

Inventor Portal User Guide

USA Office of Commercialization and Industry Collaboration (OCIC)

Contact: Dr. Ashley S. Lindsey
Marketing and Licensing Associate
aslindsey@southalabama.edu
251.460.7932 Office

Version: September 18, 2019

Purpose: This guide is to (i) guide you through the steps to setup an Inventor Portal Account, and (ii) submit an invention disclosure online through the Inventor Portal.

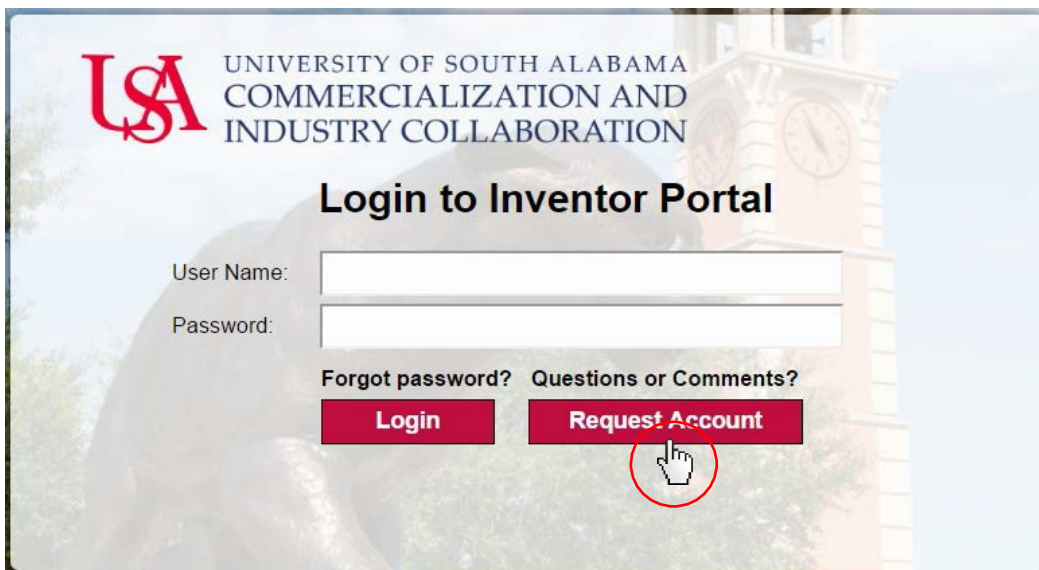
I. Creating an Inventor Portal Account

Step 1: Request a new user account as follows:

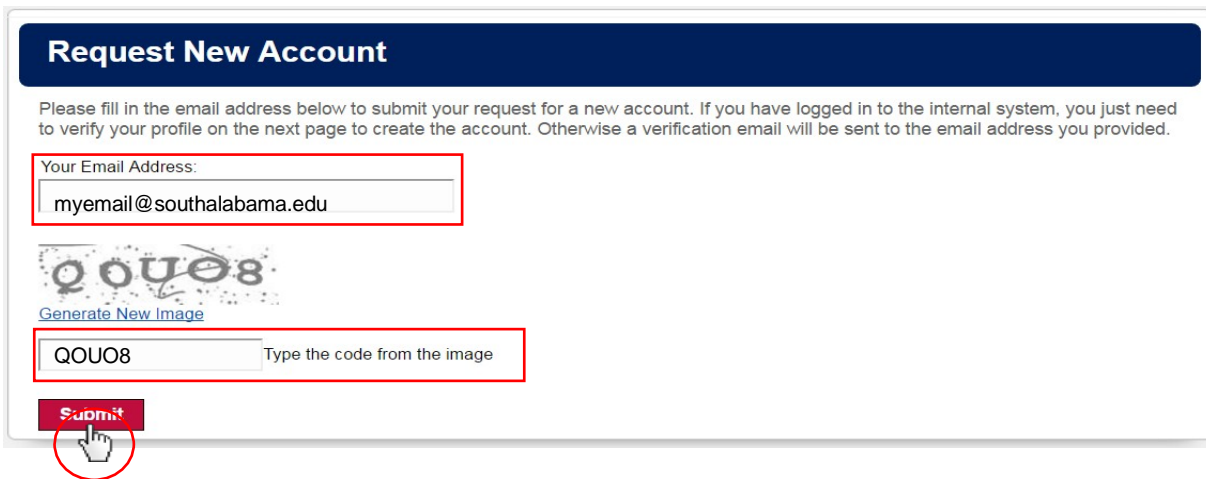
1. Visit www.southalabama.edu/ocic
2. Select the “Submit Invention Disclosure” icon



3. Select the “Request Account” button. An email will be automatically generated and includes a link to complete your account setup.



Step 2: In the “Request New Account” screen, enter your email address and the verification code and click “Submit.” You will then receive an e-mail from OCIC (ott@southalabama.edu) with the subject line of “Inventor Portal Account Request”.



The image shows a web form titled "Request New Account" with a dark blue header. Below the header, there is a paragraph of instructions. The form contains two input fields: "Your Email Address:" with the value "myemail@southalabama.edu" and a CAPTCHA field with the code "QOU08". A red box highlights the email field, and another red box highlights the CAPTCHA field. A red circle highlights the "Submit" button, which has a hand cursor icon over it.

Request New Account

Please fill in the email address below to submit your request for a new account. If you have logged in to the internal system, you just need to verify your profile on the next page to create the account. Otherwise a verification email will be sent to the email address you provided.

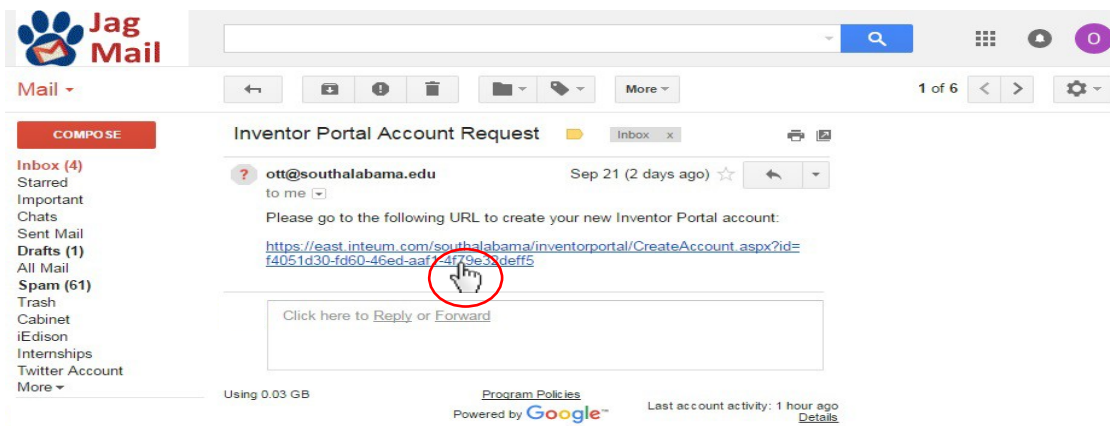
Your Email Address:
myemail@southalabama.edu

QOU08
Generate New Image

QOU08 Type the code from the image

Submit

In the email you receive with the subject line “Inventor Portal Account Request”, click the link to proceed to the Inventor Portal and create your account.



This is a one-time account setup and will serve as your login for all future invention disclosures. If you already have an account, proceed to **Section II: Submitting an Invention Disclosure**.

Important: Each inventor must have an Inventor Portal account in order to be named on an invention disclosure. If a co-inventor does not have an Inventor Portal account, please provide them the link to the OCIC Inventor Portal to create an account prior to filling out the invention disclosure. If you have questions about accounts contact Ashley Lindsey (aslindsey@southalabama.edu or 251-460-7932).

Step 3: Fill in all of the required information, including your self-created User Name and Password, on the “Create Account” form. Please make a note of your User Name and Password. Once the form is complete, click “Create an Account” at the bottom of the page. * Required Field

Create Account

Please confirm your contact information below or enter in the required fields to associate your account with a contact record.

Already have an account? [Login Here](#)

Personal Information

Prefix: First Name: * M.I.

Last Name: * Suffix:

User Name: * Password: *

Title:

Citizenship: *

Email

Email Address: Type: [Remove](#)

☒ Set as default email

[Add another Email](#)

Phone Number

Phone Number: Type: [Remove](#)

☒ Set as default Phone Number

[Add another Phone Number](#)

Address

Address:

Type: [Remove](#)

City: State / Prv: Postal Code:

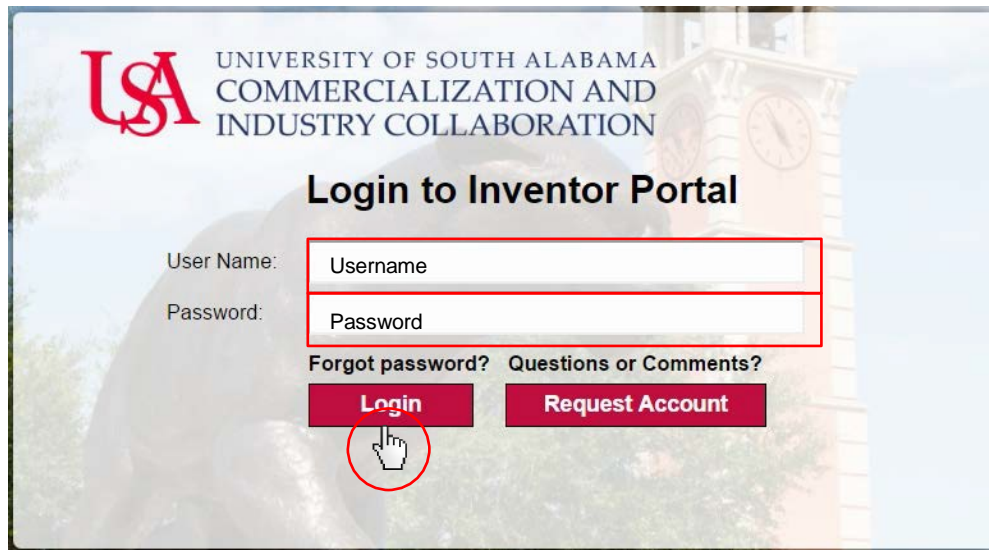
Country:

☒ Set as default Address

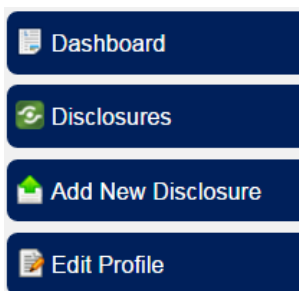
[Add another Address](#)

II. Submitting and Invention Disclosure

Step 1: Login to the OCIC Inventor Portal by selecting “Submit Invention Disclosure” icon at our website www.southalabama.edu/ocic. Enter the User Name and Password you created in Section I of this guide and click “Login”.

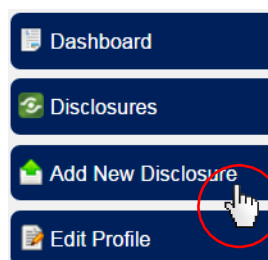


Once logged in, use the menu on the left side of the screen to navigate through the different tabs.



- **“Dashboard”** tab allows you to see the current activity that has occurred with your disclosures.
- **“Disclosure”** tab allows you to view the current disclosures on which you are a named inventor.
- **“Add New Disclosure”** tab allows you to submit a new invention disclosure.
- **“Edit Profile”** tab allows you to update your account information and change your password if needed.

Step 2: To submit a new invention disclosure click on the “Add New Disclosure” tab on the left side of the screen.



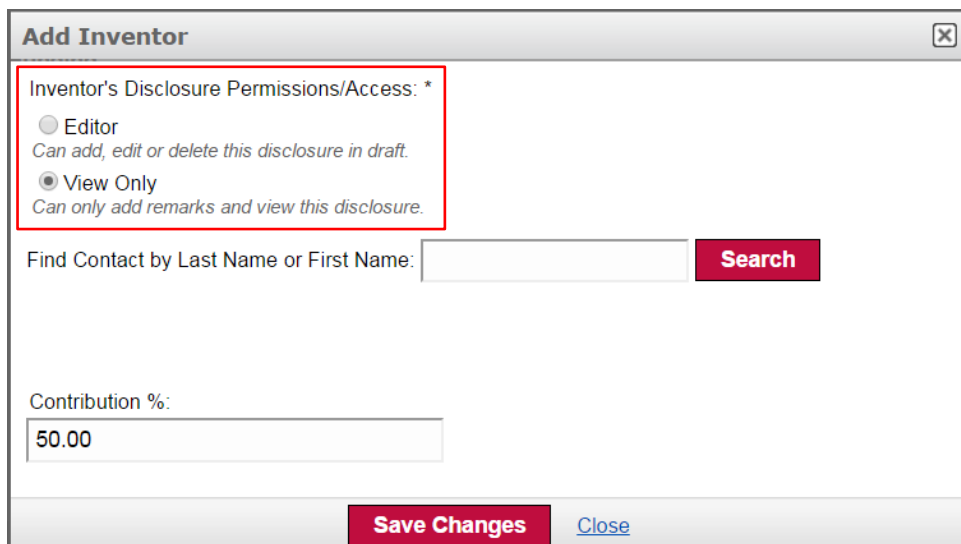
Step 3: Enter the title of your disclosure and select “Invention Disclosure” from the “Choose the Type of Disclosure” drop down menu. Click the “Create New Disclosure” button when you have completed this section. Click “Cancel” to return to the Invention Portal “Dashboard” if necessary.

Step 4: Fill in the required information on the Disclosure form. Fields with asterisks are required fields. At the bottom of the form, you can save it as a draft, download it as a PDF or WORD document for your records, and submit it for review.

For Inventions with Multiple Inventors: The name of the inventor submitting the invention disclosure will automatically be added to the “Inventors” section of the disclosure form. If there are co-inventors, first click “Edit” and change your contribution from 100% to a percentage that corresponds to your contribution as a percentage, relative to your co-inventors. Next, click the “Add Inventor” button to add additional inventors and corresponding contributions. The total co- inventor contribution should total, but cannot exceed, 100%.

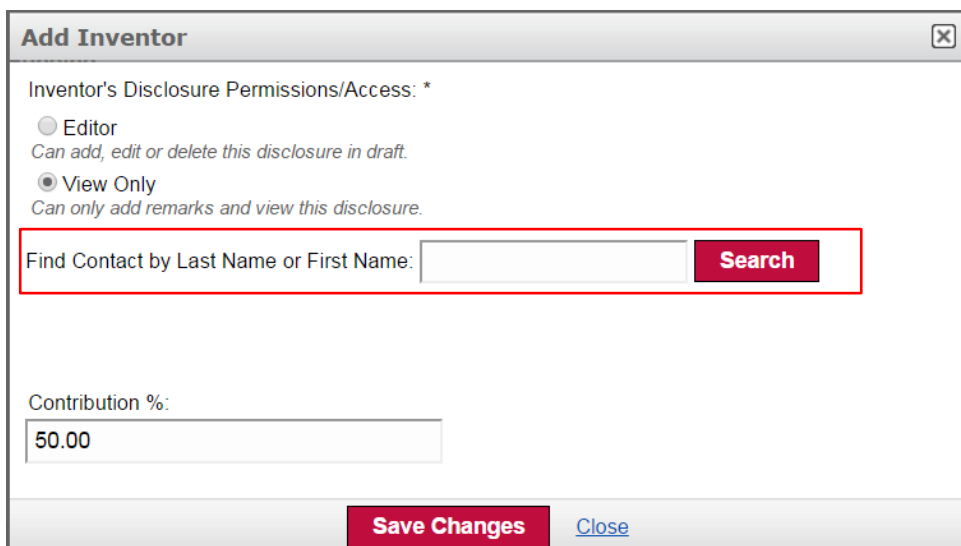
First	Last	Permission	Order	Contribution	Working for	Department	Role Type	Manage
Ashley	Lindsey	Editor	1	100.00%				Edit Delete

Important: Select the access level of each co-inventor, either as an “Administrator” or “View Only”. Administrator access will have full control over the disclosure and can edit it. “View Only” access will not have permission to edit the disclosure.



The screenshot shows the 'Add Inventor' form. A red box highlights the 'Inventor's Disclosure Permissions/Access: *' section. In this section, the 'View Only' radio button is selected, and its description, 'Can only add remarks and view this disclosure.', is visible. Below this, there is a search field labeled 'Find Contact by Last Name or First Name:' with a red 'Search' button. At the bottom, there is a 'Contribution %:' field with the value '50.00' and two buttons: 'Save Changes' and 'Close'.

To add a co-inventor, first search to see if the inventor is already in the OCIC Inventor Portal by typing in his or her last name or first name into the search field and clicking “Search”. Co- inventors must have an Inventor Portal account to be found with this search function. If you cannot find the inventor, contact that inventor to create an account (See Section I: Creating an Inventor Portal Account). You can save the progress of your disclosure and return later once all co-inventors have created an account. Update the contribution % of the con-inventor to update their contribution. Click “Save Changes” when finished.



This screenshot is identical to the one above, showing the 'Add Inventor' form. However, a red box highlights the search field labeled 'Find Contact by Last Name or First Name:' and the red 'Search' button. The 'View Only' radio button remains selected in the permissions section above.

Step 5: To add any documents, use the document uploader under “Documents” section to upload any documents pertinent to the invention disclosure, such as a detailed description of the invention, data or images, or a copy of a grant application. Acceptable file types are noted on the page.

Step 6: Click “Submit for Review” when you have completed your invention disclosure. All named inventors will get an e-mail notifying them that they have been added to an invention disclosure. In addition, all inventors will receive an email within 24 hours of submission requesting their digital signature on the invention disclosure. The OCIC is not able to proceed with the invention disclosure until all inventors have signed the invention disclosure.

Step 7: After all inventors have signed, the invention disclosure will be reviewed by the Office of Commercialization and Industry Collaboration. Once the disclosure has been reviewed, the inventors will be contacted to schedule a “kick-off” meeting to discuss the invention in more detail.

For any questions, contact Ashley Lindsey at aslindsey@southalabama.edu or 460-7932.