft**, exit, and log in later to continue adding to your disclosure. **NOTE: Disclosure Editors may edit in Draft status only. Once the disclosure is submitted and reviewed by Advantage, it can no longer be edited without assistance from Advantage staff. Be sure that you have thoroughly reviewed the disclosure and uploaded any attachments before submitting.**

Disclosure

[Save As Draft](#) [Download As PDF](#) [Download As Word](#)

Disclosure Type:

Status:

Invention Id:

Disclosure Title:

Tech Id:

Draft

This disclosure is in draft status. When you are finished editing, Submit the disclosure for administrator review using the button below.

[Save As Draft](#)

[Submit for Review](#)

Detailed Description

Public Disclosure

Future Public Disclosure

Related Patents

Competition

Products

Contributors

[Add Contributor](#)

First	Last	Permission	Order	Contribution	Department	Role Type	Manage
	Benny Beaver	View Only	1	<input type="text" value="100.00%"/>		OSU Contributor	Save Edit Delete

Funding

Documents

Interests

Remarks

[Save As Draft](#) [Submit for Review](#) [Download As PDF](#) [Download As Word](#)

Add Contributor

1. Click **Add Contributor** to add contributors to the disclosure.

2. As you add contributors, designate their editing rights (**Contributor's Disclosure Role and Rights**) for the disclosure. **NOTE: Sign Type is not required. Once the disclosure is submitted and reviewed, signature request will be sent via DocuSign.**
3. If you cannot find a Contributor in the search, you can add a new Contact.
4. If a Contributor is not an OSU employee or student, select "Non-OSU Contributor" from Role Type drop-down list.

Add Contributor

Contributor's Disclosure Role and Rights:*

Editor
Can add, edit or delete this disclosure in draft.

View Only
Can only add remarks and view this disclosure.

Find Contact by Last Name or First Name: **Search**

Search Results:

Betty Beaver
beaver.believer@oregonstate.edu
Oregon State University

Choose

[Add a new Contact](#) if you cannot find the Contact you are looking for.

Role Type:

Sign Type:

Significance: *

Contribution %:

Save Changes [Close](#)

Add Funding

1. Click **Add Funding**.
2. Enter information in the fields.
3. Click **Save Changes** (Repeat steps 1 thru 3 as needed.)

If no funding, search and select "No Funding" and save.

Find Company by Company Name: **Search**

Selected Company

USDA - ARS
Russell Research Center
PO Box 5677
Athens, GA 30607-5677 United States
[Remove](#)

Find Contact by Last Name or First Name: **Search**

Grant or Contract Number:
 Add to list

Save Changes [Close](#)

4. Use Edit/Delete fields if you need to make changes to your funding list.

Funding				
Add Funding				
Funding Institution	Investigator	Grant / Contract No.	Created	Manage
NIH - National Institutes of Health		NIH-12345678	10/5/2017	Edit Delete
USDA - ARS Beltsville Area		USDA-12121212	10/5/2017	Edit Delete

Documents

Attachments may be uploaded one at a time to your invention disclosure (15 MB size limit)

1. Click **Choose File**
2. **Select** a file
3. Click **Upload Document** (Repeat steps 1 thru 3 as needed.)

Documents				
Uploaded By	File	Extension	Created	Manage
Susan Tillitt	INVENTOR PORTAL USER GUIDE	docx	10/5/2017 4:20:06 PM	Delete

Add a Document
* Size limit is 15MB

No file chosen

Interests/Keywords

Keywords may be added to your invention disclosure

1. Click **Add Keyword**
2. Select existing keywords or create your own (Repeat steps 1 thru 2 as needed.)
3. You may delete keywords from the list as you go.

Interests	
Add Keyword	
Keyword	Manage
Diabetes	Delete
wound-infection	Delete

Remarks

Contributors and Advantage staff may enter remarks in this section to communicate regarding the disclosure. Remarks are added to the disclosure record and emailed to Contributors and Advantage Inventor Portal administrators.

By	Comment	Created
Susan Tillitt	Type any comment here and it will be emailed to the Contributors and OCCD Inventor Portal Administrators.	10/5/2017

Add a Remark

Contributors and QCCD staff can communicate here regarding the disclosure

Save Remark

Save As Draft **Submit for Review** **Download As PDF** **Download As Word**

Submit a Completed Disclosure

When your disclosure is complete, click **Submit for Review**.

Disclosure

Save As Draft **Download As PDF** **Download As Word**

Disclosure Type: Invention Disclosure

Status:

Invention Id: DRAFT/194/17

Disclosure Title: Build Better Dams

Tech Id:

Draft
This disclosure is in draft status. When you are finished editing, Submit the disclosure for administrator review using the button below.
[Save As Draft](#)
Submit for Review

Detailed Description

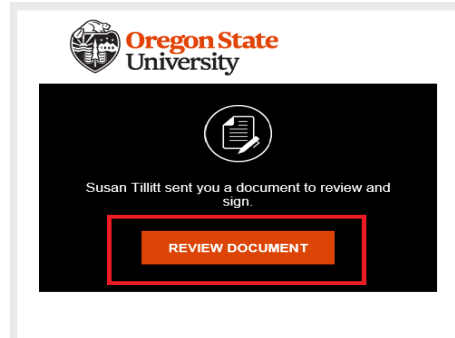
Your submission will be reviewed to ensure that it is complete, and that all the required information has been supplied.

- If your disclosure requires further information, you will receive an email or phone call from an IP & Licensing Manager.
- If your disclosure is complete, you will receive an email notification that it has been **Reviewed** and you will receive a DocuSign email requesting signatures from all OSU Contributors.
- Once reviewed, Advantage can now proceed with an invention assessment, including patentability, commercial fitness, etc.

NOTE: “Approval” of the invention disclosure is merely confirmation from Advantage that the disclosure is complete, and Advantage can now proceed with an invention assessment. This step does NOT mean that Advantage has ‘Approved’ the disclosure with regards to patentability, commercial fitness, etc.

DocuSign Signature

When the disclosure has been reviewed for completeness, each contributor will receive an email notification from DocuSign that the disclosure is ready to be digitally signed. Click on the Review Document link in the DocuSign email to review the final disclosure and sign.



Tracking Invention Disclosures

After you have created and/or submitted disclosures via Inventor Portal, you will see a summary of those disclosures.

- Click **View** to see the details of each disclosure.
- The list may be searched or filtered using the fields at the top of the summary.
- Columns may be sorted by clicking on the column header.
- Draft Disclosures may be edited and/or deleted, however, **Submitted or Approved** disclosures may not be edited or deleted without assistance from Advantage.

Disclosures										
<input type="text"/>		Search		Type: <input type="text" value="All"/>	Review Stage: <input type="text" value="All"/>	Created Date: <input type="text" value="All"/>				
Invention Id	Tech Id	Title	Type	Status	Review Stage	Contributor	All Signatures Received	Entered By	Created Date	Manage
DRAFT/194/		Building Better Dams	Invention Disclosure	Draft		No	Benny Beaver	10/5/2017	View Delete	
DRAFT/191/		Dam Systems and Methods	Software and Digital Media Disclosure	Draft		Yes	Benny Beaver	10/4/2017	View Delete	