

Online Invention Disclosure System

User Guide

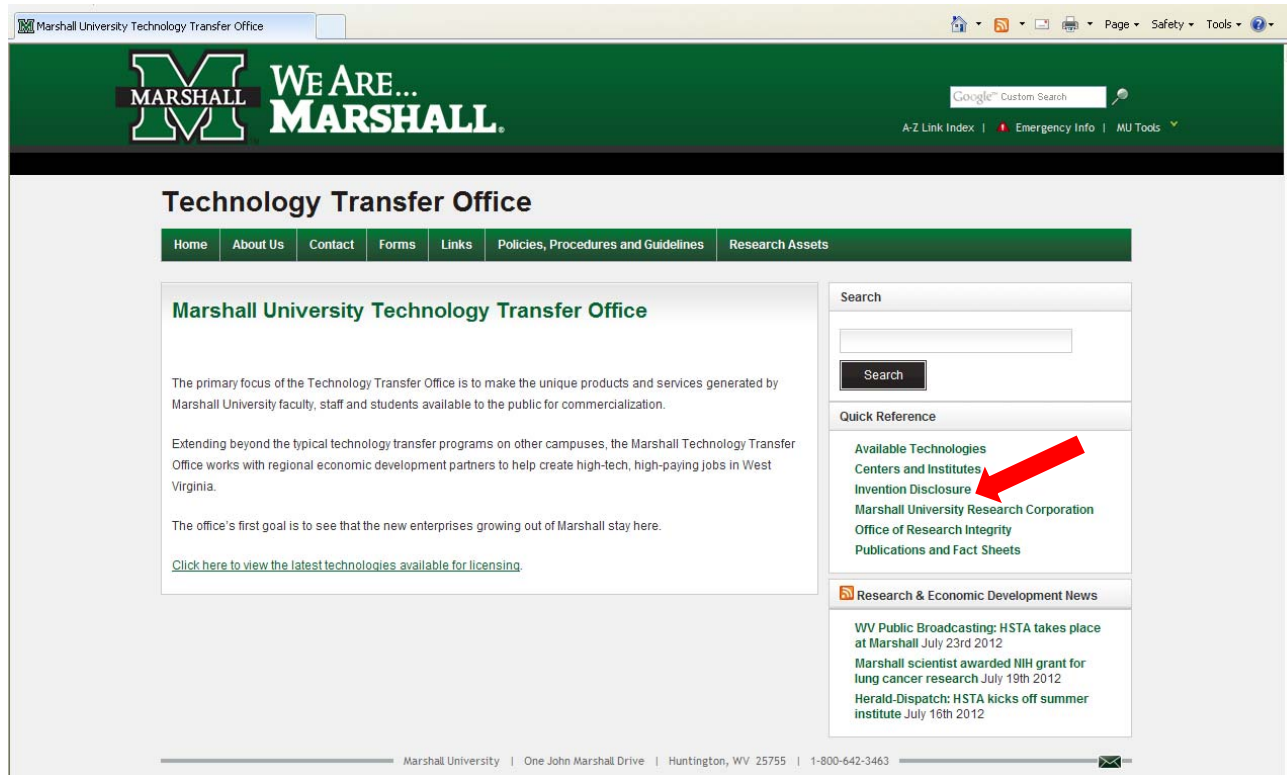


TECHNOLOGY
TRANSFER OFFICE

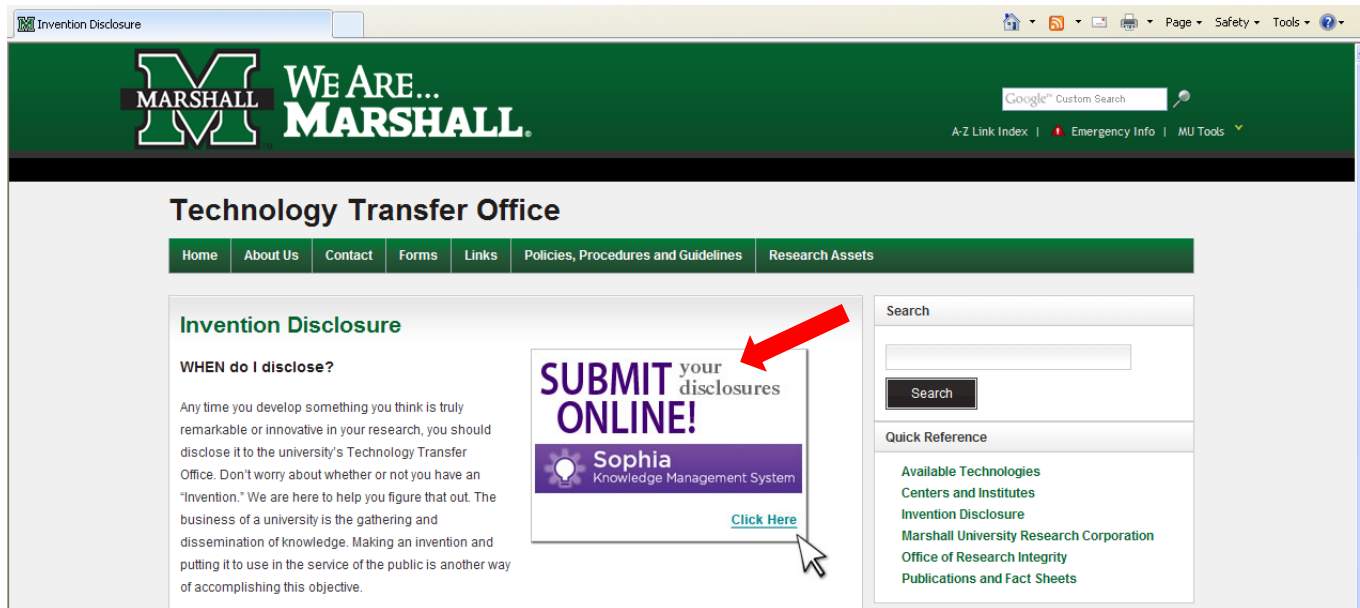
Welcome to Marshall University's online invention disclosure system. Called Sophia, the system is a product of Wellspring Worldwide. We hope this online service will provide quick, convenient, and easily accessible information regarding your invention disclosures and intellectual property protection.

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.

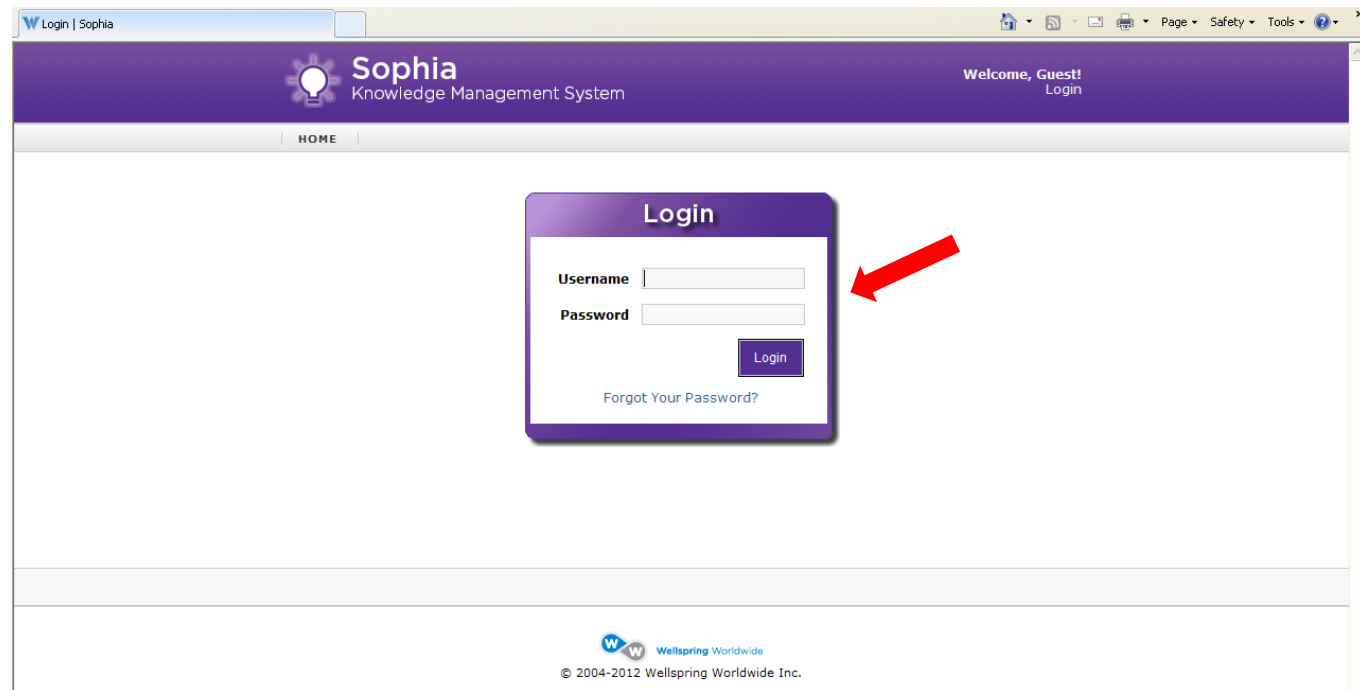
Once your account has been established, visit our website at <http://www.marshall.edu/tto> and click on the Invention Disclosure link on the right-hand Quick Reference menu.



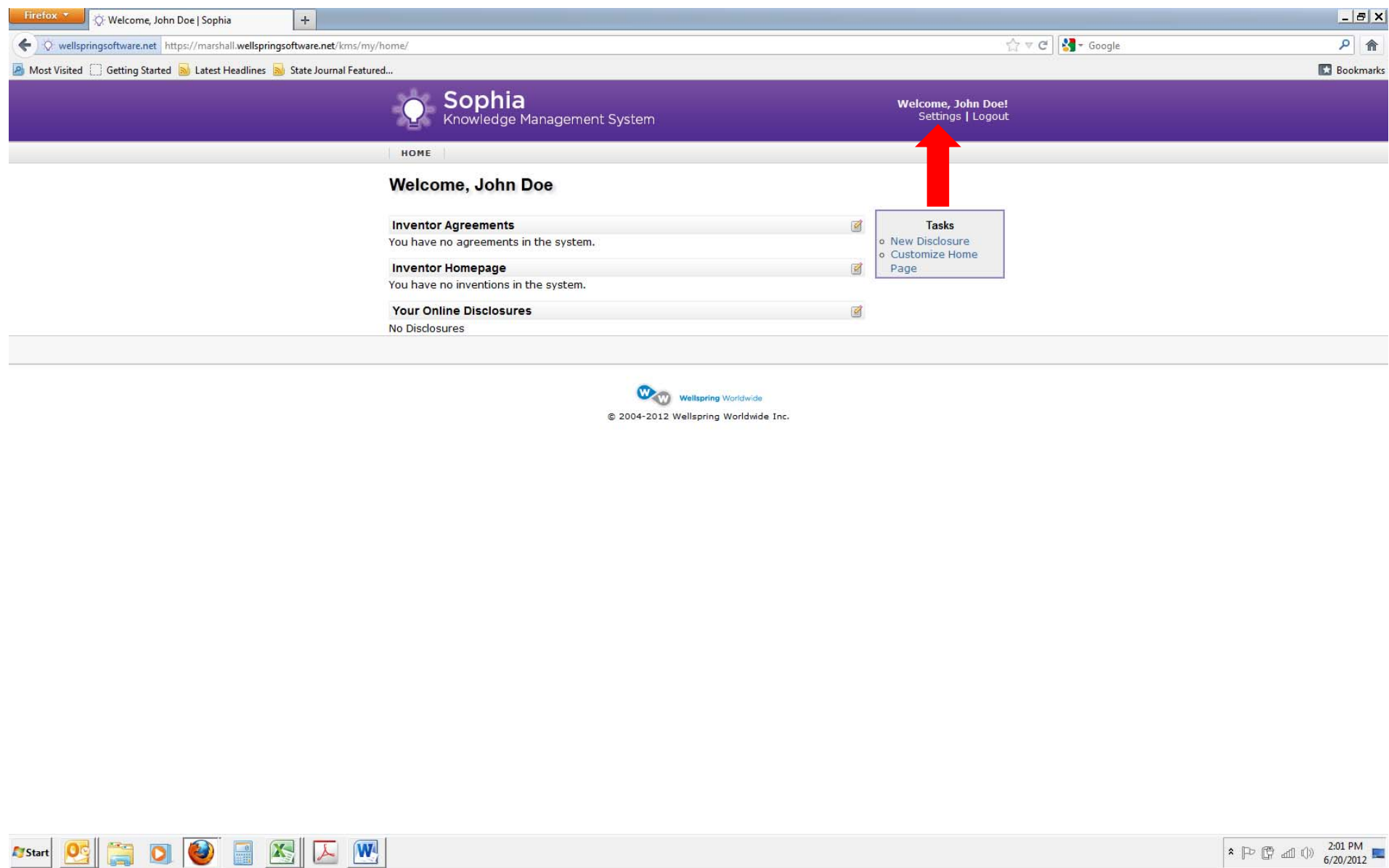
Click the “Submit Online” button.



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.



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

Firefox

John Doe | Sophia

+

wellspringsoftware.net

https://marshall.wellspringsoftware.net/kms/person/detail/210

Google


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Sophia
Knowledge Management System

Welcome, John Doe!
[Settings](#) | [Logout](#)

HOME

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

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

Set your profile photo



Start





































































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

The screenshot shows a web browser window with the URL <https://marshall.wellspringsoftware.net/kms/person/form/210/>. The page header is purple and contains the Sophia Knowledge Management System logo, a welcome message for John Doe, and a 'HOME' link. The main content area is white and features the 'Edit John Doe' form. The form has two sections: personal information and system user information. The personal information section includes fields for Primary Email (ttd@marshall.edu), Courtesy Title (Dr.), First Name (John), Middle Name, Last Name (Doe), and Suffix. The system user information section includes fields for Username (Inventor), Password, and Confirm Password. A red arrow points to the Password field. A 'Continue' button is located at the bottom of the form.

Firefox Edit John Doe | Sophia

wellspringsoftware.net https://marshall.wellspringsoftware.net/kms/person/form/210/ Google

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Sophia
Knowledge Management System

Welcome, John Doe!
Settings | Logout

HOME

Edit John Doe

Editing John Doe

* indicates a required field

Primary Email ttd@marshall.edu

Courtesy Title Dr.

First Name* John

Middle Name

Last Name* Doe

Suffix

System User Information

Username Inventor

Password

Confirm Password

Continue

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 Sophia Knowledge Management System interface. The top navigation bar is purple with the Sophia logo and the text "Sophia Knowledge Management System". On the right, it says "Welcome, John Doe!" with links for "Settings" and "Logout". Below the navigation bar, there is a "HOME" link highlighted with a red arrow. The main content area displays the user profile for "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

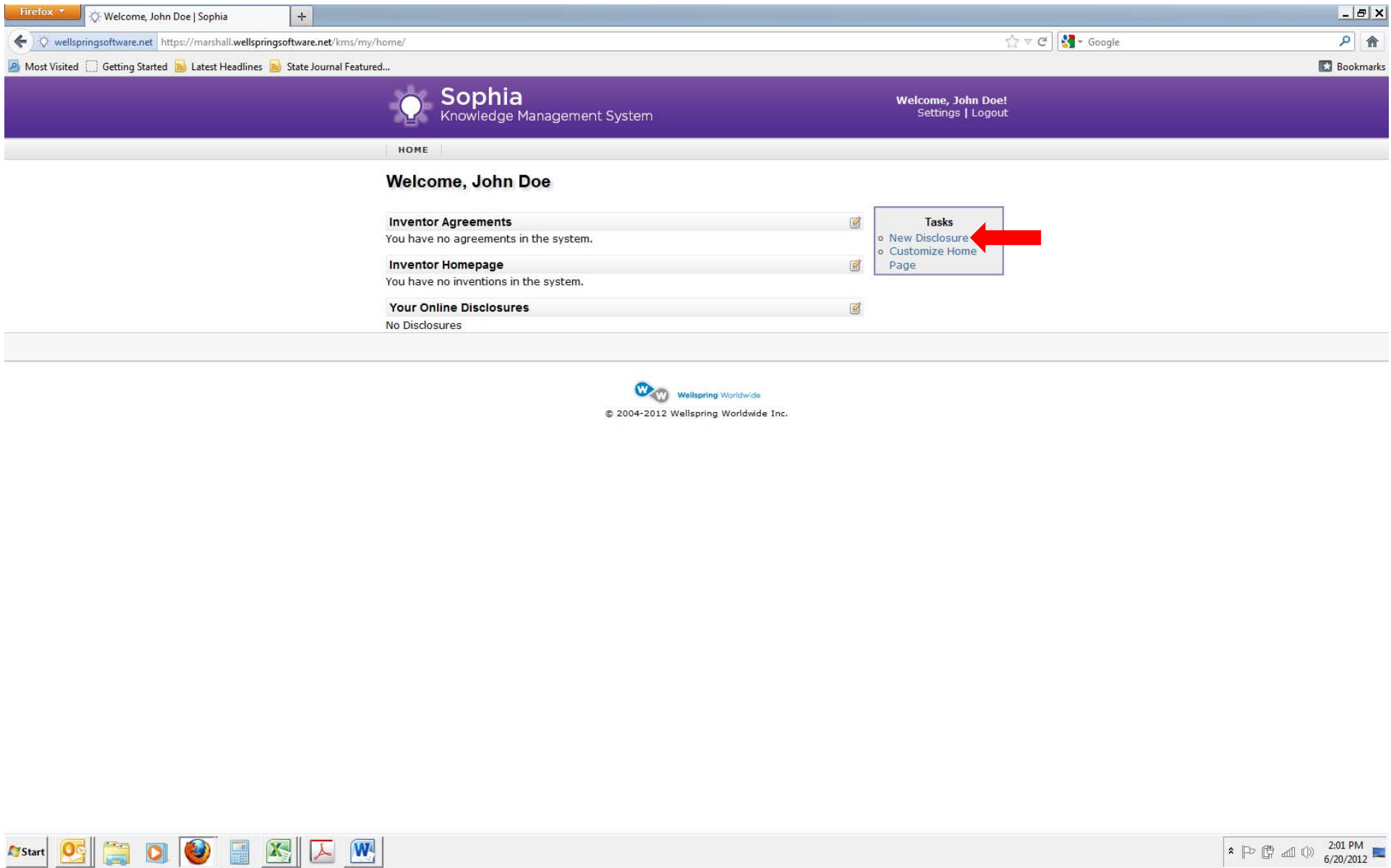
Intellectual Property

No Records Found

Agreements Listing this Person as an Agreement Person

No Agreements

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



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 with the address bar displaying 'https://marshall.wellspringsoftware.net/kms/disclosure/form/?from_wizard=1'. The page title is 'New Disclosure: Details | Sophia'. The Sophia Knowledge Management System header is purple with a lightbulb icon and the text 'Sophia Knowledge Management System'. A user greeting 'Welcome, John Doe! Settings | Logout' is in the top right. Below the header is a 'HOME' button. The main content area is titled 'New Disclosure: Details' and includes tabs for 'Details', 'Researchers', 'Funding', 'Questions', and '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 legend 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 picker set to '- MON -' and '- DAY -'), 'Circumstances of Disclosure' (large text area), and 'Suggested Keywords' (text input). The Windows taskbar at the bottom shows the Start button and icons for Office applications, and the system clock shows 2:04 PM on 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.]**

The screenshot shows a web browser window with the address bar displaying "wellspringsoftware.net" and a URL for a new disclosure form. The page title is "New Disclosure: Details | Sophia". The form contains several sections:

- First Public Disclosure**: A date selection area with dropdowns for month ("MON") and day ("DAY").
- Circumstances of Disclosure**: A large text area for describing the disclosure.
- Suggested Keywords**: A large text area for entering keywords.
- Attached Documents**: A section indicating "No files uploaded" and a prompt to "Please Attach Any Documents Relevant To This Disclosure". It includes a "File" input field and a "Browse..." button.
- Buttons**: "Attach File" and "Next Step" buttons are located at the bottom right of the form.

Red arrows are overlaid on the image, pointing to the "Browse..." button, the "Attach File" button, and the "Next Step" button.

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.

Firefox Edit Disclosure D2012-0006: Researchers ...

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

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Knowledge Management System

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HOME

Edit Disclosure D2012-0006: Researchers

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.

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](#)

W Wellspring Worldwide

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Start

2:05 PM
6/20/2012

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.

Firefox Edit Disclosure D2012-0006: Funding | So... wellspringsoftware.net https://marshall.wellspringsoftware.net/kms/disclosure/sponsor/16/?from_wizard=1

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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 | ...

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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

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

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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?

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.

Start Outlook File Explorer Firefox Internet Explorer Excel PDF Adobe Word

3:56 PM 6/20/2012

Impediments - what do you see as the greatest impediments to the commercial adoption of your invention?

Due Diligence - is further development of you invention or software program now in progress? Scheduled? Dependent on commercial or federal sponsorship? Please explain.

Are there any plans to publish or otherwise disseminate any aspect of this invention in the future?

- ☐ Yes
☐ No

For each item below, please identify by source, name and amount:

Funds

Space (room no.)

Facilities

Personnel (include staff, GA's, student assts, etc.)

Reassigned Time

University Matching

University Matching

Equipment

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.

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?

Please attach copies of any disclosures which related to this invention or software program (journal articles, conference proceedings, working papers, etc.)

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.

Attached Documents

No files uploaded

Please Attach Any Documents Relevant To This Disclosure

File Browse...

Attach File

Next

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.

Sophia
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Welcome, John Doe!
Settings | Logout

Disclosure D2012-0006: Confirm

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.

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"

[Submit For Approval](#)

Details [Print a copy of this Disclosure](#) [Edit this Disclosure](#)

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

Disclosure Researchers [Add Researchers to this Disclosure](#)

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

Funding/Sponsor [Add Funding to this Disclosure](#)

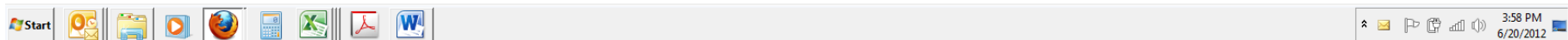
No External Funding.

Disclosure Questions [Edit Specific Answers](#)

Survey

Please check one:

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.



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.



Weisberg Applied
Engineering Complex Rm 4233
One John Marshall Drive
Huntington, WV 25755
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