

INVENTOR MANUAL



Step 1: Log in to IDEA



IDEA can be accessed at IDEA.Tennessee.edu. Log in to the secure system with your UT Netid and password.

The Dashboard

Invention Disclosure Enterprise Application

My Invention Disclosures	IDEA Dashboard					
Start Invention Disclosure C E Test on 6/26/2015	2 Draft 0 Routing 0 Completed					
 Test on 5/22 	Invention Disclosures in draft					
	• 🕑 🔛 🏛 Test on 6/26/2015					
How to use IDEA To start a new invention disclosure, click on + Start Invention Disclosure. This will	👁 🧭 🥁 🛅 Test on 5/22					
initiate a new disclosure, and should be used for a new invention that has not been previously submitted to UTRF.	How to use the IDEA Dashboard					
disclosure if you are listed as the Primary Contact. Also, once a disclosure has been submitted for approval, and is in Routing status, it can no longer be edited, only viewed.	The dashboard provides a quick way for you to see organized lists of all disclosures submitted to UTRF via IDEA. Note that the IDEA application does not have access to past files, so no inventions that were submitted to UTRF on the old					
To view a disclosure that has already been started, click on the View icon igodol . You can view any disclosure that you are listed on.	form will be visible on your dashboard. Please contact any UTRF staff member if you need a comprehensive list of your pre-IDEA inventions.					
To create a PDF copy of an invention disclosure, click on the PDF icon	Click on Draft to see a list of all your invention disclosures that are currently being drafted, but have not yet been submitted for approval. This includes disclosures on					
To delete an invention disclosure, click on the Delete icon III. You cannot delete disclosures which have already been submitted for approval, or which have been	which you are the Primary Contact, and disclosures on which somebody else has listed you as an invention but you are not the Primary Contact.					
approved.	Click on Routing to see a list of all your invention disclosures that are currently the routing/approval process, but have not yet been assigned to UTRF for management.					
	Click on Completed to see a list of all your invention disclosures that have been approved and assigned to UTRF for management.					

When you log in, you will land on the inventor dashboard. In the left column you will see a list of all invention disclosures you are listed on. This includes both disclosures that you create, and disclosures that another inventor has created and listed you on.

You may view any disclosure that you are listed on, but may only make edits if you are the Primary Contact for that invention disclosure. Also, once the Primary Contact has submitted a disclosure for approval, it is locked and can not be edited. You may also create a PDF version of the invention disclosure at any time.

Deleting a disclosure is only possible before it has been submitted for approval, and can only be performed by the Primary Contact.

You may be logging in to IDEA because you received notification that you have a disclosures waiting on your approval. If that is the case, there will be a listing in the left column titled "Disclosures waiting on my Approval".

The Dashboard

Invention Disclosure Enterprise Application



In the right column you have a sortable list of all invention disclosures you are listed on. You may choose to show only inventions disclosures that are currently in draft, only those that are being routed for approval, or those disclosures that have completed the approval process.

The rules for viewing, editing, and deleting disclosures shown in the right column are identical to the listings in the left column.

Creating a New Disclosure



To start a new invention disclosure, click the icon on the left column on your dashboard. This initiates a new invention disclosure and will launch you into the steps of providing UT and UTRF with information about your new invention.

🝷 General				
Title *	Enter Title			
Description * Enter a brief description of the technology				
Outside Parties	 I used material in the development of this technology that was acquired from a third party and was subject to a Material Transfer Agreement. During the development of this technology one or more contributors received salary or other funding support from the Department of Veterans Affairs, or used VA facilities. 			
Inventors / Contributors / Possible Inventors 1				
Funding Sources / Sponsors				
Public Disclosures				
Attachments				
Allocation of Rights in the Invention				
Approvals				

You are required to enter a title and a brief description for the each invention. Click "Save" before moving on to the next section. Once you have saved, simply click on another tab to move on. You do not have to complete the tabs in order.

New Disclosure (Adding Inventors)

+	> General							
•	Inventors / Contributors / Possible Inventors 1							
	Both UT a	nd non-UT inventors s	should be listed	I				+ Add
		Name	Title	Address	City	Phone	Email	
	C 🖻	Magid, Richard*	Director	SUITE 827 910 Madison Building	Memphis	+1 901 448 1562	rmagid1@ut	hsc.edu
	* - Primar The Prima	y Contact ry Contact is the pers	son with whom	UT and UTRF will communicate if addition	nal informatior	n is needed during the i	nvention disclo	sure process
•	External	Funding Sources / Sp	oonsors 🕕					
Public Disclosures								
Attachments ①								
•	Allocatio	of Rights in the Inv	rention 🕕					
•	Approvals							

Initially, you will be the only person listed on the invention disclosure. To add other inventors, click the "Add" icon on the upper right. This will launch the "Add Inventor" dialogue.

New Disclosures (Adding Inventors)

et ID Enter N	etID Get Inve	entor Info	d NetID
ame *	Enter Name	Address *	Enter Address
itle	Enter Title	Address2	Enter 2nd Address Line
epartment	Enter Department Name	City *	Enter City
hone *	Enter Phone Number	State *	State
mail *	Enter Email Address	ZIP *	Zip Code
	Primary Contact		

UT Inventors should be added by their NetID, this allows IDEA to pull all of their current information directly from the master UT records. If you don't know a person's NetID, use the "Find NetID" button to launch the UT directory.

Non-UT inventors should have their information added manually. The name, phone, email, and address of non-UT inventors is required.

Inventor			×		
You must add UT inventors by NetID and Non-UT inventors by manually entering their contact information					
Net ID Icavin Get Inventor Info					
Name *	Cavin, Lakita G	Address *	910 Madison Avenue Suite 82		
Title	Staff Attorney	Address2	Enter 2nd Address Line		
Department	UT Research Foundation	City *	Memphis		
Phone *	+1 901 448 7825	State *	TN		
Email *	lcavin@uthsc.edu	ZIP *	38163		
	Primary Contact				
			Save Cancel		

Lakita Cavin, (NetID "lcavin") has been identified as an inventor, and her information automatically pulled from IRIS. Click "Save" to add each inventor to the disclosure.

New Disclosures (External Sponsors)

> General	
Inventors / Contributors / Possible Inventors 1	
 External Funding Sources / Sponsors (0) 	
List all external sources of funding or sponsorship of the work which led to the invention. No External Sponsors were found.	➡ Add
Public Disclosures ①	
Attachments ①	
Allocation of Rights in the Invention	
Approvals	

If external funding supported the work that lead to the invention, UT and UTRF will have obligations to the funding sponsor. Use the "Add" icon to list external sponsors, such as the federal government, charitable foundations, or private companies.

New Disclosures (Public Disclosures)

Public Disclosures ()

Please include both past public disclosures and anticipated future public disclosures of the technology. If you are uncertain whether or not a disclosure would be considered public, please list it and your UTRF case manager will investigate.

	Add
Please note that not all authors of a manuscript will necessarily qualify as inventors of the technology.	
No conferences / journals were added.	
Thesis / Dissertation	🕂 Add
Include any thesis or dissertation describing the technology that has been submitted to meet the requirements of graduation.	
No theses / dissertations were added.	
Public Use / Sale	🕂 Add
Has any embodiment of this technology been offered for sale (i.e. has a "thing" embodying the technology or capable of performing the tech been offered for sale?) Has any embodiment of this technology been used publicly?	nology
No public use instances added.	
Other	🕂 Add
Have any other disclosures of the invention (written or oral) been made?	
No other public disclosures made.	

Because any public disclosure of your new invention can impact your patent rights, UTRF needs to know if the invention has been published in a journal article, thesis, or dissertation; presented at a conference; or been used publicly or previously offered for sale.

Use the "Add" icon to provide details of any public disclosure under the appropriate section.

New Disclosures (Attachments)



You may have a manuscript, slide presentation, video, image, or other material that will help UTRF understand the technology. One or more files can be uploaded in the "Attachments" tab. You are not required to upload any files with you disclosure.

New Disclosures (Allocation of Rights)

• General				
Inventors / Contributors / Possible Inventors 2				
Funding Sources / Sponsors				
Public Disclosures				
Attachments				
 Allocation of Rights in the Inventior 	0			
Applies only to those contributors who	are subject to The Unive	ersity of Tennessee's Policy on Patents	Copyrights, and Other Intellectual F	Property.
Name	Percent 🕄	Duty of Employment 🕄	Signed	Date
Cavin, Lakita G	0 🗘 🚺	Yes	No	
Magid, Richard	0 0	● Yes 🔘 No	Sign 3	
Total Percentage (Percentages must add up to 100%)	0	Save Percentages 2		
By your signature, you are asserting that all statements made in this technology disclosure form are correct to the best of your knowledge.				
▶ Approvals				

There are several important parts to the "Allocation of Rights in the Invention" tab.

First, an initial royalty split must be assigned for the UT inventors. (If there are non-UT inventors, their portion is handled separately.) Please note, <u>this is not the final decision</u> <u>on percentages</u>, only an initial estimate!

Second, you must indicate if this invention was done as a part of your employment at UT, or if it was unrelated to your UT position. If you have questions, call or email your local UTRF office before answering "yes" or "no".

Finally, you must digitally sign the disclosure. <u>This is the final step, and once you sign</u> the disclosure it will immediately be routed into the approvals process.

Searching for Disclosures



In addition to the listing of inventions on the dashboard, inventors and approvers can search for disclosures by inventor's name, the disclosure title, or in the disclosure description fields.

Note that your search results will be limited to disclosure that you are authorized to see. For inventors, this is all disclosure that you are listed on. For approvers this is all disclosures in your unit.

Search Form		Search Results	
Inventor Name	Magid	۵ 🖸 🍋	{no title for this Invention Disclosure}
Disclosure Description		👁 🧭 🔛 💼	Test on 5/22
Search Clear		• 🕑 🔛 💼	Test on 6/26/2015

In this example, I have searched for all disclosures listing "Magid" in the inventor field. Three inventions matching this query are visible.