Invention Disclosure:
Web User Guide for Syracuse University

Knowledge Sharing Systems
in conjunction with

Syracuse University
Office of Technology Transfer & Industrial Development
2-220 Center for Science & Technology Building
Syracuse, NY 13244-4100
315-443-5196
techtransfer.syr.edu

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Getting Started

Point your browser to the Syracuse University Office of Technology Transfer & Industrial Development website at http://techtransfer.syr.edu/

To link directly to the Invention Disclosure portal, point your browser to http://techtransfer.syr.edu/inventors/submit-an-invention.html

This system is compatible only with Internet Explorer or Mozilla Firefox browsers.
First Time Users – Setting Up Your Log In
The new user registration screen appears below. Please fill out the form in full.
Logging in to the System

Use your newly created username and password to log in to the system.

Introduction to the Portal

The Web Invention Disclosure Module provides Innovators with an organized, easy to navigate platform for preparing and submitting disclosures online. This portal interfaces with the database used by the Office of Technology Transfer & Industrial Development.
To submit a new disclosure, click on the “Add New Disclosure” button which appears in the middle of the page, after Unsubmitted Disclosures and before Submitted Disclosures. Taking this action will launch the six steps where the User can “Save and Exit” at any point to return to the Disclosure at a later date.

The module also houses the User’s in-progress or Unsubmitted Disclosures and Submitted Disclosures. Once a disclosure has been submitted, the User can monitor any status changes.

### Navigating Invention Disclosures: Submitting a New Disclosure

Click on the Add New Disclosure button to begin the web disclosure process. Several types of disclosures may be available, and the appropriate form can be selected using the drop list.

The online disclosure system will ask the user different questions based on the type of Disclosure the User chooses here. If students are named inventors/innovators, choose the option with students. For inventions that could be both software and invention disclosures, complete the invention disclosure form. The questions on the software disclosure online form presume that programming has already begun.
The following tool bar is present at the bottom of each step and provides the User with several options to best aid him/her in completing a Disclosure. Previous, Next Step, and Next Section allow the User to move between the various steps and sections. Summary provides an overview which reviews all completed steps as well as highlights missing required fields.

In contrast, here is another example of a tool bar you will see throughout the online disclosure process.

Sometimes the “Next Step” button will be slightly grayed out, in which case use the “Next Section” button.
TIP! Since the data you are typing into the Disclosure portal is being saved to a remote database that is accessible by SU Technology Transfer & Industrial Development, **it will take some time** for the system to move to the next step. Please be patient.

It is important that you not press any buttons on the keyboard or mouse as you wait.

**Step 1: General Information**

Once the user opts to add a New Disclosure, he/she will be asked to provide general information related to the invention.

Title is a mandatory field.

Help text bubbles at every step to provide additional guidance if needed.

Preparation Status will remain as ‘New-In Progress’ until the disclosure is submitted.
**Step 2: Innovator Information**

In Step 2, the innovator is asked to provide information on all innovators associated with the disclosure. The current user will automatically be included as the lead innovator. Additional innovators can be added if necessary.

1) Select “Add New Innovator” to begin.

2) Type in any portion of the name, and

3) Select the “Search” button.

4) Locate and make the appropriate “Selection” (Thomas Smith in this case).

5a) Has any of the innovator’s contact information changed? (Name; E-mail; Department; Title; Home Address; Work Address; Phone; etc) If so, use the “Update People Information” button to launch an e-mail to the Database Administrator. In the text of the e-mail indicate what information has changed and the database administrator will update the contact information for that individual. Click “Save” when you are done. More on next page...

5b) Briefly indicate in the text box what this innovator’s role was relative to the invention. Click “Save” only if the innovator contact information need not be updated.

Step 2 now shows Thomas Smith as an Innovator.
If the User is on a computer that does not have e-mail software installed on the computer, then clicking on the “Update People Information” button will not launch the needed e-mail to the database administrator. For example, most SU Users will have a Microsoft Outlook account. The software version of MS Outlook, not the web version of MS Outlook (i.e. exchange) must be loaded and possibly open in order for the system to automatically launch the e-mail. If the User needs to “Update People Information” and cannot do so due to e-mail constraints, please send an e-mail to jmcrisp@syr.edu. Please list old contact information and new confirmation in the e-mail.

If the person is not found in the database, the User can add the inventor by clicking “Add a New Person.”

Adding all available information will help others find this person in the future.

Remember to save the new record!
Step 3: Abstract

Step 3 provides the User with an opportunity to enter an Abstract describing the Disclosure.

A non-confidential abstract of 250 words or less can be entered here.

The Internal Abstract provides a space for a technical description of 250 words or less.

NOTE: You may find it helpful to complete the technical abstract that appears below first. Provide a summary of the technology that is minimally technical. The text you provide here will be used by Technology Transfer staff as they conduct market research, identify and evaluate the corresponding patent/IP landscape. Should you pursue IP protection, this text will serve as a starting point for our staff to develop a standard "technology data" for marketing this particular technology to industry.
**Step 4: Additional Invention Data**

This step captures additional data directly related to the Disclosure Type selected at the very beginning. The User will be asked to complete various questions on a form. Depending on the Data Type, questions will be answered using text fields, drop lists and dates.

If students are involved, the form will ask for details regarding status and involvement.

The User can move through sections by clicking on the links or using buttons at the bottom of the form.

**Step 5: Attachments**

In step 5, users are allowed to upload a file of any format up to 50 MG in size.
Step 6: Summary

Step 6 provides a summary of all information provided up to this point. If mandatory information is missing, a descriptive message in red will appear in the particular section of the Summary page. This same summary can be accessed at any point using the “Summary” button at the bottom of a page.

A PDF can be created at any point from the Summary Screen.

The “Submit Disclosure” button will remain deactivated until all missing information has been provided.

User has the option to “Exit/Save” at this point if more information needs to be gathered.
**Final Online Step: Print the completed, submitted disclosure**

Once the Disclosure has been submitted, the User is alerted that the process was successfully completed. While the User’s online record of the disclosure has been successfully completed, it is critical that the User take the final steps of printing the Invention Disclosure form that the system generated. Next, the User should review the document and sign it, and coordinate the effort for all other innovators to review and sign the document. Finally, send that signed, completed form to The Office of Technology Transfer & Industrial Development at 2-220 CST. See the next page for screen shots and descriptions of how to do this.

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**Go To Submitted Disclosures & Print Your Invention Disclosure Form**

This Invention Disclosure (a.k.a. a technology record) will now appear as a Submitted Disclosure.
Clicking on a column heading will sort columns by ascending and descending order.

Click on a title to gain access to any of the documents you uploaded; and also to access the pdf form that was generated/auto populated by the answers you typed into the online form; etc. (See the screen shot below.)

A PDF of the Submitted Disclosure is created and stored as an Attachment.

Click the “Show Detail” box to expand the view and gain access to the contents under any of the categories.

Please click “download” and then save and print this document, review and sign it. All named innovators should do the same.
Questions? Contact:

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