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National Institutes of Health/Office of Extramural Research



# Interagency Edison (iEdison II)

## Release Notes

Version 2.0.3.0 – November 21, 2003

## **Introduction**

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This document describes the changes and enhancements made to the iEdison II system for the November 21, 2003, release.

## **Enhancements**

- Added Federal Agencies (Indian Health Service, U.S. Army Space and Missile Defense Command)
- Updated Create Account Email Notification
- Added Unique Screen Identifiers on Help Screens
- Updated HHS Form 568
- Added Record Locking

## **Issues Resolved in this Release**

- View Notification Modifications
- “Other” Agency Type
- Invention Overview Graphical Tree
- Manage Invention Reports
- Manage Patent Reports
- Manage Utilization Reports
- Help Text Improvements
- Content Modifications
- Change Password
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- Email Notifications
- Generate Extramural/Government Agency Messages

# Enhancements

The following enhancements were implemented in the current release of iEdison II.

## Federal Agencies Added

The Indian Health Service (IHS) and U.S. Army Space and Missile Defense Command (ARMY/SMDC) have been added to the list of participating federal agencies in the iEdison II system. This allows invention and patent reports where IHS or ARMY/SMDC is the primary or supporting agency to be reported and maintained. Numerous changes were made throughout the system to include the new agencies including but not limited to:

- The Home Page now displays IHS and ARMY/SMDC in the list of participating agencies.
- The Agency Contact List has been updated to include the contact information for IHS and ARMY/SMDC.
- The list of valid primary agencies on pages throughout the iEdison system has been updated to include "IHS" and "ARMY/SMDC" as valid federal agencies. For example, some affected pages include Create New Invention Report, Modify Invention Report, etc.
- The help topic "Help with Formats—Grant/Contract Number" has been updated to include valid formats for IHS and ARMY/SMDC.

Primary Agencies Added: IHS and ARMY/SMDC

IHS and ARMY/SMDC now displayed in the list of valid Primary Agencies throughout the system.

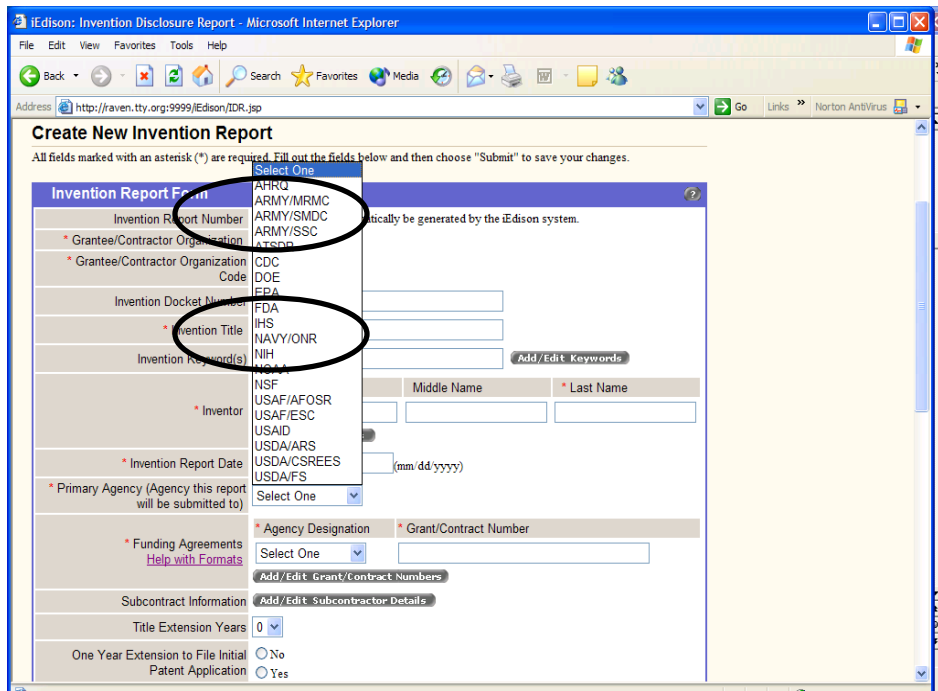


Figure 1: Create New Invention Report Form (IEDISON-2000)

## Create Account Email Notification Updated

The Create Account Email Notification has been modified to include two additional data elements. For new extramural account notifications, the ‘Organization Name’ field associated with the new account will now be included in the body of the email. For new agency account notifications, the ‘Agency’ field associated with the new account will now be included in the body of the email.

## Unique Screen Identifiers on Help Screens

Each help page in the iEdison system now has a unique screen identifier located in the lower right-hand corner of the screen (i.e., IEDISON-8000), which is useful when reporting problems to the help desk.

## HHS Form 568 Updated

The Adobe Acrobat version of the Final Invention Statement, HHS Form 568, has been updated to allow entry of data in the fields on the form.

### Directly Enter Data on Form

Form data can now be entered and then printed for submission to the NIH.

Department of Health and Human Services  
**Final Invention Statement and Certification**  
 (For Grant or Award)

DHHS Grant or Award No. \_\_\_\_\_

A. We hereby certify that, to the best of our knowledge and belief, all inventions are listed below which were conceived and/or first actually reduced to practice during the course of work under the above-referenced DHHS grant or award for the period \_\_\_\_\_ through \_\_\_\_\_  
 original effective date date of termination

B. Inventions (Note: If no inventions have been made under the grant or award, insert the word "NONE" under Title below.)

NAME OF INVENTOR	TITLE OF INVENTION	DATE REPORTED TO USPHS
John Smith	Test Invention Title	11/7/2003

C. First Signature — The person responsible for the grant or award is required to sign (in ink). Sign in the block opposite the applicable type of grant or award.

TYPE OF GRANT OR AWARD	WHO MUST SIGN (title)	SIGNATURE
Research Grant	Principal Investigator or Project Director	

Figure 2: Form HHS 568

## Record Locking

The following rules regarding record locking are now enforced in the iEdison system:

- Only one user can update a given invention, patent, or utilization report at a time. Therefore, different users cannot update the same record simultaneously.
- The same user cannot request a lock on more than one invention, patent, or utilization report at a time.
- A lock is cleared after successful completion of a transaction that updates the record, when the transaction is cancelled, when the user is logged out of the system (regardless of whether the user requested the logout), and when the specified number of minutes defined by the system

administrator has expired. The current default specified for the time a lock can be held is 90 minutes.

- An appropriate error message is displayed when a user attempts to modify a record that they no longer retain a lock on.
- An appropriate error message is displayed when a user attempts to modify a record that is locked by another user.

## Issues Resolved in this Release

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The following issues were resolved in the current release of iEdison II.

### View Notification Modifications

- The default value for the ‘Should notification messages be displayed upon login?’ field on the View Preferences page is now set to “Yes” when an account is created. This allows the user to view any outstanding notification messages when they first login to the system.
- If the value of the ‘Are the inventions submitted by the organization assigned to the user?’ field on the View/Update Your Organization’s Profile page is set to “Yes”, then the system now only displays notification messages for a particular invention report to the Extramural OTT user to which the invention report is assigned. In addition, any notification messages associated with an unassigned invention report are sent to all the Extramural OTT users at the institution.

If the value for this field is set to “No”, the system always displays the notification messages for a particular invention report to all the Extramural OTT users at the institution.

- The Extramural OTT Administrators will always see all notification messages regardless of the value of the ‘Are the inventions submitted by the organization assigned to the user?’ field.

### “Other” Agency Type

- The following rules regarding the use of the value “Other” in the list of available values for an agency are now enforced:
  - “Other” is not a valid value for the ‘Primary Agency’ field when creating and modifying invention reports.
  - “Other” is a valid value for the ‘Agency Designation’ field in the Funding Agreements section when creating and modifying invention reports.
  - “Other” is a valid value for the ‘Agency Designation’ field on the Search forms for existing invention reports and patents reports.
- The ‘Agency Designation’ field encompasses both primary and supporting agencies during searches.

### Invention Overview Graphical Tree

The graphical tree displayed on the Invention Overview area in the left-hand frame when modifying invention and patent reports now correctly displays the relationship of patent reports that have a ‘Type of Patent Application’ equal to “CPA” and “RCE” to their parent and each other.

### Manage Invention Reports

- The ‘Agency Designation’ part of the ‘Funding Agreement’ field is now defaulted to the agency selected in the ‘Primary Agency’ field when adding a new invention report.
- The Invention Report Search Results page was modified to only display a matching invention report once regardless of the number of search criteria that match with the invention report. For example, if the search criteria entered included an Inventor Name, a Grant/Contract Number, and

an Invention Title all of which matched the same invention report, only one resulting invention report would be displayed instead of three.

## Manage Patent Reports

The following changes were made to the patent report related pages in the iEdison system:

- The 'Patent Expiration Date' field can now be provided regardless of whether the 'Patent Issue Date' field exists. However, if the 'Patent Issue Date' field is provided, then the 'Patent Expiration Date' field must be greater than the 'Patent Issue Date' field defined on all related patents.
- The Patent Search Results page was modified to only display a matching patent report once regardless of the number of search criteria that match with the patent report. For example, if the search criteria entered included an Inventor Name, a Grant/Contract Number, and a Patent Inventor Name all of which matched the same patent report, only one resulting patent report would be displayed instead of three.
- A patent report may now only have one child patent report associated with it. If the value entered in the 'Parent Patent Docket Number' field is already associated with another patent report in the database, an error message will be returned indicating that the indicated parent patent report already has a child patent report associated with it.
- If the 'Invention Status' field is equal to "Elect Title" and a 'Patent Issue Date' is supplied, then both the 'Non-Provisional Patent Application Number' and 'Filing Date Non-Provisional Patent Application' must also be supplied.
- Continuation patents (those where the 'Type of Patent Application' field equals "CPA" or "RCE") can no longer be associated with patent linking. Therefore, the fields 'Parent Patent Docket Number' and 'Parent Patent Organization Code' on the Patent Report form are not applicable for patents of this type. As such, the iEdison system disallows any values to be saved in these fields for these types of patent reports.
- The 'Non-Provisional Patent Application Number' field and the 'Type of Patent Application' field can now be changed for the most recent "CPA" or "RCE" patent report, which is the last patent report in the chain.

## Manage Utilization Reports

The following changes were made to the utilization report related pages in the iEdison system:

- For post-2000 fiscal year utilization reports, the 'Month that begins the utilization reporting period' field, also known as the fiscal month, must be defined for the organization's profile before a utilization report can be added for that organization.
- The start date of the utilization reporting period is now accurately reflected when adding and modifying utilization reports. For example, if the fiscal month for the extramural organization, which is the month defined for the 'Month that begins the utilization reporting period' field on the View/Update Organization's Profile page, is set to July and the fiscal year defined for the utilization report is 2003, then the reporting period is the twelve-month period starting on 7/1/2002.
- The 'DOE "S"' field no longer displays when adding/modifying utilization reports for DOE-related invention reports.

- The ‘In the designated reporting period, what was the total income received as a result of license or option agreements?’ field can now be entered without having to also supply the number of licenses awarded during the designated reporting period for utilization reports dated 2001 and later. Even if no licenses were awarded in the designated reporting period, you can still receive income from licenses that were awarded in past reporting periods.

## Help Text Improvements

The following changes were made to the iEdison help system:

- The help topic ‘Account Locked’ was added to inform users what it means to have their account locked and what they need to do to get it reinstated.
- The help topic ‘Help with Formats—Patent Number’ was added to help users enter valid values in the ‘Patent Number’ field.
- The help topics ‘Generate Invention Report’ and ‘Generate Patent Report’ were updated to provide the user with additional information regarding how to download data.
- The ‘Add/Modify Patent Reports’ help topic was updated to reflect the same terminology used on the ‘Add/Modify Patent’ page for ‘Final Invention Rights Determination’. In the help page, the terminology was changed from ‘Government Action Status’ to ‘Final Invention Rights Determination’. In addition, the definition for this field was updated.

## Content Modifications

The following modifications were made to the iEdison system content:

- Text displaying the full agency name now appears when you move your mouse over the agency acronyms that appear on the right-hand side of the iEdison Home Page.
- When a login failure occurs as a result of the database being unavailable, then an informative message related to this condition is displayed.

## Change Password

The ‘New Password’ field on the Change Password page is now restricted to 20 characters.

## Reassign Invention Report Button

The ‘Reassign Invention Report’ button now only appears on the Modify Account Search Results page next to accounts that have at least one invention report assigned to them.

## Generate Invention Report Sort Order

When “Invention Status” is chosen as one of the sort options on the Generate Invention Report page, the system now accurately sorts the results alphabetically in ascending order.

## Dollar Amounts

All dollar amounts are now rounded to the nearest whole dollar. For example, dollar amounts will be rounded on utilization reports submitted.



## Inventor Waiver Email Address

The 'Email Address' field on the Inventor Certification Form is now restricted to 80 characters.

## Email Notifications

The following modifications were made to the iEdison email notifications:

Email Notification	Summary of changes made
All notifications	Email notifications are no longer sent to email addresses associated with deleted accounts.
Account Modification Email	<p>This email was modified to include the detailed descriptions regarding which account fields were modified and the data it was changed from and to. For example, if the phone number and zip code associated with the account were modified, the following items are now displayed in the Details section of the email notification:</p> <ul style="list-style-type: none"> <li>• The Phone was changed from '453-444-3232' to '410-555-4343.'</li> <li>• The Zip was changed from '20008' to '21212.'</li> </ul>
Registration Notification Email	This email will now be sent to the contact person for the agency specified on the registration form. If multiple contacts exist for the specified agency in the database, an email notification will be sent to each one. This email notifies the agency that the indicated organization has requested to register with the Interagency Edison system and has used their agency's funding agreement number to validate the identity of their organization.
Registration Notification Approval Email	This email will now be sent to the contact person for the agency specified on the registration form. If multiple contacts exist for the specified agency in the database, an email notification will be sent to each one. This email notifies the agency that the indicated organization's request to register with the Interagency Edison system has been approved and used their agency's funding agreement number to validate the identity of their organization.
Institution Not Retain Rights Email	The date and time the patent was last modified is now displayed in the email notification. Previously, the time was missing. Also, the label "Patent Issue Date" was changed to "Patent Report Modified Date" to more accurately reflect the data it represents.

## Generate Extramural/Government Agency Messages

Message Type	Message(s) Affected	Summary of changes made
Extramural	All messages that use the value 'calculation date' in the formula used to determine when a message should be sent	<p>The message generation process was modified so that the beginning date used for messaging purposes is the date of disclosure to the government.</p> <p>This date is required to be within two months of disclosure by the inventor to grantee or contractor personnel responsible for patent matters (or within 6 months after the contractor becomes aware that a subject invention has been made, whichever is earlier, if FAR 52.227-12 is applicable to any contract that contributed to the conception and/or first actual reduction to practice of the subject invention).</p>
Extramural	Message numbers 165 through 200	<p>The message generation process was modified to:</p> <p>Rely on the 'Title Election Date' instead of the 'Disclosure Date' as a starting point to calculate the date range. In addition, 24 months is subtracted from the range.</p> <p>Ignore patent reports that have a Patent Status equal to "Record Voided" or "Transferred".</p>
Extramural	Message numbers 165 through 200	<p>The message generation process was modified to use the difference between the 'Title Election Date' and the Present Day instead of the Calculation Date. In addition, 24 months is subtracted from the range.</p>
Extramural	Message numbers 340, 345, 350, and 5290	<p>The message generation process was modified to:</p> <ul style="list-style-type: none"> <li>• Ensure that child patent reports that follow a patent report with a 'Type of Patent Application' equal to "CIP" continue to generate messages, if the preceding CIP patent report is generating a message, even if the 'Type of Patent Application' field of the child patent report is not equal to "CIP".</li> <li>• Ensure that properly linked patent reports with a 'Type of Patent Application' equal to "CPA" or "RCE" generate messages.</li> </ul>
Extramural	Message number 400	<p>The message generation process for this message was modified to only send this message when the following rules are met:</p> <p>The 'Invention Status' field for the invention report is "Licensed as an Unpatented Biological Material or Research Tool."</p> <p>The Research Tools Guidelines Agreement has not yet been accepted.</p>

Message Type	Message(s) Affected	Summary of changes made
Extramural	Message number 520	<p>The message generation process was modified to only send this message when the following rules are met:</p> <ul style="list-style-type: none"> <li>• The ‘Invention Status’ field for the invention report is “Elect Title” or “Licensed as an Unpatented Biological Material or Research Tool.”</li> <li>• The ‘Month that begins the utilization reporting period’ field has not been set.</li> <li>• The invention report does not have an associated utilization report in which the fiscal year is equal to the year prior to the current year.</li> <li>• In addition, this message will only be sent once for each organization that has messaging active. The invention report associated with the message will be the first invention report for the organization where a utilization report is required.</li> </ul> <hr/> <p><b>NOTE:</b> This message will be sent even if there is no associated patent report.</p> <hr/>
Extramural/ Government Agency	Message numbers 420 through 460	The message generation process was modified to match the new DOE and DOD requirements. In addition, the DOE grant format condition changed to use “DE-AC.”
Extramural/ Government Agency	All messages	The message generation process for both the extramural and government agency messages was modified so that messages are not sent when messaging is disabled for a particular agency.
Government Agency	Message number 5210	The message generation process was modified to successfully generate this message. Now all patents associated with a third party are successfully located.