National Institutes of Health/Office of Extramural Research

Electronic
Research
Administration

Interagency Edison (iEdison II) Users Guide

Version 2.0.3.0 January 2004

Table of Contents

Introduction

To comply with the Bayh-Dole Act, grantees and contractors who have inventions resulting from their Federally financed work must patent those inventions. Moreover, they must report specific information to the Federal government within a limited time. iEdison not only provides the forms for data delivery in a secure Web-based environment, it validates that data, and reminds users what information is needed and when through a unique double-pronged tickler system that backs up email reminders with on-screen to-do lists. It also allows organizations with in-house databases to upload their information automatically, and to download their data from the iEdison database at any time. iEdison now is used by 21 agencies for their inventions and patent reporting requirements.

User Roles

Role	Description
Agency	The Agency (Agency iEdison) account type is the Agency iEdison specialist, an iEdison staff member at a Federal agency other than the NIH. This user can view invention reports and supplementary information submitted to a particular Federal agency.
Inventor	The Inventor (Extramural Inventor) account type typically has received an inventor waiver or third-party waiver, and can submit patent reports and utilization reports related to an invention, but cannot submit new invention reports.
GMS/CMS	The GMS/CMS (Grants/Contracts Management Specialist) account types provide administrative oversight of grants, contracts, and cooperative agreements at the NIH. These users can view invention reports submitted to a particular institute or center.
IDO	The IDO (Invention Disclosure Official) account type, also known as Patent Counsel) is an invention reports specialist, often a patent counsel staff member in an iEdison Federal agency. This user can create and modify inventions, patents, utilization reports, and waivers, and can verify receipt of confirmatory licenses and government support clauses.
Intramural OTT/TDCB	The Intramural OTT/TDCB (Office of Technology Transfer / Technology Development and Commercialization Branch) account type is a specialist that deals with technology development and commercialization. This user can view extramural inventions where NIH has an interest in the technology e.g., the grantee or contractor has requested a waiver.
NIH	The NIH (iEdison Accounts Administrator) account type is an expert user of the system at the NIH. This user

Role	Description
	supports other iEdison users in the areas of registration, account administration, grantee/contractor organization maintenance, and system administration.
OTT	The OTT (Office of Technology Transfer) account type supports the Office of Technology Transfer/Licensing or Office of Research and Development at the extramural organization. This user can submit inventions, patents, and utilization reports, and request waivers.
PO	The PO (Program Official) account type provides technical oversight of grants, contracts, and cooperative agreements within the NIH. This user can view invention reports submitted to a specific institute or center.
PPE	The PPE (Program, Planning, and Evaluation) account type evaluates commercialization resulting from funding agreements, or is involved in legislative planning and preparing reports for Congressional budget hearings. This user can view utilization data specific to a particular institute or center at the NIH.

Accessing the iEdison System

Special Notes Regarding the Web Browser

iEdison is a Web-based application. Any user with a Web browser (Internet Explorer 5.0 or greater or Netscape 4.7 or greater) and Internet access can log in. Other Web browsers are also supported, but some functionality can be lost.

Please use the navigation buttons and hyperlinks provided in the iEdison interface instead of the browser buttons to move through the system pages.

Session Expiration

For security purposes, iEdison user sessions terminate after a period of inactivity. The system notifies you prior to terminating the session and gives you the option of keeping the session open or terminating the session. If a decision is not made within five minutes of receiving the notification, the iEdison system will automatically terminate the session.

1. Click **Keep Session** to keep the current iEdison user session open.
    OR
    Click **Abandon Session** to end your current session and open the Welcome to iEdison page.

NOTE: If you are in the middle of modifying data for which you have not saved your changes when you abandon the session, the unsaved changes will be lost.

Login Procedure

To log in to the iEdison system, you need a user account. This requires a unique username and password. The username and password can be any combination of letters and numbers and must be between six to twenty characters.

If you forget your password, contact the iEdison accounts administrator at your organization. He/she will be able to reset your password. Once your password has been changed, you will receive an email notification informing you of the temporary password. You will be required to change the password when you log in using your temporary password.

The iEdison system is located at http://iedison.gov/

To login to the iEdison system:
1. Go to the iEdison Home page (IEDISON-1000) as shown in Figure 1.
2. Enter your username and password in the fields provided.
3. Click **Submit** to open a new iEdison session. The iEdison Main Menu is displayed.

NOTE: If you have set your preferences to view notification messages upon login (see *Modify User Preferences*), the first page you will see after login is the View Notification Messages page. To view the Main Menu, click Main Menu from the navigation menu at the top of the page.
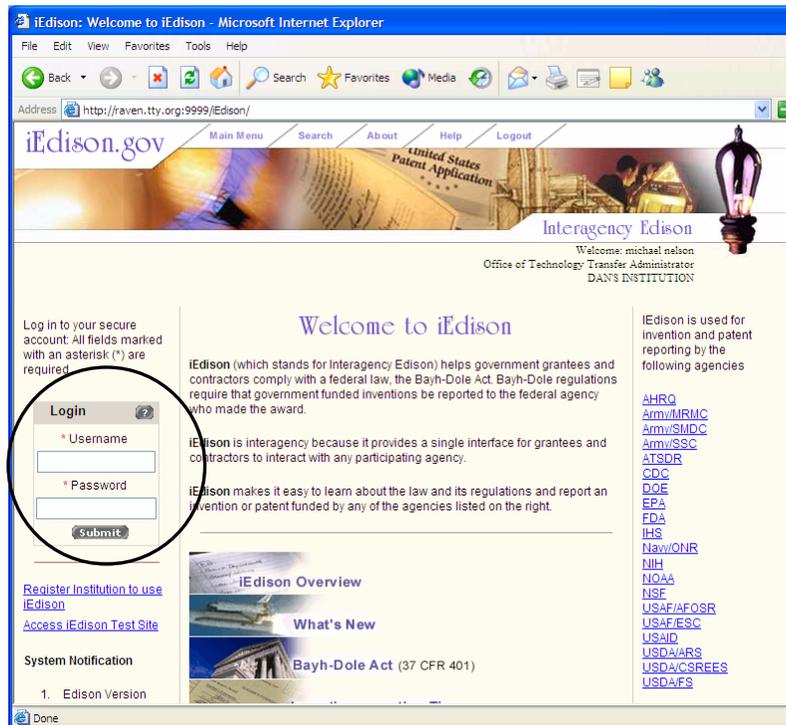
(Figure 1: iEdison Home Page (IEDISON-1000))

Exiting the iEdison Application

Logging out of the iEdison system ends your current session. The top and bottom of each page contains a Logout hyperlink.

To logout of the iEdison system:
1. Select **Logout** to access the Log Out of iEdison page.
2. Click **Yes, I want to log out** to end your current session and open the Welcome to iEdison page.

NOTE: If you close your Web browser window without logging out, your iEdison session will remain active. If you then try to log in again using the same account information, you will receive the Concurrent Login warning message (as described in *Concurrent Logins*).

Account Locked

For security reasons, the iEdison system locks an account when the number of maximum login tries has been exceeded. Administrators of the iEdison system set the number of retries allowed. Once an account is locked, the user must contact the iEdison administrator at their organization to get it unlocked. As long as the account remains locked, the user cannot access secure pages within the iEdison system.

NOTE: Administrators can refer to the section *Unlock an Account*.

Password Expiration Notification

For security purposes, user passwords expire and must be reset. If your password is about to expire, a message will appear when you log in.

If you let your password expire, you will be directed to select a new password when you next log in to the system.

Concurrent Logins

You can be logged in to the iEdison system for only one session at a time. If you attempt to log in to another session (using a second browser) or did not properly log out of the iEdison system, the system gives you the option of either terminating the first session or canceling the present login request as illustrated in Figure 2.
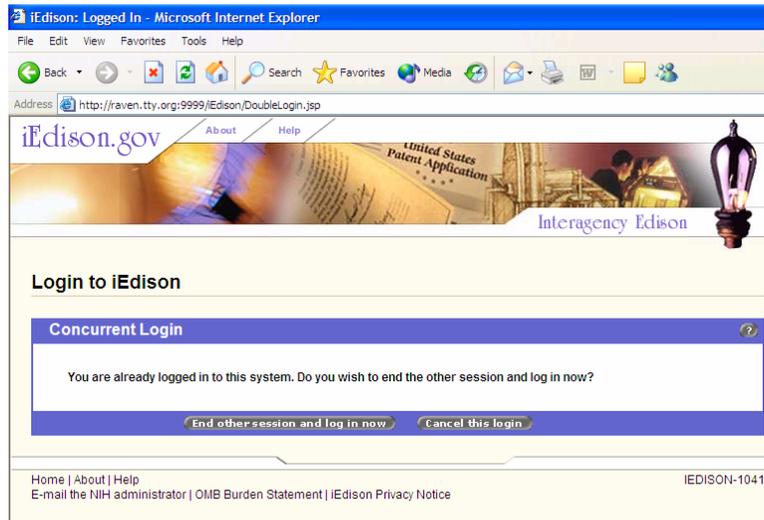
(Figure 2: Concurrent Login (IEDISON-1041))

Viewing Screens and Menus

Main Menu Screen Layout

The Main Menu page (IEDISON-4000) layout, shown in Figure 3, contains two main regions:

- The iEdison navigation menu (listed along the top of the screen).
- The hyperlink navigation options (main central section of screen).

This central screen provides access to all of the iEdison base screens, which are the primary screens used for working with iEdison.
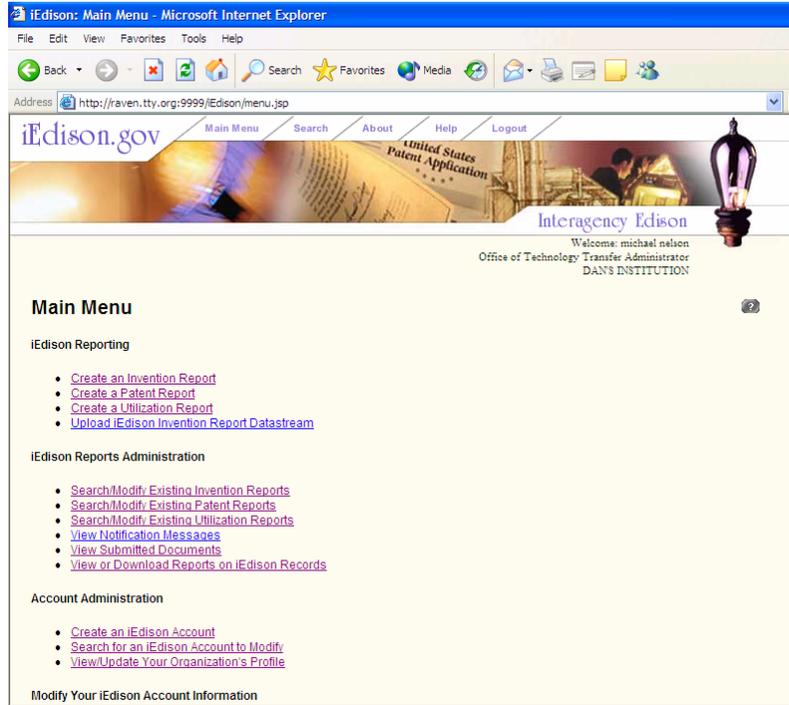
(Figure 3: iEdison Main Menu (IEDISON-4000))

Navigation Menu

Main Menu. Displays the Main Menu page (IEDISON-4000).

Search. Displays the Search Menu page (IEDISON-4005). This page allows users to access all search options available to them in one place. Options available on this screen vary depending on the user type and account type assigned to the account. Some examples include searching for existing invention reports, patent reports, and utilization reports, searching for a document to view, and searching for an account to modify.

About. Displays the About iEdison Menu Options page (IEDISON-1016). This page allows users to access introductory information about iEdison, access the code of federal regulations, access the frequently asked questions screen, and view the most current iEdison version number.

Help. Displays the iEdison Help Menu Options page (IEDISON-1011). This page allows users to access the key features and functions of the iEdison system, access the special instructions for large institutions regarding data transfer, access the help table of contents, and access the iEdison tutorial.

Logout. Displays the Log Out of iEdison page (IEDISON-1016). See *Exiting the iEdison Application* for instructions on how to log out of the system.

Main Menu Options

iEdison Reporting

Create an Invention Report. Displays the Create New Invention Report page (IEDISON-2000). See *Add a New Invention Report* for instructions on how to create an invention report.

Create a Patent Report. Displays the Invention Report Search page (IEDISON-2003). You must locate the invention report with which you want to associate the new patent report. See *Add a New Patent Report* for instructions on how to create a patent report.

Create a Utilization Report. Displays the Invention Report Search page (IEDISON-2003). You must locate the invention report with which you want to associate the new utilization report. See *Add a New Utilization Report* for instructions on how to create a utilization report.

Upload iEdison Invention Report Data Stream. Displays the Upload iEdison Invention/Patent Reports page (IEDISON-4007). See Batch Uploads for instructions on how to upload data into the iEdison system.

iEdison Reports Administration

Search/Modify Existing Invention Reports. Displays the Invention Report Search page (IEDISON-2003). See *Search for an Invention Report* for instructions on how to search for an invention report to modify.

Search/Modify Existing Patent Reports. Displays the Patent Report Search page (IEDISON-2503). See *Search for a Patent Report* for instructions on how to search for a patent report to modify.

Search/Modify Existing Utilization Reports. Displays the Invention Report Search page (IEDISON-2003). You must locate the invention report with which the utilization report is associated. See *Search for an Utilization Report* for instructions on how to search for a utilization report to modify.

View Notification Messages. Displays the View Notification Messages page (IEDISON-4001). See *Viewing Notification Messages* for instructions on how to view notification messages.

View Submitted Documents. Displays the View Documents Search page (IEDISON-4003). See Viewing Documents for instructions on how to search for and view a document.

View or Download Reports on iEdison Records. Displays the Report Menu page (IEDISON-4500). See *Generating iEdison Reports* for instructions on how view reports and download data in the iEdison system.

Account Administration

Search for Pending iEdison Registration Requests. Displays the Search for Registration Requests page (IEDISON-5500). See *Processing Registration Requests* for instructions on how to search for and modify a registration request.

Create an iEdison Account. Displays the Create Account page (IEDISON-3000). See *Create a New iEdison Account* for instructions on how to create a new iEdison account.

View/Update Your Organization's Profile. Displays the Modify Grantee/Contractor Organization Profile page (IEDISON-3500). See *Modify Your Organization's Profile* for instructions on how to modify your organization's profile.

Maintain Organizations. Displays the Grantee/Contractor Organization Maintenance Search page (IEDISON-6003). See *Viewing Invention Data by Organization* for instructions on how to search for and view invention data for a specific organization.

Modify Your iEdison Account Information

Change Your Password. Displays the Change Password page (IEDISON-3005). See *Change Your Password* for instructions on how to change your password.

Update Your User Profile. Displays the Modify Account Information page (IEDISON-3014). See *Modify Your User Profile* for instructions on how to modify your account information.

Change Your User Preferences. Displays the View Preferences page (IEDISON-3020). See *Modify User Preferences* for instructions on how to modify your user preferences.

iEdison System Administration

View Audit Records. Displays the Audit Record Search page (IEDISON-6000). See *Viewing Audit Records* for instructions on how to search for and view audit information.

View System Usage. Displays the View System Usage page (IEDISON-6005). See *Viewing System Usage* for instructions on how to view system usage information.

Search for an iEdison Account to Modify. Displays the Modify Account Search page (IEDISON-3003). See *Search for an Account* for instructions on how to search for and modify an account.

NOTE: Options available on the Main Menu page vary depending upon the user type and account type assigned to the account. As such, you can not see all of the options listed above.

Common Elements in Base Screens

All screens in the iEdison system contain common elements that facilitate navigation of the system. Figure 4, an example of an iEdison screen, shows these elements.

NOTE: For instructions on using a specific iEdison screen, see the relevant section in this Users Guide.

(Figure 4: Example of iEdison Common Elements)

Name	Description
Title Bar	The title bar lists the iEdison system name and the current screen name.
Navigation Menu	The navigation menu contains options to access many of the iEdison functions. The options available vary depending on whether you are logged in to the iEdison system.
Account Identification	The account identification section displays the name, user type, and affiliation associated with the logged-in account. Therefore, this information appears only when you are logged in to the iEdison system.
Header	The header displays the main header of the page.
Sub-Header	The sub-header displays the sub-headers on the page.
Body	The body of the page displays the main functionality

Name	Description
	accessible on the page as well as any action buttons (e.g., Submit, Cancel) associated with that functionality.
Footer Navigation Menu	The footer navigation menu contains options to access many of the iEdison functions as well as return to the iEdison home page. The options available vary depending on whether you are logged in to the iEdison system.
User Support Link	The user support link allows you to send the NIH administrator email.
OMB Burden Statement Link	The OMB burden statement link displays the OMB Reporting Burden (IEDISON-1029) page.
iEdison Privacy Notice Link	The iEdison Privacy Notice Link displays the iEdison Privacy Notice (IEDISON-1014) page.
Screen Identifier	All iEdison screens have a unique screen identifier located in the lower right-hand corner of the screen (i.e., IEDISON-1000). This identifier is especially useful when reporting any problems experienced when using the iEdison system. If you have a question or problem with a particular screen, note this number and use it when corresponding with the iEdison help desk.

Support Screens

Support screens are secondary screens that provide additional information or request additional input for working with base screens. An example of a support screen is shown in Figure 5.

(Figure 5: Example of iEdison Support Screen)

Customize User Session

Modify User Preferences

Specify whether you want to view your notification messages upon logging in to the iEdison system. This means instead of receiving the Main Menu after successful login, you are taken to the View Notification Messages.

To modify your user preferences:
1. Select **Main Menu | Change Your User Preferences** to access the View Preferences page as shown in Figure 6.
2. A list of current preferences associated with your account is displayed.
3. Choose 'Yes' to view the notification messages upon successful login or choose 'No' to go directly to the Main Menu page.
4. Click **Submit** to enter the preference information. The View Preferences Verification page is displayed
5. Click **Submit** to accept the information as it is displayed on the verification page. The View Preferences Confirmation page is displayed confirming your preference changes were saved to the database.
    OR
    Click **Edit** to return to the previous screen and modify the preference information.
    OR
    Click **Cancel** to cancel the changes and return to the Main Menu.

NOTE: You always have the option of viewing your notification messages by choosing the View Notification Messages hyperlink on your menu. See *View Your Notification Messages at any time* for more details.
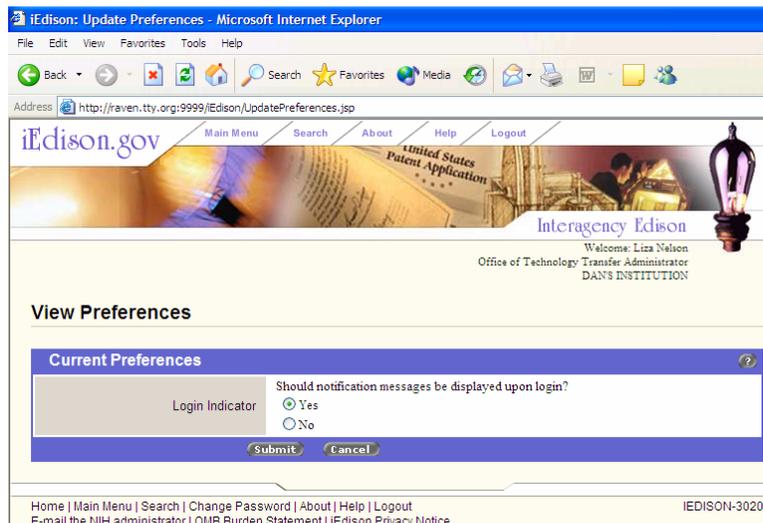
(Figure 6: View Preferences (IEDISON-3020))

Default User Preferences

The default value for viewing notification messages upon login is 'Yes.' Therefore, you will view the View Notification Messages page upon logging into the iEdison system. If you do not want to view your notifications upon login, you must modify your preferences as described in *Modify User Preferences.*

Change Your Password

To change your password:
1. Select **Main Menu | Change Your Password** to access the Change Password page as shown in Figure 7.
2. Enter the password currently associated with your account in the 'Current Password' field.
3. Enter a new password (at least six characters) in the 'New Password' field, noting the following:
   o Fields with an asterisk (*) are required.
   o The new password must be at least six characters but no more than twenty.
   o The new password can be any combination of letters and numbers.
   o The new password must be different from the current password.
4. Retype the new password in the 'Repeat New Password' field.
5. Click **Submit** to enter the information. The new password is saved and the Main Menu is displayed.

NOTE: All passwords are case sensitive.

(Figure 7: Change Password (IEDISON-3005))

Getting Help

In the iEdison system, help is never very far away. Help links appear at the top and bottom of every screen in the iEdison site. Clicking on these links produces the Help Menu giving you access to Features and Functions, Special Instructions, Help Contents and an iEdison Tutorial. The Help Contents link displays the iEdison Help Table of Contents that displays a list of key iEdison functions from which to choose.

To get help using the iEdison system, use one or more the methods described below.

View the Help Table of Contents

To view the Help Table of Contents:
1. Select **Help** from the navigation menu at the top of the page the Help Menu page is displayed.
2. Select **Help Contents** from the list of available options the iEdison Help Table of Contents page (IEDISON-8000) opens in a new browser window as illustrated in Figure 8.
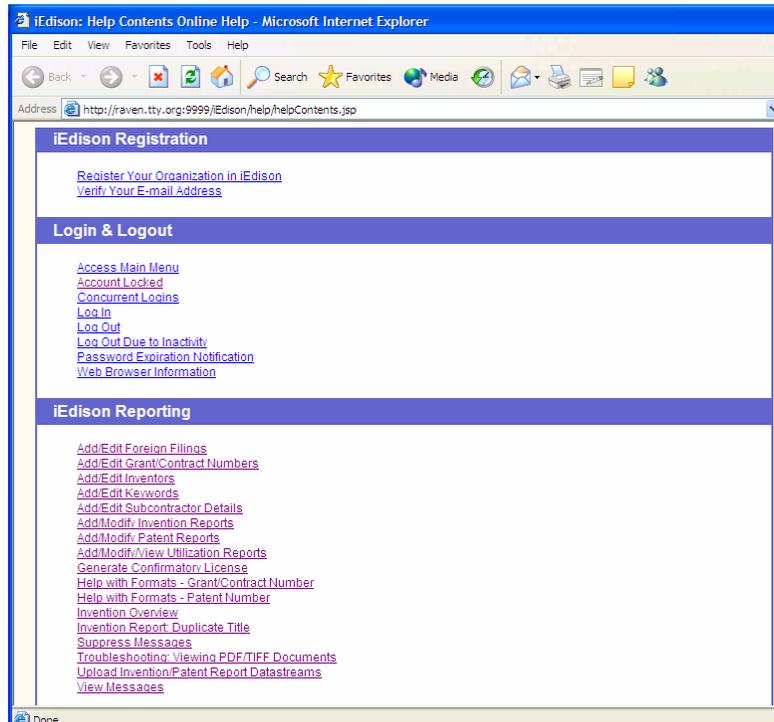
(Figure 8: iEdison Help Table of Contents (IEDISON-8000))

View a Help Topic

To view a help topic:
1. Select **Help** from the navigation menu at the top of the page the Help Menu page is displayed.
2. Select **Help Contents** from the list of available options the iEdison Help Table of Contents page opens in a new browser window.
3. Select the link for the iEdison function about which you would like additional information.

View Context Sensitive Help for a Page in the iEdison system

To view context sensitive help for a selected iEdison page:

1. Select the '**?**' icon located on title bars throughout the site as shown in Figure 9. The help topic applicable to the iEdison page you are on opens in a new browser window.
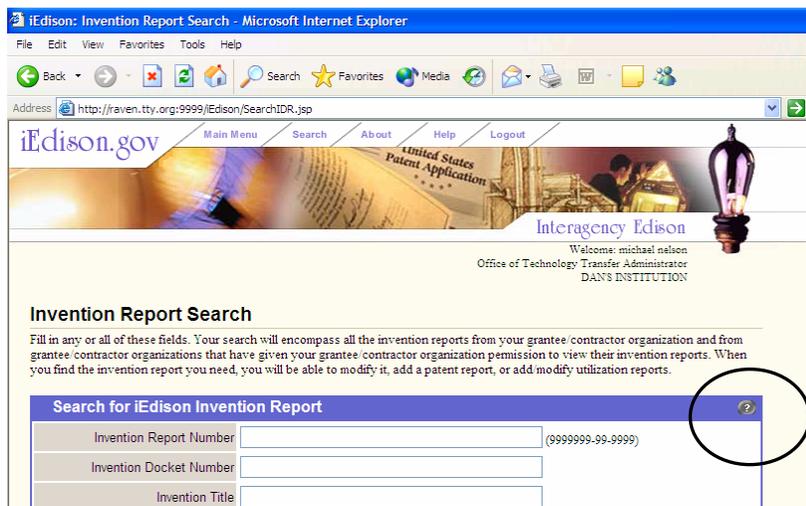
(Figure 9: Example of Context Sensitive Help)

Contact iEdison User Support

Contact the iEdison user support group using the link located in the navigation menu in the footer of all the base screens. The user support phone number is 301-435-1986. The user support email address is edison@od.nih.gov. Always include the screen identifier where you are having a problem, if applicable, when corresponding with the user support group.

The 'E-mail the NIH administrator' hyperlink located in the footer navigation menu on every screen accesses iEdison's built-in feedback system that allows you to send comments, suggestions, problems, etc., to the NIH iEdison administrator. When clicked, the Send Message to NIH iEdison Administrator page (IEDISON-1035) displays, as shown in Figure 10, allowing you to select the type of email you want to send (Bug Report, Suggestion, Technical Questions, etc.) and type in your corresponding text.

To send email to the iEdison NIH administrator:

1. Select **E-mail the NIH Administrator** at the bottom of any page in the iEdison system to access the Send Message to NIH Administrator page (IEDISON-1035).
2. Enter your **email address**.

NOTE: If you are logged in to the iEdison system, this field does not display because the system uses the email address associated with your account.

3. **Select the type of email** you want to send from the 'Type of E-mail' list.
4. **Enter the text of the message** you want to send in the 'Text of E-mail' field.

5. Click **Submit**. The Send Message to NIH iEdison Administrator Confirmation page is displayed and an email notification is sent to the NIH iEdison administrator.
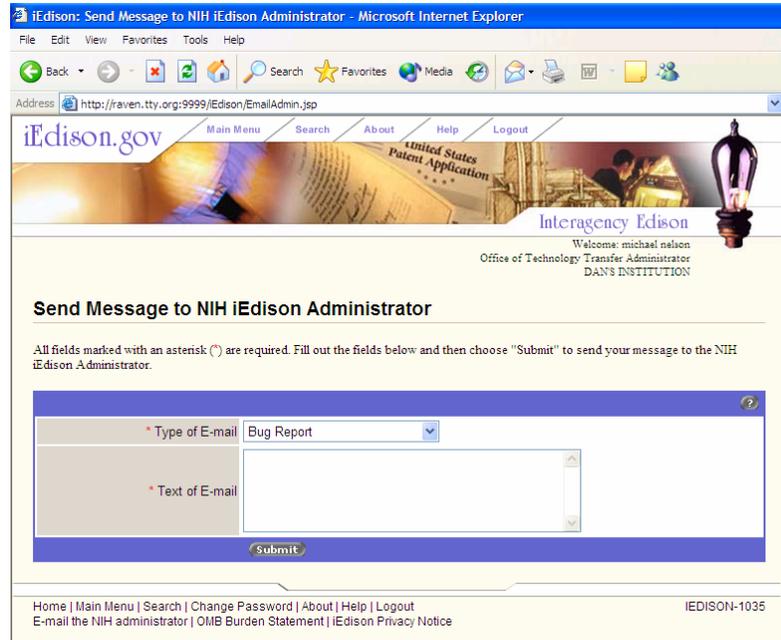
(Figure 10: Send Message to NIH iEdison Administrator (IEDISON-1035))

Registration Information

Register an Organization in iEdison

To register your institution in the iEdison system:

1. From the Welcome to iEdison page, select **Register Institution to use iEdison** to access the Request to Register iEdison Organization page as shown in Figure 11.
2. Enter the registration request information, noting the following:
    o   Fields with an asterisk (*) are required.
    o   Address information is not required. However, if you supply one field, all fields with a carat (^) are required.
    o   Providing any federal funding agreement number that the grantee or contractor organization has received at anytime in the past will facilitate making a positive identification of the grantee or contractor organization.
    o   The username has a six-character minimum and a twenty-character maximum. This is a unique name that must be assigned to one and only one user.
    o   The password has a six-character minimum and a twenty-character maximum.
    o   The username and password fields are case sensitive.
3. Click **Submit** to enter the registration information. The Request to Register iEdison Organization Step 2 page is displayed.
4. Click **Continue** to access the Interagency Edison Registration Form.

NOTE: You need Adobe Acrobat Reader to display the printable version.

5. Print the Interagency Edison Registration Form and then close the window.
6. Click **Return to iEdison Home Page**. The Request to Register iEdison Organization Confirmation page is displayed.
7. Click **Return to iEdison Home Page**. The Welcome to iEdison page is displayed.

(Figure 11: Request to Register iEdison Organization (IEDISON-5000))

Verify Your Email Address during Registration

Before your grantee or contractor organization's iEdison registration request can be processed, the iEdison system needs to verify the email address associated with the registration request. To accomplish this, an email notification is sent to the email address associated with the registration request. This individual is expected to verify that email address by following the instructions in the email notification.

To verify the email address:
1. From your email client, **open the email message** with the subject iEdison E-mail Address Verification.
2. Click the **hyperlink** in the email message as shown in Figure 12.

Date: Wed, 3 Dec 2003 17:06:50 -0500 (EST)
From: edison@tty.org
To: liza.nelson@tcg.com
Subject: iEdison E-mail Address Verification
X-Mailer: JavaMailer
X-MailScanner: Found to be clean
X-Spam-Level:
X-Spam-Checker-Version: SpamAssassin 2.60 (1.212-2003-09-23-exp) on r.tty.org
X-Spam-Status: No, hits=-98.2 required=5.0 tests=CLICK_BELOW,NO_REAL_NAME,
    USER_IN_WHITELIST,WEIRD_PORT autolearn=no version=2.60

The registration request submitted on 12/03/2003 5:06 pm in the Interagency Edison system for 'JJ U' has been received. You have been listed as the Extramural Technology Transfer Administrator who will manage accounts for the grantee/contractor organization. In order to proceed with the registration request, we need you to verify your e-mail account by responding to this message.

Please click on the link below to verify your e-mail address for the iEdison Registration Request.

http://raven.tty.org:9999/iEdison/RegistrationVerifyEmail.do?request_id=254

Once the Interagency Edison system has verified your e-mail address you will receive a message confirming your username. Your password will be the one chosen when your grantee/contractor organization was registered.

Without this response your account will not be created. If you have difficulties or receive errors please contact iEdison User Support at edison@od.nih.gov.

(Figure 12: Example of hyperlink in iEdison E-mail Address Verification Notification)

3. The iEdison system will verify your email address and the Verify Organization E-mail Address page (IEDISON-5003) will be displayed in a new browser window as illustrated in Figure 13.
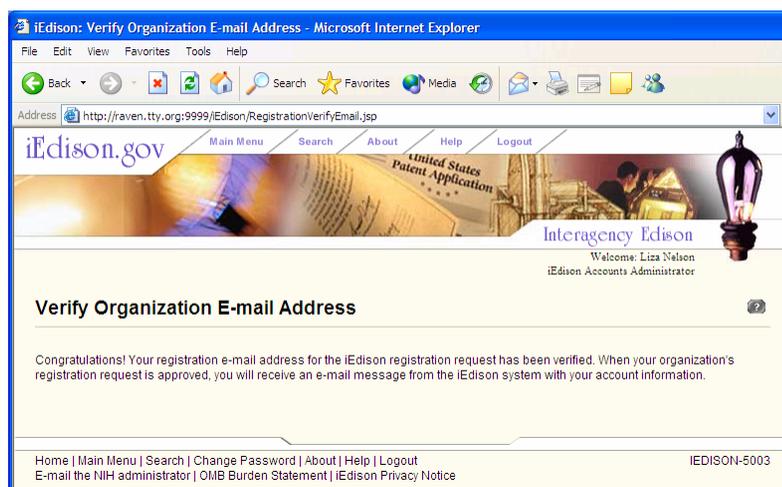
(Figure 13: Verify Organization E-mail Address (IEDISON-5003))

Profile Information

User Profile

Modify Your User Profile

To modify your user profile in the iEdison system:

1. Select **Main Menu | Update Your User Profile** to access the Modify Account Information page (IEDISON-3014) as shown in Figure 14.
2. Enter the account information, noting the following:
   - o Fields with an asterisk (*) are required.
   - o Address information is not required. However, if you supply one field, all fields with a carat (^) are required.
3. Click **Submit** to enter the information. The Modify Account Confirmation page opens.
4. To cancel the modification, click **Cancel**. The Main Menu page is displayed.

(Figure 14: Modify Account Information (IEDISON-3014))

Organization Profile

Modify Your Organization's Profile

An administrator in an organization—typically in the Office of Technology Transfer—can modify an organization's address and phone number, update the option to assign inventions to the user who submitted them, as well as change other information about the organization.

To modify the organization profile:
1. Select **Main Menu | View/Update Your Organization's Profile** to access the Modify Grantee/Contractor Organization view-only page (IEDISON-3500) as shown in Figure 15.
2. Select **Update Profile**. The Modify Grantee/Contractor Organization editable page is displayed.
3. Enter the grantee/contractor organization information, noting the following:
   o   Fields with an asterisk (*) are required.
   o   Address information is not required. However, if you supply one field, all fields with a carat (^) are required.
4. Click **Submit** to enter the information. The Verify Organizational Profile page is displayed.
5. Click **Submit** to accept the information as it is displayed on the verification page. The Update Organizational Profile Confirmation page is displayed confirming the organization profile changes were saved to the database.
   OR
   Click **Modify Organizational Profile** to return to the previous screen and modify the organization profile.

NOTE: From the Modify Grantee/Contractor Organization page you can also access account and organization usage metrics. See *View Your Organization's Usage Information* and *View Your Organization's Account Usage Information* for more details.

(Figure 15: Modify Grantee/Contractor Organization view-only (IEDISON-3500))

View Your Organization's Usage Information

To view your organization's usage information:
1. Select **Main Menu | View/Update Your Organization's Profile** to access the Modify Grantee/Contractor Organization view-only page.
2. Select **View Organization Usage**. The View Organization Usage page (IEDISON-3502) is displayed as shown in Figure 16.
3. Review the organization usage information.
4. Click **Return** to return to the Modify Grantee/Contractor Organization view-only page.

(Figure 16: View Organization Usage (IEDISON-3502))

View Your Organization's Account Usage Information

To view your organization's account usage information:
1. Select **Main Menu | View/Update Your Organization's Profile** to access the Modify Grantee/Contractor Organization view-only page.
2. Select **View Account Usage**. The View Account Usage page (IEDISON-3501) is displayed as shown in Figure 17.
3. Review the account usage information.
4. Click **Return** to return to the Modify Grantee/Contractor Organization view-only page.

(Figure 17: View Account Usage (IEDISON-3501))

Invention Report Information

Adding/Modifying Invention Reports

Add a New Invention Report

To add a new invention report:

1. Select **Main Menu | Create an Invention Report** to access the Create New Invention Report page (IEDISON-2000) as shown in Figure 18.

2. Enter invention report information, noting the following:

   o   Fields with an asterisk (*) are required.
   o   Additional keywords can be added via the Add/Edit Keywords button. See *Add/Modify Keywords for an Invention Report*.
   o   Additional inventors can be added via the Add/Edit Inventors button. See *Add/Modify Inventors for an Invention Report*.
   o   Additional grant or contract numbers can be added via the Add/Edit Grant/Contract Numbers button. See *Add/Modify Grant/Contract Numbers for an Invention Report*.
   o   Subcontractors can be added via the Add/Edit Subcontractor Details button. See *Add/Modify Subcontractor Details for an Invention Report*.
   o   Invention Disclosure documents can be added/modified. See *Add/Modify an Electronic Version of an Invention Disclosure Document*.

   o   Invention Disclosure documents can be viewed. See *View an Invention Disclosure Document*.

3. Click **Submit** to enter the information. The invention report is created and the Create Invention Report Verification page is displayed.

4. Click **Submit** to accept the information as it is displayed on the verification page OR click **Modify Invention Report** to return to the previous screen and modify the invention report.

5. The Create New Invention Report Confirmation page is displayed confirming the invention report was saved to the database and allowing you to add another invention report.

(Figure 18: Create New Invention Report Form (IEDISON-2000))

Search for an Invention Report

The search fields on the Invention Report Search page (IEDISON-2003), shown in Figure 19, are all optional. Any desired combination of the fields can be used to perform the invention report search.

To search for an invention report:
1. Select **Main Menu | Search/Modify Existing Invention Reports** to access the Invention Report Search page.
2. Enter the desired search information.

NOTE: Your search will encompass all the invention reports from your organization and from other grantee or contractor organizations that have given your organization permission to view their invention reports.

3. Click **Submit** to enter the search and open the Invention Report Search Results page.
4. A list of matching invention reports is displayed.

NOTE: Results are sorted alphabetically by invention title in ascending order.

---

5. Click **Modify Invention Report** to view or make modifications to the selected invention report. The Modify Invention Report page is displayed. See View/Modify an Invention Report for more information regarding modifying invention reports.

(Figure 19: Invention Report Search (IEDISON-2003))

View/Modify an Invention Report

To view and modify an invention report:
1. Search for and select the invention report as described in *Search for an Invention Report*. The Modify Invention Report page is displayed.
2. Enter or edit invention report information, noting the following:
    o Fields with an asterisk (*) are required.
    o Additional keywords can be added via the Add/Edit Keywords button. See *Add/Modify Keywords for an Invention Report*.
    o Additional inventors can be added via the Add/Edit Inventors button. See *Add/Modify Inventors for an Invention Report*.
    o Additional grant or contract numbers can be added via the Add/Edit Grant/Contract Numbers button. See *Add/Modify Grant/Contract Numbers for an Invention Report*.
    o Subcontractors can be added via the Add/Edit Subcontractor Details button. See *Add/Modify Subcontractor Details for an Invention Report*.
    o Invention Disclosure documents can be added. See *Submit an Electronic Version of an Invention Disclosure Document*.

---

o Invention Disclosure documents can be viewed/modified. See *View/Modify an Invention Disclosure Document*.

3. Click **Submit** to enter the information. The invention report is updated and the Modify Invention Report Verification page is displayed.

4. Click **Submit** to accept the information as it is displayed on the verification page OR click **Modify Invention Report** to return to the previous screen and modify the invention report.

5. The Modify Invention Report Confirmation page is displayed confirming the invention report was saved to the database and allowing you to modify another invention report.

Add/Modify Grant/Contract Numbers for an Invention Report

The iEdison system allows up to 12 grant/contract numbers to be associated with an invention report. The main screen allows entry of the first grant/contract number. Additional grant/contract numbers can be added using the "Add/Edit Grant/Contract Numbers" button.

To add or modify grant/contract numbers for an invention report:
1. Add/Modify an invention report as described in *Add a New Invention Report* and *View/Modify an Invention Report*.
   Prior to submitting your changes:
2. Enter the agency designation and grant/contract number for the first funding agreement on the main screen (Create New Invention Report page OR Modify Invention Report page, depending on whether you are adding or modifying).
3. If you need to add/modify additional grant/contract numbers, click **Add/Edit Grant/Contract Numbers** to access the Add/Edit Grant/Contract Numbers page (IEDISON-2010) as shown in Figure 20.
4. Enter the supporting agency and grant/contract number for each additional funding agreement.

NOTE: The funding agreement you entered on the main page will be listed first on the Add/Edit Grant/Contract Numbers page.

5. Click **Submit** to enter the information. The additional grant/contract number information is saved and the Create New Invention Report page OR Modify Invention Report page is re-displayed, depending on whether you are adding or modifying an invention report.
   OR
   Click **Cancel**, to cancel the addition/modification of grant/contract numbers. Any changes that were made are ignored and the Create New Invention Report page or Modify Invention Report page is re-displayed, depending on whether you are adding or modifying an invention report.
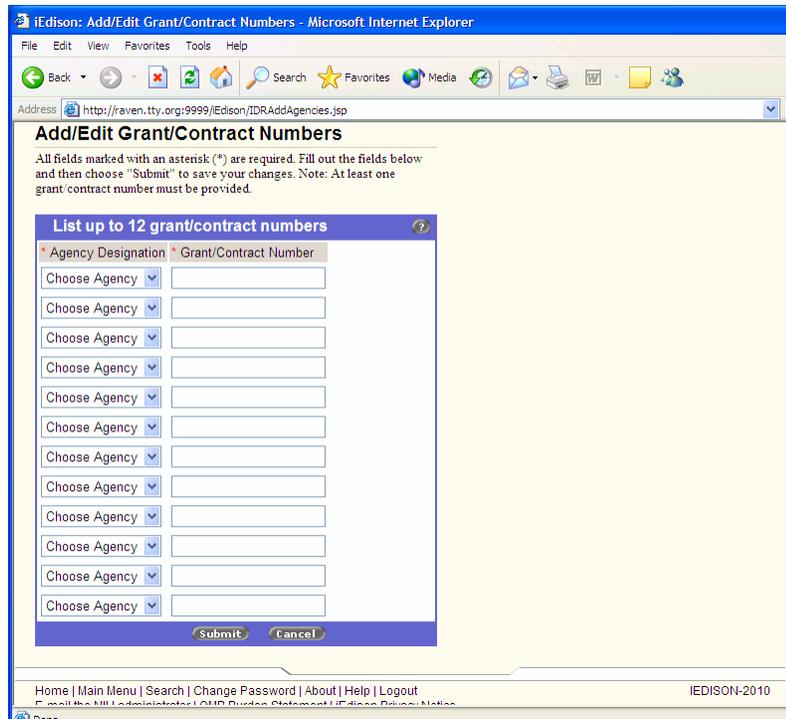
(Figure 20: Add/Edit Grant/Contract Numbers (IEDISON-2010))

Grant/Contract Number Formats

The following are the allowable grant and contract number formats that have been approved for use in the iEdison system for each Federal Agency:

Symbol or Character	Description
A	Any uppercase letter
B	Any digit or uppercase letter
#	Any digit
L	Any digit or letter
< space>	A space character
-	A dash character
L+	Any digit or letter followed by any number of any digits or letters
' '	A literal string; the quotemarks themselves should be omitted
[ ]	Only one of the values within brackets is to be included, and the brackets themselves should be omitted
/	Used within the brackets [ ] to represent OR for multiple character conditions

(Table 1: Grant/Contract Format Legend)

AHRQ:

A##<SPACE>[Hh][Ss]##### or A##<SPACE>[Hh][Ss]######
    Examples:
    B12 HS12345
    B12 HS123456

ARMY/MRMC:

'DAMD17'-##-[123cCdDhHjJmMpPvVwW]-####
    Example:
    DAMD17-12-1-1234
    DAMD17-45-d-5555

ARMY/SMDC:

'DASG60'-##-[123cCdDhHjJmMpPvVwW]-####
'W9113M'-##-[123cCdDhHjJmMpPvVwW]-####
    Example:
    DASG60-12-1-1234
    W9113M-12-1-1234

ARMY/SSC:
DAAK60-##-[123cCdDhHjJmMpPvVwW]-#### 'DAAK60'-##-[123cCdDhHjJmMpPvVwW]-####   Example: DAAK60-12-1-1234

ATSDR:
Use format required for CDC since CDC handles all of ATSDR awards.

CDC:

AL#'/CC'A###### or
AL#'/AT'A###### or
A##<space>['OH'/'CE'/'CI'/'DP'/'EH'/'PH'/'PS']###### or
A##<space>['OH'/'CE'/'CI'/'DP'/'EH'/'PH'/'PS']#####
    Examples:
    Bb1/CCB123456
    B21/ATB123456
    C11 CE123456
    C11 CE12345

DOE:

Note: Only grant-derived inventions can be reported for DOE.
 	
Grant Format:
AA-'FG'##-##AA#####['/'<B&R>]
 	
AMES NATIONAL LABORATORY CONTRACT (IA STATE UNIVERSITY) Format:
'W-7405-ENG-82'['/'<B&R>]
 	
Where <B&R> (Budget and Resources) = 14-digit character string (letters, numbers, or symbols e.g., "=")
    Examples:
    DE-FG12-12DE12345
    DE-FG12-12DE12345/ABCDEFG1234567
    W-7405-ENG-82
    W-7405-ENG-82/ABCDEF@1234567

EPA:

'68'-[WwCcDd]-##-##
'68'-[RrSs]#-##-##
'68'-[WwCcDdRrSs]#-####
L########<'-#>
L######-##<'-#>
LL########<'-#>
LL######-##<'-#>
Where <'-#> is optional and indicates a dash followed by a single digit.
     Examples:
     68-W1-12-34
     68-R1-12-34
     68-W1-1234
     123456789 or b12345678 or B12345678
     123456789-1 or b12345678-1 or B12345678-1
     1234567-12 or b123456-12 or B123456-12
     1234567-12-1 or b123456-12-1 or B123456-12-1
     1234567890 or bB12345678
     1234567890-1 or bB12345678-1
     12345678-12 or bB123456-12
     12345678-12-1 or bB123456-12-1

FDA:

Cooperative agreements - 'FD-U-'######
Grants -----------------   'FD-R-'######
Contracts --------------   '222'-##-####
                '223'-##-####
     Examples:
     FD-U-123456
     FD-R-123456
     222-12-1234
     223-12-1234

IHS:

Grants -----------------   #A#B ## ##### ##
                #A#B ## ##### ## A#
Contracts --------------   #########
     Examples:
     1B11 12 12345 12
     1B1C 12 12345 12
     1B11 12 12345 12 D1
     1B1C 12 12345 12 D1
     123456789

NAVY/ONR:

'N00014'-##-[123CcDdHhJjkKMmPpVvWw]-####
'N00014'-##-[123CcDdHhJjkKMmPpVvWw]-####'/'####
     Examples:
     N00014-12-V-1234
     N00014-12-w-1234/1234

NIH:

A##<space>AA##### or
A##<space>A###### or
AA##### or
AA######

'AA CANNOT BE 'OH' OR 'HS'
>Examples:
>B12 BC12345
>B12 BC123456
>BC12345
>BC123456

NOAA:

'50DG'AA###### or
'ADP50DD'AA###### or
'50DKN'A###### or
'NA'##LL####
>Examples:
>50DGBC123456
>ADP50DDBB123456
>50DKNB123456
>NA12bC1234

NSF:

####### or
AAA#######
>Examples:
>1234567
>BCD1234567

USAF/AFOSR:

'F49620'-##-[123cCdDhHjJkKmMpPvVwW]-####
>Example:
>F49620-96-D-1234

USAF/ESC:

'F19628'-##-[123CcDdHhJjKkMmPpVvWw]-#### or
'F19650'-##-[123CcDdHhJjKkMmPpVvWw]-####
>Examples:
>F19628-12-W-1234
>F19650-12-V-1234

USAID:

LLL-A-##-#####-## or
LLL-####A-##-###-## or
AAA-'00'-[GCQ]-##-#####
>Examples:
>bbb-B-12-12345-12
>bbb-1234B-12-123-12
>BBB-00-Q-01-12345

USDA/ARS:

[4][0-35]-LLLL-L-LLLL or
[5][034]-LLLL-L-LLLL or
'5'[89]-LLLL-L-L-LLL or
'5'[89]-LLLL-L-'F'LLL or
'58'-LLLL-L'M'-'F'LLL or
'58'-LLLL-L'M'-LLL
>Examples:
>434-abcd-a-abcd
>53-abcd-a-abc1
>59-abcd-a-a-abC

59-abcd-a-Fabc
58-abcd-aM-Fabc
58-abcd-aM-abc

USDA/CSREES:

The format should match one of:
##-#####-#### or
##-AAAA-#-#### or
'XX'-AAAA-#-#### or
'XX'-LLLL-#-#### or
'2'###-#####-##### or
'NA/'LLL+ or
'ZZ'-'ZZZZ'-'Z'-'ZZZZ'/'L+
or 'XX'-'ZZZZ'-'Z'-'ZZZZ'/'L+ or
'2'###-'ZZZZZ'-'ZZZZZ'/'L+
Essentially, this means the inclusion of three additional formats:
ZZ-ZZZZ-Z-ZZZZ/PROJECTNUMBER
XX-ZZZZ-Z-ZZZZ/PROJECTNUMBER
YYYY-ZZZZZ-ZZZZZ/PROJECTNUMBER (where YYYY is the current year)
NA/PROJECTNUMBER (IF FORMULA GRANT NUMBER IS UNKNOWN)
Where the PROJECTNUMBER must always be at least three characters in
length if "NA" is used; otherwise, there must be at least 1 character after the
slash.

> Examples:
> 12-12345-1234
> 12-BCDE-1-1234
> XX-BCDE-1-1234
> XX-aBcD-1-1234
> 2123-12345-12345
> NA/aBc or NA/aBc1dA
> ZZ-ZZZZ-Z-ZZZZ/a
> XX-ZZZZ-Z-ZZZZ/b
> 2001-ZZZZZ-ZZZZZ/C

- If this invention resulted from a CSREES grant or cooperative
  agreement, enter the CSREES-issued grant number in the field.

- If this invention resulted from a CSREES formula-funded project (i.e.,
  Hatch, McIntyre-Stennis, Smith-Lever, etc.), enter the CSREES-issued
  grant number for the formula grant (if available) followed by the your
  institutions formula project number (such as Hatch XXX12345).

If you have questions about the use of these numbers, contact Bob MacDonald
at rmacdonald@csrees.usda.gov.

USDA/FS:

##-'11'######-### or
##-LL-'11'######-### or
'4'[0-3]-LLLL-#-#### or
'5'[2-5]-LLLL-##-##

> Examples:
> 12-11123456-123
> 12-aB-11123456-123
> 41-abCD-1-1234
> 54-Abcd-12-12

OTHER:

Agency abbreviation plus a slash and freeform number just for informational purposes.

Add/Modify Inventors for an Invention Report

The iEdison system allows up to 12 inventors to be associated with an invention report. The main screen allows entry of the first inventor. Additional inventors can be added using the "Add/Edit Inventors" button.

To add or modify inventors for an invention report:
1. Add/Modify an invention report as described in *Add a New Invention Report* and *View/Modify an Invention Report.* **Prior to submitting your changes:**
2. Enter the name for the first inventor on the main screen.

NOTE: First and last name are required.

---

3. If you need to add/modify additional inventors, click **Add/Edit Inventors** to access the Add/Edit Inventors page (IEDISON-2009) as shown in Figure 21.
4. Enter the name for each additional inventor.

NOTE: The inventor you entered on the main page will be listed first on the Add/Edit Inventors page.

---

5. Click **Submit** to enter the information. The additional inventor information is saved and the Create or Modify page is re-displayed, depending on whether you are adding or modifying an invention report
OR
Click **Cancel** to cancel the addition/modification of inventors. Any changes that were made are ignored and the Create or Modify page is re-displayed, depending on whether you are adding or modifying an invention report.
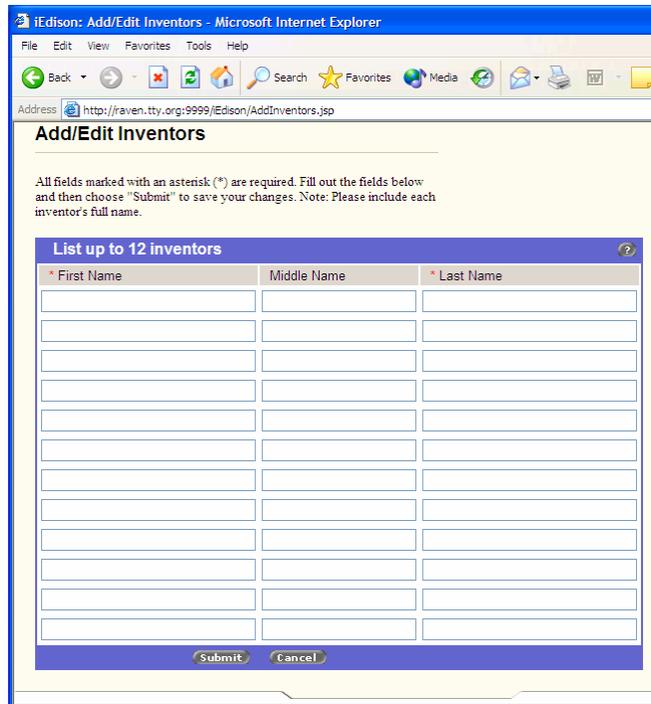
(Figure 21: Add/Edit Inventors (IEDISON-2009))

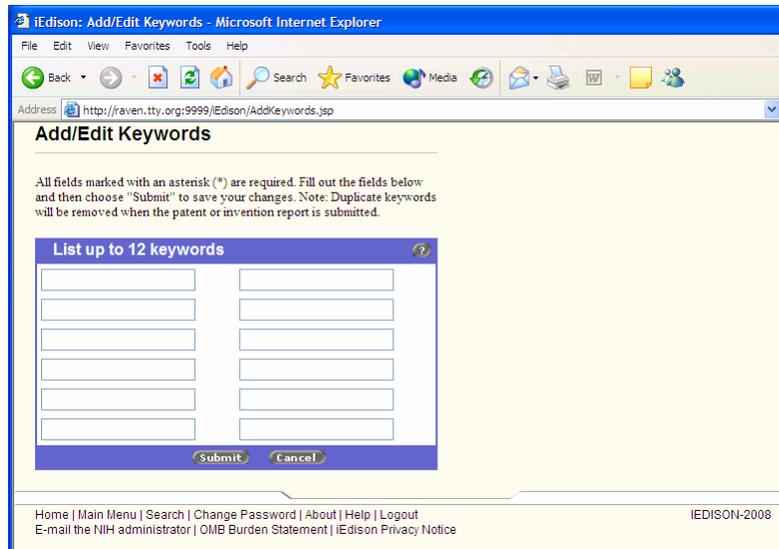## Add/Modify Keywords for an Invention Report

The iEdison system allows up to 12 keywords to be associated with an invention report. The main screen allows entry of the first keyword. Additional keywords can be added using the "Add/Edit Keywords" button.

To add or modify keywords for an invention report:
1. Add/Modify an invention report as described in *Add a New Invention Report* and *View/Modify an Invention Report*. **Prior to submitting your changes:**
2. Enter the first keyword on the main screen.
3. If you need to add/modify additional keywords, click **Add/Edit Keywords** to access the Add/Edit Keywords page (IEDISON-2008) as shown in Figure 22.
4. Enter the name for each additional keyword.

NOTE: The keyword you entered on the main page will be listed first on the Add/Edit Keywords page.

5. Click **Submit** to enter the information. The additional keyword information is saved and the Create or Modify page is re-displayed, depending on whether you are adding or modifying an invention report.
   OR
   Click **Cancel** to cancel the addition/modification of keywords. Any changes that were made are ignored and the Create or Modify page is re-displayed, depending on whether you are adding or modifying an invention report.

(Figure 22: Add/Edit Keywords (IEDISON-2008))

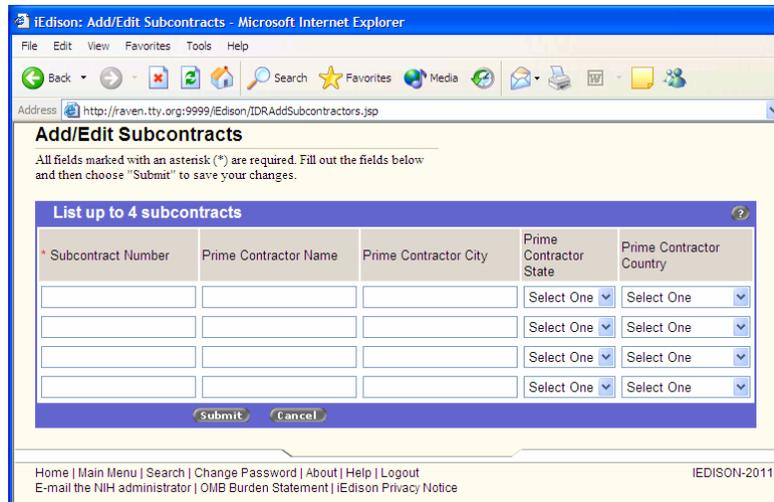## Add/Modify Subcontractors for an Invention Report

The iEdison system allows up to 4 subcontractors to be associated with an invention report. Subcontractor details can be added using the **Add/Edit Subcontractor Details** button.

To add or modify subcontractors for an invention report:
1. Add/Modify an invention report as described in *Add a New Invention Report* and *View/Modify an Invention Report*.
   Prior to submitting your changes:
2. Click **Add/Edit Subcontractor Details** to access the Add/Edit Subcontracts page (IEDISON-2011) as shown in Figure 23.
3. Enter the subcontractor details for each subcontract.

NOTE: The subcontract number is a required field.

4. Click **Submit** to enter the information. The subcontractor information is saved and the Create New Invention Report page OR Modify Invention Report page is re-displayed depending on whether you are adding or modifying an invention report.
   OR
   Click **Cancel**, to cancel the addition/modification of subcontract information. Any changes that were made are ignored and the Create New Invention Report page OR Modify Invention Report page is re-displayed depending on whether you are adding or modifying an invention report.

(Figure 23: Add/Edit Subcontracts (IEDISON-2011))

View the Invention Overview for an Invention Report

When modifying an invention report, the iEdison system provides you with a graphical representation of the invention report and related patents. This representation is called the Invention Overview (IEDISON-2017) and is shown in Figure 24. It shows the relationship between the invention, its related patents, and where applicable, their child patents.

To view the invention overview for an invention report:
1. Search for the invention report you want to view the invention overview for as described in *Search for an Invention Report*.
2. Click **Modify Invention Report**. The invention overview for the selected invention report is displayed.
3. To edit an invention report or related patent report, select the **Edit** link next to the desired item.
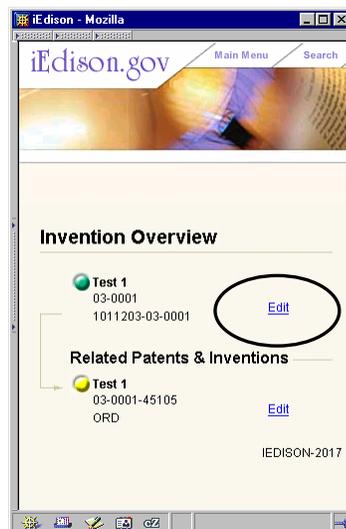
(Figure 24: Invention Overview (IEDISON-2017))

Uploading and Viewing Invention Disclosure Documents

Add/Modify an Electronic Version of an Invention Disclosure Document

Extramural users can electronically submit and view the invention disclosure documents in the iEdison system. Invention Disclosure documents can be submitted in four different formats:

- ❑ PDF – Portable Document Format
- ❑ Paper – Fax or mail
- ❑ TIFF - Tagged Image File Format
- ❑ Text – Paste ASCII text in the Invention Disclosure Text field

On-line submission of a PDF, TIFF or Text file eliminates the need to fax or mail a paper copy.

To add or modify an electronic version of an invention disclosure document:

1. Add/Modify an invention report as described in *Add a New Invention Report* and *View/Modify an Invention Report*.
   Prior to submitting your changes:
   o For **PDF or TIFF** invention disclosure documents, select the appropriate document type, click Browse and select the file or type the file location in the 'Invention Disclosure File Location' field.
   o For **Paper** invention disclosure documents, select Paper as the document type, and mail or fax the invention disclosure document.
   o For **Text** invention disclosure documents, select Text as the document type, click Browse and select the file or type the file location in the invention disclosure file location field OR cut and paste the text in the 'Invention Disclosure Text' field.

   NOTE: There is a maximum of 20 pages of text. Anything longer than 20 pages will be truncated.

2. Click **Submit** to enter the information.
   OR
   Click **Cancel**, to cancel the addition of invention disclosures. Any changes that were made are ignored.
3. The file is uploaded and a 'View Current Document' hyperlink appears next to the 'Current Invention Disclosure' field on the Invention Report Verification page. Select this link to view the document.
4. Click **Submit** to accept the information as it is displayed on the Invention Report Verification page.
   OR
   Click **Modify Invention Report** to return to the previous screen and modify the invention report.
5. The Invention Report Confirmation page is displayed confirming the invention report was saved to the database.

View an Invention Disclosure Document

To view an invention disclosure document:
1. Add/Modify an invention report as described in *Add a New Invention Report* and *View/Modify an Invention Report*.
   Prior to submitting your changes:
2. Select the 'View Current Document' hyperlink next to the 'Current Invention Disclosure' field.

NOTE: For help viewing PDF or TIFF versions of the invention disclosure document, see *Troubleshooting the Viewing of PDF/TIFF Invention Disclosure Documents.*

Troubleshooting the Viewing of PDF/TIFF Invention Disclosure Documents

To troubleshoot viewing of **PDF** documents:
1. Verify a version of Adobe Reader is installed on your computer. Downloads of Adobe Reader can be found at http://www.adobe.com/support/downloads/main.html#Readers.
2. Click **Start | Run** from the Windows menu bar.
3. Type 'regedit' in the field provided.
4. Click **OK**. The Registry Editor window opens.
5. In the Registry Editor window, navigate to My Computer -> HKEY_CLASSES_ROOT -> MIME -> Database ->Content Type -> application/pdf.
6. Verify that '.pdf' is listed as the value next to Extension. If not, click on Extension and then click **Edit | Modify** using the edit menu bar. Enter '.pdf' in the value data field and then click **OK**.

NOTE: If you continue to have problems viewing PDF invention disclosure documents, contact technical support at your organization.

To troubleshoot viewing of **TIFF** documents:
1. Verify a version of QuickTime is installed on your computer. Downloads of QuickTime can be found at http://www.apple.com/quicktime/download/.
2. Click **Start | Settings | Control Panel** from the Windows menu bar.
3. Double click on the **QuickTime** icon to open the QuickTime Settings window.
4. Select '**Browser Plug-In**' from the drop down field at the top of the window.
5. Click the **MIME Settings** button.
6. Click the **plus sign (+) next to the Images Header** to open the Images directory.
7. Check the **box next to the TIFF image file field**.
8. Click **OK**.

NOTE: If you continue to have problems viewing TIFF invention disclosure documents, contact technical support at your organization.

Invention Report Properties

Grant View-Only Access to an Invention Report

The iEdison system allows you to grant "view only" access of an invention report to other organizations.

To grant "view-only" access, on the Create New or Modify Invention Report form, enter the organization codes for the organizations to which you are granting access in the 'Organization Code for Other Organizations to View Invention and Related Patents' field as shown in Figure 25.
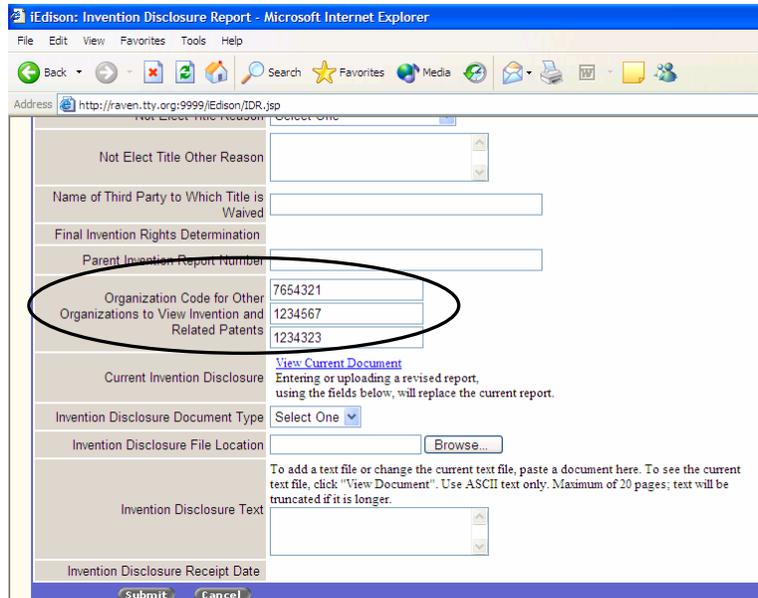
(Figure 25: Example of Granting View Only Access)

NOTE: You can grant access to a maximum of three organizations.

Designate a Parent Invention Report

Designation of a "parent" or main invention report can link invention reports.

To link invention reports:
1. Search for and select the parent invention report as described in *Search for an Invention Report*.
2. Record the value of the 'Invention Report Number' field.
3. Search for and select the invention report that you would like to link to the main invention report.
4. Enter and submit the invention report number of the parent invention report into the 'Parent Invention Report Number' field as shown in Figure 26.
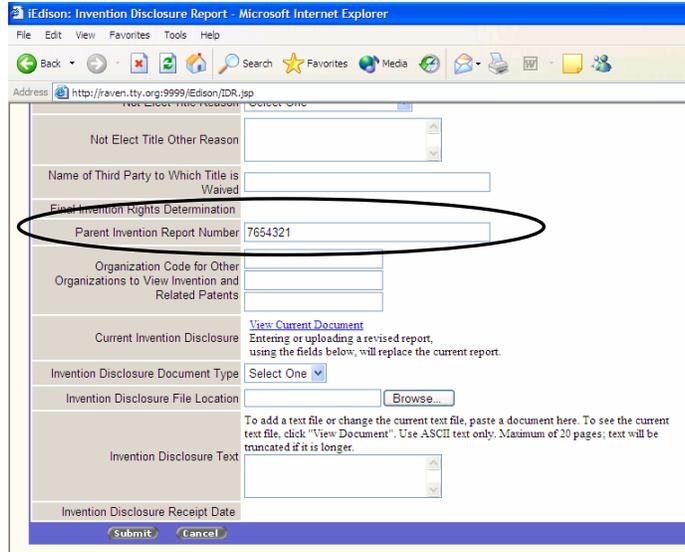
(Figure 26: Example of Designating a Parent Invention Report)

Reassign an Invention Report

Invention reports can be reassigned from one user to another within the same organization. This feature assists organizations with managing workflow and notification messages. By default, the original assigned user is the user who submitted the invention report.

To reassign the invention report to a different user:
1. Search for and select the account you want to modify as described in *Search for an Account*.
2. In the result set for the desired account, click **Reassign Invention Report**. The Reassign Invention Reports page opens as shown in Figure 27.

NOTE: If the selected user has no assigned invention reports, the system returns a notification message indicating that no records could be found.

3. In the result set for the desired invention reports, select the user the invention report should now be assigned to from the Reassign To list.
4. Click **Reassign Invention Reports** to reassign the selected invention reports. The Reassign Invention Reports Verification page opens.
   OR
   Click **Cancel**, to cancel the reassignment. The Modify Account Search Results page is redisplayed.
5. Click **Submit** to accept the information as it is displayed on the verification page. The Reassign Invention Reports Confirmation page is displayed confirming the reassignments were saved to the database.
   OR
   Click **Modify Reassignments** to return to the previous screen and modify the reassignment information.
   OR
   Click **Cancel**, to cancel the reassignment. The Modify Account - Results for Modify Account Search page is redisplayed.

NOTE: The account owner will receive an email notification informing them of the change.
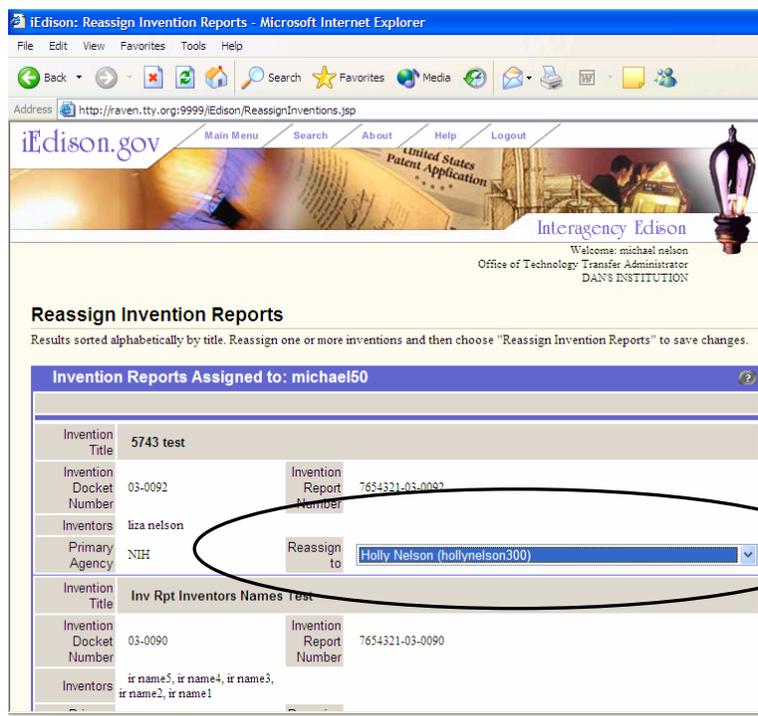
(Figure 27: Example of Reassigning an Invention Report)

Batch Uploads

Upload Invention Reports in a Data Stream

To upload invention reports into the iEdison system via a data stream:

1. Select **Main Menu | Upload iEdison Invention Report DataStream** to access the Upload iEdison Invention/Patent Reports - Select File to Upload page.
2. Click **Browse** and select the file or type the file location in the path and file name field.
3. Click **Submit**. The Submission Summary page is displayed indicating that the file was successfully uploaded and awaiting processing.

NOTE: The option to upload data streams is only displayed if the organization has been granted the ability to perform batch uploads by the NIH administrator.

Special Warnings Regarding Invention Reports

Duplicate Title Notification

The iEdison system will alert the user if a duplicate invention title is submitted as shown in Figure 28. In this way, the system attempts to identify what could be an inadvertent data entry error. However, the system does not reject the submission of two invention reports with the same invention title.

(Figure 28: Invention Report – Duplicate Title (IEDISON-2022))

Parent/Child Link Breakage Notification

If modifications are made to an invention report that result in the existing parent/child relationships being broken, the iEdison system will notify the user, as shown in Figure 29, and ask how to proceed. The user can choose to submit the changes as they are or return to the Invention Report Form.

(Figure 29: Modify Invention Report – Parent/Child Link Breakage (IEDISON-2013))

Review and Accept the Research Tools Guideline Agreement

The research tools guidelines agreement can now be reviewed and accepted online. When submitting an invention report that is licensed as an unpatented biological material or research tool, the acceptance terms of a Research Tools Guidelines Agreement (IEDISON-2015), shown in Figure 30, will automatically be displayed prior to submission of the report.
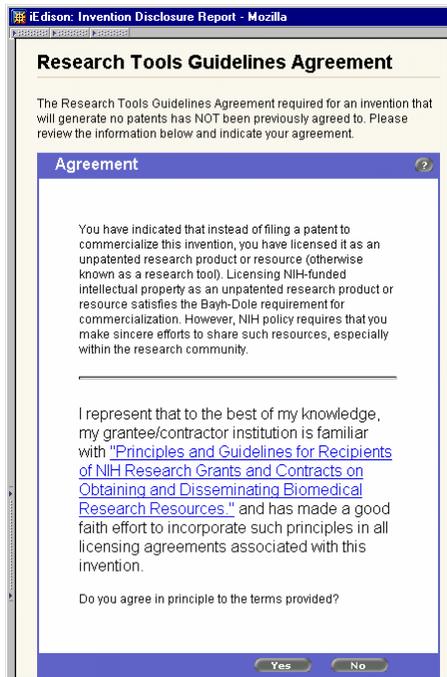
(Figure 30: Research Tools Guidelines Agreement (IEDISON-2015))

You must choose to accept or deny the agreement. To accept the terms of the agreement, select **Yes**. You are returned to the Invention Report Form. If you decline to accept the terms of the agreement by choosing **No**, the Research Tools Guidelines Agreement Warning page (IEDISON-2016), shown in Figure 31, will be displayed with additional information regarding non-acceptance of the agreement.

(Figure 31: Research Tools Guidelines Agreement Warning (IEDISON-2016))

Invention Report Date Notification

The iEdison system notifies the user, as shown in Figure 32, when they enter an invention report date that is greater than two months prior to the current date. Since most invention reports are reported within two months, this warning by the system is an attempt at identifying what could be an inadvertent data-entry error. However, the system will not reject the submission of an invention report with an invention report date greater than two months old.

(Figure 32: Invention Report – Invention Report Date (IEDISON-2014))

Title Election Date Notification

The iEdison system notifies the user, as shown in Figure 33, when they enter a title election date that is greater than two years (plus any allowed extensions) from the current date. The warning displayed by the system is an attempt at identifying what could be an inadvertent data entry error. However, the system does not reject the submission of an invention report with a title election date greater than two years old (plus any allowed extensions).
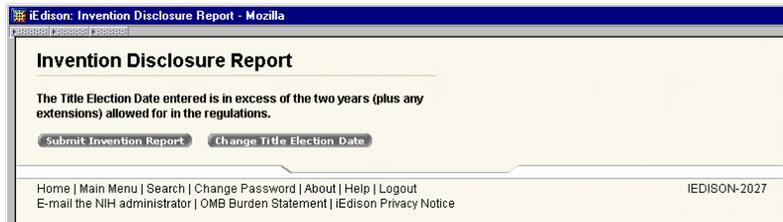
(Figure 33: Invention Report – Title Election Date (IEDISON-2027))

Record Locking

The following rules regarding record locking and invention reports are enforced in the iEdison system:

- Only one user can update a given invention 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 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.

Patent Report Information

Adding and Modifying Patent Reports

Add a New Patent Report

To add a new patent report:
1. Select **Main Menu | Create a Patent Report** to access the Invention Report Search page.
2. Search for the invention report you want to associate the patent with as described in *Search for an Invention Report*.
3. Click **Add Patent Report**. The Create New Patent Report page (IEDISON-2500) is displayed as shown in Figure 34.
4. Enter or edit patent report information, noting the following:
    o   Fields with an asterisk (*) are required.
    o   Additional keywords can be added via the Add/Edit Keywords button. See *Add/Modify Keywords for a Patent Report*.
    o   Additional inventors can be added via the Add/Edit Inventors button. See *Add/Modify Inventors for a Patent Report*.
    o   Additional foreign filings can be added via the Add/Edit Foreign Filings button. See *Add/Modify Foreign Filings for a Patent Report*.
    o   Government Support Clauses and Confirmatory Licenses can be added. See *Add/Modify an Electronic Version of a Government Support Clause or Confirmatory License Document*.
    o   Government Support Clauses and Confirmatory Licenses can be viewed. See *View a Government Support Clause or Confirmatory License Document*.
2. Click **Submit** to enter the information. The patent report is updated and the Create Patent Report Verification page is displayed.
3. Click **Submit** to accept the information as it is displayed on the verification page
    OR
    Click **Modify Patent** to return to the previous screen and modify the patent report.
4. The Create Patent Report Confirmation is displayed confirming the patent report was saved to the database and allowing you to add another patent report.

(Figure 34: Create New Patent Report (IEDISON-2500))

Patent Number Formats

The following approved patent number formats can be used in the iEdison system.

Symbol or Character	Description
#	Any digit
' '	A literal string; the quotemarks themselves should be omitted

#######
########
'PLT'####
'PLT'#####
'PP'####
'PP'#####
#,###,###
##,###,###
'D'#####
'PP'#,###
'PP'##,###
'RE'#####

Examples:
1234567
12345678
PLT1234
PLT12345
PP1234
PP12345
1,234,567
12,345,678
D12345
PP1,234
PP12,345
RE12345

(Table 2: Patent Number Format Legend)

Search for a Patent Report

The search fields on this page are all optional. Use any desired combination of the fields to perform the patent report search.

To search for a patent report:
1. Select **Main Menu | Search/Modify Existing Patent Reports** to access the Patent Report Search page (IEDISON-2503) as shown in Figure 35.
2. Enter the desired search information, noting the following:
   o Your search will encompass all the patent reports from your organization and from grantee and contractor organizations that have given your organization permission to view their invention reports.
   o The search criteria include patent-specific as well as invention report-specific parameters. Any combination of these fields can be used to perform the patent report search.
3. Click **Submit** to enter the search and open the Patent Report Search Results page.

4.   A list of matching patent reports is displayed.

NOTE: Results are sorted alphabetically by invention title in ascending order.

5.   Click **Modify Patent Report** to view or make modifications to the selected patent report. The Modify Patent Report page is displayed. See *View/Modify a Patent Report* for more information regarding modifying patent reports.

(Figure 35: Patent Report Search (IEDISON-2503))

Modify a Patent Report

To modify a patent report:
1. Search for and select the patent report as described in *Search for a Patent Report*. The Modify Patent Report page is displayed.
2. Enter or edit patent report information, noting the following:
   o Fields with an asterisk (*) are required.
   o Additional keywords can be added via the Add/Edit Keywords button. See *Add/Modify Keywords for a Patent Report*.
   o Additional inventors can be added via the Add/Edit Inventors button. See *Add/Modify Inventors for a Patent Report*.
   o Additional foreign filings can be added via the Add/Edit Foreign Filings button. See *Add/Modify Foreign Filings for a Patent Report*.
   o Government Support Clauses and Confirmatory Licenses can be added. See *Add/Modify an Electronic Version of a Government Support Clause or Confirmatory License Document*.
   o Government Support Clauses and Confirmatory Licenses can be viewed. See *View a Government Support Clause or Confirmatory License Document*.
3. Click **Submit** to enter the information. The patent report is updated and the Modify Patent Report Verification page is displayed.
4. Click **Submit** to accept the information as it is displayed on the verification page.
   OR
   Click **Modify Patent** to return to the previous screen and modify the patent report.
5. The Modify Patent Report Confirmation page is displayed confirming the patent report was saved to the database and allowing you to add or modify another patent report.

Add/Modify Foreign Filings for a Patent Report

The iEdison system allows up to 12 foreign filings to be associated with a patent report. The main screen allows entry of the first foreign filing. Additional foreign filings can be added using the **Add/Edit Foreign Filings** button.

To add or modify foreign filings for a patent report:
1. Add/Modify a patent report as described in *Add a new Patent Report* and *View/Modify a Patent Report*.
   Prior to submitting your changes:
2. Enter the country, patent prosecutions status, and foreign filing action date for the first foreign filing on the main screen (Create New Patent Report page OR Modify Patent Report page, depending on whether you are adding or modifying).
3. If you need to add/modify additional foreign filings, click **Add/Edit Foreign Filings** to access the Add/Edit Foreign Filings page (IEDISON-2508) as shown in Figure 36.
4. Enter the country, patent prosecutions status, and foreign filing action date for each additional foreign filing.

NOTE: The foreign filing you entered on the main page will be listed first on the Add/Edit Foreign Filings page.

5. Click **Submit** to enter the information. The additional foreign filing information is saved and the Create New Patent Report page OR Modify Patent Report page is re-displayed, depending on whether you are adding or modifying a patent report.
OR
Click **Cancel**, to cancel the addition/modification of foreign filings. Any changes that were made are ignored and the Create New Patent Report page OR Modify Patent Report Form page is re-displayed, depending on whether you are adding or modifying a patent report.

(Figure 36: Add/Edit Foreign Filings (IEDISON-2508))

Add/Modify Inventors for a Patent Report

The iEdison system allows up to 12 inventors to be associated with a patent report. The main screen allows entry of the first inventor. Additional inventors can be added using the **Add/Edit Inventors** button.

To add or modify inventors for a patent report:
1. Add/Modify a patent report as described in *Add a new Patent Report* and *View/Modify a Patent Report*.
   Prior to submitting your changes:
2. Enter the name for the first inventor on the main screen.

NOTE: First and last name are required.

3. If you need to add/modify additional inventors, click **Add/Edit Inventors** to access the Add/Edit Inventors page (IEDISON-2009) as shown in Figure 37.
4. Enter the name for each additional inventor.

NOTE: The inventor you entered on the main page will be listed first on the Add/Edit Inventors page.

5. Click **Submit** to enter the information. The additional inventor information is saved and the Create or Modify page is re-displayed, depending on whether you are adding or modifying a patent report.
   OR
   Click **Cancel**, to cancel the addition/modification of inventors. Any changes that were made are ignored and the Create or Modify page is re-displayed, depending on whether you are adding or modifying a patent report.

(Figure 37: Add/Edit Inventors (IEDISON-2009))

Add/Modify Keywords for a Patent Report

The iEdison system allows up to 12 keywords to be associated with a patent report. The main screen allows entry of the first keyword. Additional keywords can be added using the **Add/Edit Keywords** button.

To add or modify keywords for a patent report:
1. Add/Modify a patent report as described in *Add a new Patent Report* and *View/Modify a Patent Report*.
   Prior to submitting your changes:
2. Enter the first keyword on the main screen.
3. If you need to add/modify additional keywords, click **Add/Edit Keywords** to access the Add/Edit Keywords page (IEDISON-2008) as shown in Figure 38.
4. Enter the name for each additional keyword.

NOTE: The keyword you entered on the main page will be listed first on the Add/Edit Keywords page.

5. Click **Submit** to enter the information. The additional keyword information is saved and the Create or Modify page is re-displayed, depending on whether you are adding or modifying a patent report.
    OR
    Click **Cancel**, to cancel the addition/modification of keywords. Any changes that were made are ignored and the Create or Modify page is re-displayed, depending on whether you are adding or modifying a patent report.
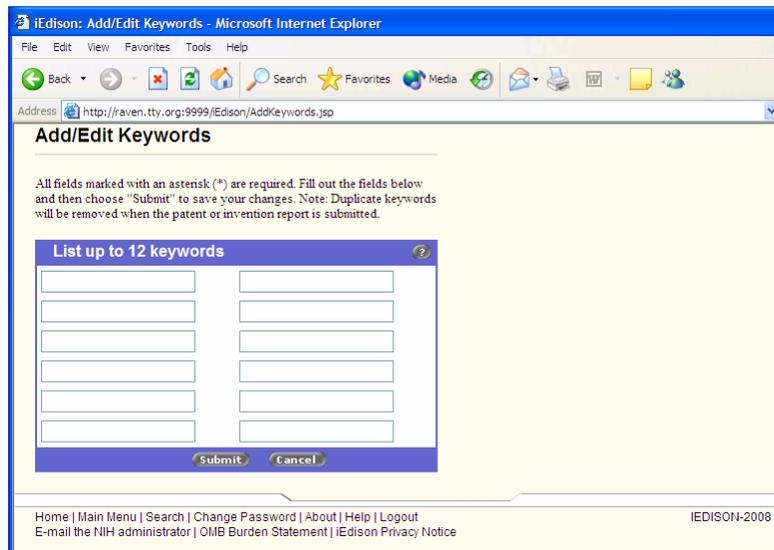
(Figure 38: Add/Edit Inventors (IEDISON-2008))

View the Invention Overview for a Patent Report

When modifying a patent report, the iEdison system provides you with a graphical representation of the patent report and its related invention report. This representation is called the Invention Overview (IEDISON-2017) and is shown in Figure 39. It shows the relationship between the invention, its related patents, and, where applicable, their child patents.

To view the invention overview for a patent report:
1. Search for the patent report you want to view the invention overview for as described in *Search for a Patent Report*.
2. Click **Modify Patent Report**. The invention overview for the selected patent report is displayed.
3. To edit a patent report or related invention report, select the **Edit** link next to the desired item.

(Figure 39: Invention Overview (IEDISON-2017))

Uploading and Viewing Patent Report Documents

Add/Modify an Electronic Version of a Government Support Clause or Confirmatory License Document

Extramural users can electronically submit and view government support clauses and confirmatory licenses in the iEdison system. These documents can be submitted in three different formats:

- ❑ PDF – Portable Document Format
- ❑ Paper – Fax or mail
- ❑ TIFF - Tagged Image File Format

On-line submission of a PDF or TIFF eliminates the need to fax or mail a paper copy.

NOTE: Paper versions can be submitted via fax or mail. You do not need to submit a paper version if you submit electronically.

To submit an electronic version of these documents:
1. Add/Modify a patent report as described in *Add a New Patent Report* and *View/Modify a Patent Report*.
   Prior to submitting your changes:
   o For **PDF or TIFF Confirmatory License** documents, select the appropriate document type, click Browse and select the file or type the file location in the 'Confirmatory License File Location' field.
   o For **PDF or TIFF Government Support Clause** documents, select the appropriate document type, click Browse and select the file or type the file location in the 'Government Support Clause File Location' field.
   o For **Paper** invention disclosure documents, select Paper as the document type, and mail or fax the confirmatory license or government support clause document.

NOTE: There is a maximum of 20 pages of text. Anything longer than 20 pages will be truncated.

---

2. Click **Submit** to enter the information. The patent report is updated and the Create Patent Report Verification or Modify Patent Report Verification page is displayed depending on whether you are adding or modifying the patent report.
3. Click **Submit** to accept the information as it is displayed on the verification page OR click **Modify Patent** to return to the previous screen and modify the patent report.
4. The Create Patent Report Confirmation or Modify Patent Report Confirmation page is displayed confirming the patent report was saved to the database and allowing you to add or modify another patent report.

View a Government Support Clause or Confirmatory License Document

To view a government support clause or confirmatory license document:
1. Add/Modify a patent report as described in as described in *Add a New Patent Report* and *View/Modify a Patent Report*.
   Prior to submitting your changes:
2. Select the 'View Current Document' hyperlink next to the 'Current Confirmatory License' field to view the confirmatory license or 'Current Government Support Clause' field to view the government support clause.

NOTE: For help viewing PDF or TIFF versions of the confirmatory license and government support clause documents, see *Troubleshooting the Viewing of PDF/TIFF Government Support Clause and Confirmatory License Documents*.

Generate a Confirmatory License from within iEdison

A version of the confirmatory license can be generated from the public area of the iEdison site (requiring no login) or from the secure area of the iEdison site. If the license is generated from the secure area, the iEdison system will automatically populate the form with the information from the selected patent report.

To generate the confirmatory license from the **public** area:

1. From the Welcome to iEdison page, select **NIH** to access the NIH Extramural Invention Topics page.
2. Select **License to the U. S. Government** to access the License to United States Government - License Form page.
3. Enter the confirmatory license information.
4. Click **Submit**.
5. A printable version of the confirmatory license is displayed with the information you entered filled in.
6. Print, sign and fax the form to the NIH at 301-480-0272.

To generate the confirmatory license from the **secure** area:
1. Add/Modify a patent report as described in *Add a New Patent Report* and *View/Modify a Patent Report*.
2. When the confirmation page is displayed, select **Print License**.
3. A printable version of the confirmatory license is displayed with information from the selected patent report filled in.
4. Print, sign and fax the form to the NIH at 301-480-0272.

Troubleshooting the Viewing of PDF/TIFF Government Support Clause or Confirmatory License Documents

To troubleshoot viewing of **PDF** documents:
1. Verify a version of Adobe Reader is installed on your computer. Downloads of Adobe Reader can be found at http://www.adobe.com/support/downloads/main.html#Readers.
2. Click **Start | Run** from the Windows menu bar.
3. Type 'regedit' in the field provided.
4. Click **OK**. The Registry Editor window opens.
5. In the Registry Editor window, navigate to My Computer -> HKEY_CLASSES_ROOT -> MIME -> Database ->Content Type -> application/pdf.
6. Verify that '.pdf' is listed as the value next to Extension. If not, click on Extension and then click **Edit | Modify** using the edit menu bar. Enter '.pdf' in the value data field and click **OK**.

NOTE: If you continue to have problems viewing PDF government support clause or confirmatory license documents contact technical support at your organization.

To troubleshoot viewing of **TIFF** documents:
1. Verify a version of QuickTime is installed on your computer. Downloads of QuickTime can be found at http://www.apple.com/quicktime/download/.
2. Click **Start** | **Settings** | **Control Panel** from the Windows menu bar.
3. Double click on the **QuickTime** icon to open the QuickTime Settings window.
4. Select '**Browser Plug-In**' from the drop down field at the top of the window.
5. Click the **MIME Settings** button.
6. Click the **plus sign (+) next to the Images Header** to open the Images directory.
7. Check the **box next to the TIFF image file field**.
8. Click **OK**.

NOTE: If you continue to have problems viewing TIFF government support clause or confirmatory license documents contact technical support at your organization.

Patent Report Properties

Grant View Only Access to a Patent Report

The iEdison system allows you to grant "view only" access of a patent report to other organizations.

To grant "view only" access, on the Create New or Modify Patent Report page, enter the organization codes for the organizations to which you are granting access in the 'Organization Code for Other Organizations to View this Patent' field as shown in Figure 40.

NOTE: Only the organization that submitted the parent invention report has permission to edit the linked patent reports.

(Figure 40: Example of Granting View Only Access)

NOTE: You can grant access to a maximum of three organizations.

Link a Patent Report

Patent reports can be linked in the iEdison system to other patents. Once patent reports are linked, the patent will appear in the invention overview under the 'Related Patents and Inventions' heading.

To link patents:
1. Search for and select the parent patent report as described in *Search for a Patent Report*.
2. Record the value of the 'Grantee/Contractor Organization' and 'Patent Docket Number' fields as shown in Figure 41.

(Figure 41: Modify Patent Report IEDISON-2505)

3. Search for and select the patent report that you would like to link to the main patent report.
4. Enter and submit the patent docket number and grantee/contractor organization code associated with the parent patent into the "Parent Patent Docket Number" and "Parent Patent Organization Code" fields as shown in Figure 42.

(Figure 42: Modify Patent Report IEDISON 2505)

5. The patent report is now linked to the parent patent identified by the patent docket number and patent organization code you entered. The invention overview displayed for the patent report will now reflect the linked relationship between these patent reports as show in Figure 43.

NOTE: Complete step 4 above for each patent that you want to designate as a child to the parent patent. You can link a maximum of four patents.

(Figure 43: Example of Linked Patents)

Batch Uploads

Upload Patent Reports in a Data Stream

To upload patent reports in a data stream:
1. Select **Main Menu | Upload iEdison Invention Report DataStream** to access the Upload iEdison Invention/Patent Reports - Select File to Upload page.
2. Click **Browse** and select the file or type the file location in the path and file name field.
3. Click **Submit**. The Submission Summary page is displayed indicating that the file was successfully uploaded and awaiting processing.

NOTE: The option to upload data streams is only displayed if the organization has been granted the ability to perform batch uploads by the NIH administrator.

Special Warnings regarding Patent Reports

Parent/Child Link Breakage Notification

If modifications are made to a patent report that result in the existing parent/child relationships being broken, the iEdison system will notify the user, as shown in Figure 44, and ask them how they want to proceed. The user can choose to submit the changes as they are or return to the Invention Report Form.

Modify Patent Report

You have made changes to this patent report which would break existing parent/child relationships. Accept these changes and submit patent report, or return to patent form and make changes.

(Figure 44: Modify Patent Report – Parent/Child Link Breakage (IEDISON-2511))

Record Locking

The following rules regarding record locking and patent reports are enforced in the iEdison system:

- Only one user can update a given patent report at a time. Therefore, different users cannot update the same record simultaneously.
- The same user cannot request a lock on more than one patent 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.

Utilization Information

Adding/Modifying Utilization Information

Add a New Utilization Report

To add a new utilization report:
1. Select **Main Menu | Create a Utilization Report** to access the Invention Report Search page.
2. Search for the invention report you want to create a new utilization report for as described in *Search for an Invention Report*.
3. Click **Manage Utilization Reports**. The Manage Utilization Reports - Utilization Report Year page (IEDISON-2800) is displayed as shown Figure 45.

(Figure 45: Manage Utilization Reports – Utilization Report Year (IEDISON-2800))

4. Enter the reporting year for which you want to create a utilization report.
5. Click **Submit**. The appropriate version of the Utilization Report page is displayed.
   o If a utilization report for the reporting year chosen does not exist, you will see the Add version of the Utilization Report page (if you have access to add a utilization report).
   o If a utilization report for the report year chosen already exists, you will see the Modify version of the Utilization Report page with the last saved data values displayed (if you have access to modify a utilization report).
   o If you do not have access to add or modify the utilization report, the view-only version of the page is displayed.
6. Enter the new utilization report information.

NOTE: The fields displayed on the utilization form vary depending on the reporting year. See Figure 46 for the pre-2001 format and Figure 47 for 2001 and later.

7. Click **Submit** to enter the information. The utilization information is updated and the Add Utilization Report Verification page is displayed.
   OR
   Click **Modify Report** to return to the previous screen and modify the utilization report.
8. Click **Submit** to accept the information as it is displayed on the verification page. The Manage Utilization Reports Confirmation page is displayed confirming the utilization report was saved to the database and allowing you to enter another utilization report.

(Figure 46: Add Utilization Report Form – Pre-2001 (IEDISON-2801))

(Figure 47: Add Utilization Report Form – 2001 and later (IEDISON-2806))

Search for an Utilization Report

The search fields on this page are all optional. Use any desired combination of the fields to perform the utilization report search.

To search for an utilization report:

1. Select **Main Menu | Search/Modify Existing Utilization Reports** to access the Invention Report Search page.
2. Search for the invention report you want to create, modify, or view utilization information for as described in *Search for an Invention Report*.

Modify an Utilization Report

To view or modify a utilization report:

1. Select **Main Menu | Search/Modify Existing Utilization Reports** to access the Invention Report Search page.
2. Search for the invention report you want to modify or view utilization information as described in *Search for an Invention Report*.
3. Click **Manage Utilization Reports**. The Manage Utilization Reports - Utilization Report Year page is displayed.
4. Enter the reporting year for which you want to modify or view utilization information.
5. Click **Submit**. The appropriate version of the Utilization Report page is displayed.
   o If a utilization report for the reporting year chosen does not exist, you will see the Add version of the Utilization Report page (if you have access to add a utilization report).
   o If a utilization report for the report year chosen already exists, you will see the Modify version of the Utilization Report page with the last saved data values displayed (if you have access to modify a utilization report).
   o If you do not have access to add or modify the utilization report, the view-only version of the page is displayed.
6. Edit or review utilization information.
7. Click **Submit** to enter the information. The utilization information is updated and the Modify Utilization Report Verification page is displayed.
   OR
   Click **Modify Report** to return to the previous screen and modify the utilization report.
8. Click **Submit** to accept the information as it is displayed on the verification page. The Manage Utilization Reports Confirmation page is displayed confirming the utilization report was saved to the database and allowing you to modify another utilization report.

Record Locking

The following rules regarding record locking and utilization reports are enforced in the iEdison system:

- Only one user can update a given 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 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.

Account Administration

Adding/Modifying Account Information

Administrators can manage the accounts of the office's staff. Administrators can create, modify, and delete accounts, reassign inventions from one account to another, and unlock accounts. Each action produces an email notification to the user informing him or her of those changes.

Create a New iEdison Account

To create a new iEdison account:

1. Select **Main Menu** | **Create an iEdison Account** to access the Create Account page (IEDISON-3000) as shown in Figure 48.
2. Enter new account information, noting the following:
   o Fields with an asterisk (*) are required.
   o The username has a 6-character minimum and a 20-character maximum. This is a unique name that must be assigned to one and only one user.
   o The NIH institute or center is for account types PO, GMS/CMS, Intramural OTT/TDCB, or PPE, and only is accessible to certain administrators.
   o The Agency is for account types IDO or Agency, and only is accessible to certain administrators.
   o Address information is not required. However, if you supply one, all fields with a carat (^) are required.
3. Click **Submit** to enter the information. The account is created and the Create Account Confirmation page is displayed.

NOTE: The account owner will receive an email notification containing the username and a randomly generated password. The system requires the new user to change the password immediately after the first login. See *Change Your Password* for more information.

*(Figure 48: Create Account (IEDISON-3000))*

Search for an Account

Search for an account to change the password, update the user type, update account information, delete the account, or reassign invention reports.

To search for an account to modify:

1. Select **Main Menu | Search for an iEdison Account to Modify** to access the Modify Account Search page (IEDISON-3003) as show in Figure 49.
2. Enter the desired search information.

NOTE: You do not have to fill in all fields. Use any combination of fields on this page (Username, Last Name, Extramural Organization Name, and User type) to find an account. Additional search fields (Federal Agency, NIH Institute or Center, and Account Type) are available to authorized users.
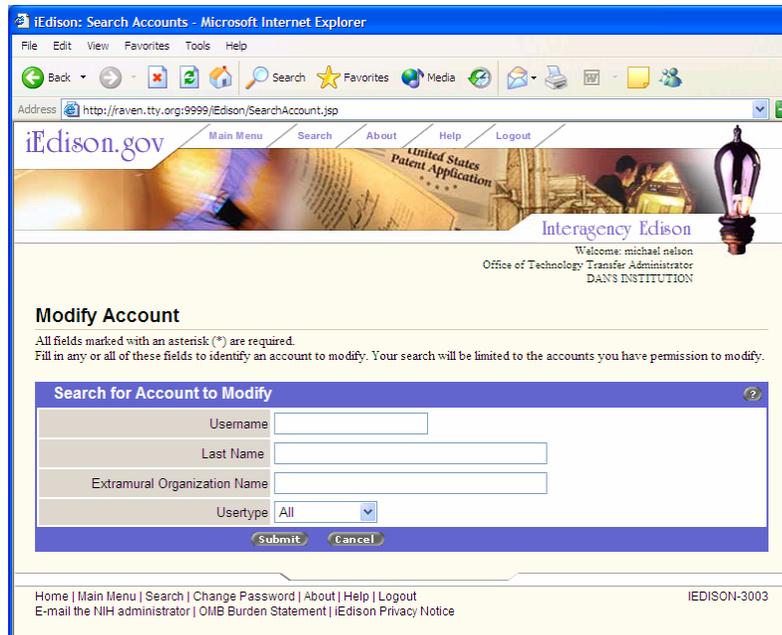
(Figure 49: Modify Account Search (IEDISON-3003))

3. Click **Submit** to enter the search and open the Modify Account Search Results page (IEDISON-3004), as shown in Figure 50, with a list of matching accounts displayed.

NOTE: The account information on the search results page includes the name, username, user type, email, and organization name for each user (agency and account type are displayed for authorized users). Buttons next to each account allow you to change the password, change the user type, update the account, delete the account, or reassign invention reports for the account.
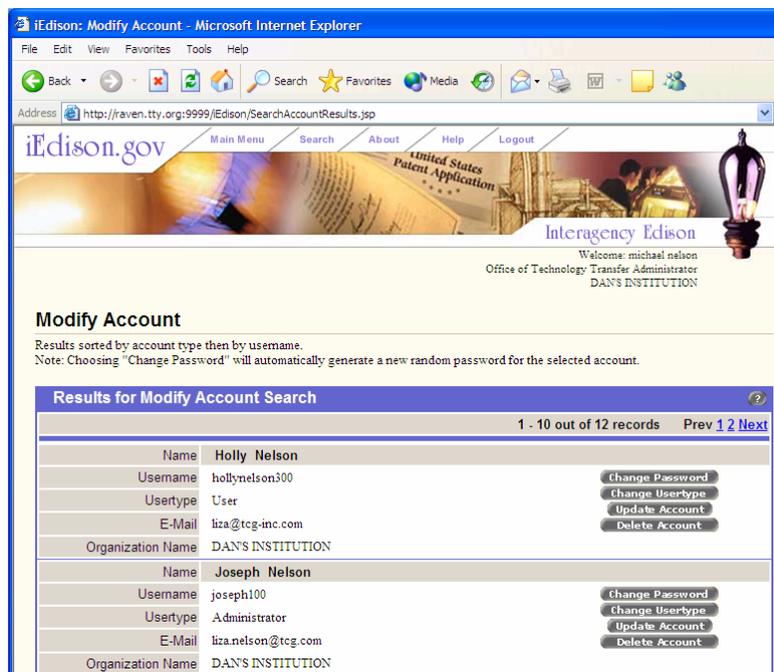
(Figure 50: Modify Account Search Results (IEDISON-3004))

View/Modify Account Information

Clicking the 'Update Account' button on the Modify Account Page displays the update account information page, which allows the administrator to update the user's contact information. An email notification with the changes is automatically sent to the user. The user also has access to the contact information so that he or she can update it as described in *Modify Your User Profile*.

To update the account information for a selected iEdison account:
1. Search for the account you want to modify as described in *Search for an Account*.
2. In the result set for the desired account, click **Update Account**. The Modify Account Information page opens.
3. Enter the account information, noting the following:
   o Fields with an asterisk (*) are required.
   o Address information is not required. However, if you supply one field, all fields with a carat (^) are required.
4. Click **Submit** to enter the information. The Modify Account Confirmation page opens.

NOTE: The account owner will receive an email notification of the change.

   OR
   Click **Cancel**, to cancel the modification. The Modify Account Search Results page is redisplayed.

Delete an Account

Clicking the 'Delete Account' button prompts you to verify that you want to remove the account from the system. Deleting an account cannot be reversed because it removes the user from the iEdison system.

To delete a selected iEdison account:
1. Search for the account you want to delete as described in *Search for an Account*.
2. In the result set for the desired account, click **Delete Account**. The Delete Account Verification page (IEDISON-3010) opens as shown in Figure 51.
3. Click **Yes** to confirm and finalize the deletion. The Delete Account Confirmation page opens to confirm the deletion was made.

NOTE: The account owner will receive an email notification of the deletion.

   OR
   Click **No**, to cancel the deletion. The Modify Account Search Results page is redisplayed.
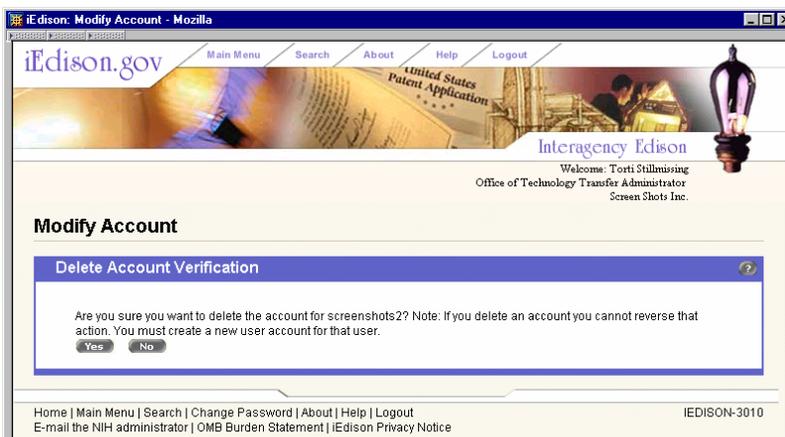
*(Figure 51: Delete Account Verification (IEDISON-3010))*

Reset an Account's Password

Clicking the 'Change Password' button on the Modify Account Search Results page automatically generates a system-generated password for the selected user account. This is useful if the user forgets their password. An email notification with the new password is sent automatically to the account owner.

To reset the password for a selected iEdison account:
1. Search for the account you want to reset the password for as described in *Search for an Account*.
2. In the result set for the desired user account, click **Change Password**. The system automatically resets the user's password to a system-generated password and opens the Change Password Confirmation page (IEDISON-3007) as shown in Figure 52.

NOTE: The account owner will receive an email notification informing them of the change. As soon as they log in with their reset password they will be prompted to change their password.
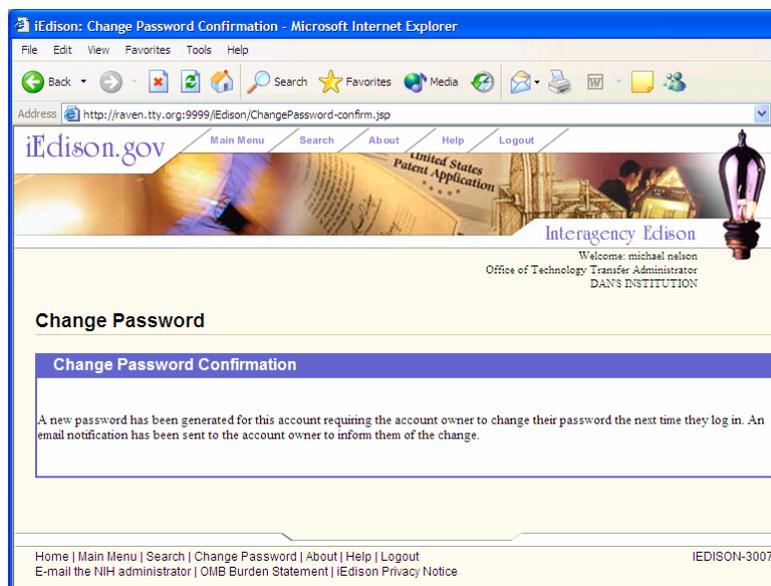
(Figure 52: Change Password Confirmation (IEDISON-3007)

Unlock an Account

Clicking the 'Unlock Account' button prompts you to verify that you want to unlock the account in the system. For security reasons, the iEdison system locks an account when the number of maximum login tries has been exceeded. Administrators of the iEdison system set the number of retries allowed. Once an account is locked, the user must contact their iEdison administrator to get it unlocked. As long as the account remains locked, the user will not be able to access the secure pages within the iEdison system.

To unlock a selected iEdison account:
1. Search for the account you want to unlock as described in *Search for an Account*.
2. In the result set for the desired account, click **Unlock Account**. The Verify Unlock Account page (IEDISON-3012) is displayed as shown in Figure 53.
3. Click **Yes** to confirm and finalize the unlocking of the account. The Unlock Account Confirmation page opens to confirm the account was unlocked.
   OR
   Click **No**, to cancel the unlocking of the account. The Modify Account Search Results page is redisplayed.

(Figure 53: Verify Unlock Account (IEDISON-3012)

Change an Account's User Type

Clicking the 'Change User Type' button on the Modify Account page allows the administrator to change the permission level for the account from user to administrator or administrator to user.

To modify the user type associated with an account:
1. Search for the account you want to modify as described in *Search for an Account*.
2. In the result set for the desired account, click **Change Usertype**. The Change User Type for: <username> page opens.
3. Select a new user type.
4. Click **Submit** to enter the information. The Modify Account - Change User Type for: <username> Confirmation page (IEDISON-3008) opens as shown in Figure 54.

NOTE: The account owner will receive an email notification of the change.

OR
Click **Cancel**, to cancel the modification. The Modify Account Search Results page is redisplayed.
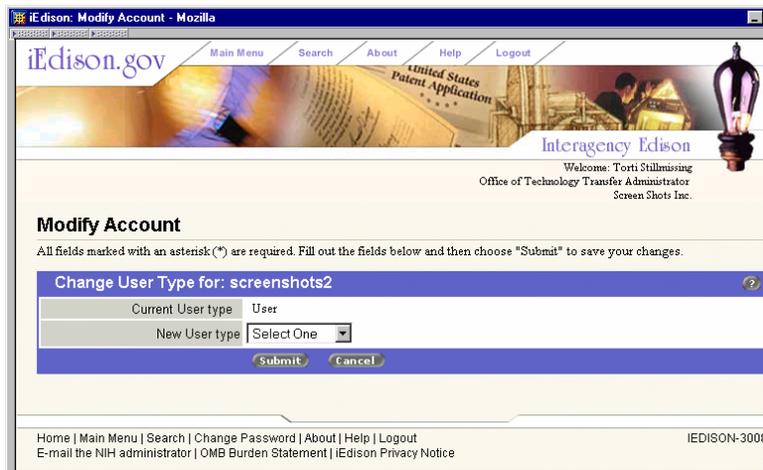
(Figure 54: Change User Type for: <username> (IEDISON-3008)

Report Information

Generating iEdison Reports

The iEdison system allows you to generate different types of reports: Invention Assignment, Invention Report, and Patent Report.

Access Report Menu

To access the main report menu:
1. Select **Main Menu | View or Download Reports on iEdison Records** to access the Report Menu page.
2. Select the **hyperlink** for the report you want to generate.

Generate an Invention Assignments Report

The Invention Assignments report displays a list of all invention reports and to whom they are currently assigned.

To access the Invention Assignment report:
1. Select **Main Menu | View or Download Reports on iEdison Records** to access the Report Menu page.
2. Select **Generate Invention Assignment Report.** The Invention Assignments Report page (IEDISON-4503) is displayed as shown in Figure 55.
3. Review the report, noting the following:
    o   Select the **hyperlink on the invention report number** to view the selected invention report details. The Modify Invention Report page is displayed for the selected invention report.
    o   Select the **hyperlink on the name of the person the invention is assigned to,** to view the selected user's account information. The Modify Account page is displayed for the selected user.

(Figure 55: Invention Assignments Report (IEDISON-4503))

Generate an Invention Report

To access the Invention report:

1. Select **Main Menu | View or Download Reports on iEdison Records** to access the Report Menu page.
2. Select **Generate Invention Report**. The Generate Invention Report - Report Criteria page (IEDISON-4501), as shown in Figure 56, is displayed in a new browser window.
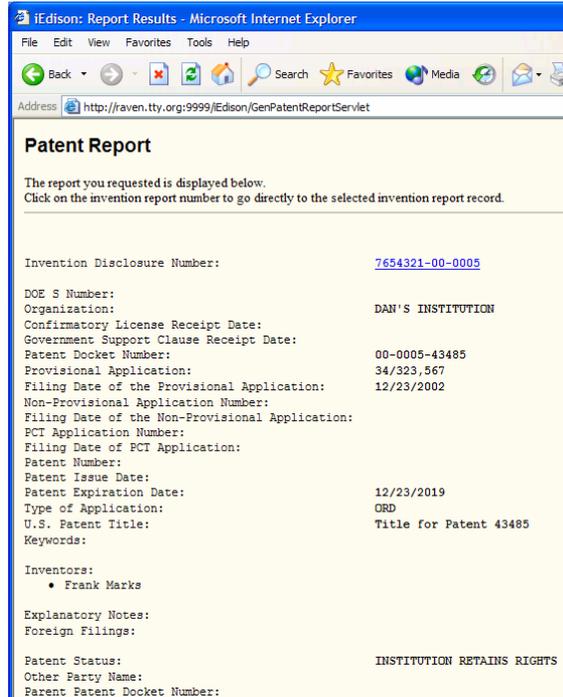

(Figure 56: Generate Invention Report – Report Criteria (IEDISON-4501))

3. Enter the desired report information, noting the following:
    o You can enter a primary, secondary, and tertiary sort order for the report results.
    o **For viewing the report on the screen**, choose Non-Delimited Report as the file format and Display on Screen as the download type.
    o **For downloading the report**, choose Comma Delimited or Tab Delimited as the file format and Download to Disk as the download type.

NOTE: When you save the file, change the name to (XXXX.csv) if you are downloading to a comma-delimited file OR (XXXX.tab) or (XXXX.txt) if you are downloading to a tab-delimited file.

4. Click **Submit** to generate the report. The Invention Report Details page is displayed as shown in Figure 57.
5. Review the report, noting the following:
    o If the download type selected was **Display on Screen**, the Invention Report Details page is displayed. Select the **hyperlink on the invention report number** to view the selected invention report details. The Modify Invention Report page is displayed for the selected invention report.
    o If the download type selected was **Download to Disk**, the file download prompt is displayed.
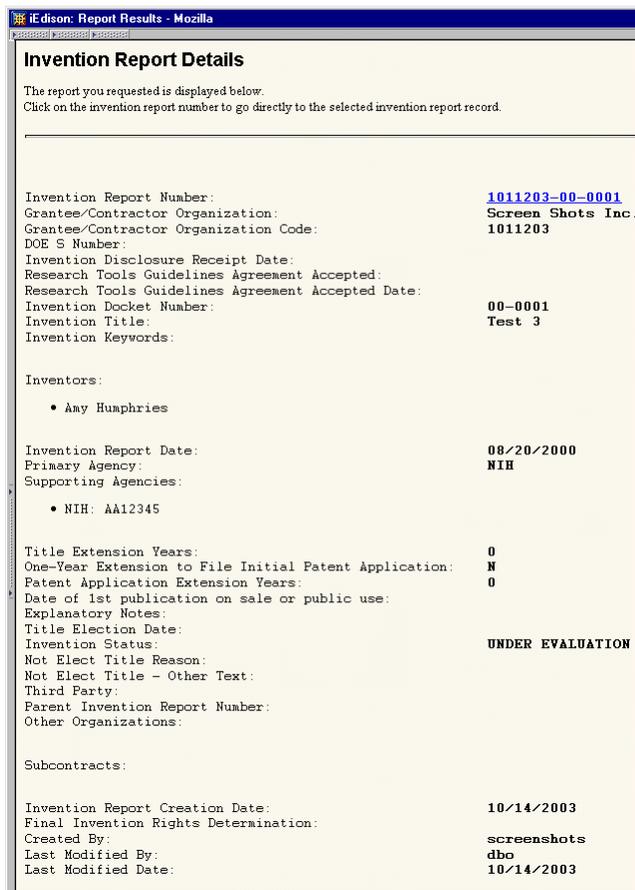
(Figure 57: Example of Invention Report Details)

Generate a Patent Report

To access the Patent report:
1. Select **Main Menu | View or Download Reports on iEdison Records** to access the Report Menu page.
2. Select **Generate Patent Report**. The Generate Patent Report - Report Criteria page (IEDISON-4502) is displayed, as shown in Figure 58, in a new browser window.

(Figure 58: Generate Patent Report – Report Criteria (IEDISON-4502))

3. Enter the desired report information, noting the following:
   o You can enter a primary, secondary, and tertiary sort order for the report results.
   o **For viewing the report on the screen**, choose Non-Delimited Report as the file format and Display on Screen as the download type.
   o **For downloading the report**, choose Comma Delimited or Tab Delimited as the file format and Download to Disk as the download type.

NOTE: When you save the file, change the name to (XXXX.csv) if you are downloading to a comma-delimited file OR (XXXX.tab) or (XXXX.txt) if you are downloading to a tab-delimited file.

4. Click **Submit** to generate the report, the Patent Report page is displayed as shown in Figure 59.
5. Review the report, noting the following:
   o If the download type selected is **Display on Screen**, the Patent Report Details page is displayed. Select the **link on the invention report number** to view the selected invention report details. The Modify Invention Report page is displayed for the selected invention report.
   o If the download type selected is **Download to Disk**, the file download prompt is displayed.

(Figure 59: Example of Patent Report)

Download Report Information

Report data can be downloaded from the iEdison system in two different formats: Comma Delimited and Tab Delimited.

To download invention or patent report data:

1. From the Generate Invention Report - Report Criteria page or Generate Patent Report - Report Criteria page, depending on which type of data you are downloading, select the following report options:
   o Select **Download to Disk** as the download type.
   o Choose **Comma Delimited** or **Tab Delimited** as the file format.

NOTE: You can enter a primary, secondary, and tertiary sort order for the download.

2. Click **Submit** to download the report data, the file download prompt is displayed.

NOTE: When you save the file, change the name to (XXXX.csv) if you are downloading to a comma-delimited file OR (XXXX.tab) or (XXXX.txt) if you are downloading to a tab-delimited file.

3. Follow screen prompts to complete the download.

Notification Message Information

Viewing Notification Messages

View Your Notification Messages at any Time

To view your notification messages at any time:

1. Select **Main Menu | View Notification Messages** to access the View Notification Messages page (IEDISON-4001) as shown in Figure 60.
2. A list of notification messages is displayed. Note the following information about the results list:
   o Results are sorted by urgency, then message date/time.
   o The list of notification messages includes only those that you are allowed to view and that you have not suppressed. See below for more information regarding suppressing messages.
3. Select the **link on the invention report number** to view the selected invention report details. The Modify Invention Report page is displayed for the selected invention report.
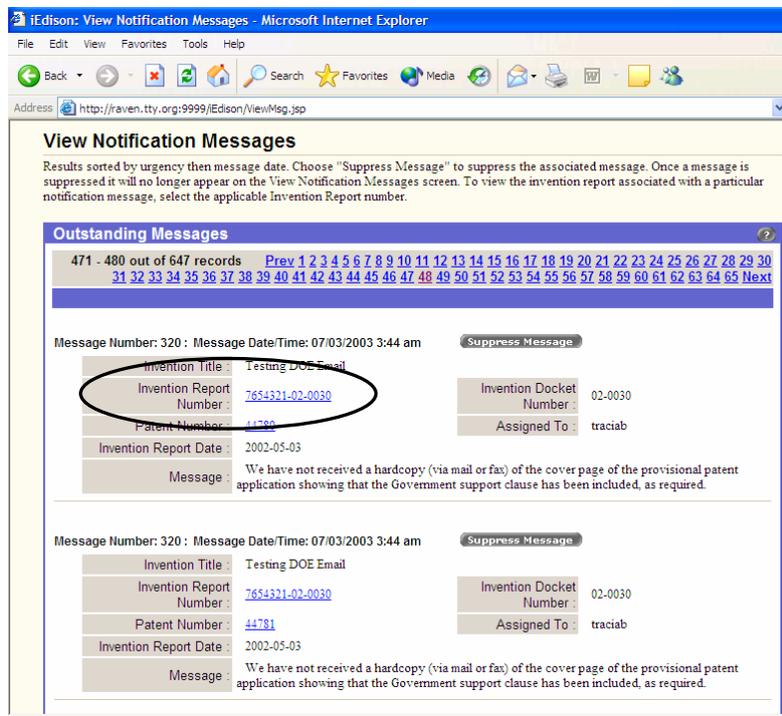
(Figure 60: View Notification Messages (IEDISON-4001))

View Your Notification Messages upon logging in to the iEdison system

The default value for viewing notification messages upon login is 'Yes'. Therefore, you will view the View Notification Messages page upon logging into the iEdison system. If you change the default value to not display messages upon log in, you will be taken directly to the Main Menu page after successfully logging into iEdison.

To specify that you want to view your notification messages upon logging in to the iEdison system:
1. Select **Main Menu | Change Your User Preferences** to access the View Preferences page.
2. A list of current preferences associated with your account is displayed.
3. Choose 'Yes' to view the notification messages upon successful login.
4. Click **Submit** to enter the preference information. The View Preferences Verification page is displayed.
5. Click **Submit** to accept the information as it is displayed on the verification page. The View Preferences Confirmation page is displayed confirming your preference changes were saved to the database.
   OR
   Click **Edit** to return to the previous screen and modify the preference information.
   OR
   Click **Cancel** to cancel the changes and return to the Main Menu.
6. The next time you log into the iEdison system, your notification messages will be displayed upon successfully logging into iEdison.

NOTE: You always have the option of viewing your notification messages by choosing the View Notification Messages hyperlink on your menu. See *View Your Notification Messages at any time* for more details.

Suppress a Notification Message

Notification messages for each user can be suppressed so that only messages related to specific invention or patent reports are displayed. The iEdison system allows you to suppress a notification message once you have viewed it.

NOTE: Administrators always see all notification messages.

To suppress messages:
1. Click **Suppress Message** next to a notification message that you would like to have removed from your list.
2. That notification message is removed and you are returned to the View Notification Messages page.

View Documents Information

Viewing Documents

iEdison Administrators can view all invention disclosures, confirmatory licenses and government support clause documents submitted via the iEdison system.

View a Confirmatory License Document

To view a confirmatory license document:

1. Select **Main Menu | View Submitted Documents** to access the View Documents Search page (IEDISON-4003) as shown in Figure 61.

(Figure 61: View Documents Search (IEDISON-4003))

2. Enter the following search information:
    o   Choose "confirmatory license" for the 'Invention Report Document Type' field.
    o   Enter other desired search criteria. All search fields are optional. Use any desired combination of fields to perform the search.
    o   Your search will encompass all documents that you are allowed to view.

NOTE: Your search encompasses all confirmatory licenses that you are allowed to view.

3. Click **Submit** to enter the search and open the View Documents Search Results page (IEDISON-4004) as shown in Figure 62.
4. A list of matching confirmatory licenses is displayed. Results are sorted by invention report number and then by invention docket number.

NOTE: Documents received via fax or mail will not be accessible.
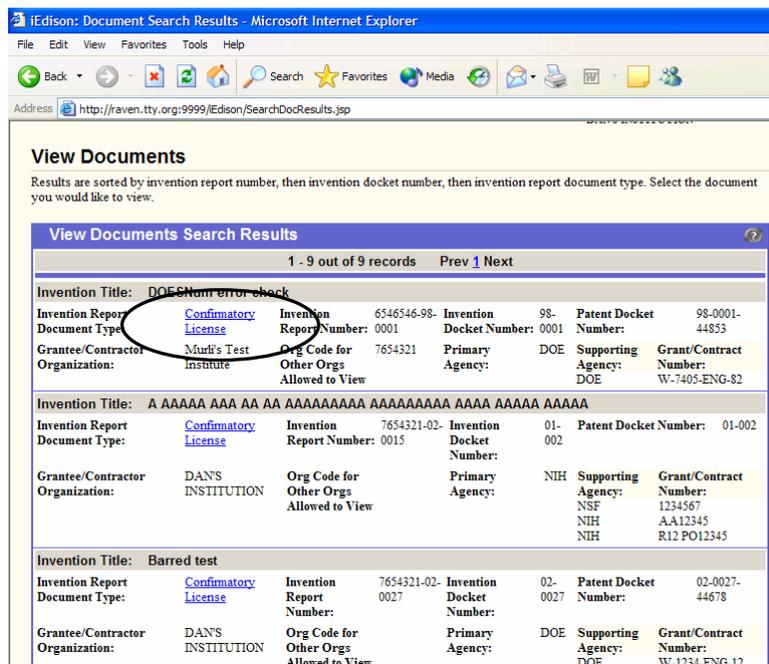
(Figure 62: View Documents Search Results (IEDISON-4004))

5. Click the **confirmatory license hyperlink** to view the selected document.

NOTE: For help viewing PDF or TIFF versions of confirmatory license documents, see *Troubleshooting the Viewing of PDF/TIFF Government Support Clause or Confirmatory License Documents*.

View a Government Support Clause Document

To view a government support clause document:
1. Select **Main Menu | View Submitted Documents** to access the View Documents Search page.
2. Enter the following search information:
   o Choose "government support clause" for the 'Invention Report Document Type' field.
   o Enter other desired search criteria. The search fields are all optional. Use any desired combination of fields to perform the search.
   o Your search will encompass all documents that you are allowed to view.

NOTE: Your search encompasses all government support clauses that you are allowed to view.

3. Click **Submit** to enter the search and open the View Documents Search Results page.

4. A list of matching government support clauses is displayed. Results are sorted by invention report number and then by invention docket number.

NOTE: Documents received via fax and mail are not accessible.

5. Click the **government support clause hyperlink** to view the selected document.

NOTE: For help viewing PDF or TIFF versions of government support clause documents, see *Troubleshooting the Viewing of PDF/TIFF Government Support Clause or Confirmatory License Documents*.

View an Invention Disclosure Document

To view an invention disclosure document:
1. Select **Main Menu | View Submitted Documents** to access the View Documents Search page.
2. Enter the following search information:
   o Choose "invention disclosure" for the 'Invention Report Document Type' field.
   o Enter other desired search criteria. The search fields are all optional. Use any desired combination of fields to perform the search.
   o Your search will encompass all documents that you are allowed to view.

NOTE: Your search encompasses all invention disclosures that you are allowed to view.

3. Click **Submit** to enter the search and open the View Documents Search Results page.
4. A list of matching invention disclosures is displayed. Documents received via fax or mail are not accessible.

NOTE: Results are sorted by invention report number and then by invention docket number.

5. Click the **invention disclosure hyperlink** to view the selected document.

NOTE: For help viewing PDF or TIFF versions of invention disclosure documents see *Troubleshooting the Viewing of PDF/TIFF Invention Disclosure Documents*.

NIH Waiver/Requests Information

Creating NIH Waivers/Requests

Generate and Submit a Confirmatory License

A version of the confirmatory license can be generated from the public area of the iEdison site (requiring no login) or from the secure area of the iEdison site. If the license is generated from the secure area, the iEdison system will automatically populate the form with the information from the selected patent report.

To generate the confirmatory license from the **public** area:

1. From the Welcome to iEdison page, select **NIH** to access the NIH Extramural Invention Topics page.
2. Select **License to the U. S. Government** to access the License to United States Government page (IEDISON-1015) as shown in Figure 63.

(Figure 63: License to United States Government (IEDISON-1015))

3. Enter the confirmatory license information.
4. Click **Submit**.
5. A printable version of the confirmatory license, as shown in Figure 64, is displayed with the information you entered filled in.
6. Print, sign and fax the form to the NIH at (301) 480-0272.
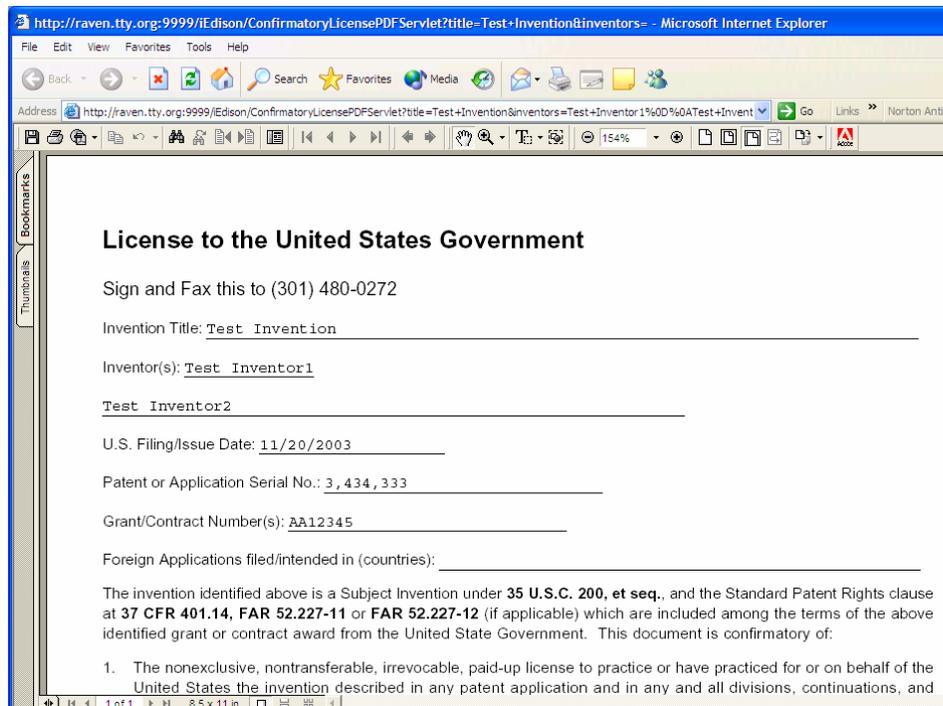
(Figure 64: Example of Printable Version of the License to United States Government)

To generate the confirmatory license from the **secure** area:
1. Add/Modify a patent report as described in *Add a new Patent Report* and *View/Modify a Patent Report*.
2. When the confirmation page is displayed, select **Print License** as shown in Figure 65.
3. A printable version of the confirmatory license is displayed with information from the selected patent report filled in.
4. Print, sign and fax the form to the NIH at (301) 480-0272.
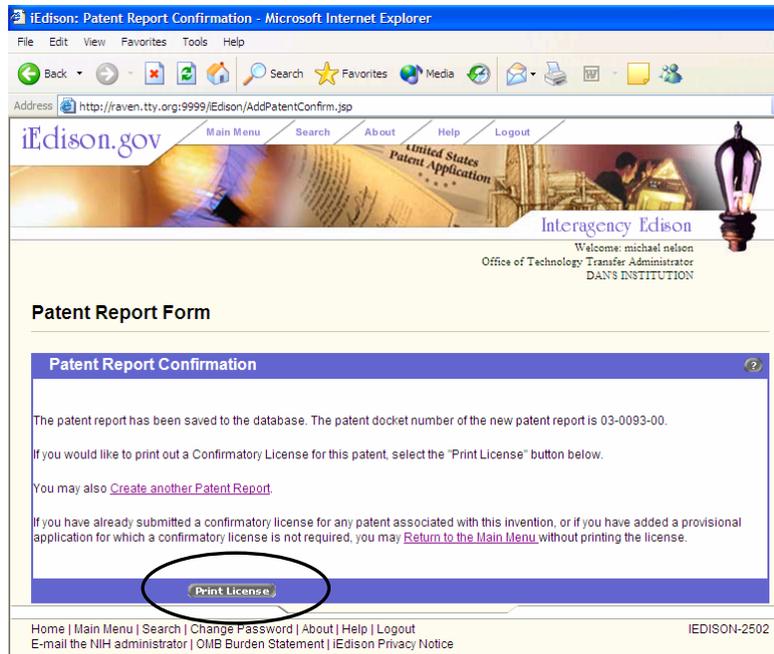
(Figure 65: Patent Report Confirmation (IEDISON-2502))

Generate and Submit an Inventor Certification Form

To generate and submit an inventor certification form:

1. From the Welcome to iEdison page, select **NIH** to access the NIH Extramural Invention Topics page.
2. Select **NIH Procedures for Waiving an Invention to the Inventor** to access the Processing of Requests for Assignment of Invention Rights to the Inventor page.
3. Select **inventor certification** to access the Inventor Certification page (IEDISON-1017) as shown in Figure 66.

(Figure 66: Inventor Certification (IEDISON-1017))

---

4. Enter the inventor certification information, noting the following:
   o Fields with an asterisk (*) are required.
5. Click **Submit**.
6. A view-only version of the Inventor Certification page (IEDISON-1020) is displayed as shown in Figure 67.
7. Click **Print this form**.
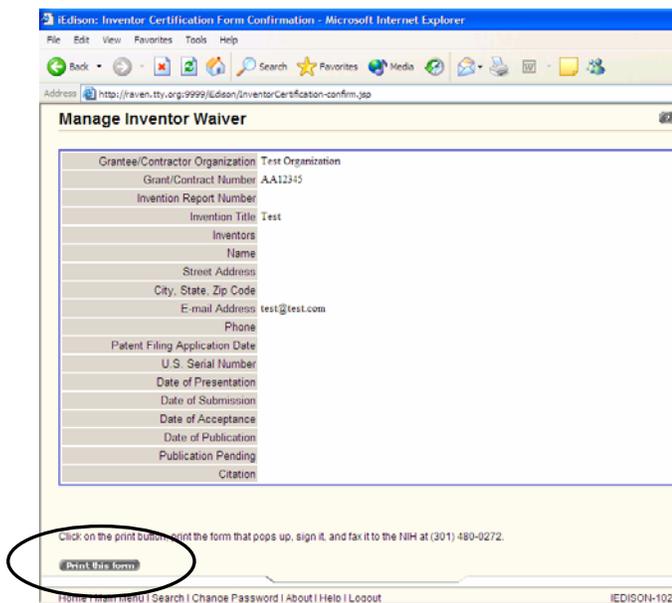
(Figure 67: Inventor Certification – View Only (IEDISON-1020))

8. A printable version of the inventor certification is displayed with the information you entered filled in as shown in Figure 68.
9. Print, sign, and fax the form to the NIH at (301) 480-0272.
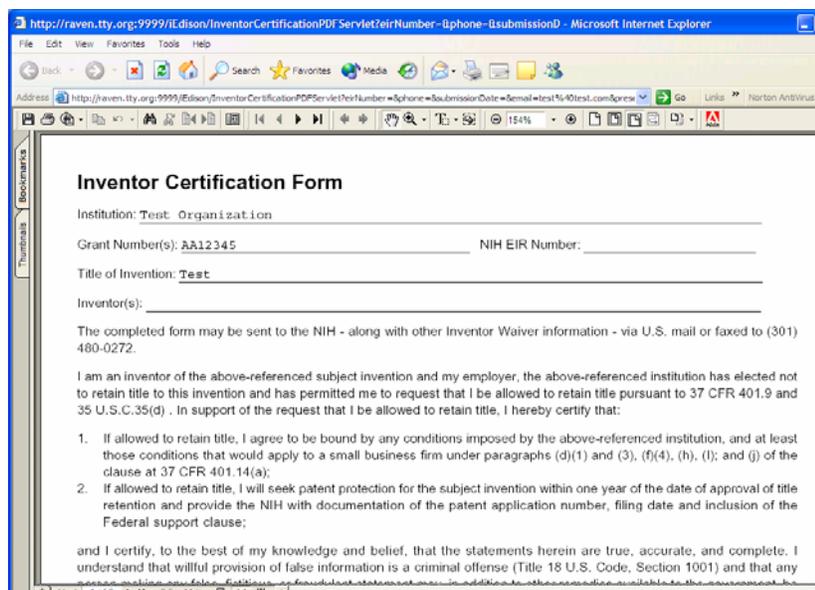
(Figure 68: Example of Printable Version of the Inventor Certification)

Generate and Submit an Inventor Waiver Request Form

To generate and submit an inventor waiver request form:

1. From the Welcome to iEdison page, select **NIH** to access the NIH Extramural Invention Topics page.
2. Select **NIH Procedures for Waiving an Invention to the Inventor** to access the Processing of Requests for Assignment of Invention Rights to the Inventor page.
3. Select **commercialization questions** to access the Inventor Waiver Request page (IEDISON-1018) as shown in Figure 69.

(Figure 69: Inventor Waiver Request (IEDISON-1018))

4. Enter the inventor waiver request information, noting the following:
   o Fields with an asterisk (*) are required.
5. Click **Submit**.
6. The Inventor Waiver Request Confirmation page (IEDISON-1019) is displayed, as shown in Figure 70, with the information you entered filled in and an email notification is submitted to the NIH.
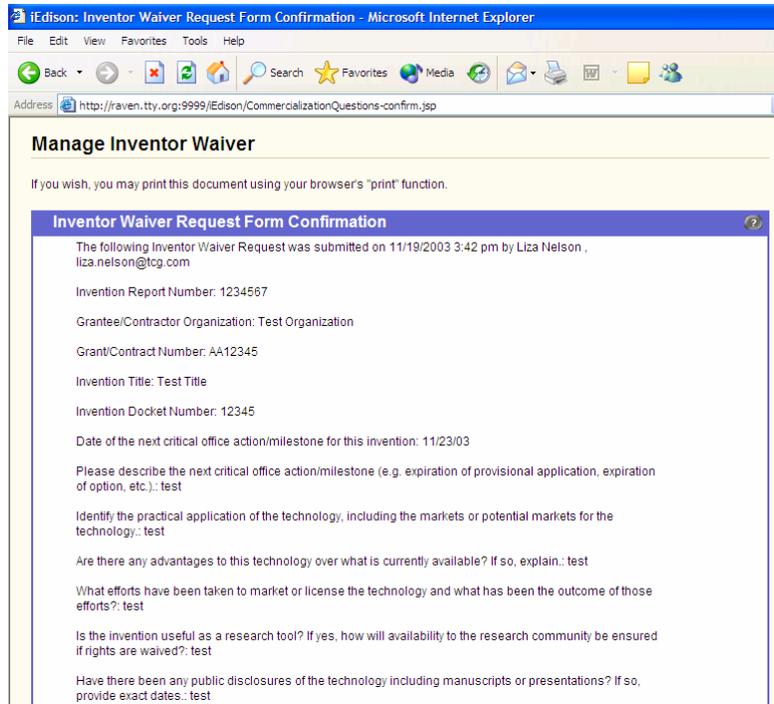
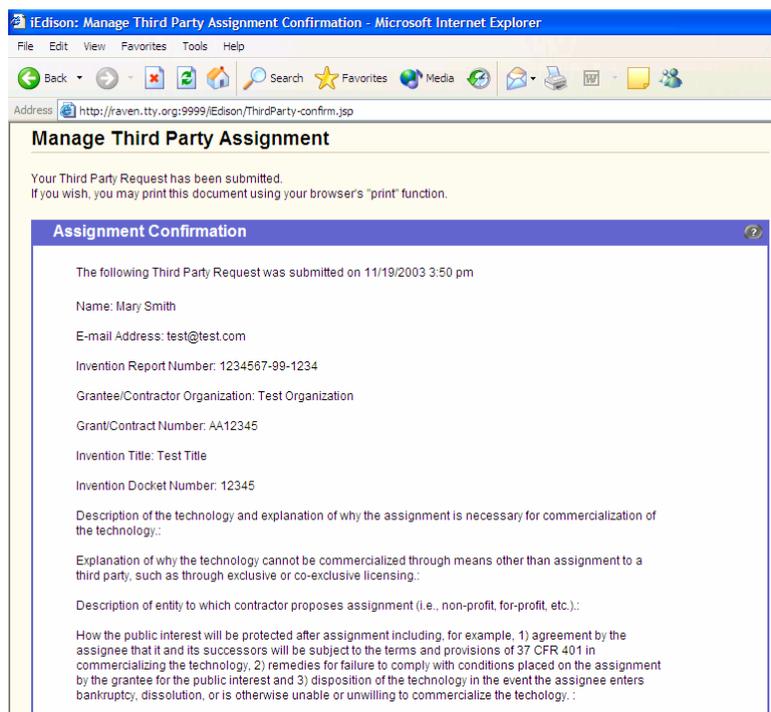*(Figure 70: Inventor Waiver Request Confirmation (IEDISON-1019))*

Generate and Submit a Third-Party Assignment Request

To generate and submit a third-party assignment request:

1. From the Welcome to iEdison page, select **NIH** to access the NIH Extramural Invention Topics page.

2. Select **NIH Procedures for Request for Approval of Third Party Assignment** to access the Third Party Assignment Request page (IEDISON-1022) as shown in Figure 71.

(Figure 71: Third Party Assignment Request (IEDISON-1022))

3. Enter the third party assignment request information, noting the following:
    o   Fields with an asterisk (*) are required.
4. Click **Submit**.
5. The Third Party Assignment Confirmation page (IEDISON-1021) is displayed, as shown in Figure 72, with the information you entered filled in and an email notification is submitted to the NIH.

(Figure 72: Third Party Assignment Request Confirmation (IEDISON-1021))

Generate and Submit a U.S. Manufacturing Waiver Request

To generate and submit a U.S. manufacturing waiver request:
1. From the Welcome to iEdison page, select **NIH** to access the NIH Extramural Invention Topics page.
2. Select **Expediting Requests for Waivers of the U.S. Manufacturing Requirement** to access the NIH Procedures for Requests for Waivers of the U.S. Manufacturing Requirement in Licenses to Extramural Inventions - U.S. Manufacturing Waiver Request Form page (IEDISON-1027) as shown in Figure 73.

(Figure 73: U.S. Manufacturing Waiver Request (IEDISON-1027)

3. Enter the manufacturing waiver request information, noting the following:
   o Fields with an asterisk (*) are required.
4. Click **Submit**.
5. The NIH Procedures for Requests for Waivers of the U.S. Manufacturing Requirement in Licenses to Extramural Inventions Confirmation page (IEDISON-1028) is displayed, as shown in Figure 74, with the information you entered filled in and an email notification is submitted to the NIH.
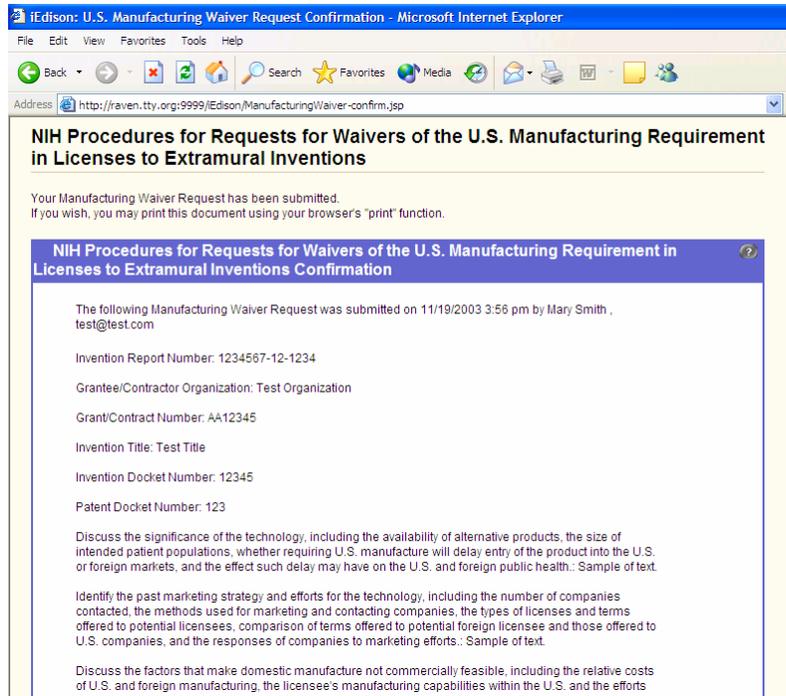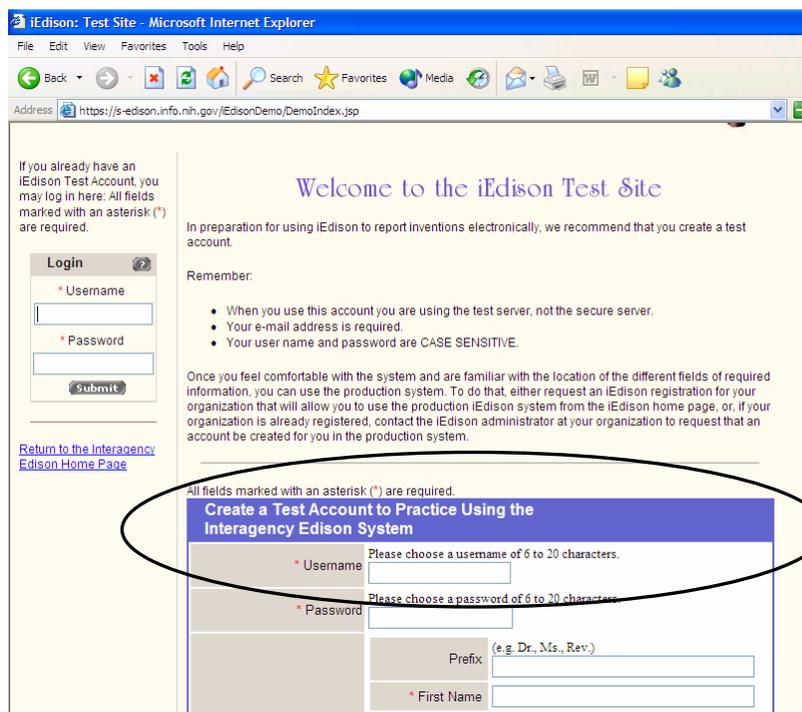
(Figure 74: U.S. Manufacturing Waiver Request Confirmation (IEDISON-1028)

Demo System Information
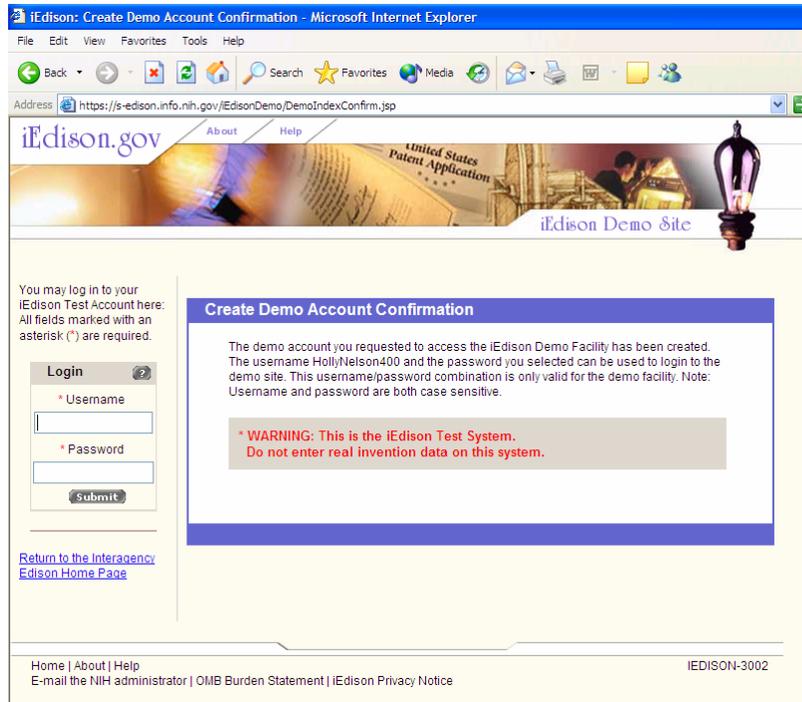
Creating Test Accounts

Create a Test Account

1. Select **Main Menu | Access iEdison Test Site** to access the Welcome to iEdison Test Site page (IEDISON-1001) as shown in Figure 75.

(Figure 75: iEdison Test Site Welcome Page (IEDISON-1001)

2. In the Create Test Account section, enter new test account information, noting the following:
   - o Fields with an asterisk (*) are required.
   - o The username has a 6-character minimum and a 20-character maximum. This is a unique name that must be assigned to one and only one user.
   - o The password has a 6-character minimum and a 20-character maximum.
   - o The username and password fields are case sensitive.
3. Click **Submit** to enter the information. The account is created and the Create Demo Account Confirmation page (IEDISON-3002) is displayed as shown in Figure 76.

*(Figure 76: Create Demo Account Confirmation (IEDISON-3002)*

Accessing the Demo System

Log in to iEdison Demo System

To log in to the iEdison Test system, you need a test account. This requires a unique username and password. The username and password can be any combination of letters and numbers and must be between six to twenty characters. For more information regarding creating a test account, see Create a Test Account.

To log in to the iEdison Test Site:
1. Select **Main Menu | Access iEdison Test Site** to access the Welcome to iEdison Test Site page as shown in Figure 77.
2. Enter your test username and password in the fields provided.
3. Click **Submit** to open a new iEdison Test session.
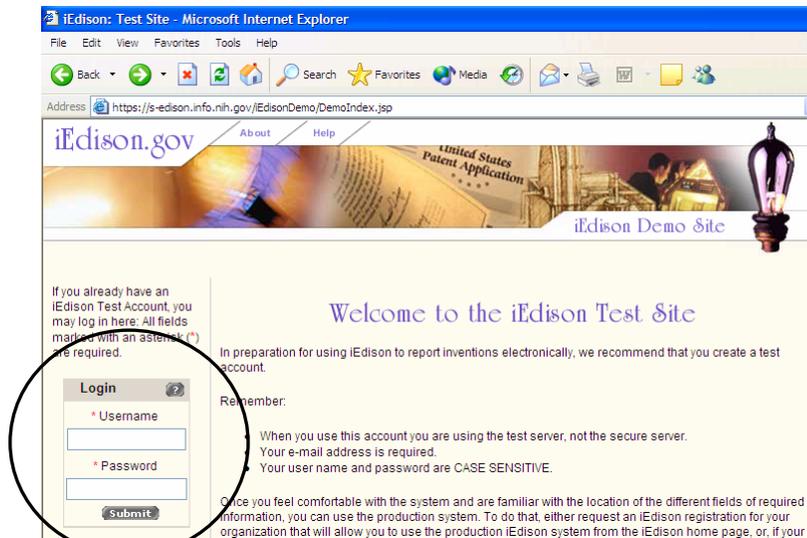
(Figure 77: Example of iEdison Test Site

Email Notifications

Extramural Messages

The iEdison system has many built-in email notifications to ensure proper notification of all changes to your submissions. The notifications sent to extramural organizations are sorted alphabetically by message subject and listed below. The 'Message Subject' reflects the text that appears as the subject in the email notification.

Message Subject	Description
iEdison Email Address Verification	An email message is generated automatically by the system and sent to the Office of Technology Transfer (OTT) administrator or the inventor, who registers a new iEdison organization, to validate the email address entered on the registration request form.
IEdison Email Address Verification Confirmation	When the OTT administrator or the inventor verifies his or her email address, the system replies to them with a message confirming that validation.
iEdison Invention Report Transferred Notification	When a user has transferred an invention report, the Invention Report Transferred Notification email is automatically generated and sent to the extramural OTT administrators who are assigned to the organization from whom rights are being removed and to the extramural OTT administrators who are assigned to the organization receiving the rights to the invention report being transferred. The email is also sent to the email address specified for iEdison user support.
iEdison Notification of Account Deletion	When an account is deleted, an email message is automatically sent to the account owner.
iEdison Notification of Account Modification	When account information has been modified, an email message with the changes is automatically sent to the account owner.
iEdison Notification of Change of Account Type	If an account administrator changes a user's account, either from an administrator to a regular user, or from one type of user within the federal system to another type, an email message is sent automatically to the person whose account was changed.
iEdison Notification of Broken Patent Link	When an organization or inventor modifies a patent report that causes a parent/child patent or invention report relationship to be broken, an email message is sent automatically to all organizations that had

Message Subject	Description
	been able to view any related patent report.
iEdison Notification of E-mail Address Change	When you change your email address, or when an administrator changes it for you, an email message with the new email address is sent automatically to the new email address.
iEdison Notification of Invention Report Reassignment	When an Office of Technology Transfer (OTT) administrator assigns an invention report to someone other than the person who entered the report (the default owner), an email message with details of the newly assigned invention report is sent to the new owner.
iEdison Notification of New Account	When an administrator creates an account, an email message containing the username, password, and permissions information is sent automatically to the person whose account has been created.
iEdison Notification of Password Change	When an account administrator resets a user's password, an email message is automatically sent to the user with the new password. This randomly generated password must be changed the first time the user logs in.
iEdison Patent Report Transferred Notification	When an organization transfers a patent to another organization, an email message is sent automatically to the extramural OTT administrator at the organization relinquishing the rights and the organization receiving the rights, as well as the iEdison administration office.
iEdison Registration Approval and Account Creation	When the iEdison accounts administrator approves a registration request, an email message is sent automatically to the OTT administrator or the inventor who submitted the request. That message includes the username for the account.
iEdison Registration for Your Grantee/Contractor Organization	An email message is sent automatically to the signing authority for an organization that the organization's request for registration has been approved and the organization was registered with iEdison under their signing authority. The email message goes to the person whose name and email address were listed on the registration request as the signatory for the organization.
iEdison Registration Rejection Notification	When the iEdison accounts administrator rejects a registration request, an email message is sent automatically to the OTT administrator or the inventor who submitted the request.
Request for More iEdison Information	The iEdison accounts administrator can send email to the OTT administrator or the inventor requesting more information before processing a registration request.

Agency Messages

The iEdison system has many built-in email notifications to ensure proper notification of all changes to your submissions. The notifications sent to agency users are sorted alphabetically by subject and listed below. The 'Subject' column reflects the text that appears as the subject in the email notification.

Message Subject	Description
iEdison Accounts Administrator Message Notification Re: <message type>	When a user chooses to send a message to the NIH iEdison Accounts Administrator using the 'E-mail the NIH administrator' hyperlink, an email message is sent to the NIH iEdison Accounts Administrator with details regarding the issue the user needs assistance with.
iEdison Institution Not Retains Rights Notification	When an organization or inventor changes the patent status from "Institution Retains Rights" to some other value, an email message is sent automatically to the primary and supporting agencies identified in the invention report related to the patent that rights are not being retained and that government action is needed.
iEdison Invention Disclosure Modified Notification	When an organization modifies the text of an invention disclosure or uploads a new invention disclosure document, an email message is sent automatically to notify the primary agency and the supporting agencies identified in the invention report that a new invention disclosure document has been uploaded and needs to be verified.
iEdison New Invention Report Notification	When an organization creates a new invention report with Departmnet of Energy (DOE) funding, an email message is sent automatically to notify agency users at DOE that a new invention report has been added and needs to be verified.
iEdison New Patent Report Notification	When an organization creates a new patent report with DOE funding, an email message is sent automatically to notify agency users at DOE that a new patent report has been added and needs to be verified.
iEdison Not Elect Title Notification	When an organization or inventor chooses not to elect title to an invention, an email message is generated by the system to notify the primary agency associated with the invention that an invention report has been submitted with a status of "Not Elect Title".
iEdison Notification of Inventor Waiver Request	The Inventor Waiver Request Email is generated automatically after successful completion of the commercialization form to notify the National Institutes of Health that an organization has

Message Subject	Description
	requested approval for an inventor waiver for one of their inventions. The organization still must print, sign and fax the Inventor Certification form to complete the transaction.
iEdison Notification of Manufacturing Waiver Request	When an organization asks for approval for a manufacturing waiver for a patent filing, an email message is sent automatically to the NIH.
iEdison Notification of Patent Confirmatory License Notification	When an organization or inventor uploads a new confirmatory license document, an email message is automatically sent to the primary agency identified in the invention report related to this patent report indicating that a new confirmatory license document has been uploaded and needs to be verified.
iEdison Notification of Third Party Assignment Request	When an organization requests approval for third-party assignment for one of its inventions, an email message containing the specifics of the request is sent to the iEdison accounts administrator.
iEdison Registration Notification	When an organization registers with iEdison, the Federal agency whose funding agreement number is on the registration form is notified by email, and the agency is asked to validate the organization's registration information.
iEdison Registration Approval Notification	When a registration request is approved, a notification message is sent by email to the Federal agency whose funding-agreement number was listed in the registration request form.

IEdison Administrator Information

iEdison allows administrators to:

- Search, view, and modify invention-related data for all records in the system.
- View all documents submitted via iEdison without having to modify the invention or patent report.
- Process pending registration requests.
- Manage all iEdison accounts including the ability to change the account type.
- Manage invention-related data by organization.
- View audit records.
- View system usage.

NOTE: Although all users can search, view and modify invention reports for the organization to which they belong or have been granted "view only" access, only the iEdison administrator can access all of the invention reports in the system.

Processing Registration Requests

The iEdison system has a simplified registration process for new organizations and inventors, see *Register an Organization in iEdison* for more details. Once a request is submitted, it is processed by the iEdison Accounts Administrator. Functionality related to the processing of these registration requests follows.

Search Registration Requests

To search for a registration request to process:

1. Select **Main Menu | Search for Pending iEdison Registration Requests** to access the Search for Registration Requests page (IEDISON-5500) as shown in Figure 78.

NOTE: The search fields on this page are all optional. Use any desired combination of the fields to perform the search.

(Figure 78: Search for Registration Requests (IEDISON-5500))

2. Enter the desired search information.

NOTE: Your search encompasses all registration requests that meet your search criteria.

3. Click **Submit** to enter the search and open the Search for Registration Requests Results page (IEDISON-5501) as shown in Figure 79.
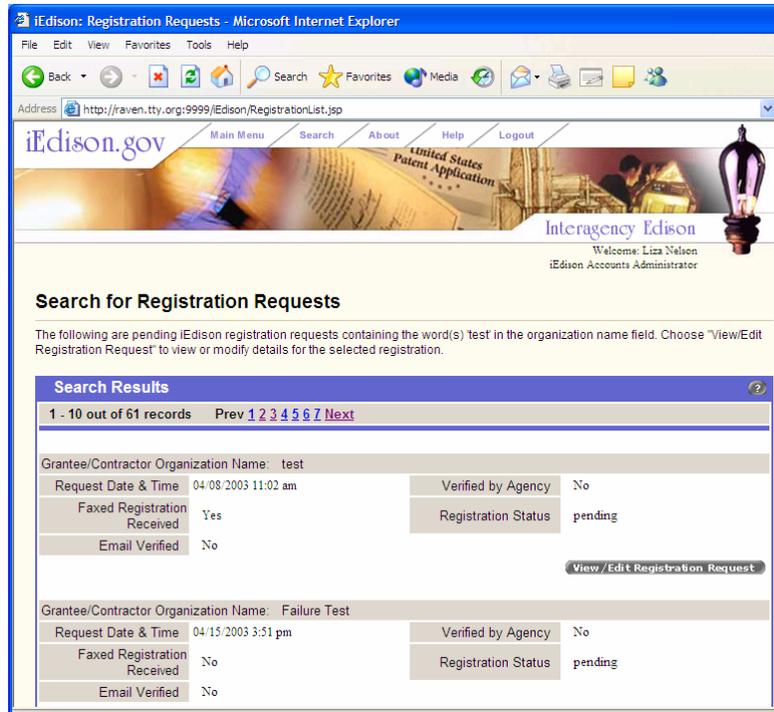
(Figure 79: Search for Registration Requests Results (IEDISON-5501))

4. A list of matching registration requests is displayed.

NOTE: Results are sorted by request date and time, oldest first.

5. Click **View/Edit Registration Request** to view registration details for the desired registration request. The iEdison Registration Request Details page (IEDISON-5502) is displayed as shown in Figure 80.

From the Registration Request Details page, the iEdison administrator can update the registration status, send an email request for additional information, note the receipt of registration-verification items such as the faxed request, update organization information and assign a grantee/contractor organization code.

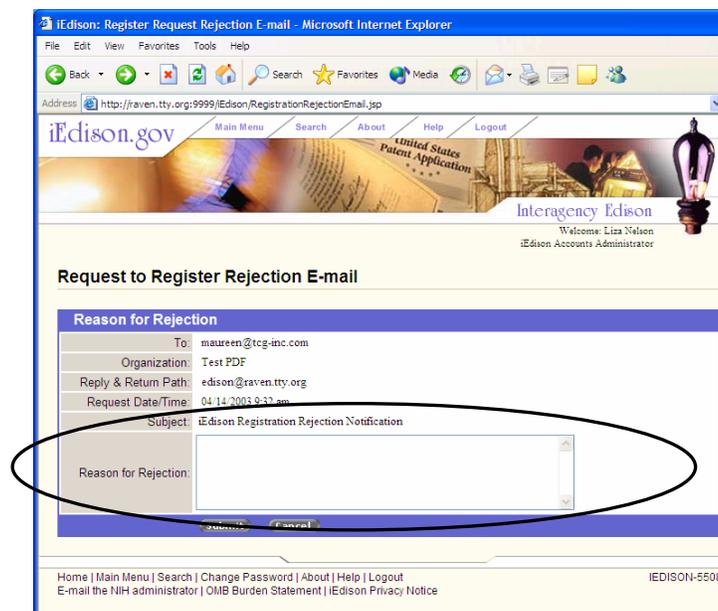*(Figure 80: Registration Request Details (IEDISON-5502))*

View/Modify a Registration Request

To view/modify a registration request:

1. Search for and select the registration request as described in *Search iEdison Registration Requests*.
2. The iEdison Registration Request Details page is displayed.
3. Enter the registration information, noting the following:
    o   Fields followed by an asterisk (*) are required.
    o   A registration request cannot be approved until the faxed registration has been received, the email address has been verified, and the registration request has been verified by the agency.
    o   Click **Cancel Changes** to reset the registration request details back to their last saved value. The iEdison Registration Request Details page is re-displayed with the old values present.

4. Click **Submit Changes** to enter the information. The registration request is updated and the iEdison Registration Information Confirmation page (IEDISON-5503) is displayed as shown in Figure 81.

    o   Click **View Registration Request** to view the registration request you just modified.

    o   Click **Search for another registration request** to return to the Search for Registration Requests page and perform a new search.

    o   Click **Return to main menu** to access the iEdison Main Menu page.
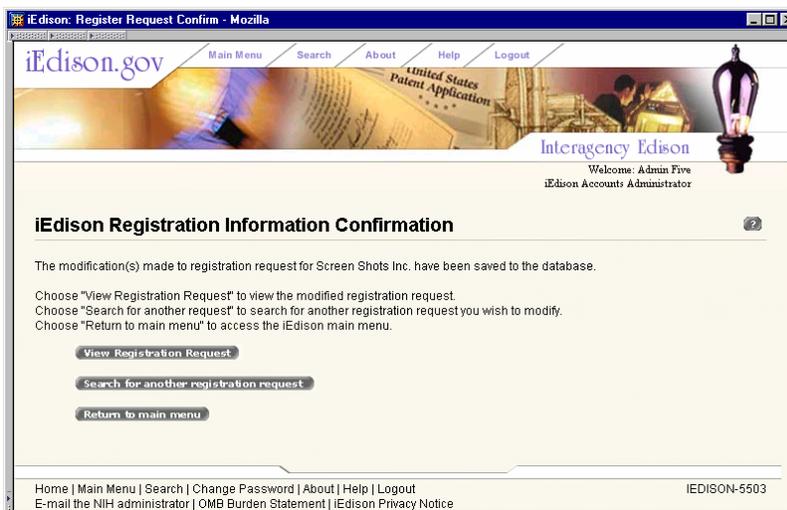
(Figure 81: iEdison Registration Information Confirmation (IEDISON-5503))

Approve a Registration Request

To approve a registration request:

1. Search for and select the registration request as described in *Search iEdison Registration Requests*.

2. The iEdison Registration Request Details page is displayed. Note the following about the registration information:

    o   Fields followed by an asterisk (*) are required.

    o   A registration request cannot be approved until the faxed registration has been received, the email address has been verified, and the registration request has been verified by the agency.

    o   Click **Cancel Changes** to reset the registration request details back to their last saved value. The iEdison Registration Request Details page is re-displayed with the old values present.

3. Set the registration status to "Approved".

NOTE: When modifications to the request are submitted, the individuals listed as the Extramural Technology Transfer contact and the Signatory will receive an email notification regarding the approval.

4. Click **Submit Changes** to enter the information. The registration request is approved and the iEdison Registration Information Confirmation page is displayed.

o   Click **View Registration Request** to view the registration request you just modified.
o   Click **Search for another registration request** to return to the Search for Registration Requests page and perform a new search.
o   Click **Return to main menu** to access the iEdison Main Menu page.

Deny a Registration Request

To deny a registration request:
1.   Search for and select the registration request as described in *Search iEdison Registration Requests*.
2.   The iEdison Registration Request Details page is displayed. Note the following about the registration information:
     o   Click **Cancel Changes** to reset the registration request details back to their last saved value. The iEdison Registration Request Details page is re-displayed with the old values present.
3.   Set the registration status to "Rejected".

NOTE: When a registration request is denied, the individual listed as the Extramural Technology Transfer contact will receive an email notification regarding the rejection.

4.   Click **Submit Changes** to submit the rejection. The Request to Register Rejection E-mail page (IEDISON-5508) is displayed as shown in Figure 82.

(Figure 82: Request to Register Rejection E-mail (IEDISON-5508))

5.   Enter the reason you are denying the registration request in the 'Reason for Rejection' field.
6.   Click **Submit Changes** to confirm the rejection. The Request to Register Reject E-mail Confirmation page is displayed.
7.   Click **Return** to return to the iEdison Main Menu page.

Request More Information Regarding a Registration Request

To request more information regarding a registration request:

1. Search for and select the registration request as described in *Search iEdison Registration Requests*.

2. The iEdison Registration Request Details page is displayed. Note the following about the registration information:
   - o Fields followed by an asterisk (*) are required.
   - o Click **Cancel Changes** to reset the registration request details back to their last saved value. The iEdison Registration Request Details page is re-displayed with the old values present.

3. Click **Send e-mail for information**. The Request More Information page (IEDISON-5504) is displayed as shown in Figure 83.

(Figure 83: Request More Information (IEDISON-5504))

4. Enter the details regarding the additional information needed in the 'Additional Text' field.

5. Click **Submit** to send the request. The Request More Information Confirmation page (IEDISON-5505) is displayed as shown in Figure 84.
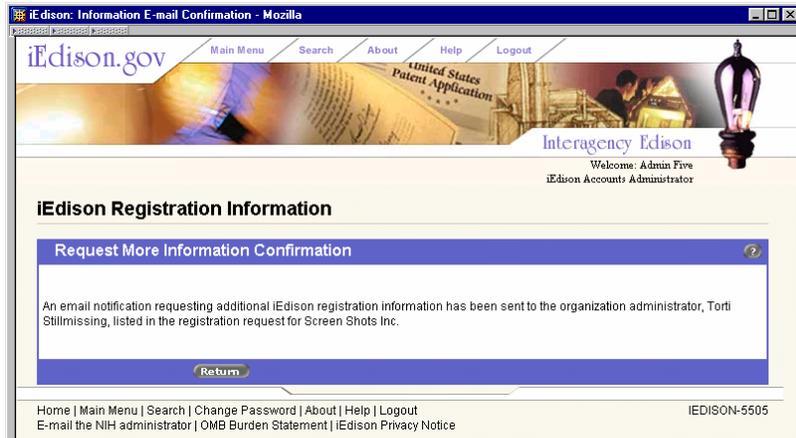
(Figure 84: Request More Information Confirmation (IEDISON-5505))

6.   Click **Return** to return to the iEdison Main Menu page.

Special Warning Regarding Registration Requests

The iEdison system will alert users if they attempt to approve an organization that has not met the minimum conditions for registration as shown in Figure 85. A registration request cannot be approved until the faxed registration has been received, the email address has been verified, and the registration request has been verified by the agency. Until these three conditions are met, the user will continue to receive the Request Approval Error message.

(Figure 85: Request Approval Error (IEDISON-5505))

Modifying an Account

**Change an
Account's
Account Type**

To modify the account type associated with an account:
1.   Search for the account you want to modify as described in *Search
     for an Account*.
2.   In the result set for the desired account, click **Change Usertype**.
     The Change User Type for: <username> page opens.
3.   Select a new user type.
4.   Click **Submit** to enter the information. The Change User Type
     for: <username> Confirmation page opens.

NOTE: The account owner will receive an email notification of the change.

OR
Click **Cancel**, to cancel the modification. The Modify Account -
Results for Modify Account Search page is redisplayed.

**Update Account
Information**

Clicking the 'Update Account' button on the Modify Account Page displays the
update account information page, which allows the administrator to update the
user's contact information. An email notification with the changes is
automatically sent to the user. Users also have access to the contact information
so that they can update it as described in *Modify Your User Profile*.

To update the account information for a selected iEdison account:
1.   Search for the account you want to modify as described in *Search
     for an Account*.
2.   In the result set for the desired account, click **Update Account**.
     The Modify Account Information page opens.
3.   Enter the account information, noting the following:
     o   Fields with an asterisk (*) are required.
     o   Address information is not required. However, if you supply
         one field, all fields with a carat (^) are required.
4.   Click **Submit** to enter the information. The Modify Account
     Confirmation page opens.

NOTE: The account owner will receive an email notification of the change.

OR
Click **Cancel**, to cancel the modification. The Modify Account
Search Results page is redisplayed.

Viewing Audit Records

Search for an Audit Record

The audit trail in the new iEdison system enables iEdison administrators to monitor system usage and data changes.

To search for a record in the audit trail:

1. Select **Main Menu | View Audit Records** to access the Audit Record Search page (IEDISON-6000) as shown in Figure 86.

NOTE: The search fields on this page are all optional. Use any desired combination of the fields to perform the audit record search.

(Figure 86: Audit Record Search (IEDISON-6000))

2. Enter the desired search information, noting the following:
   o   Your search will encompass all the audit records that meet your search criteria.
3. Click **Submit** to enter the search and open the Audit Record Search Results page.
   OR
   Click **Cancel** to return to the Main Menu.
4. A list of matching audit records is displayed. Note the following information about the audit list:
   o   By default, results are sorted by event date, oldest first.
   o   A link is provided on the audit event field to show the details of the selected audit record.
   o   Results can be re-sorted by using the up and down arrows next to each column header.
5. Select the **audit event link** for the audit record for which you want to view audit details.   The Audit Record Details page is displayed.

View an Audit Record

The Audit Record Search Results page (IEDISON-6001), as shown in Figure 87, displays the user actions, username, entity affected, session identifier, event date, and any applicable comments. The columns can be changed to display in ascending or descending order by clicking on the blue arrows located next to each column heading.

To view an audit record:

1. Search for the audit record you want to view details about as described in *Search for an Audit Record.*

2. Select the **audit event link** for the audit record for which you want to view audit details.   The Audit Record Details page (IEDISON-6002) is displayed as shown in Figure 88.

NOTE: Clicking the link for the event displays the record details, including the old and new data values for each field that was affected by the user's actions.

3. This page lists the item that was modified, the value prior to modification, and the value after modification.
4. Click **Return to Search Screen** to return to the Audit Record Search Results page.

(Figure 87: Audit Record Search Results (IEDISON-6001))
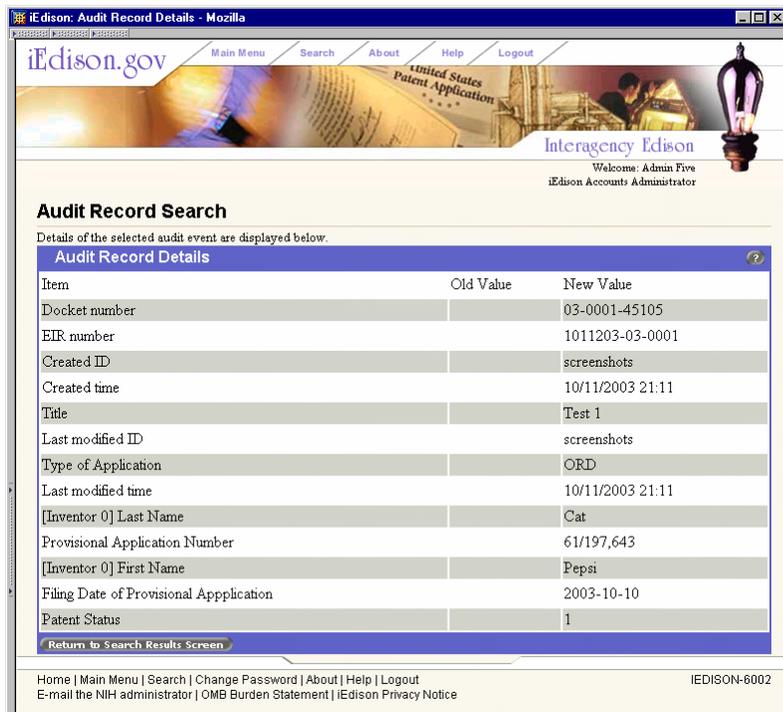
(Figure 88: Audit Record Details (IEDISON-6002))

Viewing System Usage

View System Usage for all Organizations

From these figures, the iEdison administrator can determine the total number of registered extramural organizations and federal agencies, total number of extramural and federal accounts, and the total number of extramural and federal logins.

To view the organization usage totals for the system:
1.   Select **Main Menu | View System Usage** to access the View System Usage page (IEDISON-6005) as shown in Figure 89.
2.   Review the organization usage information.
3.   Click **Return** to return to the Main Menu page.
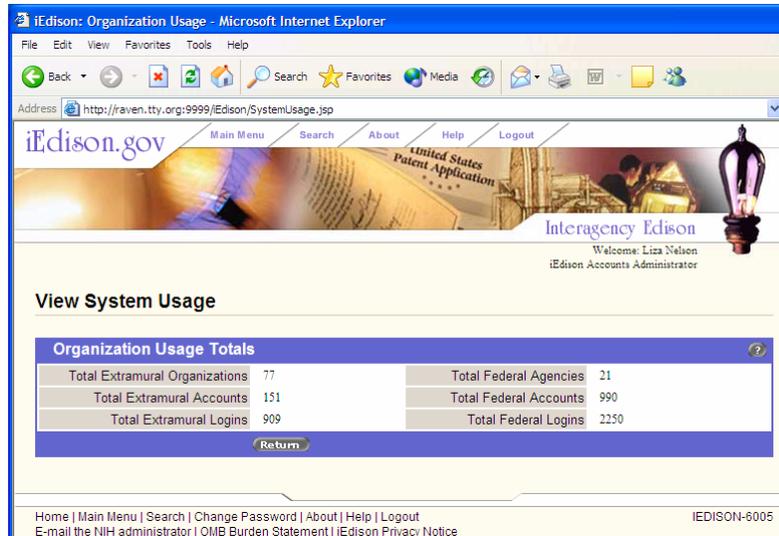
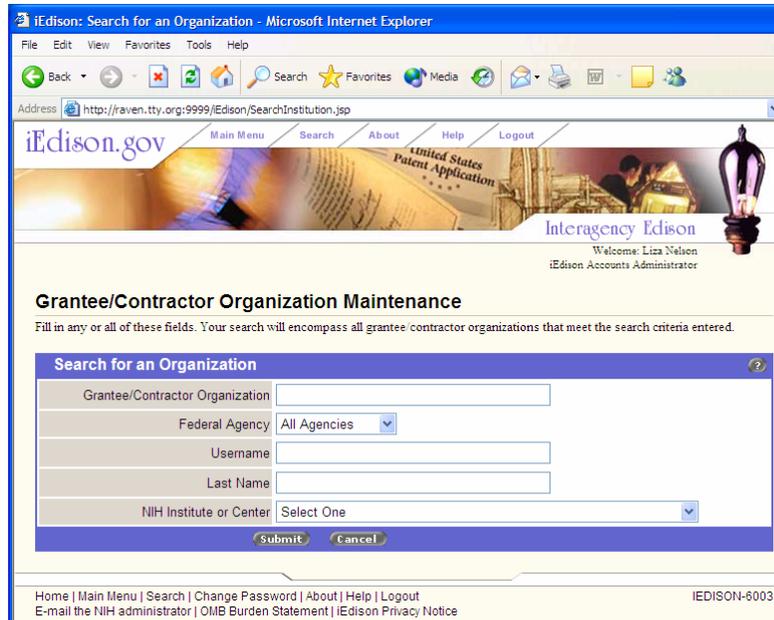*(Figure 89: View System Usage (IEDISON-6005))*

Viewing Invention Data by Organization

In the iEdison system, NIH administrators have the ability to access all invention records related to the registered organizations.

Access Invention Data for an Organization

To access organization records:

1. Select **Main Menu | Maintain Organizations** to access the Grantee/Contractor Organization Maintenance Search page (IEDISON-6003) as shown in Figure 90.

(Figure 90: View System Usage (IEDISON-6005))

2. Enter the desired search information, noting the following:
   o Your search will encompass all the grantee and contractor organizations that meet your search criteria.
3. Click **Submit** to enter the search and open the Grantee/Contractor Organization Maintenance Search Results page (IEDISON-6004) as shown in Figure 91.
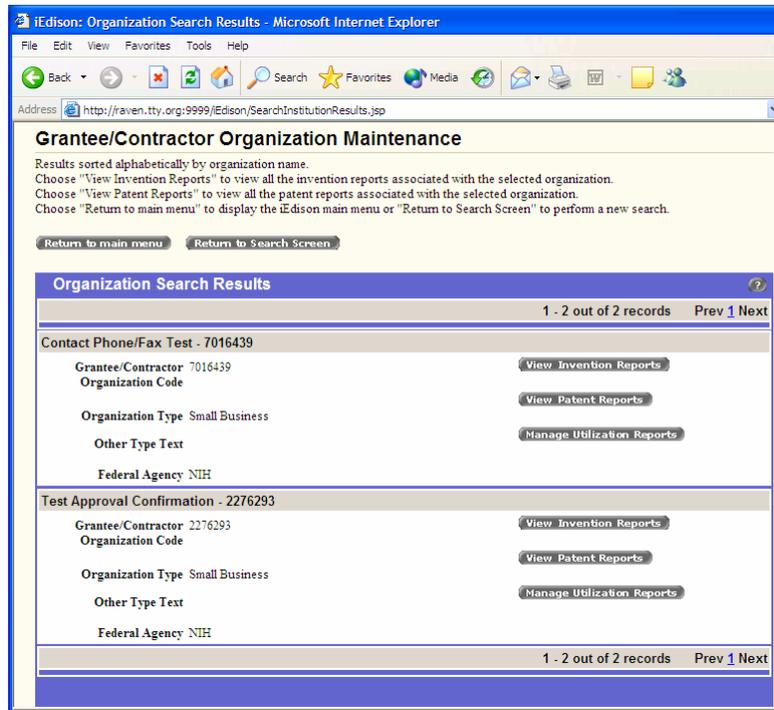
(Figure 91: Grantee/Contractor Organization Maintenance Search Results (IEDISON-6004))

4. A list of matching grantee and contractor organizations is displayed. Note the following information about the results list:
   o Results can be re-sorted by using the up and down arrows next to each column header.
   o Results are sorted alphabetically by grantee or contractor organization name.
   o From the search results, you can choose to view the Invention Reports, Patent Filings or Utilization Reports associated with a particular organization.

NOTE: Clicking the applicable button produces the search results for all records of the selected type associated with that organization and allows access to view, modify, or edit each record.
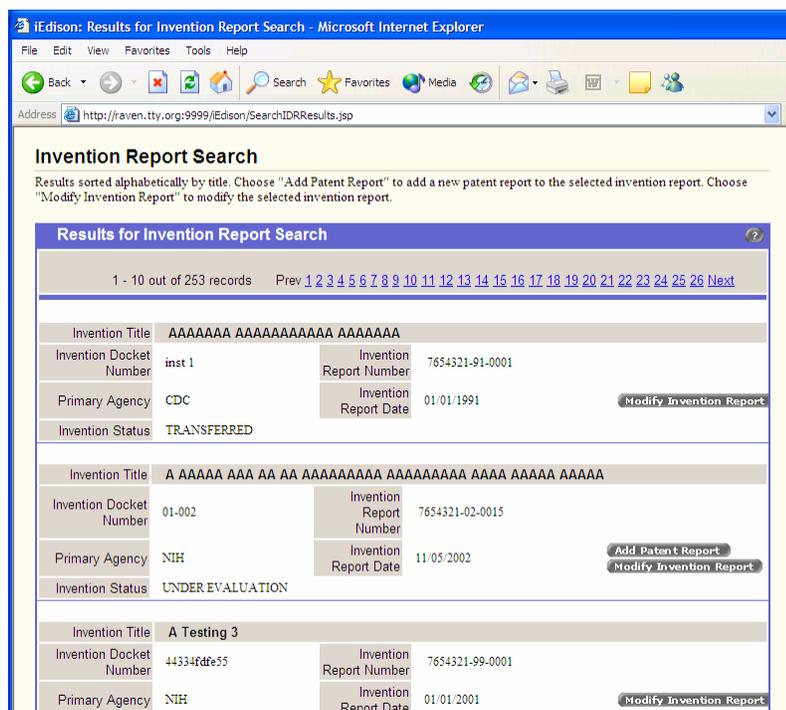
View all Invention Reports for an Organization

To view all invention reports for an organization:
1. Search for the grantee/contractor organization you want to view invention reports for as described in *Access Invention Data for an Organization*.
2. A list of matching grantee and contractor organizations is displayed.

NOTE: Results are sorted alphabetically by grantee or contractor organization name.

3. Click **View Invention Reports** to view all the invention reports associated with the selected organization. The system displays the Invention Report Search Results page (IEDISON-2004) with all the selected organizations invention reports displayed as shown in Figure 92.
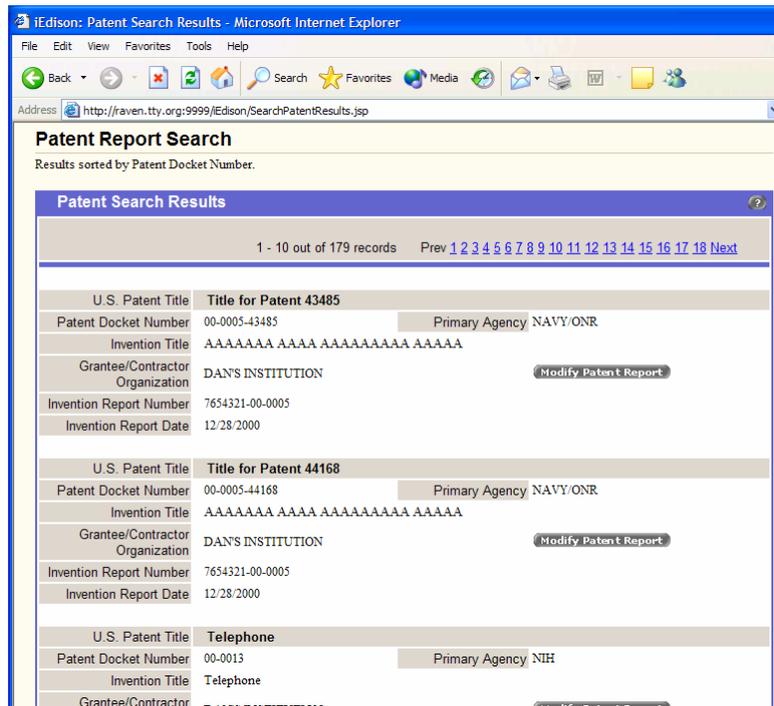

(Figure 92: Invention Report Search Results (IEDISON-2004))

View all Patent Reports for an Organization

1. Search for the grantee/contractor organization you want to view patent reports for as described in *Access Invention Data for an Organization*.
2. A list of matching grantee and contractor organizations is displayed.

NOTE: Results are sorted alphabetically by grantee or contractor organization name.

4. Click **View Patent Reports** to view all the patent reports associated with the selected organization. The system displays the Patent Report Search Results page (IEDISON-2504) with all the selected organizations patent reports displayed as shown in Figure 93.

(Figure 93: Patent Report Search Results (IEDISON-2504))

View all Utilization Reports for an Organization

1. Search for the grantee/contractor organization you want to view utilization reports for as described in *Access Invention Data for an Organization*.
2. A list of matching grantee and contractor organizations is displayed.

NOTE: Results are sorted alphabetically by grantee or contractor organization name.

5. Click **View Utilization Reports** to view all the utilization reports associated with the selected organization. The system displays the Invention Report Search Results page (IEDISON-2004) with all the selected organizations invention reports with utilizations associated with them displayed as shown in Figure 94.

(Figure 94: Invention Report Search Results (IEDISON-2004))