

UWM RESEARCH FOUNDATION INVENTOR PORTAL

As you know, the UWM Research Foundation is the IP management and technology commercialization arm of the University of Wisconsin-Milwaukee.

In collaboration with the UWM Office of Technology Transfer, the UWM Research Foundation (UWMRF) utilizes Inventor Portal, an online system, which makes it possible for each of you to submit and view the status of your invention directly from your desk.

The purpose of the invention disclosure form is to provide a written, dated notice of your invention. A disclosure is necessary to enable the university to comply with most industry contractual requirements as well as the requirements of the U.S. Federal Government laws and regulations as they apply to university grants and contracts.

An invention disclosure should be completed when something new and useful has been *conceived* or developed, or when unusual, unexpected, or non-obvious research results have been achieved and can be potentially used for commercial purposes.

The Portal is accessible through <https://uwm.inteum.com/uwm/inventorportal/login.aspx> gives each inventor the ability to do the following activities:

- Complete and submit Invention Disclosures online;
- Check the status of your submitted Invention Disclosures;
- Check the status of all patent applications on which you are listed as an inventor; and
- Check marketing contacts associated with each of your inventions.

Enclosed is a “Step by Step” manual for entering data and navigating through the Portal. Although the Portal was designed to be intuitive and easy to use the instruction manual should answer any questions you may have. Alternatively, you can contact Jessica Silvaggi at 414-906-4654 or Smruti Patil at 414-906-4657 with any technical questions.

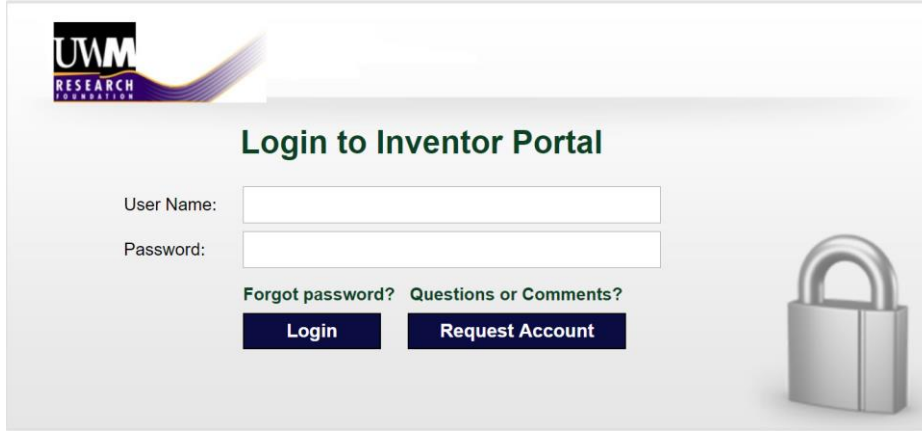
Once you have accessed and worked with the Portal, we are confident that you'll see the benefits of having this new information at your fingertips. If you have any questions or wish to provide suggestions for improving the Portal to UWMRF, please contact Jessica Silvaggi at the number above or jessica@uwmrf.org.

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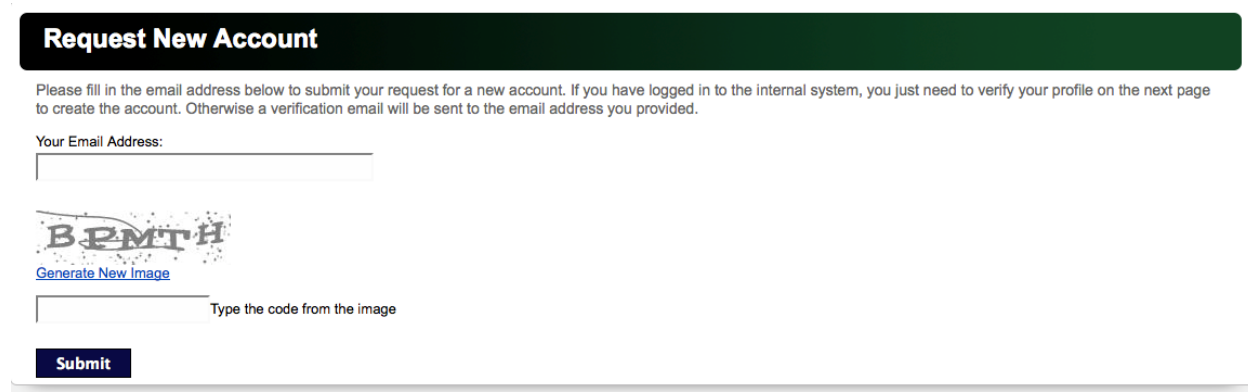
Logging onto the UWMRF Inventor Portal

UWMRF Inventor Portal Web address: <https://uwm.inteum.com/uwm/inventorportal/login.aspx>



The screenshot shows the 'Login to Inventor Portal' page. It features the UWM Research Foundation logo in the top left. The main heading is 'Login to Inventor Portal'. Below this, there are two input fields: 'User Name:' and 'Password:'. To the right of these fields is a large, 3D-rendered padlock icon. Below the input fields, there are two links: 'Forgot password?' and 'Questions or Comments?'. At the bottom of the form area, there are two buttons: 'Login' and 'Request Account'.

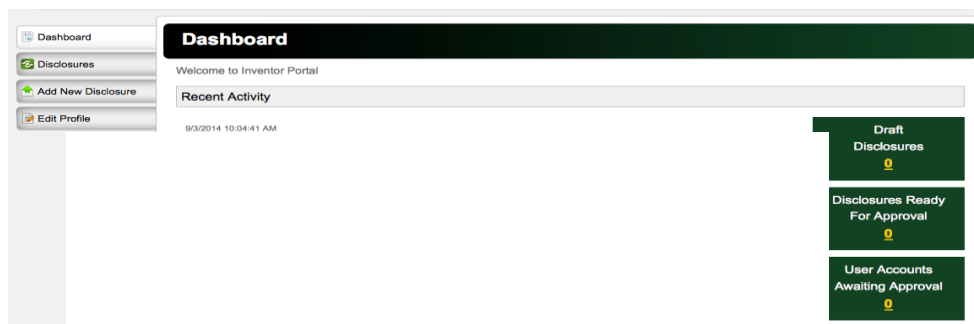
Enter your Inventor Portal User Name and Password or click on Create an Account to create a new account.



The screenshot shows the 'Request New Account' page. The title is 'Request New Account'. Below the title, there is a paragraph of instructions: 'Please fill in the email address below to submit your request for a new account. If you have logged in to the internal system, you just need to verify your profile on the next page to create the account. Otherwise a verification email will be sent to the email address you provided.' Below this text is a text input field labeled 'Your Email Address:'. Underneath the email field is a CAPTCHA image showing the letters 'BPMTH' with a 'Generate New Image' link below it. Below the CAPTCHA is another text input field labeled 'Type the code from the image'. At the bottom left of the form area is a 'Submit' button.

Fill in the information as requested and click on Request Account. You will receive an email indicating that your new account has been approved.

Once logged on, the UWMRF Inventor Portal home page will be displayed:



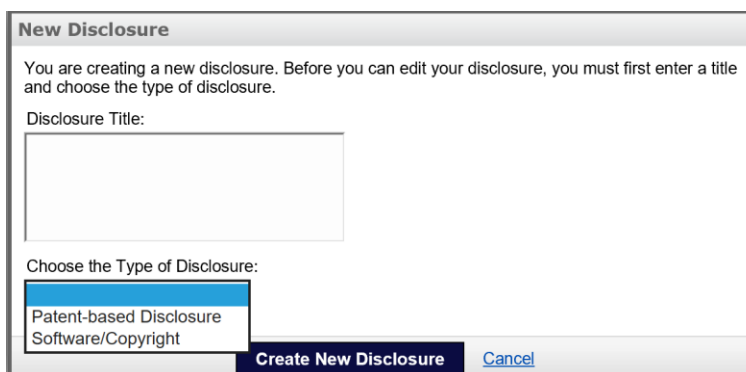
The screenshot shows the 'Dashboard' page. On the left is a navigation menu with items: 'Dashboard', 'Disclosures', 'Add New Disclosure', and 'Edit Profile'. The main content area has a header 'Dashboard' and a sub-header 'Welcome to Inventor Portal'. Below this is a 'Recent Activity' section with a timestamp '9/3/2014 10:04:41 AM'. On the right side, there are three summary boxes: 'Draft Disclosures' with a count of 0, 'Disclosures Ready For Approval' with a count of 0, and 'User Accounts Awaiting Approval' with a count of 0.

Overview

Tab	What You Can Do
<p>Dashboard</p> <p>Add New Disclosure</p> <p>Disclosures</p> <p>Edit Profile</p> <p>[Logout]</p>	<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>To enter data about a new disclosure</p> <p>To view the list of your disclosures. The Disclosure tab displays your number of Drafts, Submitted, and Approved disclosures.</p> <p>Need Help? Click on Submit Feedback in the upper right hand corner, enter your email address and any feedback or comments and click [Submit].</p> <p>On the right hand side there is a few boxes. Here you can view Draft Disclosures, Disclosures Ready For Approval, and Use Accounts Awaiting Approval.</p> <p>Click on the Edit Profile tab to update your account information and click [Save Changes].</p> <p>Click Logout on the top right of the Inventor Portal home page to log out of the site.</p>

Creating a new Inventor Portal Disclosure

- To add a new disclosure click [Add New Disclosure](#) to display a “Disclosure Title” dialog.



New Disclosure

You are creating a new disclosure. Before you can edit your disclosure, you must first enter a title and choose the type of disclosure.

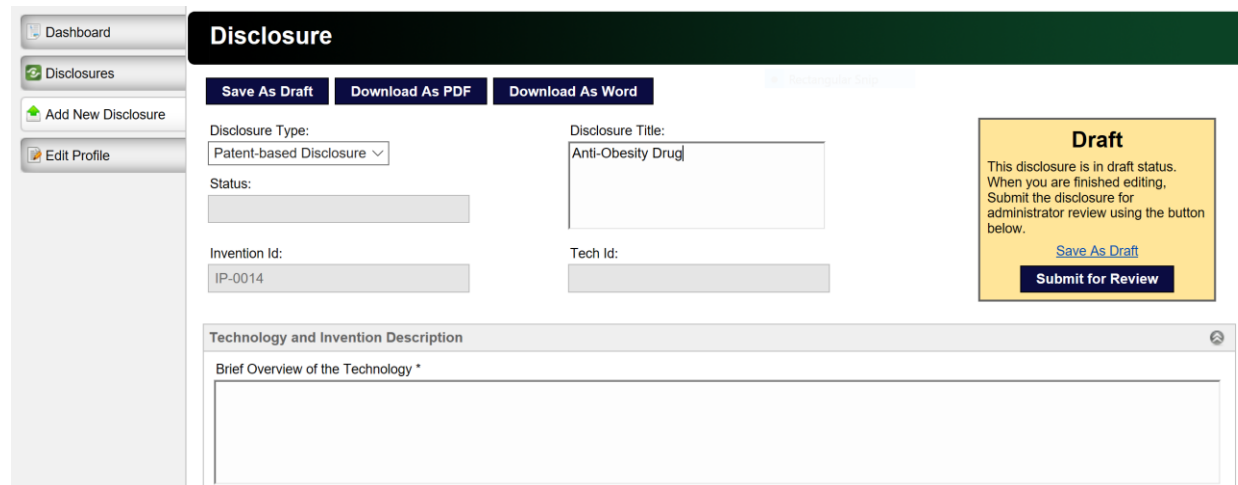
Disclosure Title:

Choose the Type of Disclosure:

Patent-based Disclosure
Software/Copyright

Create New Disclosure [Cancel](#)

2. Enter the title of your new disclosure and click [Create New Disclosure].
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 until it has been submitted. Once submitted, the disclosure can no longer be edited without the assistance of a technology transfer representative. Be sure you have thoroughly checked all the information before submitting your disclosure.

4. Under the Description header there is a list of fields to enter disclosure information. The information fields that have a star after the title indicates that an information entry is required for submission.

The following table lists the UWMRF Inventor Portal fields of entry and descriptions. Asterisks (*) denote fields that are required for submission.

Technology Invention and Description

Brief Overview of the Technology*:

Provide a brief, laypersons overview of the invention (no more than 2-3 paragraphs) explaining what the invention is and what it does (but not how it does it). What is the field of technology? What are the problems and/or opportunities in the technology field?

Invention Description*:

Describe how your invention works technically, stating its key features, its most important uses. Please include supporting evidence (data, results, diagrams, etc.) that provide a more complete description of the invention and how it works. What is unique and novel about the invention? How is it beneficial and to whom?

Invention Conception Date*:

Conception according to U.S. patent law involves the formulation of an invention in the mind of the inventor(s). It is the point when the means by which the technology can be produced is perceived or realized.

Invention Reduction to Practice:

Reduction to practice can be accomplished two different ways. Actual reduction to practice is a physical embodiment of the invention for its intended use. Construction reduction to practice is reasonable theoretical proof that the invention will work, which is described in writing.

Provide details on the current stage of development of the invention:

If applicable, please offer details of where the invention is at and where it is headed.

Publications and Disclosures

Are related patents or publications known to the Inventor(s)?

List most relevant patents, articles, journals, or abstracts of other authors.

Related publications by the Inventor(s).

List and attach in the documents section any of your own publications, posters, abstracts, or presentations that are at all related to this invention.

Has there been any full or partial disclosures? Y/N

Public disclosure is a public use, offer for sale, or an oral, written, or electronic disclosure of the invention to a person outside the research team that would enable another person skilled in the field to practice the invention or repeat its development. This can include the defense of thesis dissertations.

If yes, we need the disclosure date.

If yes, describe the disclosure:

Please provide the names of persons or companies to whom you disclosed to and whether a confidentiality agreement was utilized. Please provide copies of any publications, abstracts, posters, or other materials which mention or describe the invention in part or whole using the documents tab.

Are there any future publication or disclosure plans? Y/N

If yes, future disclosure date.

If unpublished and undisclosed, provide the anticipated disclosure date and any submissions already made for potential publication or disclosure.

If yes, describe the future disclosure:

Accurate data is essential, as public disclosures affect patent rights in the U.S. and abroad.

Initial Meeting Availability

Initial Meeting Option 1*:

Calendar Date

Initial Meeting Time Option 1*:

Typed entry

Initial Meeting Option 2:

Calendar Date

Initial Meeting Time Option 2:

Typed entry

Meeting Availability Comments:

Please add in any comments you want the technology transfer associate to be aware of.

Commercial Applications*

Text box to inform technology transfer representative of the commercial potential of the invention.

Useful questions to consider:

- What particular features of the invention are unusual AND how do they differ from present technology(ies)?
- What prompted you to develop this invention? What problem(s) does it solve?
- Are there any disadvantages to this invention compared to present technologies or in general?

Inventor(s)

The inventor(s) tab displays all of the inventors associated with the disclosure.

1. Click the inventor(s) tab and the name of the submitting inventor will be displayed.
2. Click [Add Inventor] and enter the information for the new inventor using the Add Inventor dialog

Add Inventor

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

Selected Contact:
No contact selected

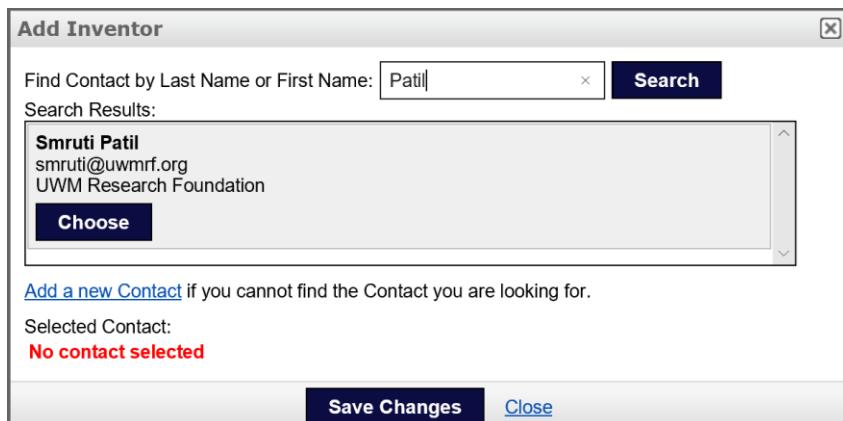
Save Changes [Close](#)

Inventor's Disclosure Role & Rights (Required):

Mark the role and 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.

Find Inventor by Last Name (Required):

If the inventor has an Inventor Portal account or an associated contact record in the UWMRF office Inteum 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 [Add a new Contact](#), complete the fields as prompted and click [Save Changes].



Add Inventor

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

Search Results:


Smruti Patil
smruti@uwmrf.org
UWM Research Foundation

Choose

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

Selected Contact:
No contact selected

Save Changes [Close](#)



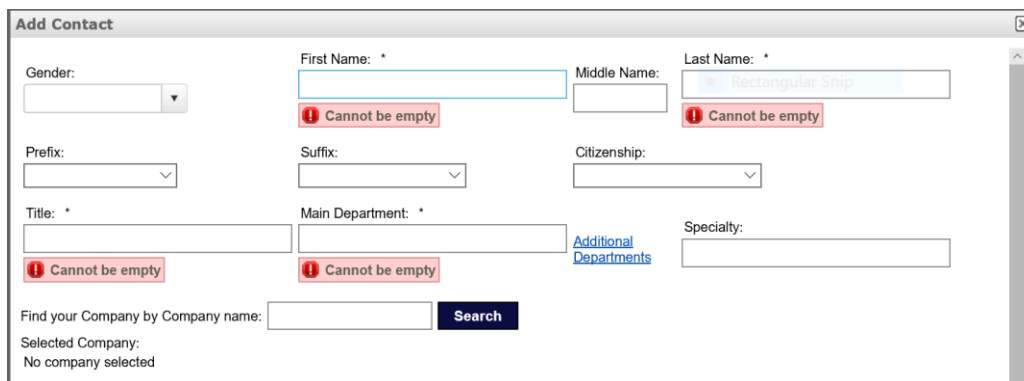
Add Inventor

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

No results found. [Add a new Contact](#) if you cannot find the Contact you are looking for.

Selected Contact:
No contact selected

Save Changes [Close](#)



Add Contact

Gender:
! Cannot be empty ! Cannot be empty

Prefix: Suffix: Citizenship:
 [Additional Departments](#)
! Cannot be empty ! Cannot be empty

Find your Company by Company name: **Search**

Selected Company:
No company selected

When adding a new contact please scroll all the way down and enter the home address for each new inventor(s). This information is used in assignment of your inventions to UWMRF and to the US Patent and Trademark Office.

Add Contact ✕

✖ You must enter at least 1 email

Email Address: *

Type:

▼

[Remove](#)

! Cannot be empty

Set as default email

[Add another Email](#)

[Add another Phone Number](#)

Address:

Type:

▼

Type:

▼

Remove

! Cannot be empty

City: State / Prv:
▼
 Postal Code:

Country:
▼

Set as default Address

[Add another Address](#)

Save Changes
Close

Selected Contact:

Smruti Patil
 smruti@uwmrf.org
 UWM Research Foundation
[Remove](#)

At the time of Invention

Working For:
▼
 ...

Client/Dept:
▼
 ...

Inventor's Disclosure Permissions/Access: *

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

View Only
Can only add remarks and view this disclosure.

Deferred View Only
Can only add remarks and view this disclosure after it's approved

No View
Can not view this disclosure and receive email notifications

Role Type:
▼

Signature Type:
▼
 digital

Signature Terms:
▼
 IP Signature Terms - default

Sign Date:
M/d/yyyy

Significance: *
2

Contribution %:
0.00

Client Department:

Please enter the Inventor's Department.

Inventor Order (Required):

Enter the inventor's significance (1, 2, 3....)

Contribution:

The percent that this inventor contributed to the invention.

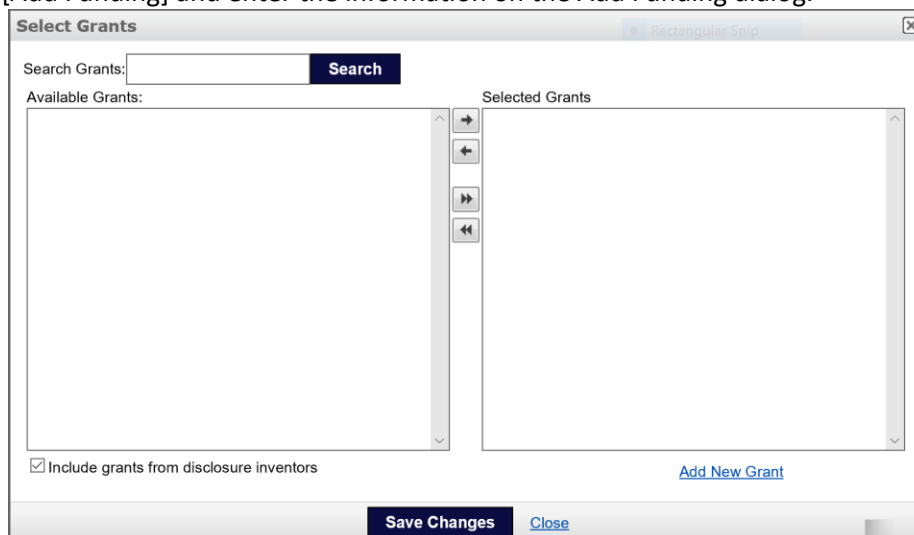
Documents

Attach any documents such as grants, manuscripts, etc. which are necessary to fully describe your invention.

Funding

The Funding tab shows any sponsorship support received for the research that resulted in the invention being disclosed.

1. Click [Add Funding] and enter the information on the Add Funding dialog.



Find Funding Institution by Name: 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 [Add Institution here](#) to add a new funding institution.

Find Principal Investigator by Last Name: 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 [Add Investigator here](#) to add a new principal investigator.

Grant/Contract Number (Required for Federal Grants): Type in the Grant/Contract Number. Click [Save Changes] and the funding Institution information as entered will be displayed on the Funding tab.

Remarks

Enter any comments about the disclosure to be read by your technology transfer representatives and/or other users who have been assigned as inventors for this disclosure and click [Post Remark]. This is also

where a technology transfer representative may reach out for more information to be added to the disclosure before approval.

Remarks ⊗

By	Comment	Created
No remarks to display.		

Add a Remark

[Save Remark](#)

Editing an Existing Inventor Portal Disclosure

If you don't have time to complete the disclosure you can click Save as Draft.

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](#)

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.

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

Submitting a UWMRF Inventor Portal Disclosure

After you have completed entering the information about the disclosure and filled out all the required fields the disclosure can be submitted. To submit the disclosure:

1. Click [Submit For Review](#).

Disclosure

Save As Draft Download As PDF Download As Word

Disclosure Type: Patent-based Disclosure ▾

Status:

Invention Id: IP-0014

Disclosure Title: Anti-Obesity Drug

Tech Id:

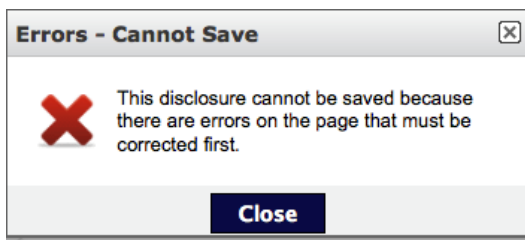
Draft

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

- If there are any required fields that are not filled in, a dialogue box will appear reminding you to correct the errors before continuing.



- Errors will be highlighted as you scroll through the disclosure.
- Once you have filled in all the required fields, submit your disclosure again.

Description

Brief Overview of Invention/Work *

Cannot be empty

Confidential Description *

Cannot be empty

Key words for prior art and literature searches *

Cannot be empty

Submit Disclosure [X]

Once submitted, this disclosure will no longer be editable (except remarks) and an administrator will be notified to review the disclosure. Are you sure you want to submit this disclosure?

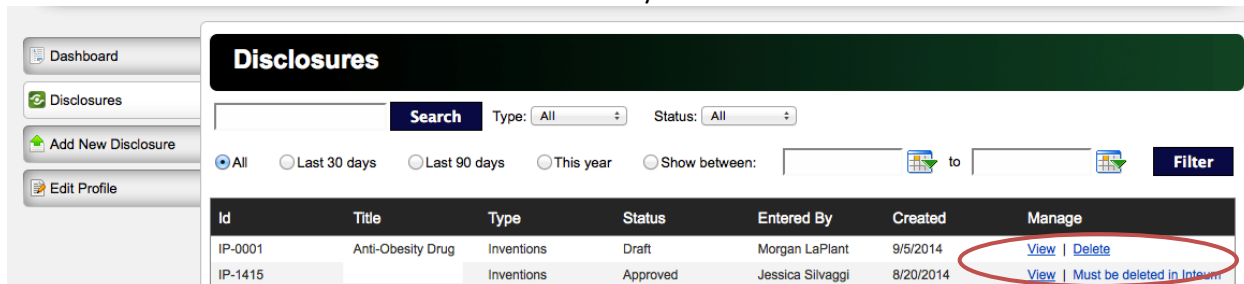
Yes **No**

- A text box will appear stating **“Once submitted, this disclosure will no longer be editable (except remarks) and an administrator will be notified to review the disclosure. Are you sure you want to submit. Check the box for “Yes” to submit your disclosure.**

Making sure the Portal Disclosure is submitted

Under the Disclosures tab, a list of your disclosures will show. Find the technology in question and in its respective row the current *Status* information will reflect if the disclosure has been submitted.

Please remember that once the disclosure has been submitted, it cannot be edited, however, in the *Manage* column on the far right of the table a user can [View](#) the disclosure to review the information fields and add remarks in the Remarks tab if necessary.



Id	Title	Type	Status	Entered By	Created	Manage
IP-0001	Anti-Obesity Drug	Inventions	Draft	Morgan LaPlant	9/5/2014	View Delete
IP-1415		Inventions	Approved	Jessica Silvaggi	8/20/2014	View Must be deleted in Interm

Checking the Status of a Portal Disclosure

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 Disclosures Status will change to **Approved-Approved** or **Approved-In Review**.

NOTE: After the disclosure is approved all inventors that are listed on the disclosure will receive an automated email requesting a digital signature.

Note, if the disclosure is rejected, its status reverts to Draft, and the Remarks tab can be reviewed to read an explanation for the rejection entered by the technology transfer administrator (e.g. due to a lack of complete information). At this point the Edit button can be clicked to open and revise the disclosure information as requested and then it can be re-submitted.

Once the technology transfer administrator re-reviews the submission and approves it the *Status* will update to Approved-Approved or Approved-In Review as above and the disclosure will again be locked from any further editing except for remarks.

Inventors can continue to log into the Inventor Portal to check the progress and review any ongoing remarks.

Other important aspects of the invention that the technology transfer representative is interested in:

Keywords: The UWMRF searches numerous databases when searching for invention, patent, and market information. Please provide a short list of words, acronyms, common industry phrases, categories, or descriptions related to your invention.

Other Agreements:

Identify any agreements related to the invention:

List any agreements that you have entered into that are related to the invention and might grant rights of any sort of the invention to a company or other party outside of the university (commercially sponsored research agreements, consortia agreements, consulting agreements, etc.)

Did invention use any outside materials?

Did this invention use any materials that were obtained from a company, another institution, or other party?

Was this material covered by an MTA or other?

Was this material covered by a Material Transfer Agreement, Sponsored Research Agreement, Collaboration Agreement, or any other type of agreement?

Were related materials transferred outside?

Did you transfer to any researcher outside of your institution any new materials (DNA, peptides, cell lines, vectors, catalysts, alloys, composites, prototypes, etc.) related to the invention?

Stage of Development

- Describe the development status (i.e. concept only, laboratory tested, prototype, etc.). Indicate what further development is planned and/or may be necessary.
- Have the products been made, written, or tested?
- Is there a date if any future testing of the technology is planned?

Are inventors interested in a Start-up Company?

Have inventors actually formed a company?

Other Important Information:

Agreements:

As agreements are created and populated in the UWMRF's database that pertain to the disclosure, the Agreement ID, party involved, agreement type, status and other pertinent information will be displayed so that the inventor(s) can view the status of all related agreements.

Patents:

As patent records are created and populated in UWMRF'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 will be displayed so that the inventor(s) can view the status of all related patents.

Please contact Jessica Silvaggi (jessica@uwmr.org) for any further information regarding the UWMRF Inventor Portal.