National Institutes of Health/Office of Extramural Research

Electronic Research Administration

Interagency Edison (iEdison II)

Release Notes

Version 2.0.2.0 − September 26, 2003

Interagency Edison (Version 2.0.2.0) Release Notes

Introduction

This document describes the changes and enhancements made to the iEdison II system for the September 26, 2003 release. Many modifications have been made to the iEdison system. However, these release notes only show major changes.

Overview

➢ Enhancements

Multiple E-mail Addresses
Navigation Improvements
Unique Screen Identifiers

➢ Issues Resolved in this Release

<u>Major Items</u>

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Phone Number Format
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Manage Patent Reports
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DOE "S" Number Field
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Minor Items

Update Your User Profile
Government Support Clause and Confirmatory License Receipt Dates
Modify Another Patent Link
Duplicate Invention Report Title Warning
Apostrophes in Inventor Names
Middle Initial Field
Explanatory Notes Field
Cancel Button Added to View Preferences
Text Documents Limited to 40K
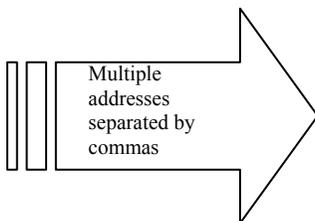Demo Account Creation
Printed Waiver Forms

Enhancements

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

Multiple E-mail Addresses

The 'E-mail' field has been modified throughout the iEdison system to accept the inclusion of multiple e-mail addresses. For example, on the Create Account Form when an account is created multiple e-mail addresses can be associated with the account. The initial notification regarding the new account as well as other account-related e-mail notifications will be sent to all addresses listed. This allows users to enter their work and home e-mail addresses if they choose.

Multiple E-mail Addresses Allowed

Multiple addresses separated by commas

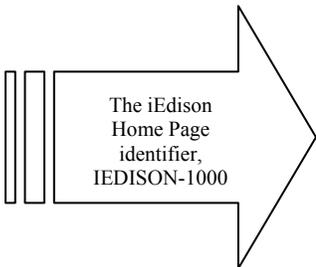*Figure 1: Create Account Form (IEDISON-3000)*

Navigation Improvements

A link to the main menu has been added to each secure page in the system. In addition, Previous and Next links have been added to the top and bottom of each search-results screen.

Unique Screen Identifiers

Each page in the iEdison system now has 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.

Unique
Identifier on
Every Screen

The iEdison
Home Page
identifier,
IEDISON-1000

Figure 2: iEdison Home Page (IEDISON-1000)

Issues Resolved in this Release

Major Items

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

Login Information
The warning message received when a login fails, has been modified to be more generic, "Incorrect username or password", instead of specifying precisely why the login failed for security reasons.

The number of error messages received when the repeat password field is left blank has been reduced so that only a single message is displayed.

The message displayed when an account is locked now displays the full message text regarding what a user should do when their account is locked. Previously, the system was cutting the message off. In addition, the full message is being displayed on all attempted logins after the account is locked. Previously, the full message text was only being displayed on the attempt resulting in the account being locked. All subsequent login attempts only displayed the brief error message, "Account locked", with no additional details regarding what to do.

Account Information
Users can no longer delete the account they are currently using if they are logged into the system under that account.

The 'Phone Number' field has been removed from the address record. This allows the user to supply a phone number but no address without eliciting an error message from the system. Previously, if a phone number was entered, then the address became required.

Phone Number Format
All 'Phone Extension' fields in the iEdison system now allow 9 digits to be entered. In addition, a restriction has been added to only allow numbers to be saved to the database. The display problem in Netscape has also been resolved so that all 9 digits can be viewed.

On the Modify Account page, an example of the phone number format for phone numbers within the United States (999-999-9999) has been added to the page. For all other countries or if the country is left blank no formatting is enforced.

Manage Invention Reports

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

- The 'Subcontractor Number' field is mandatory when adding or modifying subcontractor details. All other fields are optional. An error message will be displayed if the 'Subcontractor Number' field is left blank.
- The status "Non Elect Title - Waive to Third Party" is non-editable for non NIH Administrative users.
- The Reset button on the Invention Report Search – Search for iEdison Invention Report page has been modified to accurately reset data values on the page when selected.
- The 'Parent Invention Report' field now accepts values when adding or modifying an invention report without generating an error message.
- If the NIH iEdison Administrator deletes the 'Research Tools Guidelines Agreement Accepted Date' field of an invention report when modifying an invention report, the OTT user who next updates that invention report must again confirm that he agrees to accept the terms of the Research Tools Guidelines Agreement.
- The 'Title Election Date' field can now be successfully added, modified, or removed when adding or modifying invention reports.
- The following error message is now displayed when a status other than one of the three not elect title statuses is selected and the 'Not Elect Title Other Reason' field is provided when creating or modifying an invention: "The Not Elect Title Reason has been entered and the Invention Status is not "Not Elect Title". "
- The following error message is now displayed when any status other than "Not Elect Title - Waive to Third Party" is selected and the 'Third Party Name' field is provided when creating or modifying an invention: "The Name of the Third Party to which Title is Waived has been entered and the Invention Status is not equal to "Not Elect Title - Waive to Third Party". (ID: 20419)"
- The following error message is now displayed when the status selected is "Not Elect Title - Waive to Third Party" and the 'Third Party Name' field is not provided when creating or modifying an invention: "Third party is a required field."
- The 'Third Party Name' field is now restricted to 100 characters.
- The 'Invention Report Date' and 'Title Election Date' fields on the Create Invention Report and Modify Invention Report pages are displayed with the four-digit year that the system assumes when a two-digit year is entered.

Utilization Reporting

The Manage Utilization button is now only displayed for an invention report in search results where the invention status is equal to 'Elect Title' or 'Licensed as an Unpatented Biological Material or Research Tool'.

Manage Patent Reports

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

- The 'Patent Title' field now accepts 300 characters.
- The list of available values for 'Type of Patent Application' field on the Patent Report Form now includes "ORD/UTIL" and "RCE". In addition, the default value for this field when creating a new patent report has been set to "ORD/UTIL".
- The system now generates a 'Patent Docket Number' if this field is left blank when modifying patent reports.
- The default selection for the 'Patent Prosecution Status' field on the Add/Edit Foreign Filings page is now "ACTIVE". Previously, no default was being set.
- If a parent invention report has an invention status equal to 'Barred', a patent can still be added if at least one of the following fields is before 1 year of the parent invention's 1st publication on sale or public use date: 'Provisional Application Date', 'Non-Provisional Application Date', or 'Patent Issue Date'.
- The following error message is now displayed when a 'Patent Expiration Date' is entered and a 'Patent Issue Date' is not provided when creating or modifying a patent: "You have entered a Patent Expiration Date when the Patent Issue Date has not been defined."
- The 'Patent Docket Number' field is now blank when the Create Patent Report page opens. When the 'Patent Docket Number' is left blank on the Create Patent Report page or cleared from the Modify Patent page, a 'Patent Docket Number' is generated equal to the last 6 digits of the 'Invention Report Number' + 2-digit sequence number using the format (##-####-##). Also, if a unique 'Patent Docket Number' is entered, that number is accepted.
- The system changes the 'Invention Status' on the parent invention report as follows. If the 'Non-Provisional Patent Application Date' or 'Patent Issue Date' provided on the patent filing occurs before the 'Date of 1st publication, on sale or public use' + 1 year, then the 'Invention Status' on the patent report is changed to "Elect Title". If the 'Non-Provisional Patent Application Date' or 'Patent Issue Date' were not provided and the 'Provisional Patent Application Date' provided on the patent report occurs before the 'Date of 1st publication, on sale or public use' + 1 year, then the 'Invention Status' on the patent report is changed to "Under Evaluation".

Patent Report Search

The 'U.S. Patent Title' search field is not case sensitive. For example, entering "Test Title" will now return the same records as entering "TEST TITLE", "test title", or any other combination of upper and lower case letters.

"Other" has been added to the list of available values for the 'Agency Designation' field.

Searching by 'Invention Status' equal to "Not Elect Title - Waive to Third Party" now returns the appropriate results.

DOE "S" Number Field

The following modifications were made in the iEdison system and are related to the 'DOE "S" Number' field:

- The 'DOE "S" Number' field is now restricted to 15 characters when creating or modifying invention reports and patent reports.
- The 'DOE "S" Number' is generated when an invention report is modified to make DOE the primary agency associated with the invention report.
- When creating an invention report that has the DOE as the primary agency, a warning message is now displayed when the range of 'DOE "S"' numbers available in the iEdison system is exhausted.

Help Text Improvements

The following changes were made to the iEdison help system:

- The field definition for the 'Non-Provisional Application Number' field was revised to indicate under what conditions the field can be modified versus read-only. Specifically, the 'Non-Provisional Application Number' field can be modified when the parent invention report of the selected patent report has an 'Invention Status' equal to "Elect Title". In all other cases this field is read-only.
- The help topic "Change User Type" was added to the help system.
- The help text associated with the Create Patent Confirmation screen was added to the system.
- All help topics were modified to reflect changes in the system since the last release, this included changes to the navigation instructions as well as updates to the Field Definition and See Also sections.

Content Modifications

The following modifications were made to the iEdison system content:

- The label invention disclosure date was changed to invention report date throughout the system.
- The header displayed in the upper-right hand corner of the screen now accurately displays the role for the logged in user and the entity they are associated with.
- The screen labels for the 'Number of End User Logins' and 'Number of Administrative User Logins' on the Modify Grantee/Contractor Organization - View Organization Usage page were updated to reflect that these numbers only reflect the number of logins experienced in the system in the last 30 days.
- The 'Username' field was removed from the header on the Reassign Invention Reports Verification and Reassign Invention Reports Confirmation pages because more than one user can be reassigned invention reports.
- The text "Patent Filing" has been changed to "Patent Report" on the Modify Patent Confirmation page.
- The error message displayed when a duplicate 'Invention Docket Number' occurs on the Create and Modify Patent Report page is as follows: "The Invention Docket Number, TST-123456-123, is already in use for this Grantee/Contractor Organization. (ID: 20392)".

E-mail Notifications

The following modifications were made to the following iEdison e-mail notifications:

E-mail Notification	Summary of changes made
Generate Automatic E-mail Message (Government Agency)	The sort order of the messages in this e-mail was changed to primary agency, message number, and then posting date (length of time it has existed).
Institution Not Retains Rights E-mail	The users designated in the iEdison system will receive this e-mail notification when the invention status is changed from "Institution Retains Rights" to another invention status. Subsequent modifications to the invention report will not result in additional e-mail notifications being sent. This e-mail is sent only once when the status is actually changed. In addition, text modifications were made to the body of this e-mail so that the 'DOE "S" Number' is only displayed when the primary agency associated with the report is equal to "DOE". Also, the field label 'Patent Issue Date' was changed to 'Patent Filing Last Modified On' to reflect that this corresponding date/time is when the patent report was last modified in the iEdison system.
Invention Report Modified E-mail	This message is not sent when the document type equals "Paper" but is for the other document types (Text, PDF, or TIFF).
Modify Account E-mail	The individual who the inventions have been transferred from will receive one e-mail notification listing all the invention reports that have been re-assigned. Previously they received one e-mail notification for each invention report that was reassigned. In addition, text modifications were made to the body of the e-mail to be more generic and cover all the accounts types. Previously, the wording was specific to extramural accounts. Lastly, the specific changes made to an account are now included at the bottom of the e-mail.
Not Elect Title E-mail	Text modifications were made to the body of the e-mail so that the 'DOE "S"' number is only displayed when the primary agency associated with the report is equal to "DOE".
Notification of Invention Report Reassignment E-mail	Each person re-assigned inventions will receive one e-mail notification listing all invention reports they have been assigned. Previously they received one e-mail notification for each invention report they were assigned.
Patent Confirmatory License Modified E-mail	Text modifications were made to the body of the e-mail so that the 'DOE "S"' number is only displayed when the primary agency associated with the report is equal to "DOE". In addition, this message is not sent when the document type equals "Paper" but is for the other document types (Text, PDF, or TIFF).
Patent Filing Modified E-mail	Text modifications were made to the body of the e-mail so that the 'DOE "S"' number is only displayed when the primary agency associated with the report is equal to "DOE".

E-mail Notification	Summary of changes made
Patent Link Broken E-mail	Text modifications were made to the body of the e-mail so that the 'DOE "S"' number is only displayed when the primary agency associated with the report is equal to "DOE".
Registration Notification Approval E-mail	Changed the recipients of this e-mail to be those associated with the agency profile.
Registration Notification E-mail	Changed the recipients of this e-mail to be those associated with the agency profile.

Minor Items

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

Update Your User Profile

The 'Phone' and 'Fax' numbers can now be entered and saved to the database without entering an address.

Government Support Clause and Confirmatory License Receipt Dates

The 'Receipt Date' associated with a Government Support Clause or Confirmatory License document is now cleared when a new version of the document is uploaded.

The 'Government Support Clause Receipt Date' has been added to the Create New Patent page as a display only field. Previously this field was missing.

Modify Another Patent Link

The patent report link on the Patent Report Modification Confirmation page now takes the user to the Patent Report Search - Search for iEdison Patent Report page instead of the Invention Report Search – Search for iEdison Invention Report page.

Duplicate Invention Report Title Warning

The warning displayed when an invention report is created or modified with an 'Invention Title' equal to an existing title has been modified to be case-insensitive.

Apostrophes in Inventor Names

'Inventor Names' that include apostrophes are now accepted in the iEdison system.

Middle Initial Field

The 'Middle Initial' field now accepts 30 characters.

Explanatory Notes Field

The 'Explanatory Notes' field is now restricted to 500 characters.

Cancel Button Added to View Preferences

A Cancel button was added to the View Preferences – Current Preferences screen to provide the user with a way to return to the Main Menu.

Text Documents Limited to 40K

All text documents uploaded into the iEdison system are now limited to 40K. Additional text will be truncated.

Demo Account Creation

In development "demo mode", the Create a Test Account form on the Demo home page displays the selected password as "******". Also for security reasons, the user's 'Password' has been removed from the text of the Create Demo Account Confirmation page.

Printed Waiver Forms

The format of the Inventor Waiver Request, Third-Party Assignment, and U.S. Manufacturing Waiver forms have been modified so that when printed the content of the document does not get cut off.

Issues Resolved in this Release – Admin Only

Process Registrations

The organization profile data is now auto-populated when a request is approved on the iEdison Registration Request Details page.

Account Information

The 'Organization Code' for an inventor is now displayed and editable on the Modify Account - Update Account Information page for the NIH iEdison Accounts Administrator.

If "Select One" is chosen for the 'Account Type' or 'User Type' when modifying an account, the system prompts the user to provide a valid value from the list.

Modify Accounts Search

The default selection for the 'Agency Field' on the Modify Account – Search for an Account to Modify page is now "All Agencies".

The results displayed on the Modify Account – Results for Modify Account Search page are now sorted alphabetically by 'Account Type' and then by 'Username'. Previously the system was sorting by the ID number of the 'Account Type' instead of alphabetically by the text description.

The Modify Account Search Results page was updated so that only data elements relevant to the account are listed in the search results. For example, 'Organization Name' no longer appears for an NIH iEdison Account Administrator account but does for Extramural OTT and Extramural Inventor accounts.

View Documents

The content at the top of the View Documents – View Documents Search Results page was updated to match the labels displayed on the page. In addition, if a different sort order is selected, the content at the top of the screen dynamically changes to reflect the most recent sort criteria.

The View Documents – Search for Documents page now correctly enforces the search criteria entered in the 'Supporting Agency' field. Results are now restricted based on the selection made in this field.

The 'Invention Report Document Type' field value "Patent Application" was changed to "Government Support Clause" on the View Documents – Search for Documents page.

Content Modifications

The button "View Patent Filings" was changed to "View Patent Reports" on the Grantee/Contractor Organization Maintenance - Organization Search Results page. In addition, the text at the top of the page was also modified.

Create and Modify Account Improvements

The following rules are now enforced when creating and modifying accounts in the iEdison system:

- When creating an OTT account, the 'Organization Code' is required and the 'NIH Institute or Center' and 'Agency' fields cannot be saved.
- When creating IDO or Agency accounts, the 'Agency' is required and the 'NIH Institute or Center' and 'Organization Code' fields cannot be saved.
- When creating PO, GMS/CMS, OTT/TDCB, or PPE account, the 'NIH Institute or Center' is required, the 'Agency' field must equal 'NIH', and the 'Organization Code' field cannot be saved.
- When modifying an OTT account, the 'Organization Code' is displayed and the 'NIH Institute or Center' and 'Agency' fields are not displayed.
- When modifying an IDO or Agency account, the 'Agency' field is displayed and editable, the 'NIH Institute or Center' cannot be saved, and the 'Organization Code' field is not displayed.
- When modifying a PO, GMS/CMS, OTT/TDCB, or PPE account, the 'NIH Institute or Center' field is displayed and editable, the 'Agency' field is set to 'NIH', and 'Organization Code' field is not displayed.

The following rules are now enforced when changing account types in the iEdison system:

- NIH accounts can only be changed to an IDO account.
- IDO accounts can only be changed to an NIH account.
- OTT and Inventor accounts cannot be changed to any other account type.
- Agency, PO, GMS/CMS, OTT/TDCB or PPE accounts can only be changed to an Agency, PO, GMS/CMS, OTT/TDCB or PPE account.
- When changing an account's type from NIH to IDO, the 'Agency' field is available as it is required for an IDO account.
- When changing an account's type from IDO to NIH, the 'Agency' field cannot be saved, as it does not apply to NIH accounts.
- When changing an account's type from PO, GMS/CMS, OTT/TDCB or PPE to Agency, the 'Agency' field is available as it is required for an Agency account.
- When changing an account's type from Agency to PO, GMS/CMS, OTT/TDCB or PPE, the 'Agency' field is set to NIH and the 'NIH Institute or Center' field is available as it is required for these accounts.

Other modifications to the create and modify account pages include:

- Federal agency accounts can now be deleted by the NIH iEdison Administrator when multiple administrator accounts of the same type are associated with the same agency.
- The default selection for the 'Agency' field on the create/modify account screen is now 'Select One'.

Reassign Invention Report Functionality

The drop down list of user names for reassigning invention reports now only contains users in the same (extramural) grantee organization as the logged in iEdison user.

Maintain System Activities Usage Statistics

The numbers ('Total Numbers of Organizations/Agencies', Total Number of Accounts', Total Number of Logins) displayed for extramural organizations and federal agencies have been modified to exclude those associated with the test institution.

Auditing

The following modifications were made to the auditing system:

- The 'Invention Status' was added to the audit record for the creation and modification of a new invention report.
- The 'Not Elect Title Reason' is no longer being stored as "Other", unless it is specifically chosen and saved.
- The mime type was added to the audit record for all actions involving the storage of documents.
- The Audit Record Details for the Audit Event "RegistrationModify" now contain the old and new values for every modifiable registration field.
- The modify patent audit record was updated to only audit the items that are being modified.
- Reassignment of invention reports is now part of the audit record.
- The audit log entries for the Audit Event 'ReassignIDR' now correctly display the invention report number, rather than the word 'null'.
- When a Government Support Clause document is uploaded, the Audit Log Details now correctly refer to "Government Support Clause Document Key" and "Government Support Clause Document Type".

Duplicate Username

The system no longer checks the uniqueness of the username on the iEdison Registration Request Details page when other data regarding the registration request is modified. The system now only re-checks the username uniqueness if a change is made to what was originally requested.

Maintain Organizations Search

The list of available values for Federal Agency on the Grantee/Contractor Organization Maintenance – Search for an Organization page now includes "Army/SSC", "ATSDR", and "USDA/ARS".

Registration Search Results

When querying pending registration requests by name, then status, then date, the system now accurately sorts the results as requested. Previously the third sort criteria were not enforced.