

# Invention Disclosure : Web User Guide for Syracuse University

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## Knowledge Sharing Systems

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

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## Getting Started

To link directly to the Invention Disclosure portal, point your browser to  
[https://disclosures.techtransfer.syr.edu/UREF12823018420039332026/WD1\\_Login/A11139332029](https://disclosures.techtransfer.syr.edu/UREF12823018420039332026/WD1_Login/A11139332029)

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.

The image shows a web interface with three distinct sections, each enclosed in a rounded rectangular box with a blue border. The top section is titled "Login" and contains two input fields: "Username" and "Password", each followed by a blue "Login" button. The middle section is titled "Register" and contains the text "If you do not have a login please register. Registration is free." followed by a blue "User Registration" button. The bottom section is also titled "Register" and contains the text "If you are already a registered user, but have forgotten your password, enter your e-mail address in the entry blank below. Then click the Reset Password button. A temporary password will be e-mailed immediately." followed by an "Email Address" input field and a blue "Reset Password" button. A yellow callout bubble with a black border and a tail pointing to the "User Registration" button contains the text "First time users, click here."

**Login**

Username

Password

Login

**Register**

If you do not have a login please register. Registration is free.

User Registration

**Register**

If you are already a registered user, but have forgotten your password, enter your e-mail address in the entry blank below. Then click the Reset Password button. A temporary password will be e-mailed immediately.

Email Address

Reset Password

First time users, click here.

## First Time Users – Setting Up Your Log In

The new user registration screen appears below. Please fill out the form in full.

**Web Disclosure Registration**  
Items with a \* are required.

**First Name\***

Middle Name

**Last Name\***

**Work Email\***

Suffix

Title

Street 1

Street 2

City

State

Zip

Phone

Citizenship

Country

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**Username\***

**Password\***

**Password Retype\***

## Logging in to the System

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

The image shows a web interface with three main sections:

- Login:** A section with a title "Login" and two input fields labeled "Username" and "Password". A blue button labeled "Login" is positioned below the fields. This entire section is circled in red.
- Register (New User):** A section with a title "Register" and the text "If you do not have a login please register. Registration is free." Below this text is a blue button labeled "User Registration".
- Register (Reset Password):** A section with a title "Register" and the text "If you are already a registered user, but have forgotten your password, enter your e-mail address in the entry blank below. Then click the Reset Password button. A temporary password will be e-mailed immediately." Below this text is an input field labeled "Email Address" and a blue button labeled "Reset Password".

## 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.

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.

**Welcome to the Web Invention Disclosure Module**

This module consists of 2 sections. The **Unsubmitted Disclosures** section allows you to prepare and submit disclosures online, taking multiple sessions if necessary. Once you submit the disclosure you can check on its status in the **Submitted Disclosures** section.

**Unsubmitted Disclosures** Export as xls

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Created On	Title
	Syracuse Technology Disclosure

**Submitted Disclosures** Export as xls

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Int Ref #	Title	Status	Date Submitted
	g with new user hdayon login	Submitted	11/02/2010

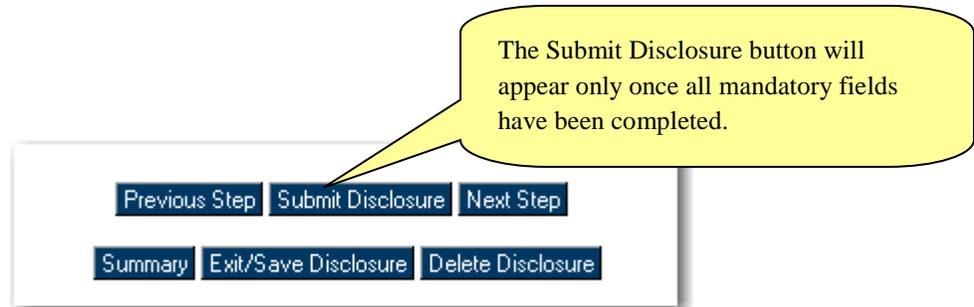
Page 1

The online disclosure system will ask the user different questions based on the type of Disclosure the User choose here.

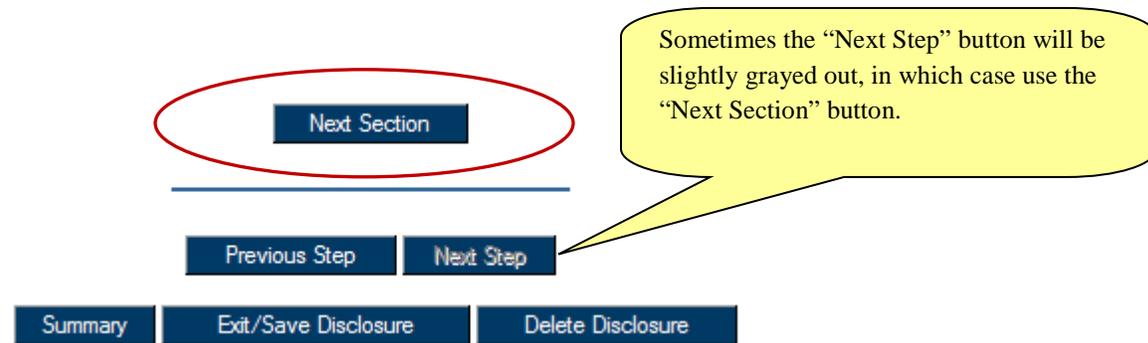
The questions on the software disclosure online form presume that programming has already begun.

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 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.



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.

The screenshot shows a web form titled "STEP 1 of 6: General Information" with a help icon. The form contains the following fields and buttons:

- Title:** A text input field containing "Detection and Measurement of Bioenergetic Fields". A yellow callout bubble points to this field with the text "Title is a mandatory field."
- IP Type:** A dropdown menu with "Technology" selected.
- Preparation Status:** A dropdown menu with "New - In Progress" selected. A yellow callout bubble points to this field with the text "Preparation Status will remain as 'New-In Progress' until the disclosure is submitted."
- Buttons:** "Submit Disclosure", "Next Step", "Summary", "Exit/Save Disclosure", and "Delete Disclosure".

A purple callout bubble points to the top right of the form with the text "Help text bubbles at every step to provide additional guidance if needed."

## Step2: 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.

### A. Inventions with Just One Innovator

Export as xls

Innovator Name	Lead	Organization (Name/Division/Department)	
Heather Dayon	Yes		Remove

Page 1  
Add New Innovator...

Previous Step   Next Step

Summary   Exit/Save Disclosure   Delete Disclosure

For inventions with only one innovator, click Next Section to proceed.

### B. Inventions with Multiple Innovators – adding an innovator that is not already in the database

The User wishes to add Michael Jabberwocky as an innovator.

Export as xls

Innovator Name	Lead	Organization (Name/Division/Department)	
Jennifer Crisp		Syracuse University	Remove
Heather Dayon	Yes		Remove

Page 1  
Add New Innovator...

Select "Add New Innovator" to begin.

The User types the first part of Michael's last name and hits the "Search" button.

- 1) Type in any portion of the name, and
- 2) Select the "Search" button.

People Search

**Search for Person:**

Where Name contains

Please FIRST search the database for the applicable Person. Only Select ADD NEW Person if you cannot find the Person in the database.

Michael Jabberwocky is not found in the Office of Technology Transfer database. As such, the User will need to provide information about Michael Jabberwocky. The following screen will appear to facilitate that process.

People Search

**Add a Person:**

SU students that are also employed by SU, in your lab for example, are to be identified as their Company, indicate the College or School (i.e. College of Arts and Sciences), the Department field, indicate their Department (i.e. Biology).

For inventors not employed by SU in any capacity, indicate the company/university.

Please fill in the following:

Work Information	Home Information
First Name <input type="text" value="Michael"/>	Home Street 1 <input type="text"/>
Middle Initial <input type="text"/>	Home Street 2 <input type="text"/>
Last Name <input type="text" value="Jabberwocky"/>	City <input type="text"/>
Suffix <input type="text"/>	State <input type="text"/>
Title <input type="text"/>	Zip <input type="text"/>
Company Name <input type="text"/>	Citizenship <input type="text" value="United States"/>
Work Division <input type="text"/>	Country <input type="text" value="United States"/>
Work Department <input type="text"/>	Home Telephone <input type="text"/>
Work Address 1 <input type="text"/>	Mobile Telephone <input type="text"/>
Work Address 2 <input type="text"/>	Home Email <input type="text"/>
City <input type="text"/>	
State <input type="text"/>	
ZIP <input type="text"/>	
Work Country <input type="text" value="United States"/>	
Work Telephone <input type="text"/>	
Work FAX <input type="text"/>	
Work Email <input type="text"/>	

SU students that are also employed by SU, in a faculty member's lab for example, are to be identified in the Title as "Student-staff"

Remember to save the new record!

SU students that are also employed by SU, in your lab for example, are to be identified in the Title as "Student-staff". For Student-Staff, indicate Syracuse University as their Company, indicate the College or School (i.e. College of Arts and Sciences) as the Division in which they work; and in the Department field, indicate their Department (i.e. Biology).

***C. Inventions with Multiple Innovators  
– adding an innovator that is “in” the database***

The User wishes to add the 3<sup>rd</sup> innovator, Suzy Smith, who the User knows has submitted invention disclosures to the Office of Technology Transfer before, and so the User expects that Suzy Smith is “in” the database. The User types Suzy’s first name and hits the “Search” button. “People Search Results” will show the database matches for the Suzy’s name.

**People Search**

**Search for Person:**

Where Name contains

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**People Search Results**

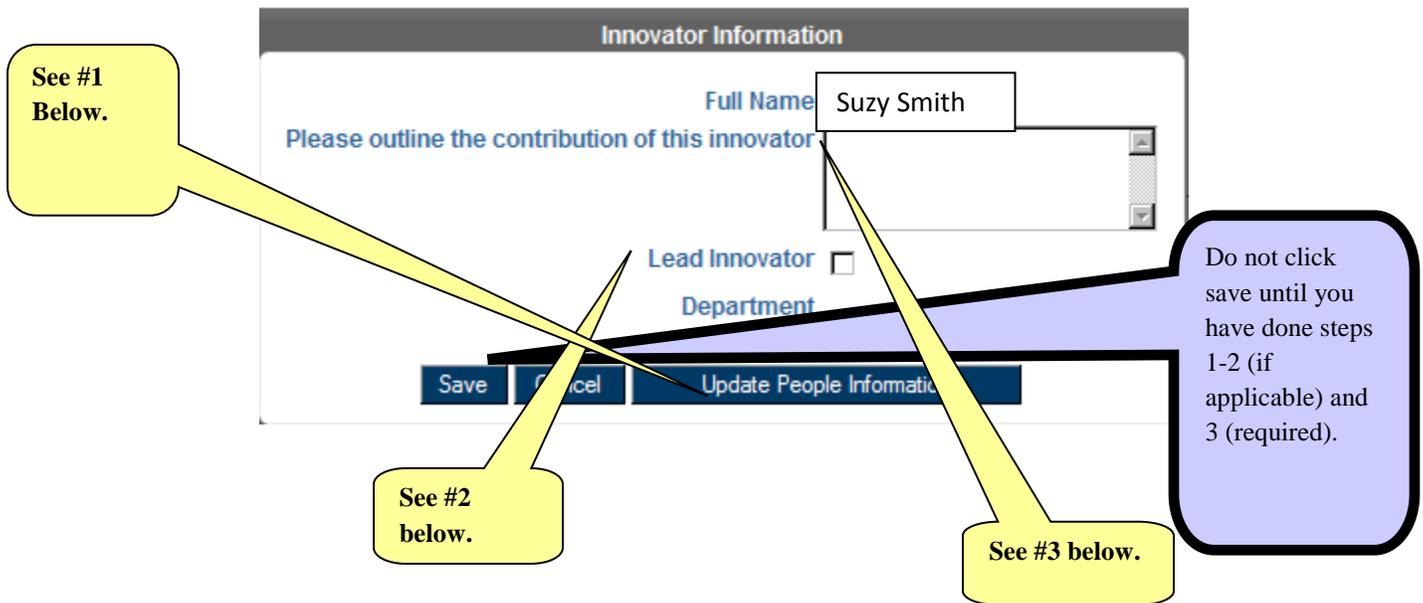
Select	Full Name	Division	Department
<input type="button" value="Select"/>	Suzy Smith		

Page 1

Please FIRST search the database for the applicable Person. Only Select ADD NEW Person if you cannot find the Person in the database.

Click on the “Select” button for the “right” person (in this case, Suzy Smith). The following screen “Innovator Information” will appear.

<<<< *This Section Intentionally Left Blank* >>>>



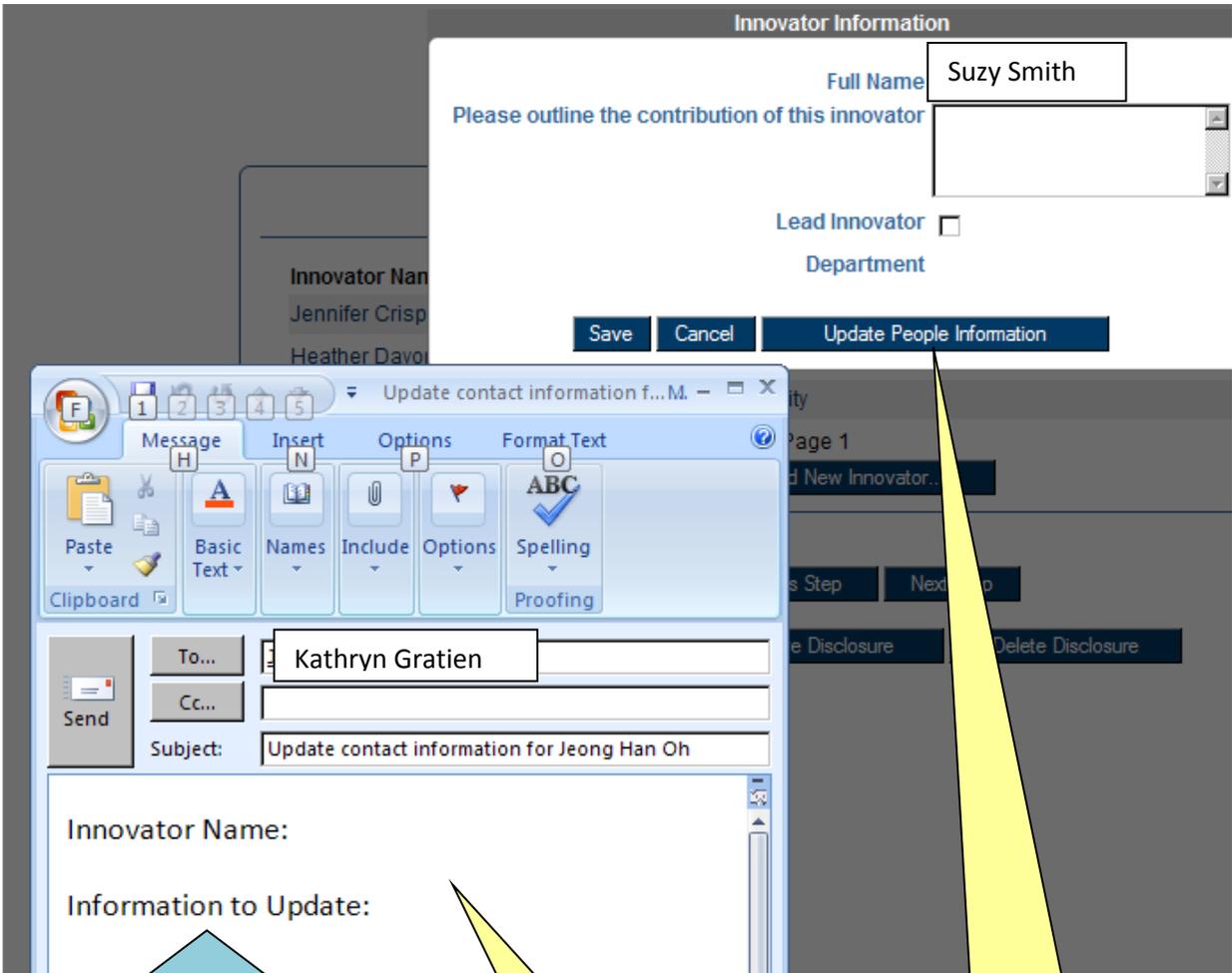
From the “Innovator Information” pop-up, **the User can take one or more of the following actions:**  
**These actions should be taken in the following order**

1. *(if applicable)* Update the Innovator’s contact information (i.e., because his lab was recently moved from Link Hall to Bowne Hall.) Do this by clicking the “Update People Information” button. Doing so will launch an e-mail to the Database Administrator in the Technology Transfer Office (See next page for a screen shot.). If the e-mail does not launch for you, please refer to footnote<sup>1</sup> for more information.
2. *(if applicable)* Identify Suzy as the Lead Innovator by clicking the “Lead Innovator” box
3. Type in the text box to provide information about the role that Suzy played as an innovator on this invention
4. Click Save

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○ <sup>1</sup> 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 [kgratien@syr.edu](mailto:kgratien@syr.edu). Please list old contact information and new confirmation in the e-mail.

The screen shot below depicts the launching of an e-mail after the User hits the “Update People Information” button. If an e-mail message does not launch for you, please refer to footnote 1 on the previous page for more information.



Type in the innovator’s name and what contact information about the innovator should be updated.

Clicking this will launch an e-mail message as seen here

### Step 3: Abstract

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

**STEP 3 of 6: Abstract Information**

Marketing/Public Abstract

A non-confidential abstract of 250 words or less can be entered here. Think of how you'd describe this to your great-grandmother.

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 SU pursue IP protection, this text will serve as a starting point for our staff to develop a standard "technology flier" for marketing this particular technology to industry.

Technical Abstract

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

Please provide a summary of the technology. You will, in a few steps, have the option of attaching documentation<sup>2</sup> relative to the technology. However, a short, technical summary is needed here. Please make reference to a) the construction, b) the principles involved, c) the details of the operations, and d) alternative methods of construction of operations. (<sup>2</sup>You will later have the option to attach documents that provide information on the technology, creations, actions, etc. You may upload photographs, drawings, sketches, manuscripts, reports, patent applications or any other descriptive material.)

[Previous Step](#) [Submit Disclosure](#) [Next Step](#)

[Summary](#) [Exit/Save Disclosure](#) [Delete Disclosure](#)

### 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.

**STEP 4 of 6: Additional Invention Data** ?

**Form Name:** Syracuse Technology Disclosure involving Student(s)

**Form Sections :**

- Student Details**
  - General Information
  - Disclosure Dates
  - Sponsorship
  - Invention Description
  - Status of Technology
  - Market for Technology

**Section Name:** Student Details  
**Section Number:** 0000001

**Question:** FOR EACH STUDENT involved with the innovation, copy the following text into the field below and provide the details requested. Leave the field blank if no students were involved.

**Help Text:** *Student Name: S.U. Program Enrolled In: Degree Sought: Expected Graduation Date: For each job you have held on campus, provide: Department, Job Title, Dates of Service and Supervisor Name.*

**Answer:**

**Question Status:** Incomplete

**Callout 1 (Yellow Star):** Here, highlight/select and copy this italicized text, then paste it into the "Answer Box." Now, use your mouse within the Answer box to answer the questions about the student.

**Callout 2 (Yellow Bubble):** If students are involved, the form will ask for details regarding status and involvement.

**Callout 3 (Yellow Bubble):** 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 5 of 6: Attachments** ?

Export as xds

Attachment Name	File Type	File Size	Download
Invention_Detail.docx	WDBN	9901	Download <input type="button" value="Delete"/>

Page 1

To add an attachment, select the file by clicking 'Browse' then select 'Upload':

## 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.

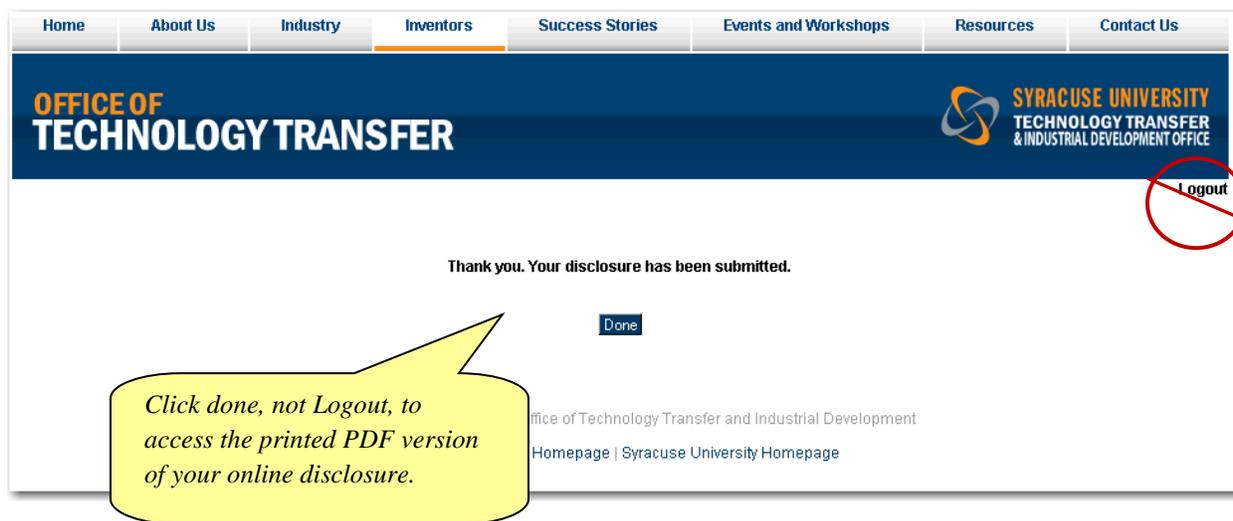
The screenshot displays the 'STEP 6 of 6: Summary' interface. At the top, there is a 'Print PDF' button. Below this, the interface is divided into five sections, each with a 'Go to Step' button:

- General Information:** Title: Detection and Measurement of Bioenergetic... (Callout: A PDF can be created at any point from the Summary Screen.)
- Innovators:** Mary Kerske (Callout: A PDF can be created at any point from the Summary Screen.)
- Abstracts:** Abstract data has been provided.
- Additional Invention Data:** Question data has been provided. (Callout: The “Submit Disclosure” button will remain deactivated until all missing information has been provided.)
- Attachments:** Invention\_Detail.docx

At the bottom of the interface, there are several buttons: 'Previous Step', 'Submit Disclosure', 'Summary', 'Exit/Save Disclosure', and 'Delete Disclosure'. (Callout: 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 at 2-220 CST. See the next page for screen shots and descriptions of how to do this.



## 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.

**Submitted Disclosures** Export as xls

Int Ref #	Title	Status	Date Submitted
TBD	Detection and Measurement of Bioenergetic Fields	Submitted	07/16/2010
129-3342-231	New Fuel Cell Efficiency Enhancement	Submitted	06/01/2010
113-2333-942	Process For Preparing Essentially Colorless Polyimide Film Containing Phenoxy-Linked Diamines	Submitted	06/01/2010
232-5341-449	Low Dielectric Polyimides	Submitted	06/01/2010

Page 1

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.)

**General Information**  Show Detail

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**Form**  Show Detail

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**Attachment** 2  Show Detail

Attachment Name	File Type	File Size	Download
6084Report.pdf	pdf	132359	Download
Invention_Detail.docx	WDBN	9901	Download

**Events: 0**  Show Detail

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 and sign it. All named innovators should do the same.



Send completed form via  
Intercampus Mail to the Technology  
Transfer Office at 2-220 CST.

Transfer (OTT) - Syracuse Unive...  
Downloaded Document: 1265Report.pdf  
Logout  
PDF file types will display below. All other file types please click the link to download: 1265Report.pdf  
Collaborate Sign  
Find

**TECHNOLOGY TRANSFER DISCLOSURE**  
**SYRACUSE UNIVERSITY**  
**OFFICE OF TECHNOLOGY TRANSFER & INDUSTRIAL DEVELOPMENT**

Your invention or idea is important (1) to your professional development; (2) to the University, and if applicable; (3) to your research sponsor. Inventions or creations include new processes, software, products, apparatus, compositions of matter, living organisms or improvements to (or new uses for) things that already exist. It is essential that it be reported promptly, so that it can be evaluated to determine if there is (a) sufficient novelty to permit patenting, and if so, (b) sufficient commercial potential to justify a licensing program for industry. **Please submit this completed form and all attachments, including extra pages added as necessary for further detail, to The Office of TechIndustrial Development at 2-220 CST.**

For Office Use Only	
SU File Number	Date Stamp
_____	
Related Files	
_____	
_____	

1. Principal Inventor or creator

**Questions? Contact:**

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