

Inventor Portal Manual

Version 1.0

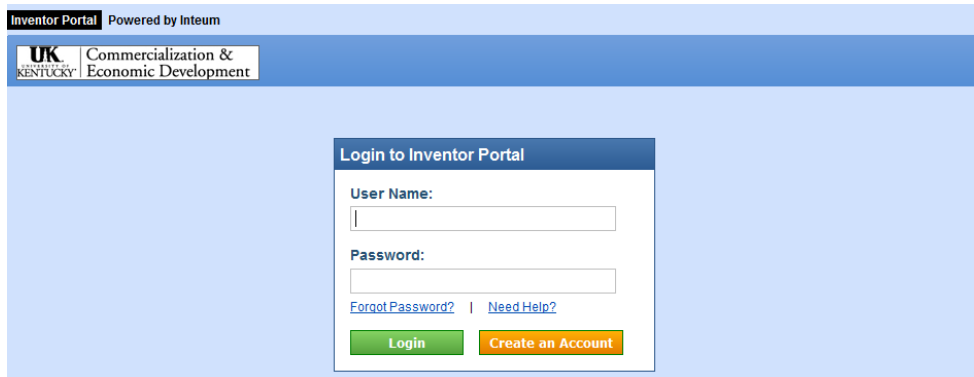
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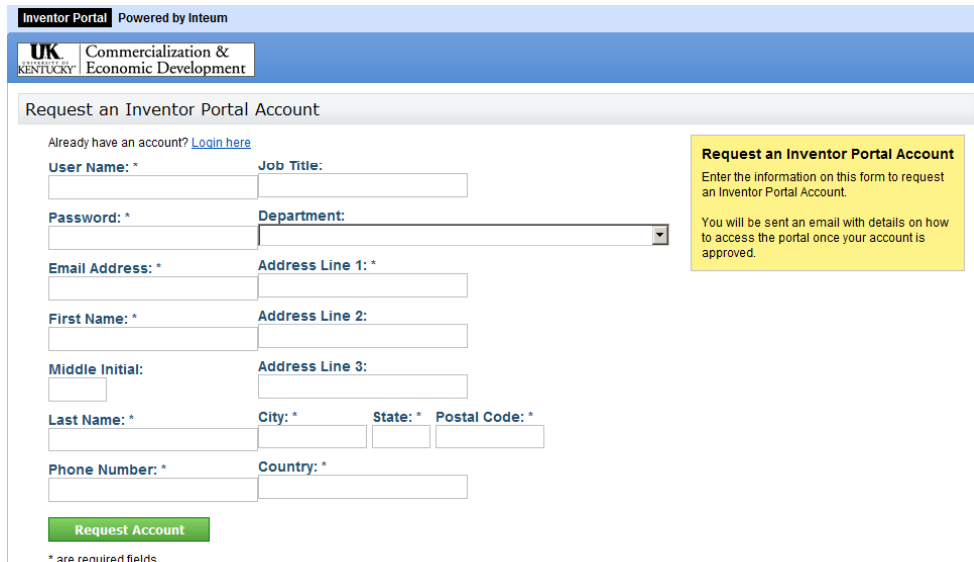
Step 1: Create an Account

If you have not done so already the first step to submitting an electronic IP disclosure via the Inventor Portal is to navigate your web browser to the following address:

<http://uky.ttoportal.com>



Once you have arrived at the page displayed above you can either enter in your user name and password or if you are first time user, create an account. To create an account you simply click the orange button labeled “Create an Account” and you will be provided the following online form to fill out:



Step 2: Inventor Portal Layout

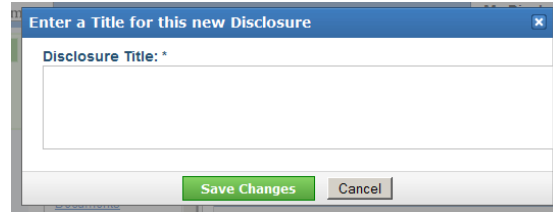
In the past all submissions were through a PDF or MS Word form that could be filled out on your computer, printed, signed and given to our office. In order to create an easy and seamless transition to an electronic format, the questions that were previously found in the form are all located on the electronic version, however they have moved in order. Before we compare the old forms to the new system, we should get acquainted with the layout of the electronic system. Once you have an account and have logged into the inventor portal you should come to the following page:

The screenshot shows the Inventor Portal interface. At the top, it says "Inventor Portal Powered by Inteum" and "You are logged in as: Made Up [Logout]". Below this is the "UK Commercialization & Economic Development" logo. The main navigation area includes "My Disclosures" and "My Account". The "My Disclosures" section has a "Show: All My Disclosures" dropdown and a message "No disclosures to show". The left sidebar contains "My Disclosures" with "Add New Disclosure" and "My Disclosures" links, "Current Status" showing "Drafts (0)", "Submitted (0)", and "Approved (0)", and "Need Help?" with a "Submit Feedback" link. A help text box at the bottom explains that disclosures are entered personally or by others and that users cannot edit submitted records.

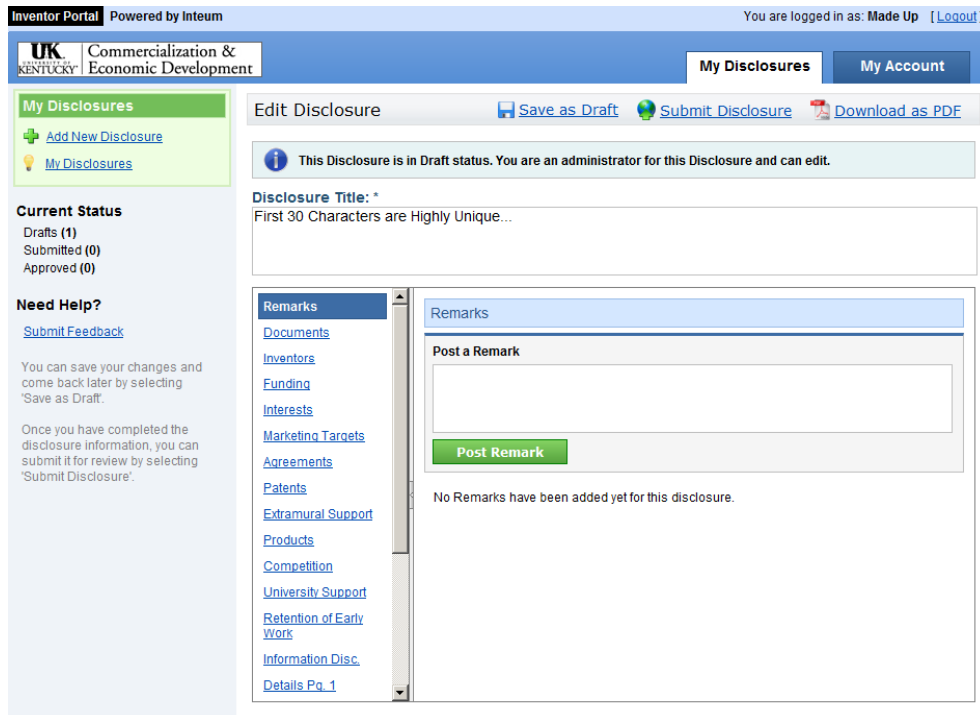
The first thing to note is the box labeled A. This should have your name displayed where it currently displays "Made Up." If for some reason this does not display your name, log out and try signing in again. If it still does not have the correct name displayed contact the administrator. The section labeled B is where you can keep your profile and account up to date with the most current information. The section labeled C is your navigation pane where you can either start a new disclosure or view your previous disclosures. Section D is an overview of all the disclosures that you have in the system. Section E is where you can contact the administrator with questions or comments related to the Inventor Portal.

Step 3: Adding a new disclosure

Once you have logged into the system, adding a new account is easy and user friendly. Click the link titled, "+ Add New Disclosure" and the first screen that is displayed is shown below:



The first thing that is needed is the Disclosure Title (previously question A) in which the first 30 characters should be highly unique to your disclosure. Once you enter in a title and click "Save Changes" the disclosure will automatically be saved in your drafts folder for future edits before submission. The next page you are brought to is the following:



The section of the page in the lower right side of your browser is where all the editing of the disclosure will occur and therefore the rest of the pictures will be specific to this area. There are three main sections which include A) Disclosure Status (top), B) Disclosure Sections (lower right) and C) Disclosure Contents (lower left).

The screenshot shows the 'Edit Disclosure' page. At the top, there are three buttons: 'Save as Draft', 'Submit Disclosure', and 'Download as PDF'. Below these is a status bar indicating the disclosure is in Draft status and that the user is an administrator. The 'Disclosure Title' field is visible with a character count. On the left, a navigation pane (Section B) lists various categories like Documents, Inventors, Funding, etc. The main content area (Section C) shows a 'Post a Remark' form and a message stating 'No Remarks have been added yet for this disclosure.'

Section A contains the links for you to save the disclosure as a draft, submit the disclosure, download the disclosure as a PDF and to edit the title of the disclosure. NOTE: Once you submit the disclosure you CAN NOT make any further edits except for remarks. If your disclosure is not ready to submit you should save it to a draft. It is also recommended to save regularly in order to avoid loss of information due to unforeseen computer malfunctions. Section B is a navigation pane that includes all the sections that will be filled out for the disclosure. Not all questions are required (see table below). Section C is where each question can be answered. When a subsection is selected in Section B multiple questions may be displayed in Section C for you to fill out. It is recommended that the user browse all subsections before beginning to fill anything out in order to better understand what types of questions are asked. Once again, to avoid loss of information clicking the "Save as Draft" link in Section A should be done regularly.

The following table is a description of each section and subsection and also how it relates to the older PDF form.

Section Title	Question	Description	PDF Form
Remarks	Remarks	Special notes made after submission.	None
Documents	Documents	Any and all documents that need to be included with the disclosure such as notes, documentation, figures and so on. (All should be PDF or MS Office documents)	None
Inventors*	Inventors*	List of inventors to be disclosed with this IP. Their contribution percentage is required.	L
Funding	Funding	List of all grants or other funding information.	None
Interests	Interests	Optional interests information	None
Marketing Targets	Marketing Targets	Optional information regarding possible marketing targets for the IP.	None
Agreements	Agreements	List of agreements that have been made tied to your IP.	None
Patents	Patents	List of patents that have come from your IP.	None
Extramural Support*	Was the technology extramurally supported?*	Provide all information known regarding extramural support for this IP.	D
	If yes, who gave the support?*		
	Give any contract related progress.*		
Products*	Have the products been made, written or tested?*	Provide all information regarding products.	None
	Test Date:*		
	Comments:*		
Competition*	Known inventions that will compete with IP:*	List all information regarding competition in the markets.	None

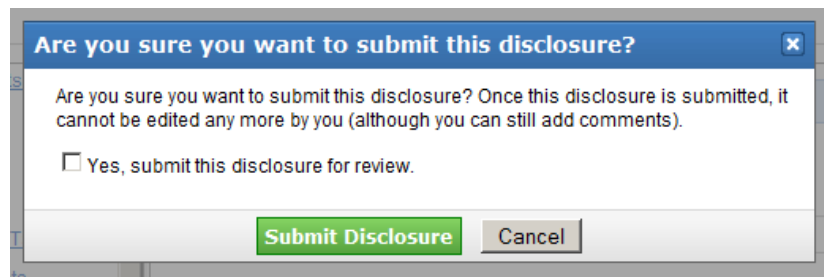
Section Title	Question	Description	PDF Form
University Support*	Were University resources used for this technology?*	Facilities, equipment, faculty staff or student time are all examples of University resources.	K
Retention of Early Work*	Did you retain samples/products from early work?*	Attach copies of substantiating notebook entries of experimental work. Note any retention of early work and where they are located.	G
Information Disc.*	Has any info been given outside the University?*	If information or samples (e.g., cell lines) relating to this intellectual property have been provided to anyone outside the University, please provide all details and dates.	E
Details Pg 1*	Problem(s) this invention solves:*	Give a detailed explanation of the problems the IP solves.	B
Details Pg 1*	Novel and unusual features:*	Give a detailed explanation of how the IP is novel or unusual.	B
Details Pg 1*	Disadvantages to invention:*	Provide any and all disadvantages the IP has.	B
Details Pg 2*	Prospective commercial uses:*	Describe the prospective commercial use of the intellectual property and your best assessment of what companies or firms might be interested in the technology.	C
Details Pg 2*	Future uses for this invention:*	Describe what the future holds for this IP regarding how it can be used.	B
Details Pg 2*	Limitations to be overcome:*	Describe what the limitations that need to be overcome are with the IP, for example the device is still in prototype stages and needs field testing.	B
Description:*	Conception Date:*	Attach any documents that can substantiate this date.	F
Description: *	First Reduction to Practice*	Attach any documents that can substantiate this date.	None

Section Title	Question	Description	PDF Form
Prior Work*	Prior related Patent applications or Patents:*	Provide all previous patent related information with the documents to substantiate them.	J
Prior Work*	Include your most recent literature search.*	Either attach the literature search under documents and reference here or enter in the search here.	J
Prior Work*	Describe the closest prior art to your technology.	What current technology is most like yours?	J
Future Disclosure*	Are there any future plans to disclose?*	If there are plans to disclose the IP in the future for any reason, please provide a date and all information regarding the plans.	None
Public Disclosure*	Has there been any full or partial disclosure?*	If any information has already been fully or partially disclosed to the public (i.e., company press release) provide all information and documents related to this disclosure.	None
Future Work*	Summarize further experimental work planned:*	Summarize further experimental work now underway or contemplated in the near future relating this intellectual property.	I
Publication*	All information revealed in grants or agreements:*	Provide citations and information on all information that has been revealed in grants or publications. Attach copies of abstracts, presentations, grants and manuscripts.	H
Experimental Work*	When did experimental work first occur:*	Provide notebook pages or other documents to substantiate this date.	G

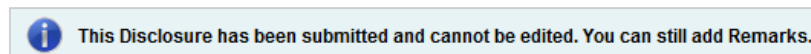
* Indicates required fields. If the field follows a yes/no question and is prompted with "if yes" then this is only required if "yes" is indicated.

Step 4: Submission of IP Disclosure

The IP disclosure submission process is fairly straight forward. Once all data has been entered into the system it is always recommended to save the disclosure as a draft first by clicking the “Save as Draft” link in the top section of the page. When everything is ready for submission and all documents have been attached, click the link labeled, “Submit Disclosure” in the top section of the page. It may take a moment to process so do not hit the link more than once. You will get the following dialog message:



It is very important to pay attention to this dialog box. If the disclosure is not finished or you want to make additional edits then press “Cancel” however if the disclosure is ready for submission then click the box where it says, “Yes, submit this disclosure for review.” Now you can press “Submit Disclosure” and the IP disclosure will be sent to our office. You should then see the following message at the top of the page:



The disclosure will then go through the review process and you will be notified what to do next by the IP committee.