



University of Utah Technology & Venture Commercialization is pleased to introduce our new Inventor Portal.

The portal is accessible through a login from any web-enabled computer and makes it possible for each inventor to:

- Complete and submit invention disclosures online.
- Check the status of your invention disclosures submitted through the Inventor Portal.
- View a list of patent applications filed in relation to your invention disclosure and check status.
- View a list of agreements executed in relation to your technology.

Following is a “step by step” manual for entering data and navigating through the portal. The TVC Inventor Portal was designed to be intuitive and easy to use, however, the instruction manual should answer any further questions you may have.

If you have any questions or wish to provide suggestions to TVC for improving the portal, please contact Leslie Smith at 801-213-3571 or leslie@tvc.utah.edu.

Logging into UofU Technology & Venture Commercialization Inventor Portal

Open a web browser and type: <https://UofU.ttoportal.com>.

1. Select **“Create an Account”**.



2. Complete the information and select **“Request an Account”**.
3. You will receive an email when your account has been approved. (Account approvals will be processed Monday through Friday 8:00 a.m. to 5:00 p.m.)

Login here'. The form contains several required fields: 'User Name: *', 'Job Title: *', 'Password: *', 'Department: *' (a dropdown menu), 'Email Address: *', 'Address Line 1: *', 'First Name: *', 'Address Line 2: *', 'Middle Initial: *', 'Address Line 3: *', 'Last Name: *', 'City: *', 'State: *', 'Postal Code: *', and 'Phone Number: *'. There is also a 'Country: *' field. A yellow callout box on the right side of the form reads: '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.' At the bottom left of the form is a green 'Request Account' button, which is circled in red." data-bbox="102 432 895 782"/>

Once logged on, the Technology & Venture Commercialization Portal home page will be displayed:

Tab	What you can do
My Disclosures	<ul style="list-style-type: none"> All of your disclosures can be monitored and managed from this tab. Once you have created, edited, and submitted a disclosure, the “My Disclosures” tab will contain a list of the disclosures that have been created by you or that others have created and included you on as an inventor. The current status of each disclosure is displayed. Using the drop-down box next to “Show”, you may filter your disclosures by status: All, Draft, Submitted or Approved.
My Account	Under the “My Account” tab you may edit your profile or change your password.
[Logout]	Click “[Logout]” in the upper right-hand corner to logout of the site.

Submitting a New Invention Disclosure through the Inventor Portal

- Click on **“Add New Disclosure”** in the upper left-hand corner.
 - A dialog box titled **“Enter a Title for this New Disclosure”** will be displayed.
- Enter the title and click **“Save Changes”**.

- A new disclosure draft with the title you entered will be displayed listing you as the inventor/administrator with 100% contribution.

NOTE: As the inventor/administrator, you can edit the disclosure in the Inventor Portal, however, once the disclosure is submitted and approved, it can no longer be edited without consent from Technology & Venture Commercialization. Be sure that you have thoroughly reviewed the disclosure and uploaded any attachments before submitting.

The screenshot shows the 'Inventor Portal' interface. At the top, it says 'Powered by InTEAM' and 'You are logged in as: Leslie Smith [Logout]'. The main header includes 'TECHNOLOGY COMMERCIALIZATION OFFICE THE UNIVERSITY OF UTAH' and navigation tabs for 'My Disclosures' and 'My Account'. On the left, there's a sidebar with 'My Disclosures' (Add New Disclosure, My Disclosures), 'Current Status' (Drafts (2), Submitted (0), Approved (0)), and 'Need Help?' (usha.k@tc.utah.edu, Submit Feedback). The main content area shows 'Edit Disclosure' with buttons for 'Save as Draft', 'Submit Invention Disclosure', and 'Download as PDF'. A message states: 'This Disclosure is in Draft status. You are an administrator for this Disclosure and can edit.' Below this, the 'Invention Disclosure Title' is 'Another New Invention'. A table titled 'Inventors' shows one entry: Leslie Smith, Administrator, 100.00% contribution. A red arrow points from the 'Inventors' table to a separate list of tabs below.

- On the left is a list of tabs in which disclosure information may be entered. Please **click on each tab** and enter the appropriate information in each field.

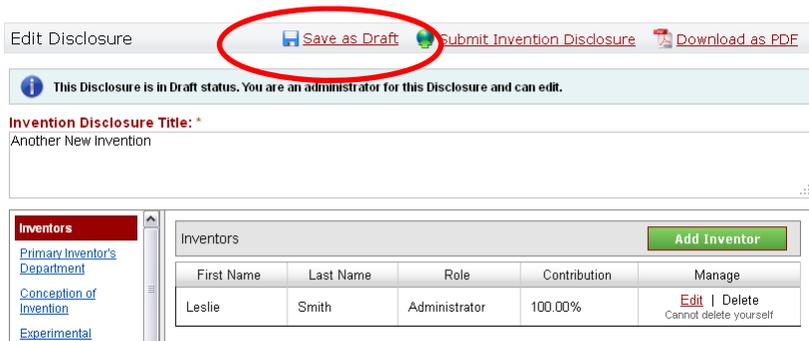
NOTE: Fields with asterisks are required.

- Hovering your cursor over a field will display a tool-tip with more information about each particular field.

This screenshot shows a detailed view of the 'Experimental evidence of Inv.' tab. The left sidebar lists various tabs: Primary Inventor's Department, Conception of Invention, Experimental evidence of Inv. (highlighted), ARUP Appointment, HCI Personnel, HHMI Employee, VA Affiliation, USTAR Appointment, Other (Please specify), Advantages, Applications, and Stage of Development. The main content area for 'Experimental evidence of Inv.' includes:

- 'Date of experimental evidence if applicable: *' with a text input field and a calendar icon.
- 'Does a written record exist: *' with a dropdown menu.
- 'Details: *' with a text area containing a tooltip: 'If yes, location of the written records. If no written record exists, list names with whom you had discussions if applicable.' This tooltip is circled in red.

- You may **SAVE** your disclosure at any time by clicking on **“Save as Draft”**, and return later to continue.
Note: The Portal will time out after 60 minutes so **SAVE YOUR WORK FREQUENTLY** by selecting **“Save as Draft”**.



7. Following is a list of each tab/field to be completed in the invention disclosure process.

<p>Inventors</p>	<p>1. Select the “Inventors” tab to add additional inventors. Note: You will need to adjust the “Contribution” level in your own record before designating a level for additional inventors as the contribution cannot exceed 100%.</p> <p>2. Inventor’s Disclosure Role & Rights (Required): Designate each inventor as either “Administrator” or “View Only.” Administrators can view and edit the disclosure prior to submission. View Only allows viewing of the disclosure and adding remarks and documents.</p> <p>3. Find Inventor by Last Name: Search for each inventor by entering their last name in the “Find Inventor” field. Possible choices will be displayed below in a drop-down box. If no choices are found, click “Add Inventor here” and complete the fields as prompted. Remember to “Save Changes.”</p> <p>4. Client Department (Optional): Enter the co-inventors’ home department(s).</p> <p>5. Inventor Order (Required): Enter the significance of the inventors (1, 2, 3...)</p> <p>6. Contribution (Optional): Enter the % that each inventor contributed to the invention. The % of contribution affects the share of royalties between inventors. (See UofU Patent and Invention Policy for further information.)</p> <p>NOTE: If percentages are not entered for each inventor, TVC will distribute them evenly.</p>	
<p>Primary Inventor’s Department</p>	<p>List the primary inventor’s department. This information is used to determine the appropriate TVC Management Team during initial review of the invention disclosure.</p>	
<p>Conception of Invention</p>	<p>Enter the date of conception of the invention and whether or not a written record exists. Enter details if applicable.</p>	
<p>Experimental evidence of Inv.</p>	<p>Enter the date of experimental evidence of the invention and whether or not a written record exists. Enter details if applicable.</p>	
<ul style="list-style-type: none"> • ARUP Appointment • HCI Personnel • HHMI Employee • VA Affiliation • USTAR Appointment • Other (Please specify) 	<p>Enter any appointments and/or memberships any of the inventors may have had at the time of the invention.</p>	

Concise Technical Summary	Provide a concise technical summary of the invention. If you need to upload any supporting documents, use the “ Upload Documents ” tab toward the bottom of the list.
Advantages	List advantages and unique features of your invention over the State-of-the-Art.
Applications	List the practical and commercial applications of the invention.
Stage of Development	<ol style="list-style-type: none"> 1. Current Stage of Development: Indicate the development stage of your invention, i.e. concept, early stage, bench prototype, industrial prototype, product, market, etc. 2. Next Steps: List the critical next steps in developing this technology. 3. Resources: What resources are needed and/or available to reach the next stage, i.e. personnel, funds, materials, etc.?
Disadvantages	List any disadvantages or limitations of the invention and how they might be overcome.
Possible Interested Companies	List any contacts and/or companies that might be interested in the invention.
Public Disclosure	Indicate whether or not the invention has been disclosed to someone outside the University of Utah and list dates and names. (ARUP and HCI are within the University of Utah confidentiality agreement.)
Future Public Disclosure	Indicate whether or not you intend to disclose the invention in the future. Include date and venue of planned disclosure.
<ul style="list-style-type: none"> • Funding-Unrestricted Univ. • Funding-Federal/Other Govt 1 • Funding-Federal/Other Govt 2 • Funding-Private/Public Foun.’s • Funding-Commercial Entity • Funding-Others 	Please list all funding sources for materials, equipment and/or salaries of all personnel involved in conception and development of the invention.
Data/Materials Used	List any data or materials used in the development of this invention. Note: Only the first field is required.
U of U Student Inventors	List the names of any University of Utah students who were inventors on the invention.
Colleagues Familiar with Work	List the names of any colleagues on campus who are knowledgeable about the work and its potential impact.
Competitors	List the names of known competitors or external researchers who are doing work in the field related to the invention.
Non-Confidential Summary	Provide a non-confidential, simple and commercially applicable summary of the invention. Note: This will be used for marketing purposes, so please include advantages, characteristics and industry applications.

Upload Documents	<div style="border: 1px solid gray; padding: 5px;"> Upload the Signature Page and Documents Add Document </div> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> No documents have been added yet. </div> <ol style="list-style-type: none"> 1. With this tab, you may upload attachments (one at a time) to your invention disclosure. 2. When you have completed filling out the invention disclosure, you will use this tab to upload the fully-signed signature page (see “Submitting Your Invention Disclosure” below). 																				
Remarks	You may enter remarks for TVC in this box. The TVC Business & Technology Development Manager may also enter remarks in return. After you have submitted your invention disclosure, if you haven’t heard from us within 24 hours, please log back in and check the remarks section of your invention disclosure.																				
Patents	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> Patents (For TCO use only) </div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th>App No</th> <th>Patent No</th> <th>Internal</th> <th>Title</th> <th>Country</th> <th>Type</th> <th>Status</th> <th>Filed</th> <th>Issued</th> <th>Updated</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td>Test patent for Trackable pacifier</td> <td>United States</td> <td>Provisional</td> <td>Requested</td> <td></td> <td></td> <td>7/1/2012</td> </tr> </tbody> </table> <p>As TVC works on your invention disclosure, patent applications may be filed. You may monitor the status of any patent applications under this tab for each respective invention disclosure.</p>	App No	Patent No	Internal	Title	Country	Type	Status	Filed	Issued	Updated				Test patent for Trackable pacifier	United States	Provisional	Requested			7/1/2012
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			Test patent for Trackable pacifier	United States	Provisional	Requested			7/1/2012												
Agreements	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> Agreements (For TCO use only) </div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th>Agreement Id</th> <th>Title</th> <th>Party</th> <th>Type</th> <th>Status</th> <th>Effective</th> <th>Updated</th> </tr> </thead> <tbody> <tr> <td>CDA-4050</td> <td>Confidential Disclosure Agreement</td> <td>Leslie J Smith</td> <td>Confidentiality [CDA]</td> <td>Active</td> <td>2/14/2013</td> <td></td> </tr> </tbody> </table> <p>In the process of marketing your invention disclosure, agreements may be executed. You may monitor the status of any agreements under this tab for each respective invention disclosure.</p>	Agreement Id	Title	Party	Type	Status	Effective	Updated	CDA-4050	Confidential Disclosure Agreement	Leslie J Smith	Confidentiality [CDA]	Active	2/14/2013							
Agreement Id	Title	Party	Type	Status	Effective	Updated															
CDA-4050	Confidential Disclosure Agreement	Leslie J Smith	Confidentiality [CDA]	Active	2/14/2013																

Editing a Draft Invention Disclosure

If you do not have time to complete an invention disclosure, you can save it as a draft and work on it later.

- In the “Manage” column of “My Disclosures,” click “Edit” to open and add additional information to the disclosure.

The screenshot shows the 'Invention Portal' interface. At the top, it says 'Powered by Intelem' and 'You are logged in as: Leslie Smith [Logout]'. The main header includes the University of Utah logo and 'TECHNOLOGY COMMERCIALIZATION OFFICE THE UNIVERSITY OF UTAH'. There are two tabs: 'My Disclosures' (active) and 'My Account'.

On the left sidebar, under 'My Disclosures', there are links for 'Add New Disclosure' and 'My Disclosures'. Below that, 'Current Status' shows 'Drafts (2)', 'Submitted (0)', and 'Approved (0)'. At the bottom, 'Need Help?' provides an email 'usha.K@tco.utah.edu' and a 'Submit Feedback' link.

The main content area is titled 'My Disclosures' and has a 'Show:' dropdown set to 'All My Disclosures'. It contains a table with the following data:

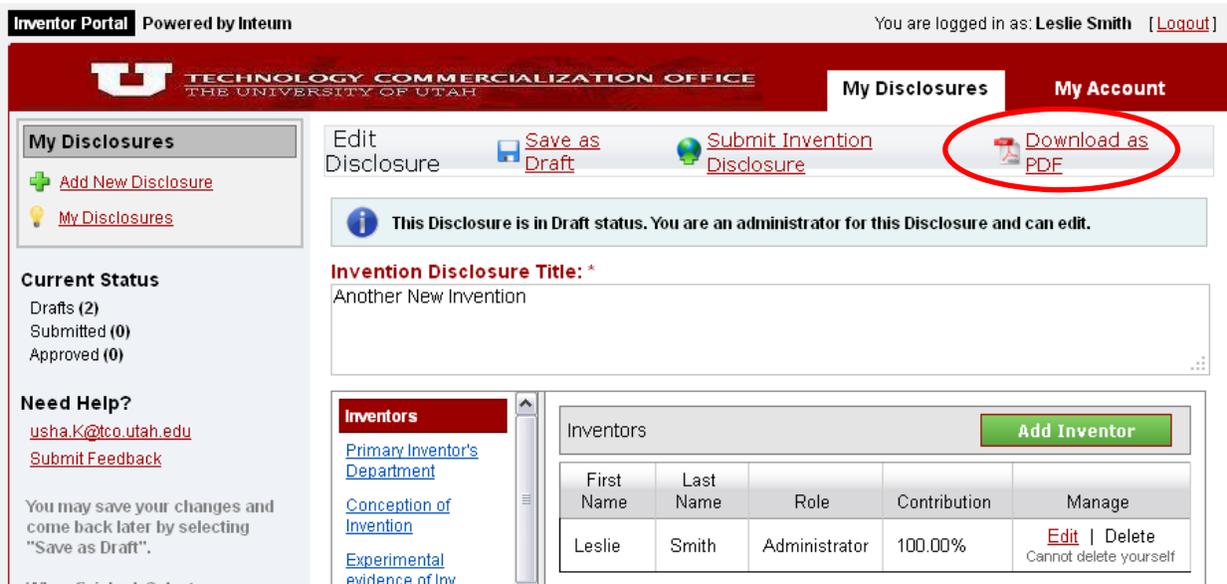
ID	Title	Entered By	Created	Status	Manage
	My New Invention Disclosure	Leslie Smith	2/14/2013	Draft	Edit
	Another New Invention	Leslie Smith	2/14/2013	Draft	Edit

In the original image, the 'Status' and 'Manage' columns for both rows are circled in red, highlighting the 'Draft' status and the 'Edit' links.

Submitting Your Invention Disclosure

Once you have completed entering your invention disclosure data:

1. Select "Download as PDF" in the upper right-hand corner.



ALL INVENTORS AFFILIATED WITH THE UNIVERSITY OF UTAH DURING THE COURSE OF DEVELOPING THIS INVENTION MUST SIGN BELOW. BY SIGNING THIS INVENTION FORM YOU HEREBY ASSIGN YOUR RIGHTS IN THIS INVENTION TO THE UNIVERSITY OF UTAH PURSUANT TO THE UNIVERSITY OF UTAH POLICY & PROCEDURES MANUAL SECTION 6: RESEARCH SECTION.

All statements and information I have made or provided in this Invention Disclosure Form are true and complete to the best of my knowledge. I understand and agree that all rights, obligations and financial interests, if any, pertaining to or derived from this invention are as determined under the University of Utah Policy & Procedures Manual "Policy". I also understand and acknowledge that the University has the right to change the policy from time to time, including the percentage of net royalties paid to me. Further, I acknowledge that the percentage of net royalties paid to inventors is derived only from consideration in the form of money or equity received under: (1) a license or material transfer agreement for licensed rights; or (2) an option or letter agreement leading to a license or material transfer agreement. I also acknowledge that the percentage of net royalties paid to inventors is not derived from research funds or from any other consideration of any kind received by the University. I agree to assist the University of Utah Technology Commercialization Office in the evaluation, possible protection and commercialization of the invention as described in this Invention Disclosure Form.

For each University of Utah and ARUP Inventor, please TYPE in all fields, then sign and date.

Primary Contact	
Inventor 1 Name:	
Citizenship:	
Home Address:	
Work Address:	
Phone:	Fax:
E-mail:	
Signature:	Date:

Inventor 2 Name:		Inventor 3 Name:	
Citizenship:		Citizenship:	
Home address:		Home address:	
Work address:		Work address:	
Phone:	Fax:	Phone:	Fax:
E-mail:		E-mail:	
Signature:	Date:	Signature:	Date:

Inventor 4 Name:		Inventor 5 Name:	
Citizenship:		Citizenship:	
Home address:		Home address:	
Work address:		Work address:	
Phone:	Fax:	Phone:	Fax:
E-mail:		E-mail:	
Signature:	Date:	Signature:	Date:

2. Print out a copy, fill out the information on the final page and obtain signatures from all University of Utah inventors.

3. Upload the fully-signed signature page using the "Upload Documents" tab.

4. Select “Submit Invention Disclosure”.

NOTE: Be sure that you have thoroughly reviewed the disclosure and uploaded any attachments before submitting. Once the disclosure is submitted and approved, it can no longer be edited without consent from Technology & Venture Commercialization. If you need to make changes after submission, contact TVC at 801-581-7792 or Leslie@tvc.utah.edu.

The screenshot shows the 'Inventor Portal' interface. At the top, it says 'Powered by Inteum' and 'You are logged in as: Leslie Smith [Logout]'. The main header includes the University of Utah logo and 'TECHNOLOGY COMMERCIALIZATION OFFICE THE UNIVERSITY OF UTAH'. There are two tabs: 'My Disclosures' and 'My Account'. Under 'My Disclosures', there are buttons for 'Edit Disclosure', 'Save as Draft', 'Submit Invention Disclosure' (circled in red), and 'Download as PDF'. A message box states: 'This Disclosure is in Draft status. You are an administrator for this Disclosure and can edit.' Below this, the 'Invention Disclosure Title' is 'Another New Invention'. On the left sidebar, there are sections for 'My Disclosures', 'Current Status' (Drafts (2), Submitted (0), Approved (0)), and 'Need Help?' with contact information for usha.k@tco.utah.edu. At the bottom, there is an 'Inventors' table with one entry for Leslie Smith, Administrator, with 100.00% contribution.

5. If you have missed entering data in any required areas of the invention disclosure, you will see an error message displaying the field(s) that need to be corrected.

6. Select “Edit Disclosure” to make the additions/corrections.

This screenshot shows a close-up of the 'Edit Disclosure' button, which is circled in red. Below the buttons, a message box states: 'This Disclosure is in Draft status. You are an administrator for this Disclosure and can edit.' Below that, a yellow warning box titled 'Please correct the following errors:' lists 20 specific error messages:

- Advantages - Advantages of your Invention: *Cannot be empty*
- Applications - Applications of the Invention: *Cannot be empty*
- Colleagues familiar with work - Colleagues on Campus Knowledgeable about Work: *Cannot be empty*
- Competitors - Known Competitors or External Researchers: *Cannot be empty*
- Conception of Invention - Date of Conception of Invention: *Cannot be empty*
- Conception of Invention - Does a written record exist: *Must choose a value*
- Conception of Invention - Details: *Cannot be empty*
- Data/Materials Used - Please Select the Data/Materials used 1: *Must choose a value*
- Disadvantages - Disadvantages or Limitations of Invention: *Cannot be empty*
- Experimental evidence of Inv. - Date of experimental evidence if applicable: *Cannot be empty*
- Experimental evidence of Inv. - Does a written record exist: *Must choose a value*
- Experimental evidence of Inv. - Details: *Cannot be empty*
- Future Public Disclosure - Do you intend to publicly disclose in future: *Must choose a value*
- Possible Interested Companies - Possible Interested Companies: *Cannot be empty*
- Public Disclosure - Invention disclosed outside U of U: *Must choose a value*
- Stage of Development - Stage of development of your Invention: *Cannot be empty*
- Summarize Invention - Concise Technical Summary: *Cannot be empty*
- Summary of Invention - Non-Confidential Summary of the Invention: *Cannot be empty*
- U of U Student Inventors - List Inventors who were Students at U of U: *Cannot be empty*

7. If all required areas have been completed, you will see this message:



8. If you are ready to submit, click the box by **“Yes, submit this disclosure for review”** and click **“Submit Disclosure.”**

9. Once the invention disclosure has been submitted, the status in the “My Disclosures” list will be updated to “Submitted.” The disclosure is no longer editable; however, you can View, Print a PDF, and add remarks.

What Happens Next?

After the disclosure has been submitted, TVC personnel will review your submission to ensure that it is complete, and that all the required information has been supplied. Approved submissions are assigned an ID number and updated with an “Internal Review” status which means that your disclosure is complete and has been assigned to a Business and Technology Development Manager for technical review.

ID	Title	Entered By	Created	Status	Manage
a-0001	Trackable pacifier	Richard Green	12/21/2012	Approved - Internal Review	View
a-0002	Gelabbibabble	Richard Green	1/1/2013	Approved - Internal Review	View
	Rock on a stick	Richard Green	2/6/2013	Submitted	View

You may continue to log into the Inventor Portal to monitor the status of your inventions, communicate with commercialization associates, and update your contact information. Keeping your email address current in the Inventor Portal ensures effective communication.

As patent, copyright or trademark applications are filed and/or agreements executed, you will be able to see the information under the **Patents** and **Agreements** tabs.