

Online Invention Disclosure System

User Guide



TECHNOLOGY
TRANSFER OFFICE

Welcome to Marshall University's online invention disclosure system. Called Sophia, the system is a product of Wellspring Worldwide. We hope this online service will provide quick, convenient, and easily accessible information regarding your invention disclosures and intellectual property protection.

To begin the process, if you do not have a username and password for Sophia you will need to contact the Marshall University Technology Transfer Office (TTO) at tto@marshall.edu or (304) 696-4365. Our staff will set up your account and e-mail login information to you.

Once your account has been established, visit our website at <http://www.marshall.edu/tto> and click on the Invention Disclosure link on the right-hand Quick Reference menu.

Marshall University Technology Transfer Office

WE ARE... MARSHALL.

Google Custom Search

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Technology Transfer Office

Home | About Us | Contact | Forms | Links | Policies, Procedures and Guidelines | Research Assets

Marshall University Technology Transfer Office

The primary focus of the Technology Transfer Office is to make the unique products and services generated by Marshall University faculty, staff and students available to the public for commercialization.

Extending beyond the typical technology transfer programs on other campuses, the Marshall Technology Transfer Office works with regional economic development partners to help create high-tech, high-paying jobs in West Virginia.

The office's first goal is to see that the new enterprises growing out of Marshall stay here.

[Click here to view the latest technologies available for licensing.](#)

Search

Search

Quick Reference

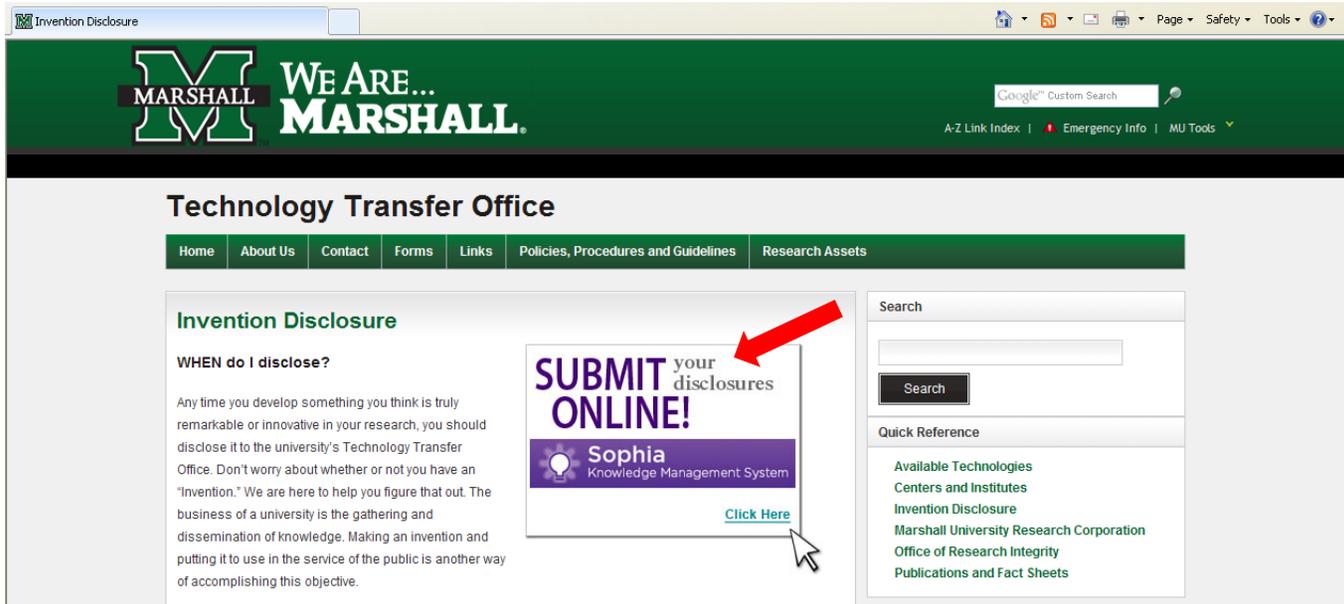
- Available Technologies
- Centers and Institutes
- Invention Disclosure
- Marshall University Research Corporation
- Office of Research Integrity
- Publications and Fact Sheets

Research & Economic Development News

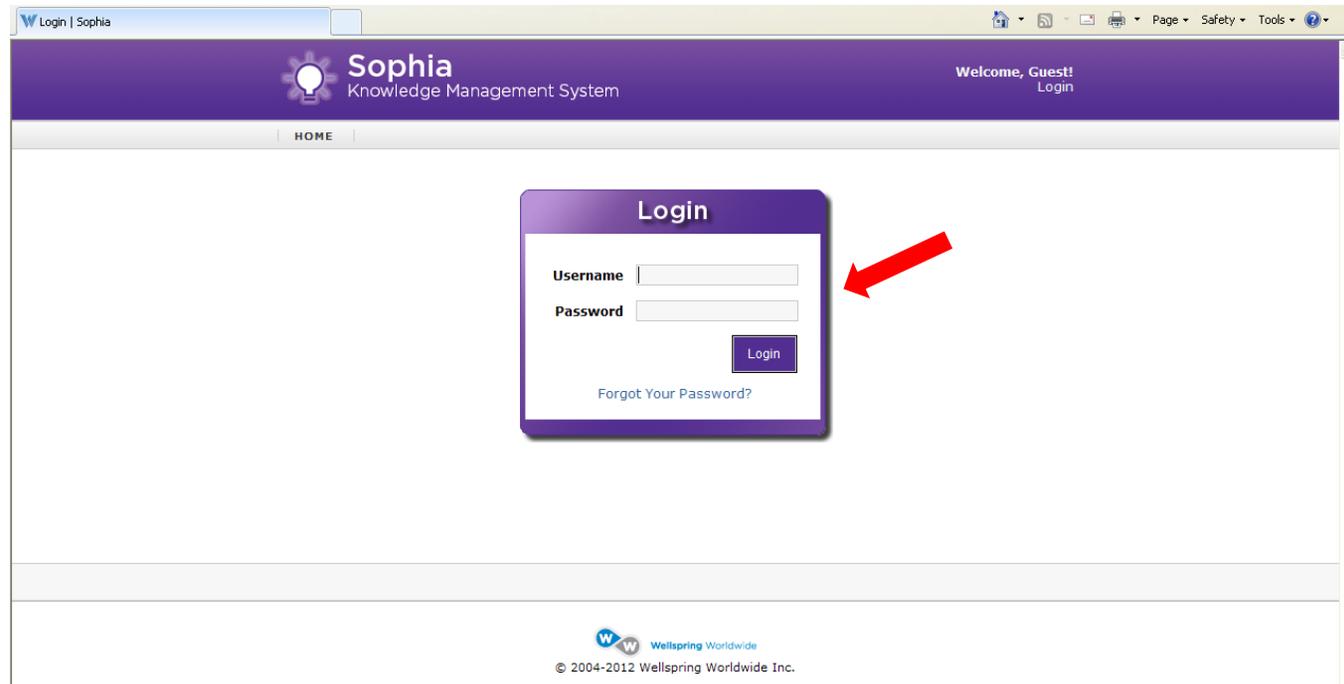
WV Public Broadcasting: HSTA takes place at Marshall July 23rd 2012
Marshall scientist awarded NIH grant for lung cancer research July 19th 2012
Herald-Dispatch: HSTA kicks off summer institute July 16th 2012

Marshall University | One John Marshall Drive | Huntington, WV 25755 | 1-800-642-3463

Click the “Submit Online” button.



And log in.



This is your homepage. Any agreements, inventions, and online disclosures you have created or have been listed as a co-inventor in will appear here. When you log in for the first time, please change your password by clicking the Settings button.

Firefox Welcome, John Doe | Sophia

wellspringsoftware.net https://marshall.wellspringsoftware.net/kms/my/home/ Google

Most Visited Getting Started Latest Headlines State Journal Featured... Bookmarks

Sophia
Knowledge Management System

Welcome, John Doe!
Settings | Logout

HOME

Welcome, John Doe

Inventor Agreements
You have no agreements in the system.

Inventor Homepage
You have no inventions in the system.

Your Online Disclosures
No Disclosures

Tasks

- New Disclosure
- Customize Home Page

Click the Pencil and Paper icon to open the edit screen.

The screenshot shows a web browser window displaying the Sophia Knowledge Management System. The user is logged in as John Doe. The page shows a user profile for John Doe with various sections: Details, System User Information, Addresses, Disclosures, Organizations, Organization Groups, Inventions, Intellectual Property, and Agreements. A red arrow points to the 'Set your profile photo' link in the Details section.

Sophia Knowledge Management System
Welcome, John Doe!
Settings | Logout

John Doe

Details

Primary Email	tto@marshall.edu
Courtesy Title	Dr.
Suffix	None
Default Job Title	None
Citizenship	United States
Employee Start Date	None
Employee Number	None
Total Distributions	\$ 0.00
CNR Starting Balance	\$ 0.00
Created By	Amy Melton on Jun 19, 2012 9:27 AM
Modified By	Amy Melton on Jun 19, 2012 9:27 AM

System User Information

Username	Inventor
Title	Inventor

Addresses

Business Address	One John Marshall Drive Huntington, WV, United States 25701 Phone: 304-696-4365 tto@marshall.edu
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Disclosures
No Related Disclosures

Organizations
No Organizations

Organization Groups

School/College	Department
No Organization Groups	

Inventions
No Inventions Found

Intellectual Property
No Records Found

Agreements Listing this Person as an Agreement Person

Enter your new password and confirm the password, then click Continue.

The screenshot shows a Firefox browser window with the address bar displaying `https://marshall.wellspringsoftware.net/kms/person/form/210/`. The page header features the Sophia Knowledge Management System logo and a welcome message for John Doe. The main content area is titled "Edit John Doe" and contains a form with the following fields:

- Primary Email: `ttto@marshall.edu`
- Courtesy Title: `Dr.`
- First Name*: `John`
- Middle Name: (empty)
- Last Name*: `Doe`
- Suffix: (empty)
- System User Information section:
 - Username: `Inventor`
 - Password: (empty) ← Red arrow points here
 - Confirm Password: (empty)

A "Continue" button is located at the bottom of the form. The footer of the page includes the Wellspring Worldwide logo and copyright information: "© 2004-2012 Wellspring Worldwide Inc." The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the time `2:03 PM` and date `6/20/2012`.

Once your password has been changed, you will be returned to your profile. Please check your contact information. If any changes need to be made click the Pencil and Paper icon to update. Click Home at the top left to return to your homepage.

The screenshot shows the user profile page for John Doe in the Sophia Knowledge Management System. The browser is Firefox, and the URL is <https://marshall.wellspringsoftware.net/kms/person/detail/210>. The page header includes the Sophia logo and a welcome message for John Doe with links for Settings and Logout. The main content area is divided into several sections:

- HOME**: A navigation link at the top left, highlighted with a red arrow.
- John Doe**: The user's name and profile header.
- Details**: A table of personal and professional information.

Primary Email	tto@marshall.edu
Courtesy Title	Dr.
Suffix	None
Default Job Title	None
Citizenship	United States
Employee Start Date	None
Employee Number	None
Total Distributions	\$ 0.00
CNR Starting Balance	\$ 0.00
Created By	Amy Melton on Jun 19, 2012 9:27 AM
Modified By	Amy Melton on Jun 19, 2012 9:27 AM
- System User Information**: A table of system-related details.

Username	Inventor
Title	Inventor
- Addresses**: A list of addresses with a 'Pencil and Paper' edit icon highlighted by a red arrow.
 - Business Address: One John Marshall Drive, Huntington, WV, United States 25701. Phone: 304-696-4365. Email: tto@marshall.edu.
- Disclosures**: No Related Disclosures.
- Organizations**: No Organizations.
- Organization Groups**: A table with columns for School/College and Department. No Organization Groups are listed.
- Inventions**: No Inventions Found.
- Intellectual Property**: No Records Found.
- Agreements Listing this Person as an Agreement Person**: No Agreements Found.

The Windows taskbar at the bottom shows the Start button and several application icons, including Firefox, Internet Explorer, and Microsoft Word. The system tray on the right indicates the time is 2:02 PM on 6/20/2012.

To create a new invention disclosure, start on your homepage. Click New Disclosure under the Tasks panel.

The screenshot shows a Firefox browser window displaying the Sophia Knowledge Management System homepage. The browser's address bar shows the URL <https://marshall.wellspringsoftware.net/kms/my/home/>. The page header includes the Sophia logo and the text "Sophia Knowledge Management System". On the right side of the header, it says "Welcome, John Doe!" with links for "Settings" and "Logout". Below the header, there is a "HOME" button. The main content area features a "Welcome, John Doe" section with three panels: "Inventor Agreements" (You have no agreements in the system.), "Inventor Homepage" (You have no inventions in the system.), and "Your Online Disclosures" (No Disclosures). To the right of these panels is a "Tasks" panel with a red box and a red arrow pointing to the "New Disclosure" option. The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the time 2:01 PM and date 6/20/2012.

As you answer the questions throughout the disclosure, be sure to click Next Step, located at the bottom of the page, if you will need to come back to complete the disclosure at a later date. The information will be saved and you can log back in to finish the disclosure. Contact the TTO with any questions regarding the disclosure.

The screenshot shows a web browser window displaying the 'New Disclosure: Details' page of the Sophia Knowledge Management System. The browser's address bar shows the URL: https://marshall.wellspringsoftware.net/kms/disclosure/form/?from_wizard=1. The page header includes the Sophia logo and the text 'Sophia Knowledge Management System' and 'Welcome, John Doe! Settings | Logout'. Below the header, there is a navigation menu with 'HOME' and a breadcrumb trail: 'New Disclosure: Details' > 'Details' > 'Researchers' > 'Funding' > 'Questions' > 'Confirm'. A message states: 'If you have any questions, please contact the Marshall University Technology Transfer Office by phone at (304) 696-4365 or via e-mail at tto@marshall.edu.' A note indicates that an asterisk (*) denotes a required field. The form fields are: 'Title*' (text input), 'Disclosure Type*' (dropdown menu with 'Online Disclosure' selected), 'Description' (large text area), 'First Public Disclosure' (date selector with '- MON -' and '- DAY -' dropdowns), 'Circumstances of Disclosure' (large text area), and 'Suggested Keywords' (text input). The Windows taskbar at the bottom shows the Start button and several application icons, with the system clock displaying '2:04 PM 6/20/2012'.

[Please Note: First Public Disclosure refers to the date of any presentation (written and/or oral, including poster presentation, PowerPoint presentation, oral explanation) or publication for individuals who are not University employees or who are not subject to a Confidential Disclosure Agreement. This online disclosure is not considered a public disclosure as it is part of the intellectual property protection procedures of the University. Likewise, any federal or state grant application that includes confidential information is not considered a public disclosure. (Please do, however, mark such applications Confidential to alert the agency. Be careful of abstract information submitted as some agencies will post such abstracts publicly online.) **Any public disclosure voids foreign patent protection rights immediately. In the U.S., the public disclosure begins a one year bar date for applying for patent protection. If you are anticipating a public disclosure, contact the TTO immediately to attempt to secure foreign patent rights with a provisional patent application.]**

Please attach any pertinent documentation relating to your invention, i.e. lab results and related images, public disclosure materials, white papers, journal manuscripts, etc., if available. Click Browse to locate the file for uploading, then click Attach File to upload. Once all files are attached, click Next Step.

The screenshot shows a Firefox browser window with the address bar displaying `https://marshall.wellspringsoftware.net/kms/disclosure/form/?from_wizard=1`. The page content includes several form sections:

- First Public Disclosure**: A date selection field with dropdowns for month (-MON-) and day (-DAY-), and a time zone icon.
- Circumstances of Disclosure**: A large empty text area.
- Suggested Keywords**: A large empty text area.
- Attached Documents**: A section with the text "No files uploaded".
- Please Attach Any Documents Relevant To This Disclosure**: A section containing a "File" label, an empty text input field, and a "Browse..." button. A red arrow points to this button.
- Buttons**: Two blue buttons, "Attach File" and "Next Step", are located to the right of the "Browse..." button. Red arrows point to both of these buttons.

At the bottom of the page, there is a logo for "Wellspring Worldwide" and a copyright notice: "© 2004-2012 Wellspring Worldwide Inc.". The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the date and time "2:04 PM 6/20/2012".

At this stage of the disclosure, please list any additional co-inventors by entering the pertinent information and clicking Add to List. Indicate who the lead inventor is, and mark the % contribution for each inventor. Once all co-inventors have been entered, please click Next Step.

The screenshot shows a web browser window with the URL https://marshall.wellspringsoftware.net/kms/disclosure/person/16/?from_wizard=1. The page header includes the Sophia Knowledge Management System logo and a welcome message for John Doe. The main content area is titled "Edit Disclosure D2012-0006: Researchers" and features navigation tabs for Details, Researchers, Funding, Questions, and Confirm. A message from the Marshall University Technology Transfer Office is displayed. Below this is a "Researcher Information" form with fields for First Name, Middle Name, Last Name, Organization, and E-Mail Address. A red arrow points to the "Add to List" button. The "Researcher List" table shows one entry for John Doe with a 100.00% contribution. A second red arrow points to the "Next Step" button.

Researcher Information
* indicates a required field
First Name*
Middle Name
Last Name*
Organization
Please provide a valid e-mail address.
E-Mail Address*

[Add to List](#)

Researcher List

Lead	% Contribution	Name	Organization	E-Mail
<input checked="" type="checkbox"/>	100.00 %	John Doe	None	tto@marshall.edu

[Next Step](#)

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At this stage of the disclosure process, please list any sponsors of your invention, including any funds approved specifically to create your invention. This step ensures appropriate disclosure to the Sponsor by the TTO. If only internal Marshall/MURC funds were used, please note this by clicking the box that indicates “This disclosure used no external funding.” Once completed, click Next Step.

Sophia
Knowledge Management System

Welcome, John Doe!
Settings | Logout

HOME

Edit Disclosure D2012-0006: Funding

Details Researchers Funding Questions Confirm

If you have any questions, please contact the Marshall University Technology Transfer Office by phone at (304) 696-4365 or via e-mail at tto@marshall.edu.

If the research was developed with any grant (federal agencies, foundations, etc.), industry research contract funds, or other sponsor's funds, please list below.

Sponsor Information

* indicates a required field, if no external funding was used, check the box below.

Sponsor Name*

Country*

Contract Number

Please include any contact information for the sponsor.
e.g. Contact name, phone number, e-mail address.

Contact Information

Add to List

Sponsor List

Add Sponsors By Entering Data Above

This disclosure used no external funding

Next Step

Wellspring Worldwide

2:05 PM
6/20/2012

This next stage includes questions regarding the specifics about the invention's creation, commercial potential, documentation, resources used in its creation, and any additional files you wish to disclose, i.e. scanned images of your lab notebook. The next several pages of this manual will appear on a single computer screen.

Firefox Edit Disclosure D2012-0006: Questions | ...

wellspringsoftware.net https://marshall.wellspringsoftware.net/kms/disclosure/question/16/?from_wizard=1

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Sophia Knowledge Management System

Welcome, John Doe! Settings | Logout

HOME

Edit Disclosure D2012-0006: Questions

Details Researchers Funding Questions Confirm

Please attach any related electronic documents at the bottom of the page.

If you have any questions, please contact the Marshall University Technology Transfer Office by phone at (304) 696-4365 or via e-mail at tto@marshall.edu.

Survey Questions

* indicates a required field

Identification of contributor(s).

In a joint invention or authorship of a software program, were different aspects of the invention or software program made by different inventors?

Yes
 No
 Uncertain

Type of Material:

Invention
 Software Program
 Other

Please check one:

Working model (demonstrates the concept, may be fractional in scale, made available materials, etc.)
 Engineering prototype (full scale model, instrumented for testing critical performance.)
 Product prototype (full scale model, designed to manufacture a quality product in volume with automated production machinery.)
 Product introduction (product is fully developed except for customer specific requests and requirements; product has some limited customer sales or customer trial site. May or may not be supported by marketing efforts.)
 Sales (product is completed and ready for volume customer deployment, product has been fully introduced to the marketplace, has significant customer sales and infrastructure in place to support those sales.)

Mark appropriate category:

Biomedical: biological materials, medical-dental products or devices for diagnosis, therapy, assistance
 Chemical: methods, processes, compounds, catalysts
 Computer & software: methods, programs, tool, networks
 Devices: engineering, analytical, imaging devices
 Materials: ceramics, metals, methods of production, superconductors
 Biological materials, plants
 Other

Start [Icons] 2:06 PM 6/20/2012

Date when you first conceived the invention or software program:

- MON - - DAY -

Do you have record of the invention's or software program's conception - a sketch, report, laboratory notebook entry, or the like - which describes your invention or software program?

- Yes
- No

Can it be independently corroborated?

- Yes
- No

Date when you actually reduced the invention or software program to practice, if this has been done:

- MON - - DAY -

Potential commercial applications of the invention or software program/potential licensees.

What do you see as the commercial use of your invention?

[Empty text area for commercial use of invention]

Are there current plans to use your idea commercially?

- Yes
- No

Have you been contacted by any party regarding the licensing of your invention or software program?

- Yes
- No

Are you aware of any companies in the field that may be interested in your invention or software program; and why? If so provide names, addresses, emails and contact person if known.

[Empty text area for interested companies]

Once all items on this screen are completed, please click Next.

The screenshot shows a Firefox browser window with the address bar displaying `https://marshall.wellspringsoftware.net/kms/disclosure/question/16/?from_wizard=1`. The page content includes the following sections:

- University Matching**: A text input field.
- Equipment**: A text input field.
- Has intellectual property protection been filed for this invention? If so, what kind? Please include the filing date and who was listed as the owner.**: A large text area for input.
- Have you formed a company to further develop this invention? If so, what kind (LLC, C Corporation, etc.), who are the principals and how many full- and part-time employees are there?**: A large text area for input.
- Please attach copies of any disclosures which related to this invention or software program (journal articles, conference proceedings, working papers, etc.)**: A section for document uploads.
- Please approve this disclosure by clicking the checkbox next to your name on the last page of this form (where it says "signoff/by". By checking the box you assert that you have read the documents in this package in their entirety and agree that they are ready for submission.**: A section for approval.
- Attached Documents**: A section showing "No files uploaded" and a "Browse..." button.
- Please Attach Any Documents Relevent To This Disclosure**: A section with a "File" input and a "Browse..." button.
- Attach File**: A purple button.
- Next**: A purple button with a red arrow pointing to it from the right.

The Windows taskbar at the bottom shows the Start button, several application icons (including Internet Explorer, Word, and Excel), and the system tray with the date and time: 3:57 PM, 6/20/2012.

This is the final stage of the invention disclosure process. After reviewing your disclosure, please be sure to click the box indicated below to sign off on the submission *before* clicking the Submit For Approval button.

The screenshot shows the Sophia Knowledge Management System interface. The browser address bar displays the URL: <https://marshall.wellspringsoftware.net/kms/disclosure/detail/16/>. The page title is "Disclosure D2012-0006: Confirm". The user is logged in as "John Doe" and has access to "Settings" and "Logout".

The main content area features a navigation menu with the following items: Details, Researchers, Funding, Questions, and Confirm. A notice box contains the following text:

Notice
Please review your information.
Please ensure that all the following Disclosure information is correct.
[Print a copy](#)
When your information is correct press "Submit for Approval"

The "Submit For Approval" button is highlighted with a red arrow.

The "Details" section includes the following information:

- Track Code: D2012-0006
- Disclosure Type: Online Disclosure
- Disclosure Status: In Progress
- First Public Disclosure: None
- Circumstances of Disclosure: None
- Suggested Keywords: None
- Description: None
- Name: New widget
- Created By: John Doe on Jun 20, 2012 2:05 PM
- Modified By: John Doe on Jun 20, 2012 3:57 PM

The "Disclosure Researchers" section includes the following table:

Share	Name	Organization	E-Mail	Signoff/By
100.00 %	John Doe	None	tto@marshall.edu	None

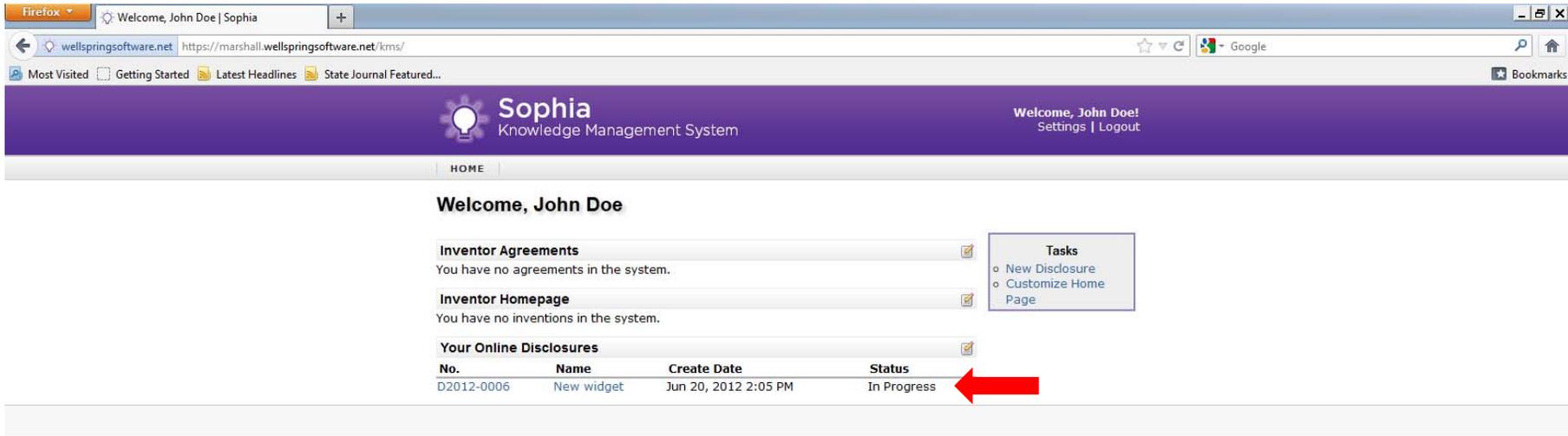
The "Funding/Sponsor" section displays the message: "No External Funding."

The "Disclosure Questions" section includes a "Survey" link.

The page concludes with the instruction: "Please check one:"

Once you submit the disclosure you will be taken to your homepage, where the new disclosure now appears. The TTO will contact any co-inventors to alert them to the disclosure and request their review and signoff prior to reviewing the disclosure. Once all inventors have reviewed and signed off, the TTO will review the disclosure, contact all inventors with any questions and will alert you to progress, including a decision by the Council on Research and Commercialization, a provisional patent filing, etc. All updates regarding your invention will be posted to Sophia.

Note: If you have not yet submitted the disclosure and need to continue completing the process, you will see the disclosure listed as still being In Progress (see example below). You can click on the disclosure to complete the process at any time.



The screenshot shows a web browser window displaying the Sophia Knowledge Management System. The page has a purple header with the Sophia logo and the text "Sophia Knowledge Management System". A navigation bar below the header contains a "HOME" link. The main content area is titled "Welcome, John Doe" and features three sections: "Inventor Agreements" (no agreements), "Inventor Homepage" (no inventions), and "Your Online Disclosures". A "Tasks" sidebar is visible on the right, listing "New Disclosure" and "Customize Home Page". The "Your Online Disclosures" section contains a table with the following data:

No.	Name	Create Date	Status
D2012-0006	New widget	Jun 20, 2012 2:05 PM	In Progress

A red arrow points to the "In Progress" status of the disclosure in the table.

As a reminder, please contact the TTO at tto@marshall.edu or (304) 696-4365 for assistance. Thank you for completing the invention disclosure process and fulfilling your obligation to disclose your inventions to Marshall University Research Corporation, which is working on behalf of Marshall University and its affiliated centers and institutes.

Please be sure to contact the TTO for assistance with any non-disclosure agreements, material transfer agreements, corporate sponsored research agreements, or Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) program submissions.



TECHNOLOGY
TRANSFER OFFICE

401 11th Street, Suite 1300

Huntington, WV 25701

304.696.4365

tto@marshall.edu

www.marshall.edu/tto