

Online Invention Disclosure System

User Guide

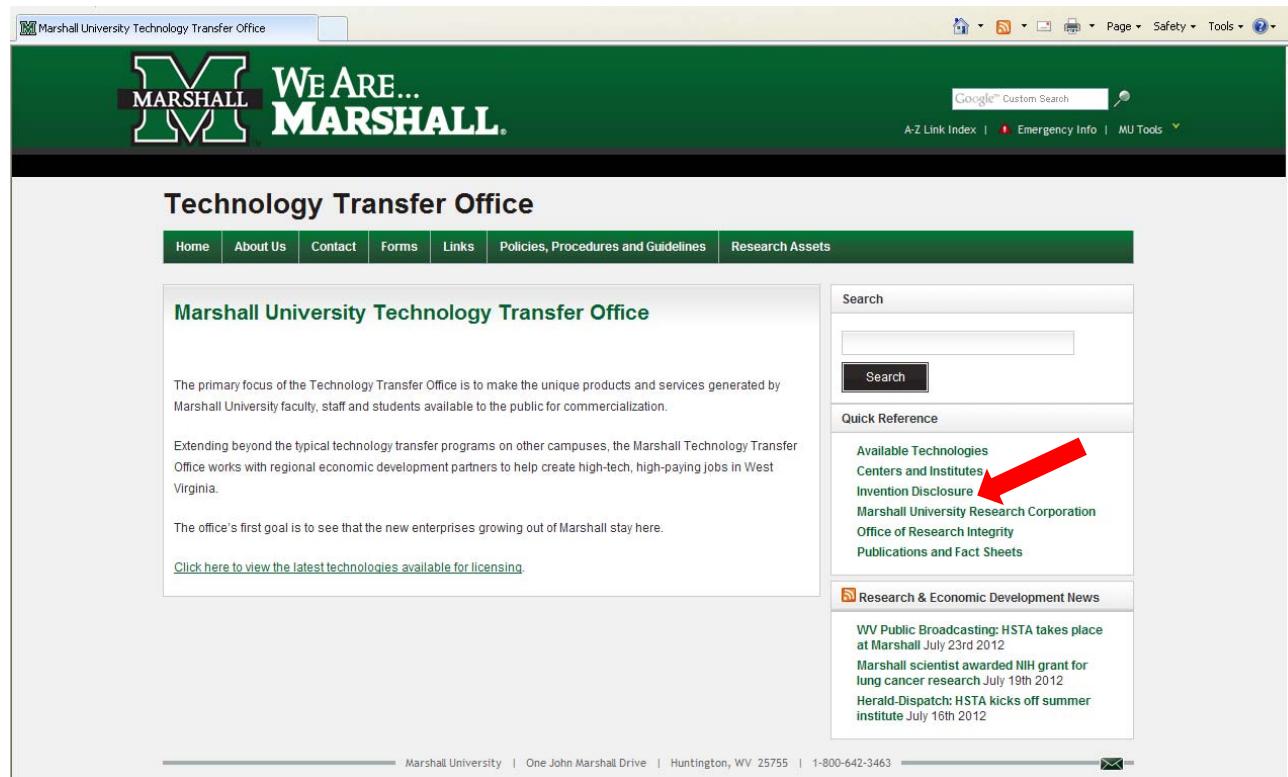


TECHNOLOGY
TRANSFER OFFICE

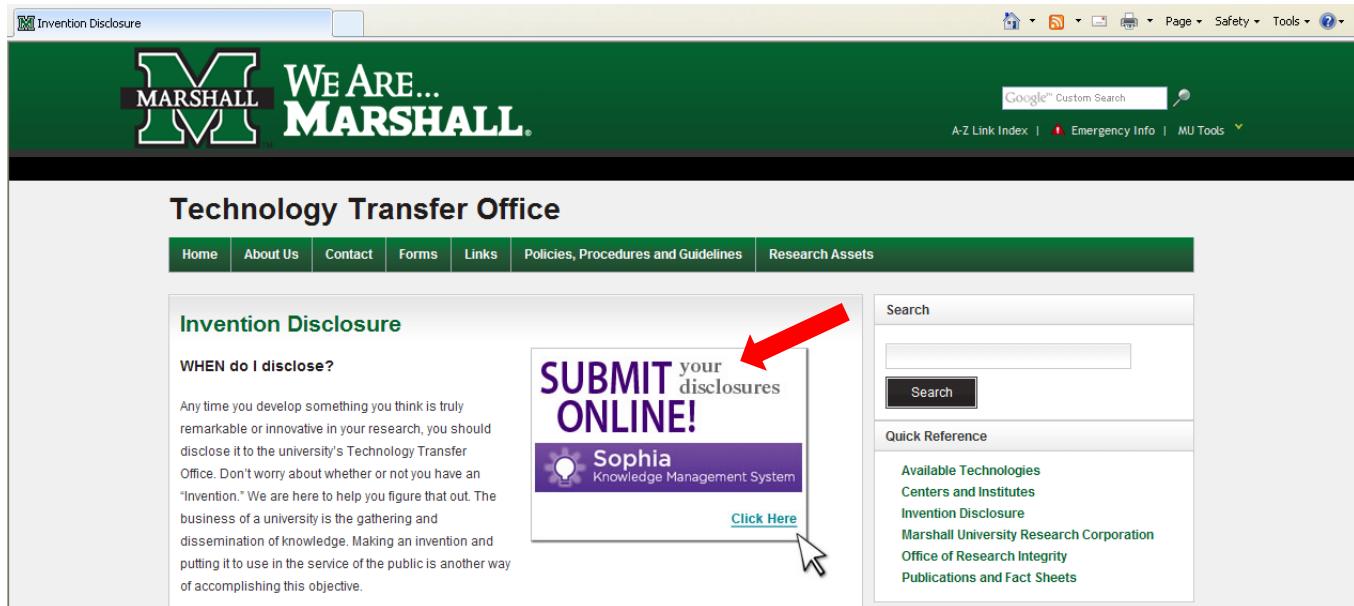
Welcome to Marshall University's online invention disclosure system. Called Sophia, the system is a product of Wellspring Worldwide. We hope this online service will provide quick, convenient, and easily accessible information regarding your invention disclosures and intellectual property protection.

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.

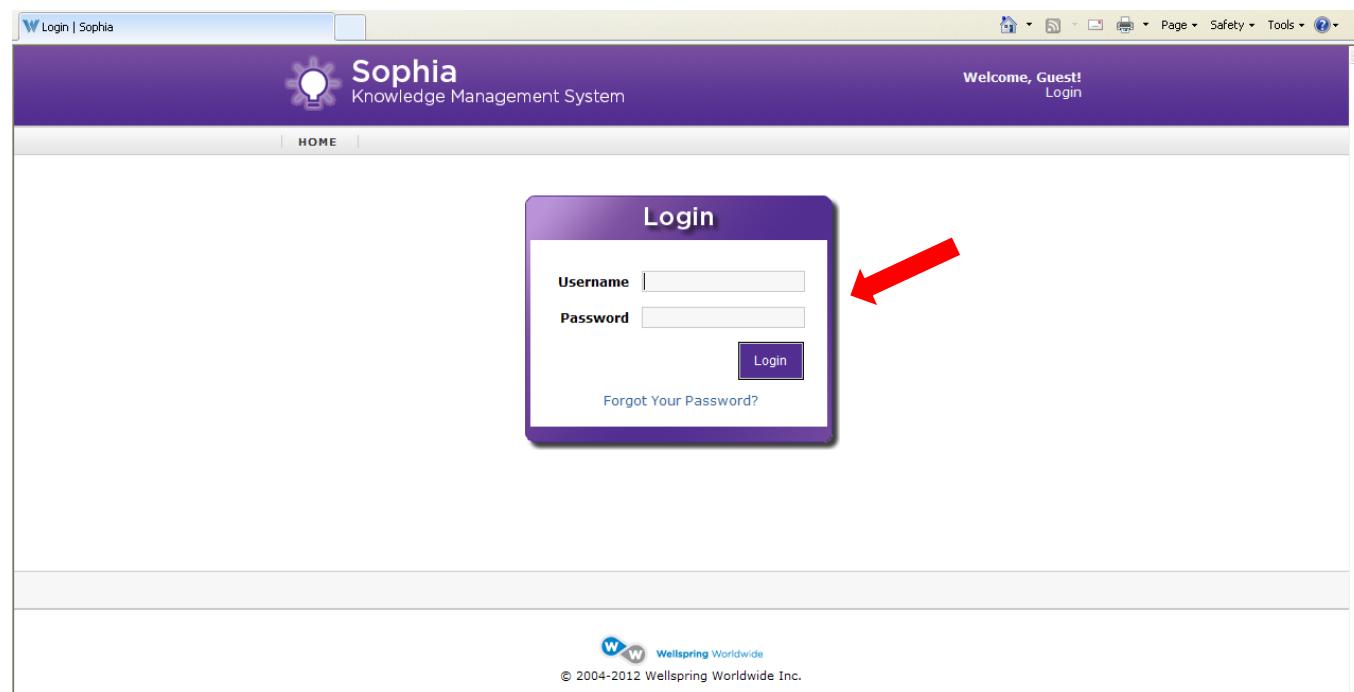
Once your account has been established, visit our website at <http://www.marshall.edu/tto> and click on the Invention Disclosure link on the right-hand Quick Reference menu.



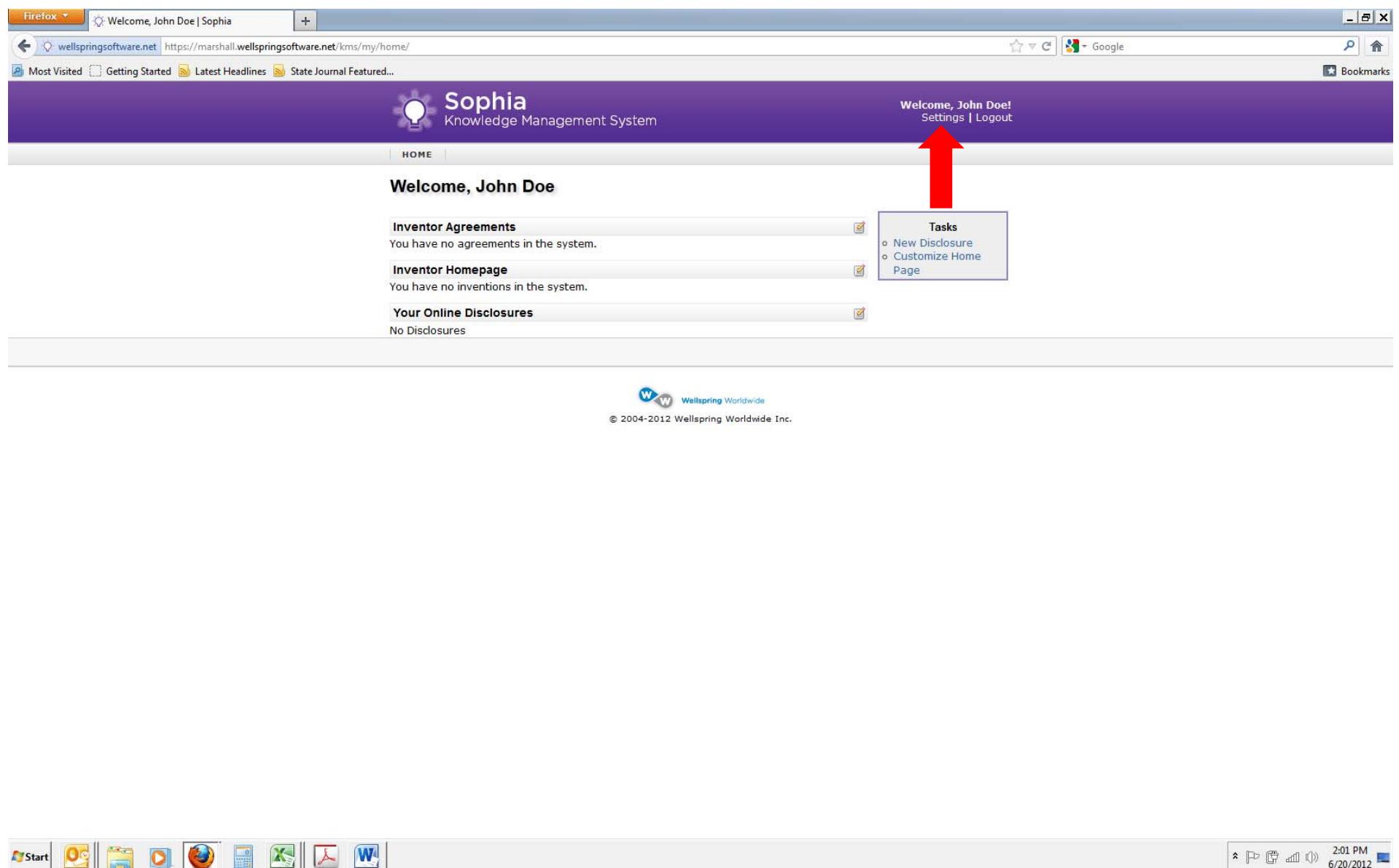
Click the “Submit Online” button.



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.



Firefox ▾ Welcome, John Doe | Sophia +

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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

- o New Disclosure
- o Customize Home Page

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Start | OC | Games | Media | Firefox | E-mail | XLS | PDF | Word | 2:01 PM 6/20/2012

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

Screenshot of the Sophia Knowledge Management System profile page for John Doe.

Header: Firefox window, address bar shows "John Doe | Sophia" and "wellspringsoftware.net". Top right: Welcome, John Doe!, Settings | Logout.

Profile Section: John Doe. Includes a "Set your profile photo" link with a red arrow pointing to it, and a "Edit" icon.

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

Bottom: Windows taskbar with various icons and system tray showing 2:02 PM, 6/20/2012.

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

Firefox Edit John Doe | Sophia +  wellspringsoftware.net https://marshall.wellspringsoftware.net/kms/person/form/210/  Google  Bookmarks

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

[HOME](#)

Edit John Doe
Editing John Doe

* indicates a required field

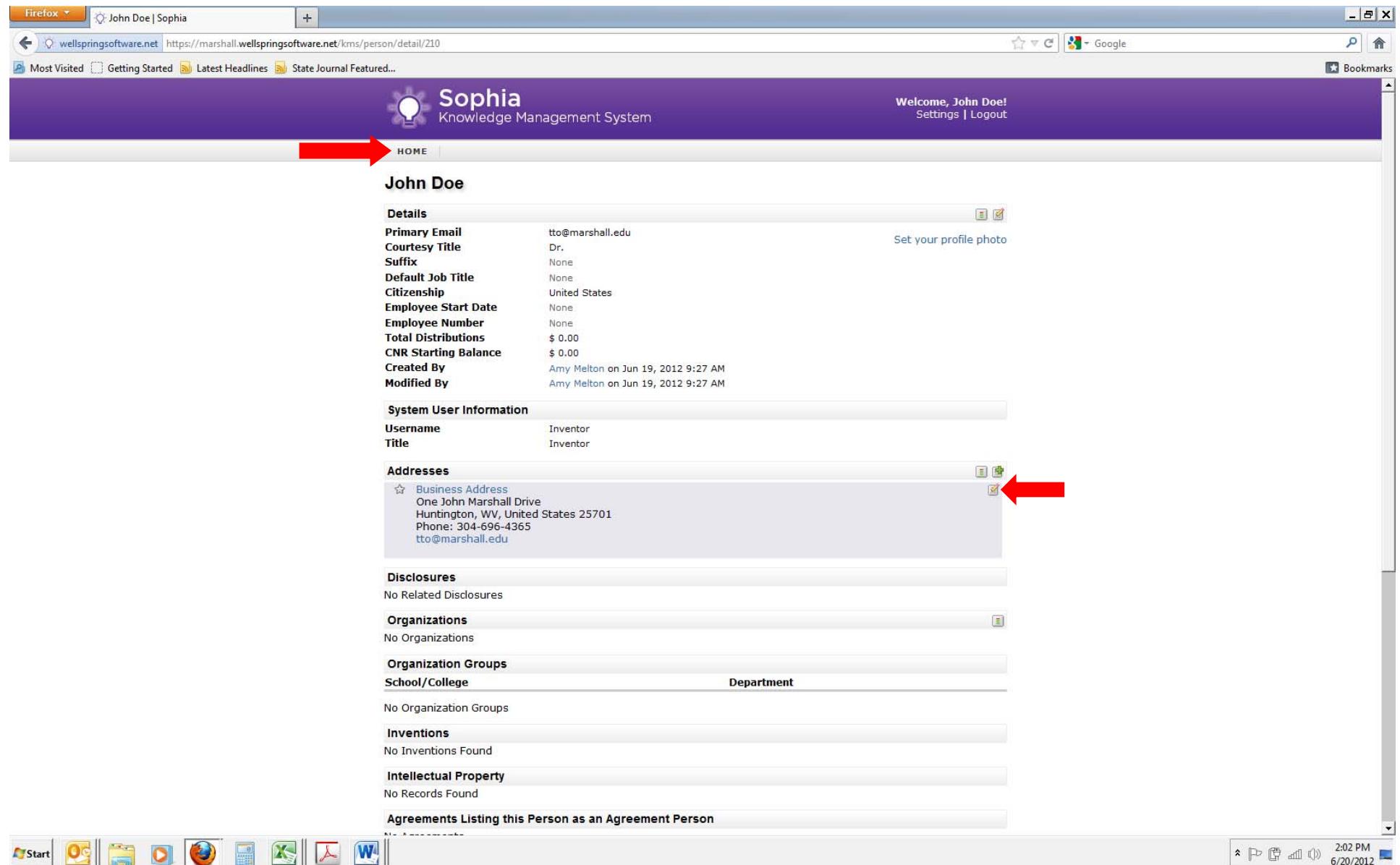
Primary Email	tto@marshall.edu
Courtesy Title	Dr.
First Name*	John
Middle Name	
Last Name*	Doe
Suffix	

System User Information

Username	Inventor
Password	<input type="password"/>
Confirm Password	<input type="password"/>



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.



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HOME (Red arrow)

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

Start  2:02 PM 6/20/2012

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

Firefox  Welcome, John Doe | Sophia 

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Knowledge Management System

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[Settings](#) | [Logout](#)

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Welcome, John Doe

Inventor Agreements
You have no agreements in the system. 

Inventor Homepage
You have no inventions in the system. 

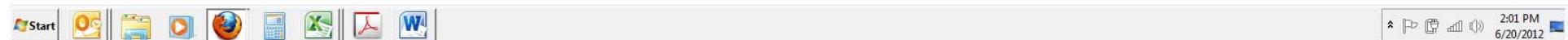
Your Online Disclosures
No Disclosures 

Tasks

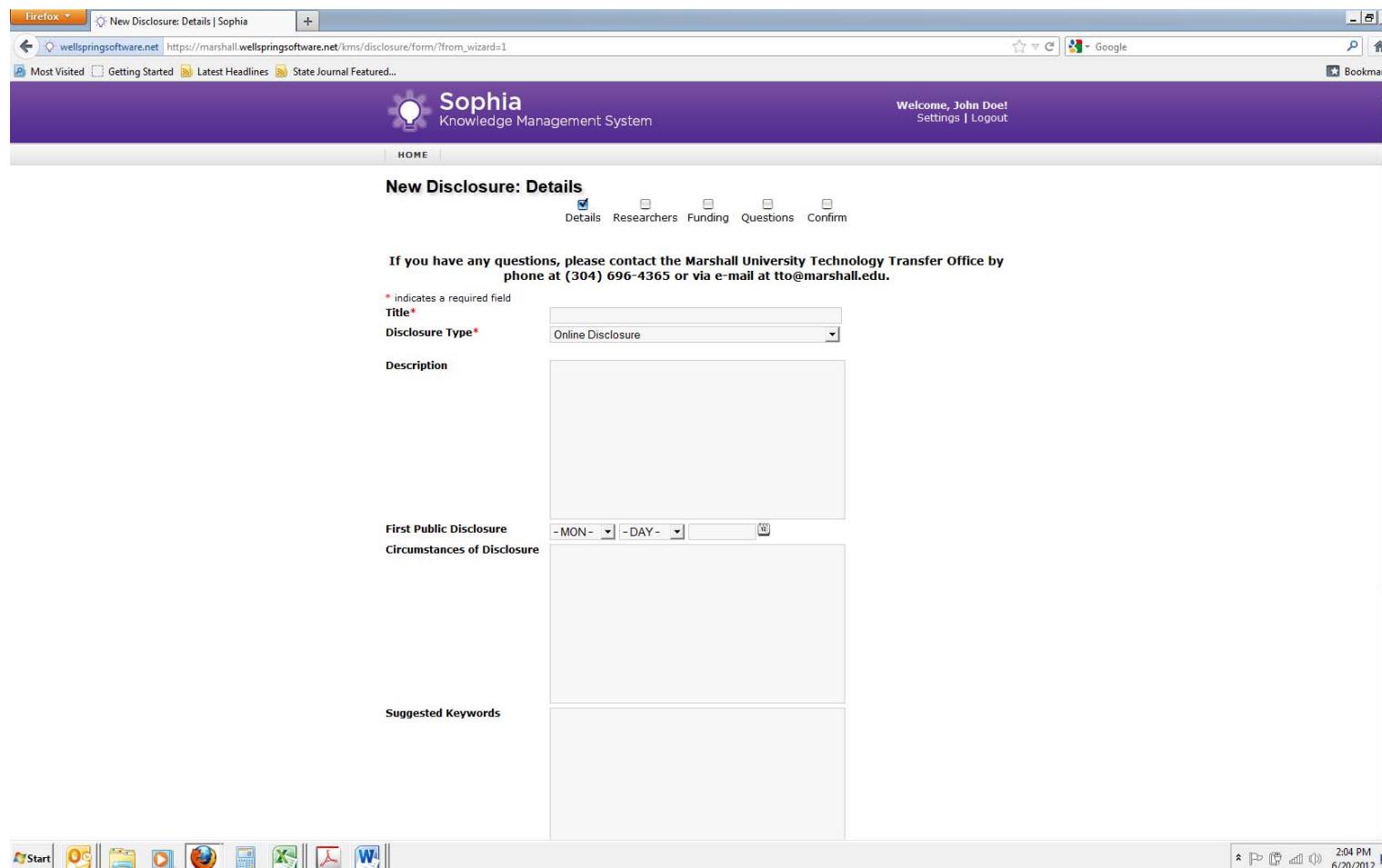
-  [New Disclosure](#)
-  [Customize Home Page](#)



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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 for the Sophia Knowledge Management System. The title bar reads "Firefox" and "New Disclosure: Details | Sophia". The address bar shows the URL "https://marshall.wellspringsoftware.net/kms/dDisclosure/form/?from_wizard=1". The page content is titled "New Disclosure: Details" and includes fields for "Title*", "Disclosure Type*", "Description", "First Public Disclosure" (with dropdowns for day and month), "Circumstances of Disclosure", and "Suggested Keywords". A navigation bar at the top has links for "HOME", "Details", "Researchers", "Funding", "Questions", and "Confirm". A "Welcome, John Doe!" message with "Settings | Logout" links is also present.

[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.

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First Public Disclosure

Circumstances of Disclosure

Suggested Keywords

Attached Documents

No files uploaded

Please Attach Any Documents Relevant To This Disclosure

File

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Start

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.

Firefox Edit Disclosure D2012-0006: Researchers ... +

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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.

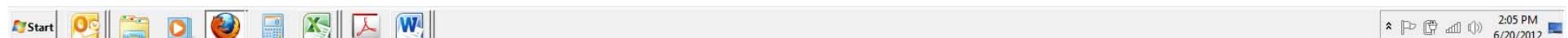
E-Mail Address*

Add to List

Researcher List

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

Next Step



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.

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Details Researchers Funding Questions Confirm

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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 

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Start         

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.

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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

2:06 PM 6/20/2012

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Date when you first conceived the invention or software program:

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:

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

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

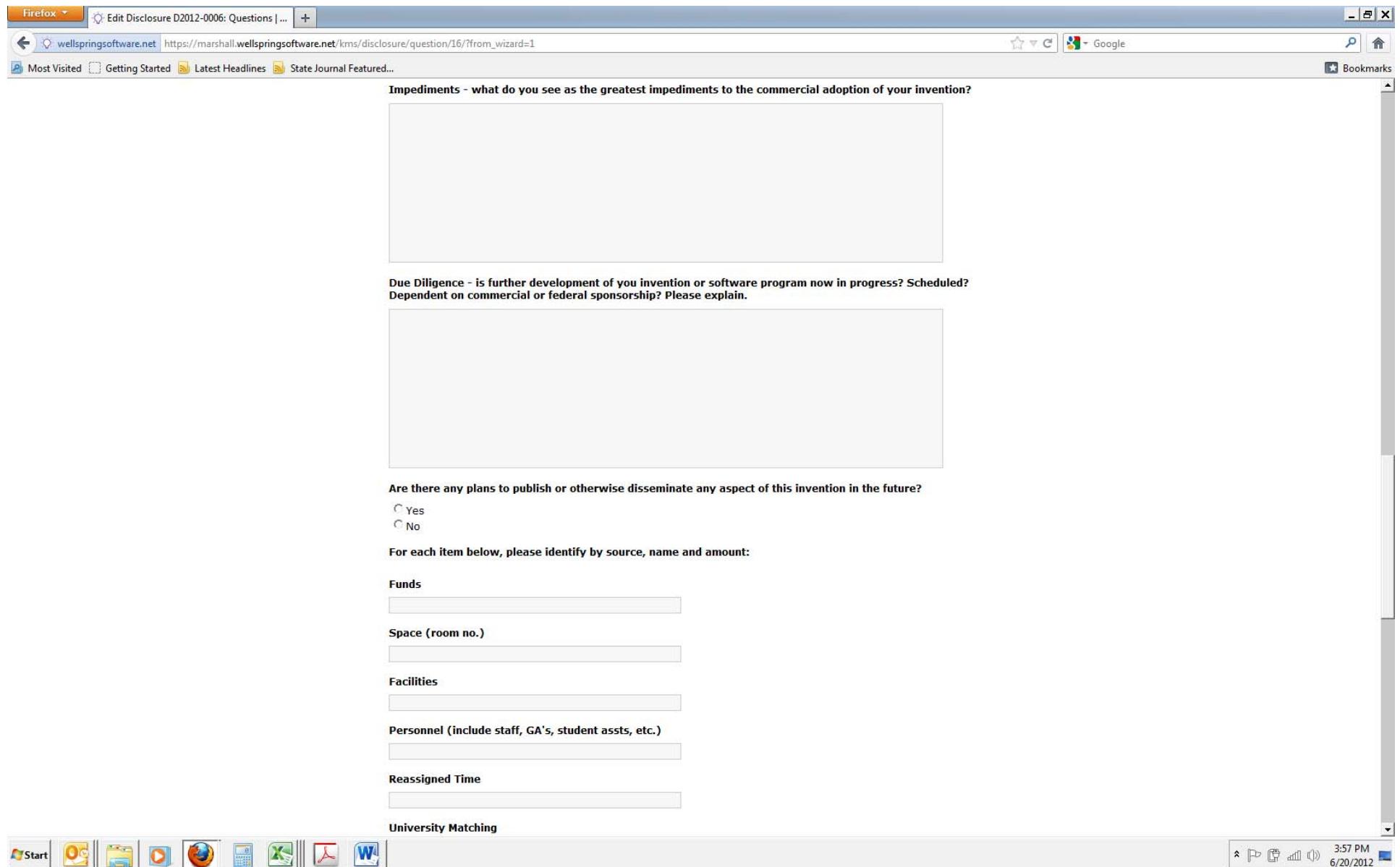
Are there current plans to use your idea commercially?

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.



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

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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 relate 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

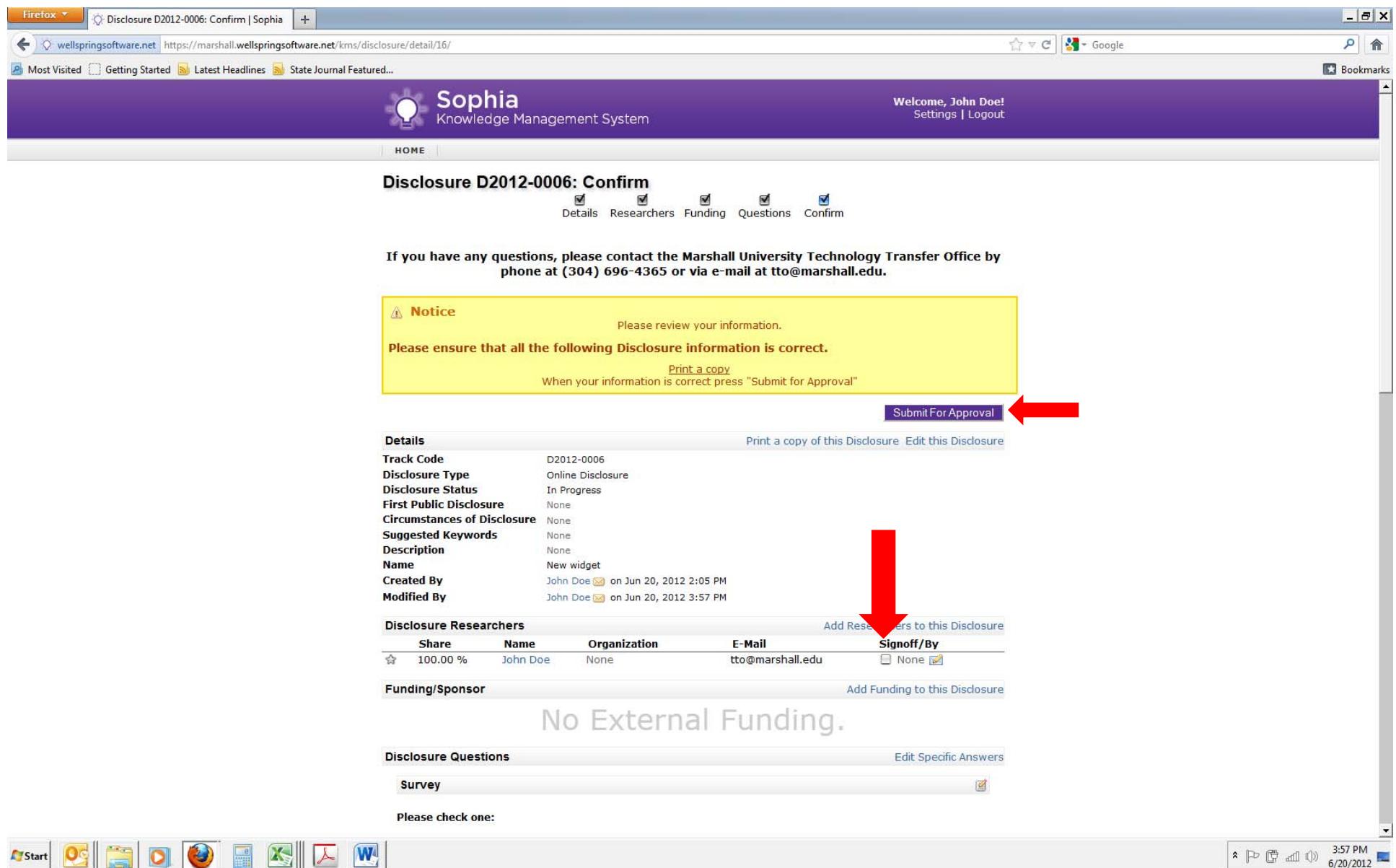
Please Attach Any Documents Relevant To This Disclosure

File



Start | 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.



Firefox Disclosure D2012-0006: Confirm | Sophia wellspringsoftware.net https://marshall.wellspringsoftware.net/kms/disclosure/detail/16/ Most Visited Getting Started Latest Headlines State Journal Featured... Bookmarks

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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"

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

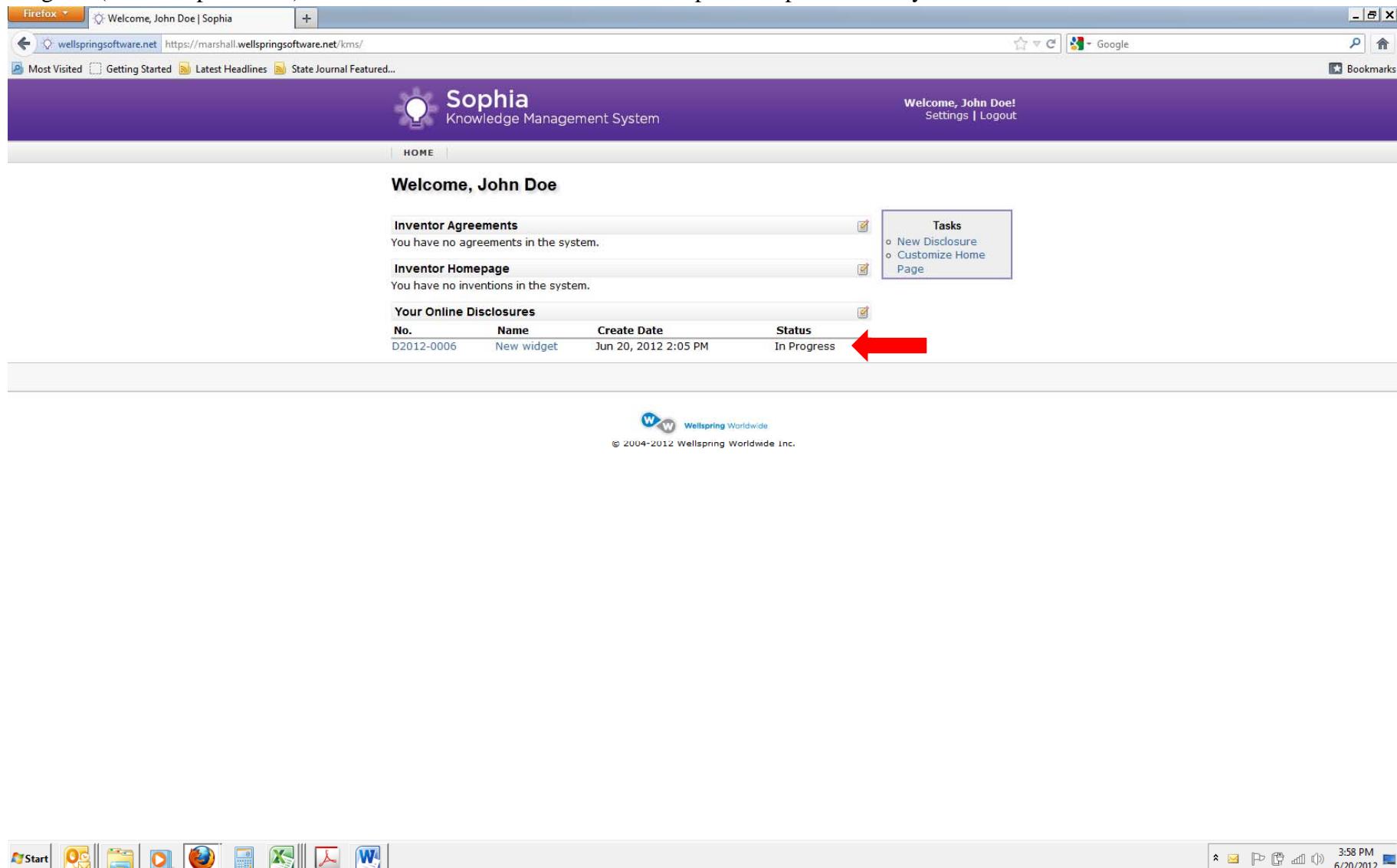


Please check one:

3:57 PM
6/20/2012

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 the Sophia Knowledge Management System homepage. The top navigation bar includes links for 'HOME', 'INVENTOR AGREEMENTS', 'INVENTOR HOMEPAGE', and 'YOUR ONLINE DISCLOSURES'. The 'YOUR ONLINE DISCLOSURES' section displays a table with one row:

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

A red arrow points to the 'Status' column for the disclosure. To the right of the disclosure table is a 'Tasks' box containing two items: 'New Disclosure' and 'Customize Home Page'.

At the bottom of the page, there is a footer with the text 'Wellspring Worldwide' and '© 2004-2012 Wellspring Worldwide Inc.' The bottom right corner shows the system tray with the date and time (3:58 PM, 6/20/2012).

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
(304) 696-4365
tto@marshall.edu
www.marshall.edu/tto