

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 UWMRF is launching the new Inventor Portal. The electronic Portal makes it possible for each of you to 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://web.inteum.com/uwm/inventorportal/login.aspx> gives each inventor the ability to do the following activities:

- Complete and submit Invention Disclosures online although you will still be able to submit paper disclosures if you prefer;
- Check the status of your submitted Invention Disclosures (you will not be able to check on your disclosure status if you choose the paper submission format);
- 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 Joseph Pfannes at 414-906-4657 with any technical questions.

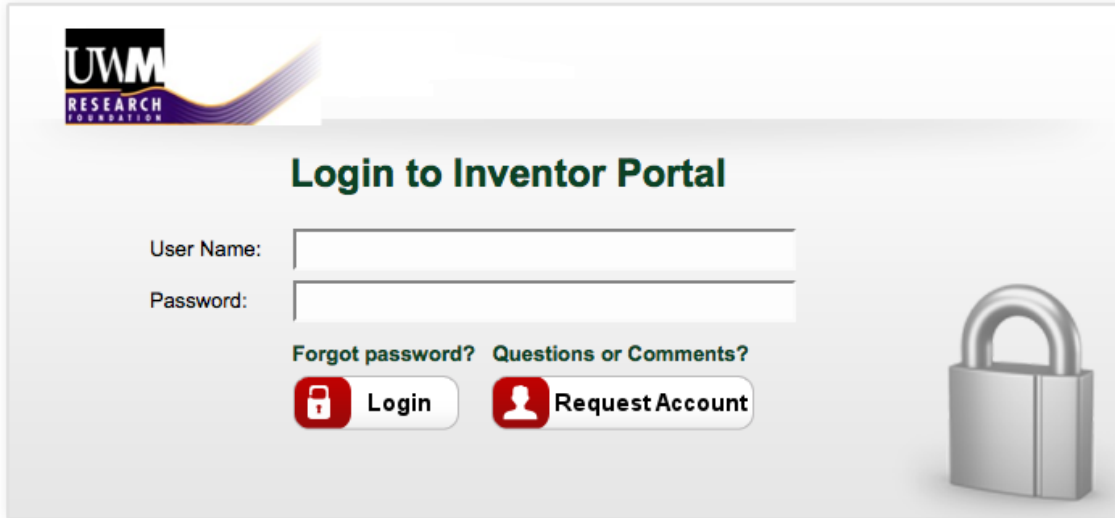
Once you have accessed and worked with the Portal, we are confident that you'll see the benefits of having this new information at your fingertips. If you have any questions or wish to provide suggestions for improving the Portal to UWMRF, please contact Jessica Silvaggi at the number above or jsilvaggi@uwmfdn.org.

Table of Contents

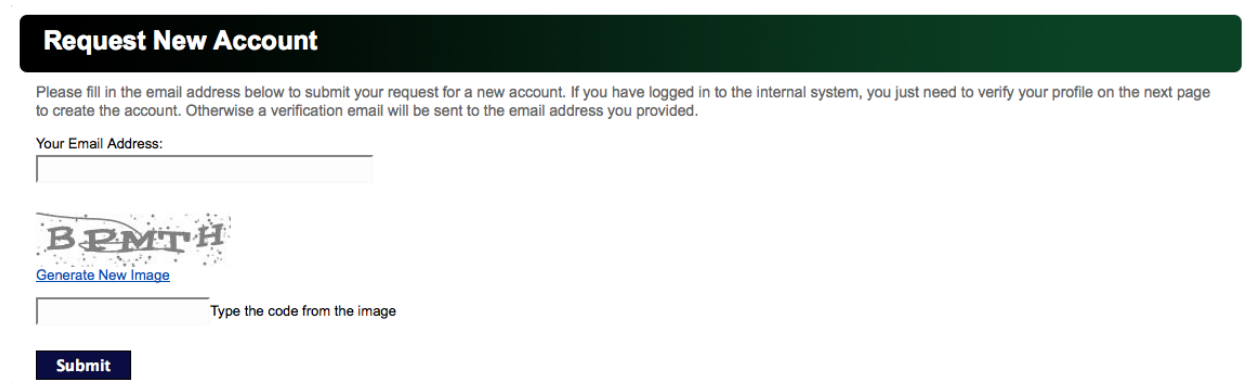
Logging onto the UWRF Inventor Portal	3
Creating a new Inventor Portal Disclosure	4
Description.....	6
Documents.....	6
Inventor(s).....	6
Inventor(s) Home Address.....	7
Conception and Reduction	7
Public Disclosure	7
Future Disclosure.....	7
Background Information	8
Patents	8
Funding	8
Other Agreements.....	9
Agreements	9
Stage of Development.....	9
Commercial Applications	9
Inventors Personal Interest.....	9
Interests.....	10
Marketing Targets	10
Remarks	11
Editing an Existing Inventor Portal Disclosure.....	11

Logging onto the UWMRF Inventor Portal

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

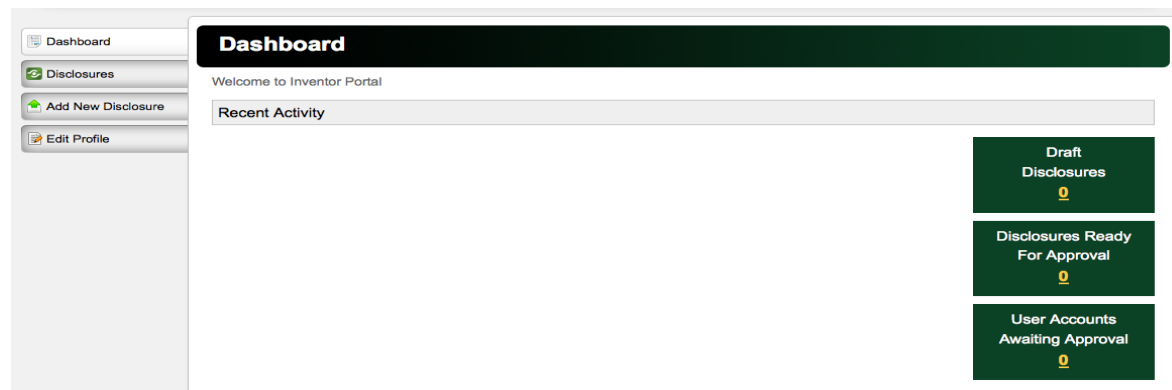


Enter your Inventor Portal User Name and Password or click on Create an Account to create a new account.



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:



Tab	What You Can Do
Disclosures	<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>On the left, click on Add New Disclosure to enter data about a new disclosure or click on Disclosures to view the list of your disclosures. The Disclosure tab displays your number of Drafts, Submitted, and Approved disclosures.</p> <p>If you 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 are able to view Draft Disclosures, Disclosures Ready For Approval, and Use Accounts Awaiting Approval.</p>
Edit Profile	Click on the Edit Profile tab to update your account information and click [Save Changes].
[Logout]	Click Logout on the top right of the Inventor Portal home page to log out of the site.

Creating a new Inventor Portal Disclosure

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

New Disclosure

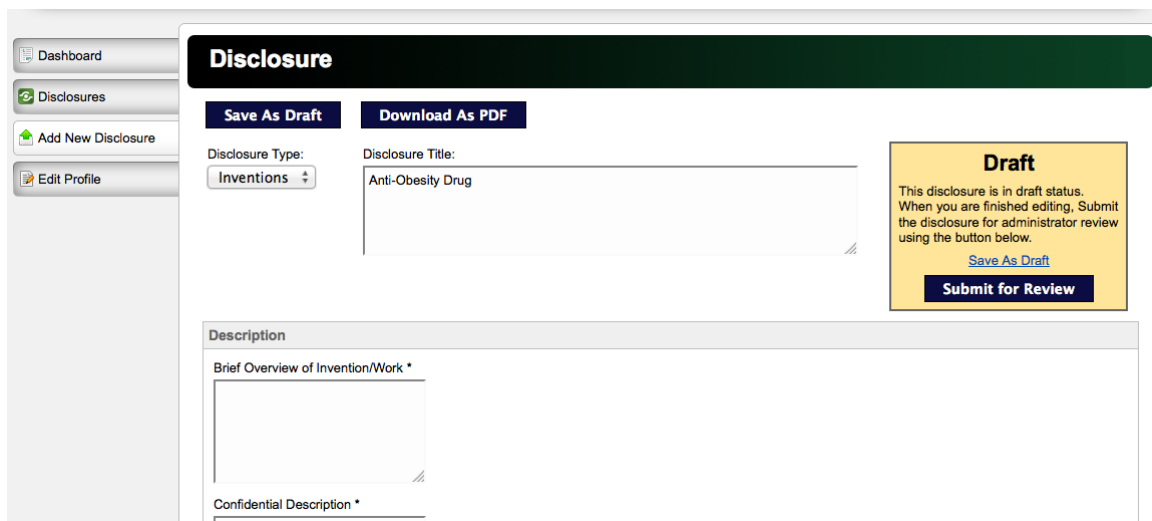
You are creating a new disclosure. Before you can edit your disclosure, you must first enter a title and choose the type of disclosure.

Disclosure Title:

Choose the Type of Disclosure:

[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 but once you have submitted the disclosure you can no longer edit it without further action on the part of your technology transfer representative. Be sure you have thoroughly checked all the information before submitting your disclosure.

4. In the description section there will be a list of sections. Each section will contain fields where the disclosure information can be entered. Any information box with a star indicates that the information is required for submission.

The following table lists the UWMRF Inventor Portal tab and their descriptions:

Description

Brief Overview of Invention:

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).

Confidential Description :

Describe how your invention works technically, stating its key features, its most important uses. Please include supporting evidence (data, results, diagrams, manuscripts, etc.) that provide a more complete description of the invention and how it works. Utilize the documents tab to attach further information such as grants, manuscripts which is necessary to describe the work.

Key words for prior art and literature searches:

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

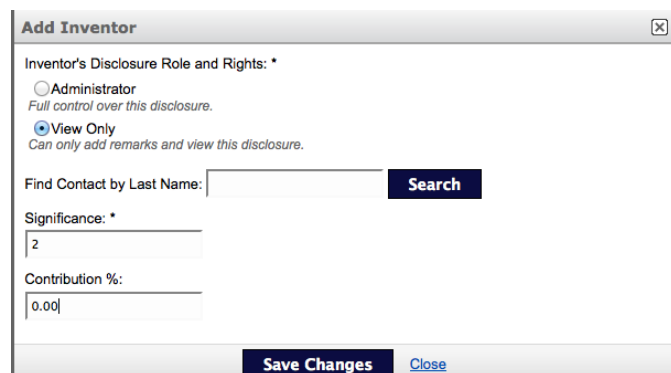
Documents

Attach any documents such as data, results, diagrams, and manuscripts etc. which are necessary to fully describe your invention.

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



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 Inventor](#), complete the fields as prompted and click [Save Changes].

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.

Inventor(s) Home Address

Please enter the home address for each of the inventors. This information is used in assignment of your inventions to UWMRF and to the US Patent and Trademark Office.

Conception and Reduction

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.

First 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.

Public Disclosure

Has there been any full or partial disclosure?

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.

If yes, disclosure date.

Please enter the date upon which you first disclosed the information.

If yes, describe disclosure.

Provide names of persons or companies to whom you disclosed 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 whole or in part using the documents tab.

Future Disclosure

Are there any future plans to disclose?

Yes or no.

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 future disclosure.

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

Background Information

Are lab/research records available?

Give reference numbers and/or physical location, but do not enclose documentation

Are related patents known to inventor?

List any patents you know of created by other inventors.

Relevant publications/abstracts of other authors.

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

List your own related publications.

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

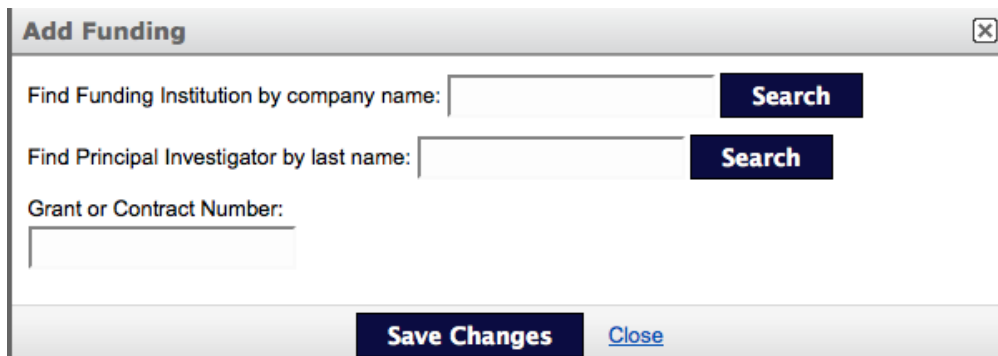
Patents

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.

Funding

The Funding tab provides for entry of 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.



Add Funding [X]

Find Funding Institution by company name: **Search**

Find Principal Investigator by last name: **Search**

Grant or Contract Number:

Save Changes [Close](#)

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.

Other Agreements

Identify any agreements related to the invention:

List any agreements that you have entered into that related to the invention and might grant rights of any sort in 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?

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.

Stage of Development

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? Yes/No

Test Date. Enter date

Commercial Applications

Novel and Unusual Features and Advantages

What particular features of the invention are unusual AND how do they differ from present technology(ies)?

Problem(s) this invention solves?

What prompted you to develop this invention? What problem(s) does it solve?

Disadvantages to invention:

Are there any disadvantages to this invention compared to present technologies or in general?

Inventors Personal Interest

Are inventors interested in a Start-up Company? Yes/No

Have inventors actually formed a company? Yes/No

Please provide the name and location of any company.

Interests

The interests tab provides for specifying keywords that pertain to the disclosure. The list of interests provided are those that are already entered in our database. Additional interest can be added if you do not find an appropriate match. NOTE: You may add more than one interest but they must be added one at a time.

Available Interests ✕

Available Interests to Choose From:

- Addiction
- Aerospace/Aviation/Defense
- Agriculture
- Aircraft
- Allergy
- Alzheimers
- Analytics/Forecasting
- Animal Health
- Animal/Fish Pharmaceuticals
- Antibiotics
- Antibodies

If the interest is not on the list above, [Add a New Interest](#).

Add Interest
[Close](#)

To add an interest, click [Add a New Interest]

Add New Interest ✕

Add New Interest:

Add New Interest
[Close](#)

Marketing Targets

The Marketing Targets tab provides for specifying companies that could have potential interest in the invention being disclosed.

Click [[Add Marketing Target](#)] and enter the information on the Marketing Target dialogue.

Add Marketing Target ✕

Find Company by Company Name: Search

Find Contact by Last Name: Search

Save Changes
[Close](#)

Type in the beginning string of a company's name and click [Search] to select a name from the displayed list of the available companies or *after* pressing the search button click [Add a New Company here](#) to add a new company.

Type in the beginning string of a contact's name and click to select a name from the displayed list of the available contacts or click [Add Contact here](#) *after* you have searched for a contact to add a new contact.

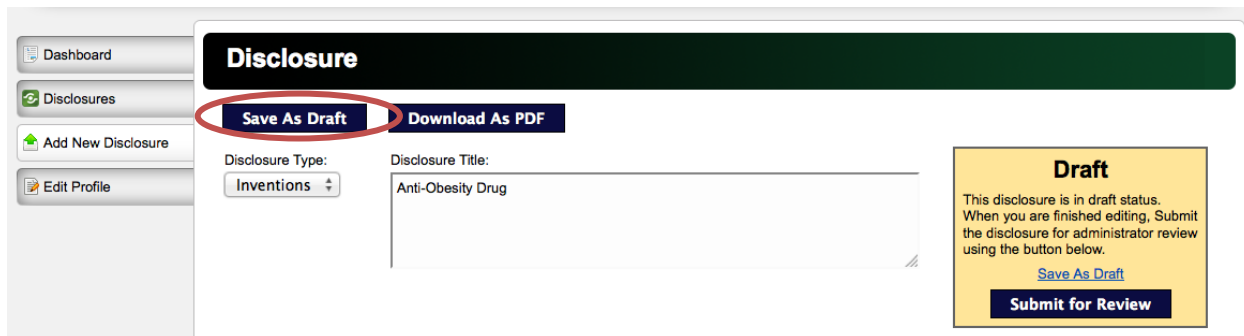
Click [Save Changes] and the marketing target will be displayed on the Marketing Target tab.

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].

Editing an Existing Inventor Portal Disclosure

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



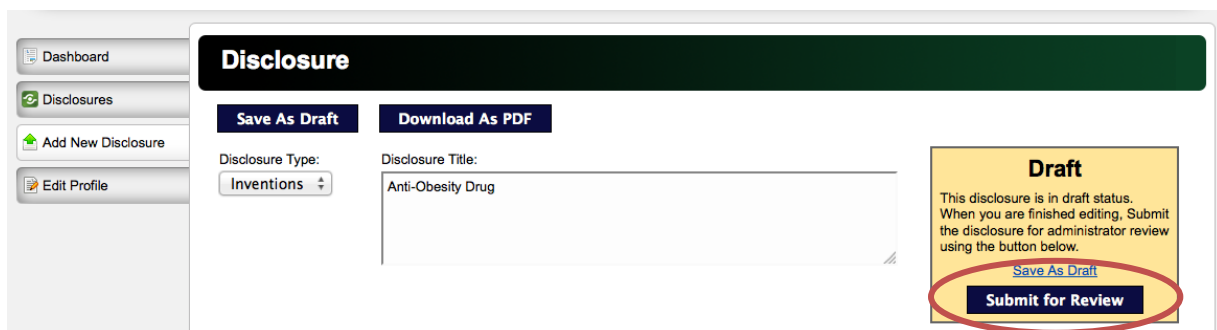
When you are ready to log into the Inventor Portal again to add information to the disclosure it will be displayed in the My Disclosures list with the status as Draft.

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

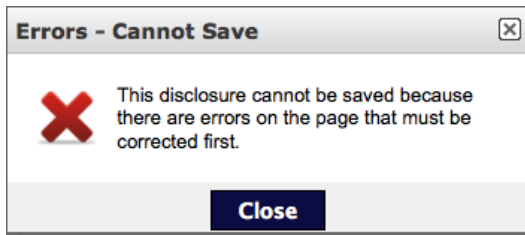
Submitting a UWMRF Inventor Portal Disclosure

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

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




2. If there are any required fields that are not filled in, the dialogue will ask you to correct the errors before continuing. The errors are highlighted and indicate which fields have not been completed.




Errors will be highlighted as you scroll through the disclosure.

Description


Brief Overview of Invention/Work *

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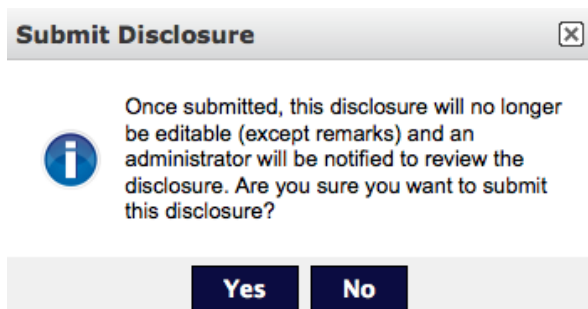
Confidential Description *

 **Cannot be empty**

Key words for prior art and literature searches *

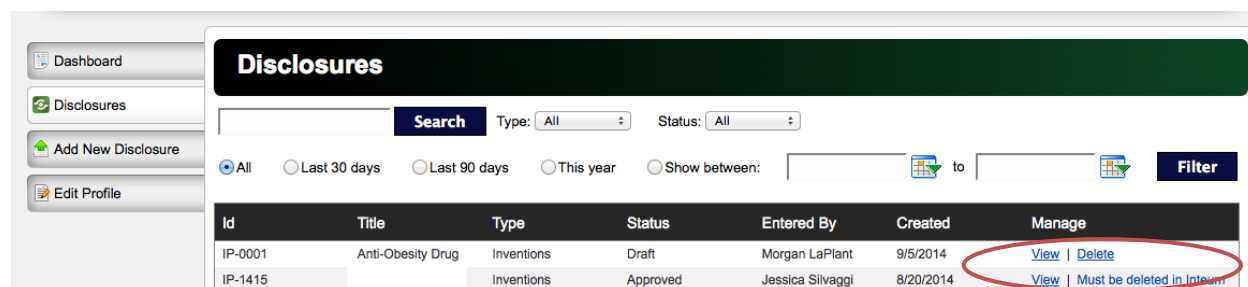
 **Cannot be empty**

3. Once you have filled in all required fields, submit your disclosure again.
4. A prompt will be displayed 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.



Now that the disclosure has been submitted, the Current Status information in the left column reflects that (1) disclosure has been submitted and the Status in the My Disclosures list of inventor portal disclosures indicates that the disclosure has been submitted. Also, note that once the disclosure has

been submitted, it cannot be edited, however the Manage Column [View](#) can be clicked to review the disclosure and add remarks can still be added in the Remarks tab.



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.

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

After the technology transfer administrator reviews the submission of the Inventor Portal disclosure and uploads the additional information they can approve the disclosure and it will be displayed as Approved-Approved or Approved-In Review as above. The disclosure will now 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.

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