



Inventor Portal User Guide

The UToledo Inventor Portal allows all faculty, staff, and student inventors to submit invention disclosures in a convenient, streamlined process. Although the portal is intuitive, users seeking additional guidance may find this tutorial helpful.

The Inventor Portal provides transparency in the development of proposed new technologies by permitting inventors to quickly upload all attachments, easily track UToledo submitted disclosures in real-time, and track all related patents.

The portal screen may be wide and require scrolling left ↔ right to navigate.

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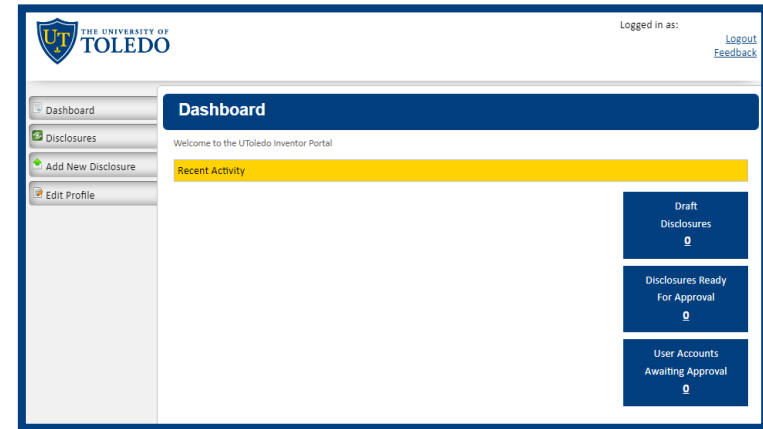
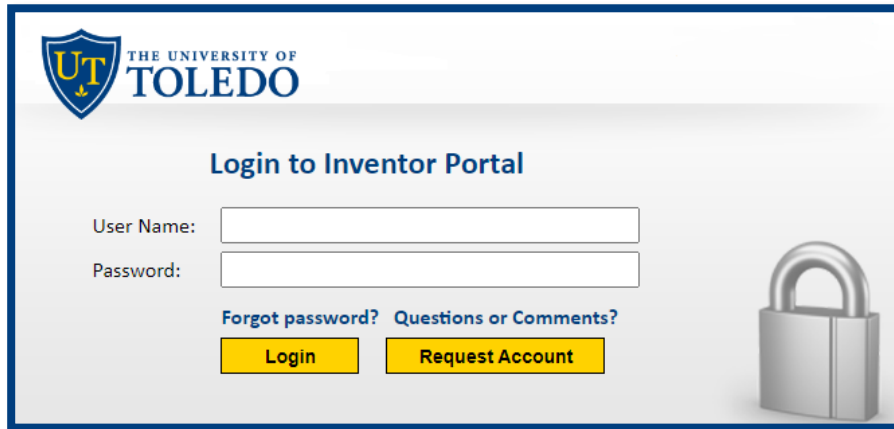
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Account Access

Using UTAD Credentials

→ Navigate to the [Inventor Portal site](#) to submit an Invention Disclosure.

- ✓ Enter your UToledo UTAD for the **User Name** and UTAD password. **User Names cannot be changed as the name defaults to the assigned UTAD ID.**

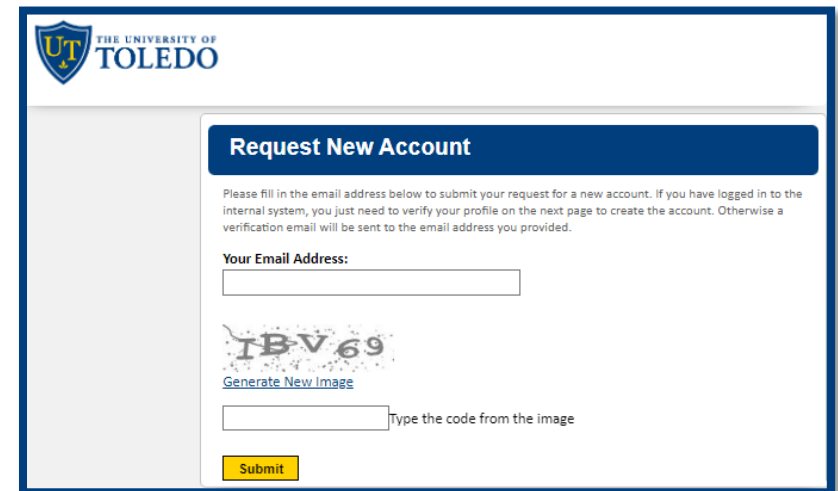


Non-UTAD Co-Inventors

→ All named co-inventors are required to sign a completed disclosure but first must create/access their account. Non-UToledo co-inventors (i.e., faculty at other institutions, research colleagues at a company, etc.) must use this link to select [Request New Account](#).

Note: the Technology Transfer Office (TTO) reviews new accounts Monday – Friday 9:00 am – 4:00 pm; please allow up to two business days to process.

- ✓ **New Account Next Steps:**
 - The TTO admin is notified of the new account request
 - Upon approval, the new user receives an email with the subject line *Inventor Portal Account Request*, along with a link to create an account
- ✓ **Creating a New Account:**
 - Enter the email address used to request the account, the CAPTCHA, and **Submit**
 - New users must complete the required **Create Account** information, or select an *existing record* if applicable (e.g., records may exist for former UToledo students or faculty/staff co-inventors, who left the university prior to the date the disclosure was submitted)
 - After updating the profile information, external users may access the portal using their chosen user name and password



Dashboard/Overview

The Dashboard serves as the home screen of the Inventor Portal screen; it is located from the menu on the left side of the screen.

Using the menu items, users may navigate the following menu buttons:

- **Dashboard** – provides a summary of all disclosures along with the status of each submission (e.g., draft, submitted, or approved)
- **Disclosures** – lists all prior and current disclosures. Select individual disclosures to view details of each submission including any documents added/modified by authorized co-inventors, editors, or TTO staff
- **Add New Disclosure** – enter a new disclosure by first selecting the correct type: **Invention Disclosure** or **Research Tool Disclosure**
- **Edit Profile** – users must maintain their contact information

The midnight blue submenu on the right indicates the number of **Draft Disclosures** or submitted **Disclosures Ready for Approval**.

Disclosures are also listed below the gold **Recent Activity** bar. Most new users will see zero (0) disclosures until a new disclosure is submitted.

Navigate the portal functionality using the left menu.

The **Dashboard** is the landing page of the portal.
All activity is shown below the gold **Recent Activity** bar.

View disclosure status in blue boxes on the right.

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Logged in as: [Logout](#) [Feedback](#)

Dashboard

Welcome to the UToledo Inventor Portal

Recent Activity

7/14/2022 11:00:11 AM	Jackie Wilkinson added a new Remark to " test " "Please upload the document with the illustration of your invention."	Draft Disclosures 1
7/13/2022 9:51:07 AM	Disclosure " test " status was changed to Approved	Disclosures Ready For Approval 3
7/13/2022 9:42:07 AM	Disclosure " Inteum Test Disclosure " status was changed to Draft	
7/13/2022 9:36:34 AM	Disclosure " test " status was changed to Submitted	

Edit Profile

First-time users of the UToledo Inventor Portal, must update the **Edit Profile** section.

Users **without** UTAD credentials will see **Create Account** (rather than **Edit Profile**) displayed at the top of the page.

Users **with** UTAD credentials will notice a few fields of their profile prepopulated. The profile section **MUST** be thoroughly updated. The Technology Transfer Office (TTO) must have updated contact information. This ensures the correct information is on file for any future potential licensing agreements or royalty payments.

If a user enters the incorrect location of their employer (highlighted in yellow), they may type the correct name in the box and use **Search** to correct the entry.

→ Very Important to keep updated:

- ✓ **Email – provide two**
 - 1) Enter your **UToledo** (Office/Work) email address as the default email
 - 2) Select the link to **Add another Email**
 - Add a secondary **Personal Email** (non-UToledo email)
- ✓ **Phone – provide two**
 - 1) List an **Office/Work** phone number
 - 2) Select the link to **Add another Phone Number**
 - Add a secondary **Personal/Mobile** phone number
- ✓ **Address – provide two**
 - 1) Select the appropriate campus location (**HSC, MC, or UTMC**)
 - List your building location (e.g., HEB, Room #4000)
 - 2) Provide your residential address, *as required by many government patent offices*
- ✓ **LinkedIn** – Your LinkedIn URL may help to locate faculty or students upon a career change or after graduation
- ✓ **Save Changes** – located at the bottom of the screen

Returning users of the UToledo Inventor Portal must update any changes to their profile.

Edit Profile

Please note that all fields marked with an asterisk (*) are required.

User Name: *

Gender: [Dropdown] First Name: * Middle Name: Last Name: *

Prefix: [Dropdown] Suffix: [Dropdown] Citizenship: * [Dropdown]

Title: * Main Department: * Additional Departments: [Dropdown] Speciality: [Dropdown]

Find your Employer by Company name: [Text] **Search**

Selected Company:

The University of Toledo - MC (Main Campus)
2801 W. Bancroft
Toledo, OH 43606 United States
 Set as my default Company
[Remove](#)

Email Address: * Type: [Dropdown] [Remove](#)

Set as default email
[Add another Email](#)

Phone Number: * Type: [Dropdown] [Remove](#)

Set as default Phone Number
[Add another Phone Number](#)

Address: Type: [Dropdown] [Remove](#)

2801 W. Bancroft Street

City: [Text] State / Prv: [Dropdown] Postal Code: [Text]

Toledo OH 43606-3390

Country: [Dropdown]

United States

Set as default Address

Address: Type: [Dropdown] [Remove](#)

Home

123 Main St.

City: [Text] State / Prv: [Dropdown] Postal Code: [Text]

Sylvania OH 43560

Country: [Dropdown]

United States

Set as default Address
[Add another Address](#)

Save Changes

Disclosures Overview

All new disclosures are assigned a Disclosure ID and initially saved in **Draft** mode. This allows users to thoroughly review the disclosure before submitting it for approval.

- All menus are unique to each user (e.g., an individual can only view disclosures in which they are listed as a co-inventor or subscriber)
- **Review Stage** – indicates the stage of the disclosure submission: **Draft**, **Submitted**, or **Approved for Patent Committee Review**
- **Status** – displays as (blank for **Draft** forms), **Returned to Inventor**, or **Accepted for Review** – see p. 8 of this document for status explanations
- Disclosures submitted may not show as **Accepted for Review** until all requested information is updated in the disclosure
- Disclosures submitted prior to 7.3.22 were imported as **Historic Invention Disclosures** and only list the title and inventor(s)

Please note the following when adding a New Disclosure:

- Once a Disclosure is **Submitted** and **Accepted for Review** by the TTO, it may only be modified with TTO staff assistance
- If a disclosure is **Returned to Inventor**, it will remain incomplete until changes are made and it is resubmitted
- All text box entries will expand if necessary when adding/updating information to the UToledo Inventor Portal
- There is one (1) **Documents** section to attach any necessary documentation for a disclosure

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Logged in as:

Dashboard

Disclosures

Add New Disclosure

Edit Profile

Disclosures

Search Type: All Review Stage: All Created Date: All

Invention Id	Tech Id	Title	Type	Status	Review Stage	Inventors	All Signatures Received	Entered By	Created Date	Manage
TBD-001		Inteum Test Disclosure	Invention Disclosure		Draft	Riordan	No	Theile Riordan	16/06/2022	View Delete

Add New Disclosure

Provide all requested information to expedite the processing and review of your submission. See p. 9 section definitions – *not all apply to each Invention Disclosure*.

- **New Disclosure** – separate pop up window opens
 - Type or copy/paste the **Title** of the disclosure in the field
 - **Choose the Type of Disclosure** from the dropdown list
 - Select the gold **Create New Disclosure** button
 - The disclosure is automatically saved in **Draft** form
 - Fields in gray are for TTO use only and cannot be modified

Add Inventors

Include **all** additional internal or external inventors.

Internal: UToledo Members

- Includes all UToledo Faculty, Staff, and/or Student Inventor(s)
 - Type the name in the search box; existing contact names will appear in the gray **Search Results** box
 - Select the correct name and confirm with the gold **Choose** button; the name now appears in the yellow **Selected Contact** box
 - Verify the contact's employer details by choosing the institution they are/were **Working For** at the time of invention (select **HSC**, **MC**, or **UTMC** campus for UToledo affiliates), pick the appropriate **College /Dept** and **Save Changes**
 - Modify the **Inventor's Disclosure Permissions/Access**; the default is set to **View Only**;
 - Select Inventor **Role Type**: Non-UT Faculty, UToledo Faculty, UToledo Staff, or UToledo Student/G.A.
 - Use the gold **Save Changes** button at the bottom of the window to save and continue

External: Non-UToledo Members

- Search for the inventor's name; if not found, use **Add a New Contact** to add the following:
 - First and Last Name
 - Citizenship
 - Professional Title
 - Department
 - LinkedIn URL
 - Company
 - Email Address
 - Phone
 - Permissions/Access setting
 - Role Type (**Non-UT Faculty** = any inventor at another institution)
- Use the gold **Save Changes** button at the bottom of the window to save and continue

Submit Disclosure

Although it is important to submit a new Invention Disclosure as soon as possible, the UToledo Inventor Portal allows users to save their Invention Disclosure as a **Draft** and return to complete it at a later date (within reason).

- Disclosures are saved in draft form immediately after a user enters a disclosure title and selects the gold **Create New Disclosure** button
- Users may see all disclosures affiliated with their name by selecting the **Disclosures** tab

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.

Title of the Invention/Research Tool:
This is my title.

Choose the Type of Disclosure:
Invention Disclosure

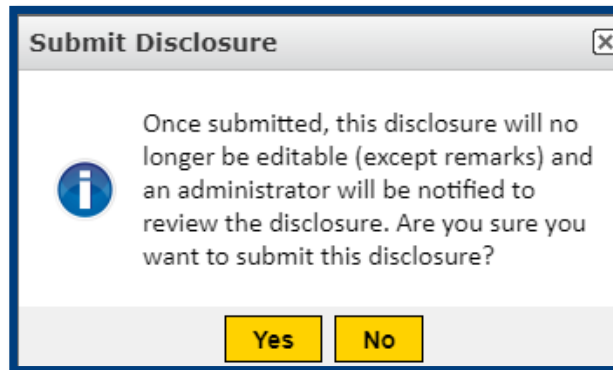
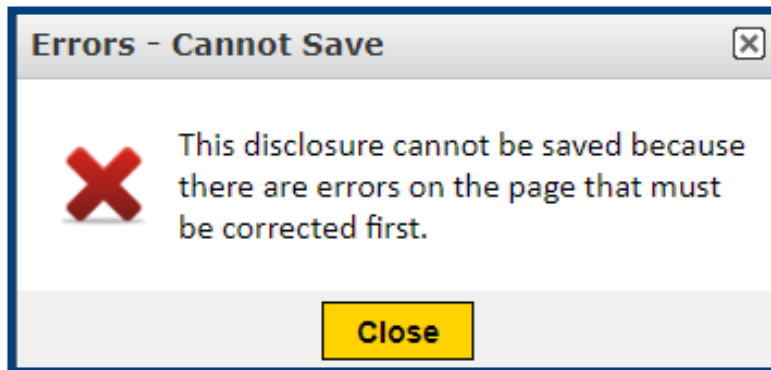
Create New Disclosure [Cancel](#)

Disclosures

Search Type: All Review Stage: All Created Date: All

Invention Disclosure ID	Tech ID	Title	Type	Status	Review Stage	Inventors	All Signature: Received	Entered By	Created Date	Manage
D2022-0044		test	Invention Disclosure	Draft		Jackie Wilkinson	No	Jackie Wilkinson	7/5/2022	View Delete

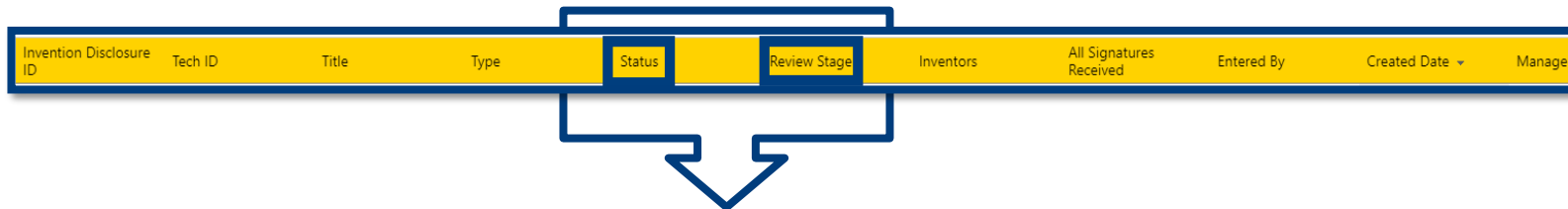
- If information is missing, an error message will remind users to correct errors prior to selecting **Submit for Review**.
 - Users should review the Invention Disclosure, complete the missing sections, and resubmit the disclosure.



➔ See the next section for an explanation of the various Invention Disclosure **Status** and **Review Stages**.

Status and Review Stages

Upon review, a TTO staff member may revert a submitted disclosure back to **Draft** status. If this is necessary, a remark will explain the change in status. Remarks will show on the Dashboard menu under **Recent Activity** and the inventor will receive an email notification of the change.



Progress of the Invention Disclosure through the Status and Review Stages

Purpose of Status Change by <u>TTO Staff</u>	Status	Review Stage	Review Stage Action by <u>Inventor</u>
		Draft	A. An inventor begins the process of submitting a disclosure. <i>(See B)</i>
		Submitted	B. The inventor completes form and selects Submit for Review . <i>(Review Stage updated; see 1.0)</i>
1.0 TTO staff reviews the disclosure. <i>(Status is updated; see 2.0. If edits are required; see 1.1)</i>	Accepted for Review	Submitted	
1.1 *If editing is needed, the disclosure status updates to Returned to Inventor and the Review Stage reverts to Draft . TTO staff adds a comment in the Remarks section (located at the bottom of the disclosure screen) to document and notify the inventor of the necessary update or requested change. <i>(See B.1)</i>	Returned to Inventor →	Draft →	B.1 If information is missing (i.e., grant information, documents, co-inventor names, etc.) the disclosure is returned to the inventor to update. The inventor receives an email regarding this change in status. <i>(See B.2)</i>
2.0 TTO staff receives the completed disclosure and begins the initial review process. <i>(See 2.1)</i>	Returned to Inventor	Submitted	B.2 Inventor reviews the Remarks section, makes changes, and finalizes disclosure by selecting Submit for Review again. <i>(Review Stage is updated again; see 2.0)</i>
2.1 The disclosure is reviewed thoroughly by the TTO staff. A Tech ID number is assigned to the disclosure. <i>(Status is updated; see C.)</i>	Accepted for Review	Submitted	
3.0 After all inventors digitally sign the disclosure, the TTO staff researches prior art/references to distinguish novelty. Patent Committee may invite an inventor to present their technology at a monthly committee meeting. Please note: this decision process may take up to 45 days.	Accepted for Review	Approved for Patent Committee Review	C. All inventors receive an email notification to sign the completed disclosure. <i>(Review Stage updated by TTO Staff; see 3.0)</i>

*Possible status change

Explanation of Disclosure Sections

1) Invention Description	Provide both a very brief and detailed description of the invention. Upload any documents in the single Documents section.
2) Prior Method	Submit information relating to any prior methods or apparatus', if any, for performing the same function of the invention.
3) Invention Conception	Include the conception date, place and existing record.
4) Reduction to Practice	Provide information regarding the first successful construction or operation of the invention that shows the practical usefulness and advantages of those features that distinguish it from prior technology.
5) Prior Art	Conduct a prior art search with the U.S. Patent and Trademark Office and Google Patents ; save any findings to upload in the Documents section.
6) Outside Disclosures	Private disclosures can serve to corroborate when the invention was made, but public disclosures, especially printed publications (including news reports, abstracts, theses, and dissertations) can limit the period for filing a U.S. patent application and possibly preclude foreign patents. Please list both private and public disclosures made regarding this invention.
7) Funding	Identify any research projects or sponsors that supported the development and reduction to practice of the described invention. <ul style="list-style-type: none"> ▪ Select Add Grants to add grant that funded the project; <i>incorrect formatting</i> of federal grant numbers will delay review of your disclosure.
7.1) Add Grants	Search for grants by Grant Number, Inventor Name, or add a New Grant while in the Add Grants screen.
8) Outside Source of Materials	Provide information regarding material relevant to the invention, received from an entity outside The University of Toledo, including those under a Material Transfer Agreement (MTA). Upload any documents in the Documents section.
9) Documents	Upload any necessary documents (the checklist is provided for the user's convenience): <ul style="list-style-type: none"> ▪ Invention Image/Detailed Descriptions ▪ Prior Art Search Findings ▪ Invention Conception Documentation ▪ Reduction to Practice Documentation ▪ Relevant MTA(s)
10) Marketing Targets	<ul style="list-style-type: none"> ▪ What products, processes, or services could result from the invention? ▪ Problem this product, process, or service solves? Who is the intended beneficiary of the product? ▪ What is the approximate market size for the invention? How was this determined?
10.1) Add Marketing Target	Share any commercial entities that may be interested in your discovery, along with keywords to help our licensing/commercialization managers find companies that are interested in your technology. Keywords are also utilized to help the public search for the non-confidential summary of available technologies on the UToledo Technology Publisher page (only technologies available for licensing are published on the page).
11) Subscribers	A subscriber is someone other than the inventor (e.g., an assistant or business manager) that may need to access the information in the disclosure. Subscribers do not need to be users of the Inventor Portal. Add individuals that you would like to be notified by email of events and actions that take place for this disclosure. All inventors are automatically added as subscribers for their respective inventions.
12) Other Comments	ONLY use prior to submitting the disclosure for review. <ul style="list-style-type: none"> ▪ Inventors may add comments regarding their disclosure prior to submitting it for review.
12.1) Add a Remark	Used after the disclosure is submitted for review. <ul style="list-style-type: none"> ▪ All inventors, subscribers, and the TTO will receive an email notification each time a new remark is made. ▪ A history of all remarks is kept within the disclosure record. ▪ The TTO may Add a Remark to communicate to inventors about their disclosure status, ask questions, etc. ▪ Inventors may Add a Remark to ask or answer questions, check on the status of the disclosure, etc.