

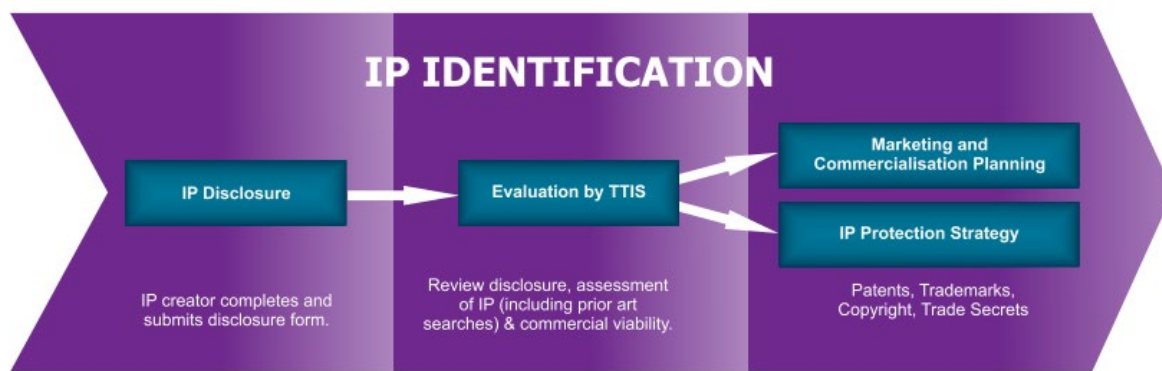
## Technology Transfer & Innovation Support

### NWU INVENTOR PORTAL USER GUIDE 2021

The purpose of the Inventor Portal is to provide an easy-to-use user interface where researchers can make an online invention disclosure\*. This guide gives step-by-step instructions on how to register an Inventor portal account and to complete and submit an invention disclosure. The online process replaces the previous manual process, simplifying the invention disclosure submission process for the researcher, saving them time and effort.

For more information, refer to the IP (Intellectual Property) policy of the NWU.

[1P\\_1.1.10\\_2021\\_e.pdf \(nwu.ac.za\)](#)



## Contents

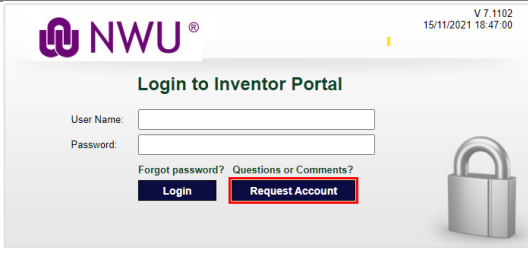
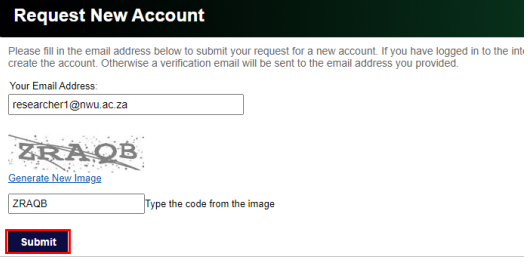
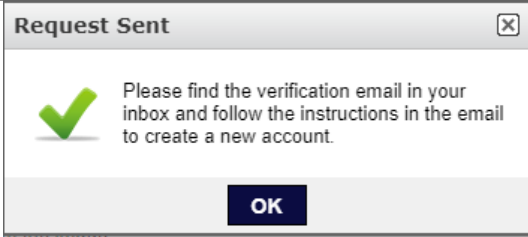
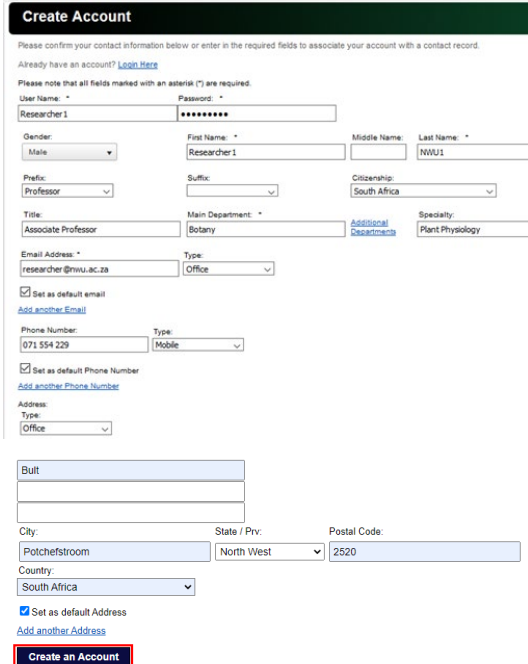
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\**Invention disclosure* is the term used on the Inventor Portal and has the same meaning as IP (Intellectual Property) disclosure, as is referred to in the IP manual of the NWU.

# 1 Registering of a new Inventor Portal Account

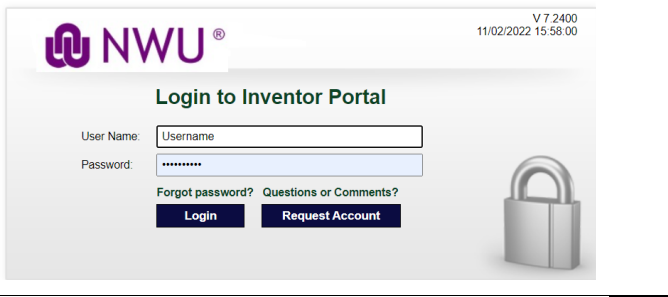
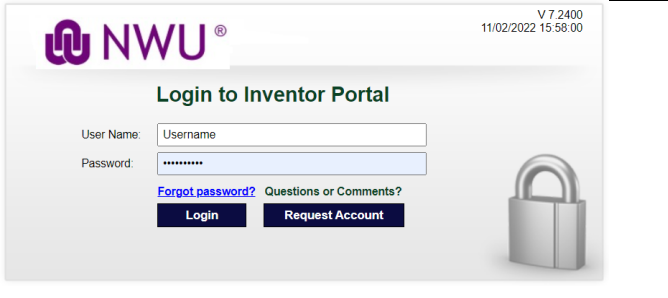
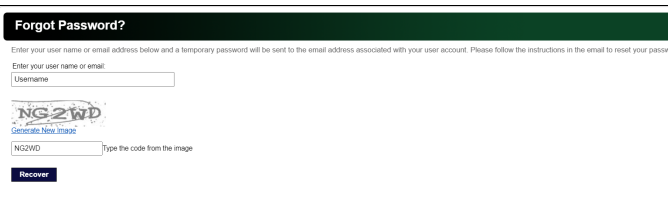
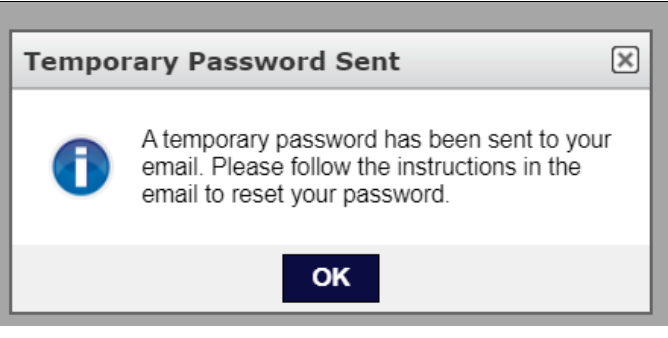
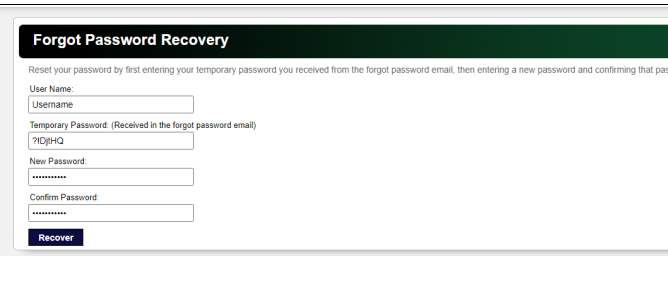
Researchers that are first time users, must create a new Inventor Portal account.

The following steps will guide you in how to register a new account.

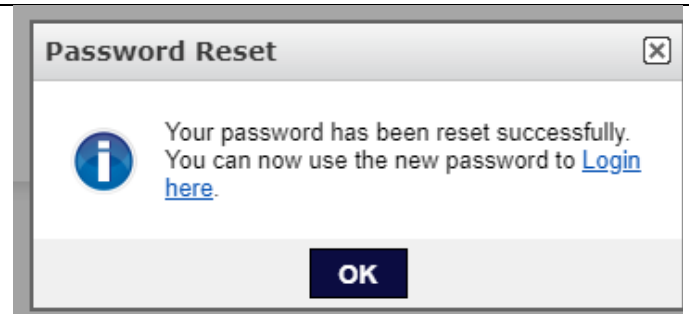
<ul style="list-style-type: none"> <li>• Within any browser, open Inventor Portal at the following link: <a href="https://nwu.inteum.com/nwu/inventorportal">https://nwu.inteum.com/nwu/inventorportal</a></li> <li>• Click on the 'Request Account' button.</li> </ul>	
<ul style="list-style-type: none"> <li>• Enter your E-mail Address</li> <li>• Enter the random generated security code</li> <li>• Click on the "Submit" button.</li> </ul>	
<ul style="list-style-type: none"> <li>• Receive a 'Request sent' message, confirming that your request has been submitted.</li> <li>• Click 'OK'</li> </ul>	
<ul style="list-style-type: none"> <li>• Receive confirmation e-mail.</li> <li>• Click on URL-web link in e-mail to complete new user registration.</li> </ul>	<p>From: portal@inteummail.com &lt;portal@inteummail.com&gt; On Behalf Of mari.berner@nwu.ac.za          Sent: Tuesday, 09 November 2021 10:08          To: <a href="mailto:researcher1@nwu.ac.za">researcher1@nwu.ac.za</a>          Subject: Inventor Portal Account Request</p> <p>Please go to the following URL to create your new Inventor Portal account:  <a href="https://nwu.inteum.com/nwu/inventorportal/CreateAccount.aspx?id=7c724d74-6f6c-4eb4-b8fb-89328538cb50">https://nwu.inteum.com/nwu/inventorportal/CreateAccount.aspx?id=7c724d74-6f6c-4eb4-b8fb-89328538cb50</a></p>
<ul style="list-style-type: none"> <li>• A 'Create Account' page appears.</li> <li>• Complete all compulsory fields, marked with an asterisk.</li> <li>• Click on the 'Create an Account' button at the bottom of the form.</li> </ul> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>▪ Username is Initial and Last Name in proper case, without spaces.</li> <li>▪ Title is your position at the university.</li> </ul>	

<ul style="list-style-type: none"> <li>• a 'Next Steps' message appears, notifying the researcher of the following: <ul style="list-style-type: none"> <li>○ The approval of the account is pending for approval by an Inventor Portal administrator</li> <li>○ Once approved, an e-mail will be sent, confirming the approval.</li> </ul> </li> </ul>	<div data-bbox="807 165 1337 371"> <h3>Next Steps</h3> <p>Your account is pending approval before you can get access to the portal. An administrator has been notified of your request. You will receive an email when your account is approved.</p> <p><b>OK</b></p> </div>
<ul style="list-style-type: none"> <li>• Receive an e-mail that your request for an Inventor Portal Account has been submitted.</li> </ul>	<div data-bbox="807 439 1337 645"> <p><b>From:</b> portal@inteummail.com &lt;portal@inteummail.com&gt; <b>On Behalf Of</b> mari.berner@nwu.ac.za  <b>Sent:</b> Thursday, 04 November 2021 09:47  <b>To:</b> <a href="mailto:portal@inteummail.com">portal@inteummail.com</a>  <b>Subject:</b> Thank you for requesting an Inventor Portal account</p> <p>We have received your request for an Inventor Portal account. Once your account is approved, an email</p> <p>If you have any questions, you can submit feedback here:  <a href="https://nwu.inteum.com/nwu/inventorportal/feedback.aspx">https://nwu.inteum.com/nwu/inventorportal/feedback.aspx</a></p> </div>
<ul style="list-style-type: none"> <li>• Receive another e-mail confirming that your account has been approved.</li> <li>• E-mail provides a URL link to log in to the Inventor Portal.</li> <li>• Click on the Inventor Portal URL link.</li> </ul>	<div data-bbox="807 672 1337 1003"> <p>Reply Reply All Forward IM</p> <p>portal@inteummail.com on behalf of mari.berner@nwu.ac.za 1 - 23:02</p> <p><b>Your Account has been Approved</b></p> <p>Your account has been approved and you have been successfully set up as an Inventor Portal user.</p> <p>Please keep this email for your records. Your login is:</p> <p>UserName: Researcher2</p> <p>You can login to Inventor Portal here:  <a href="https://nwu.inteum.com/nwu/inventorportal/">https://nwu.inteum.com/nwu/inventorportal/</a></p> </div>
<ul style="list-style-type: none"> <li>• Type in your username.</li> <li>• Type in your password.</li> <li>• Click on the 'Login' button.</li> </ul>	<div data-bbox="807 1021 1337 1270"> <p>V 7.1102 15/11/2021 18:47:00</p> <p><b>NWU</b></p> <h3>Login to Inventor Portal</h3> <p>User Name: <input type="text"/></p> <p>Password: <input type="password"/></p> <p><a href="#">Forgot password?</a> <a href="#">Questions or Comments?</a></p> <p><b>Login</b> <b>Request Account</b></p>  </div>

## 2 Inventor Portal login problems and queries

<ul style="list-style-type: none"> <li>If you experience any problems with logging in to the Inventor Portal, first make sure that the following is entered correctly:             <ul style="list-style-type: none"> <li>Username</li> <li>Password</li> </ul> </li> </ul>	
<ul style="list-style-type: none"> <li>If you have forgotten your password, click on the 'Forgot password' link above the 'Login' button.</li> </ul>	
<ul style="list-style-type: none"> <li>Type in your username / E-mail address</li> <li>Type in the image code displayed.</li> <li>Click on 'Recover'</li> </ul>	
<ul style="list-style-type: none"> <li>Receive a Pop-up message confirming that a temporary password has been sent via e-mail</li> </ul>	
<ul style="list-style-type: none"> <li>Receive e-mail with temporary password.</li> <li>Click on URL link</li> </ul>	<p><b>Subject:</b> Inventor Portal Password Recovery</p> <hr/> <p>Please go to the following URL:</p> <p><a href="https://nwu.inteum.com/nwu/inventorportal/ForgotPassword.aspx?id=188967">https://nwu.inteum.com/nwu/inventorportal/ForgotPassword.aspx?id=188967</a></p> <p>to reset your password using this temporary password:</p> <p>?!DjtHQ</p> <p>Please note that this is not your new password to log in to the portal.</p>
<ul style="list-style-type: none"> <li>A Password Recovery page opens.</li> <li>Type in the following             <ul style="list-style-type: none"> <li>Username</li> <li>Temporary password (received via e-mail)</li> <li>New Password</li> <li>Confirm new password</li> </ul> </li> <li>Click on 'Recover'</li> </ul>	

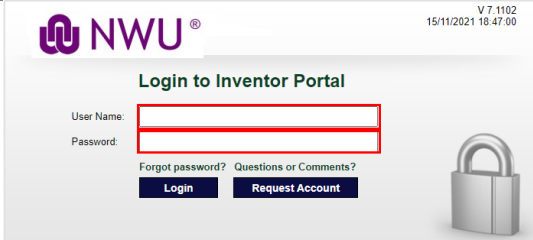
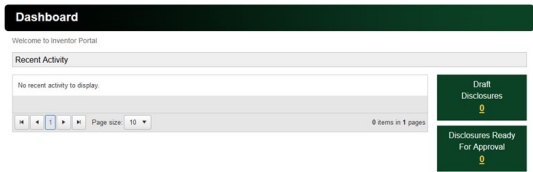
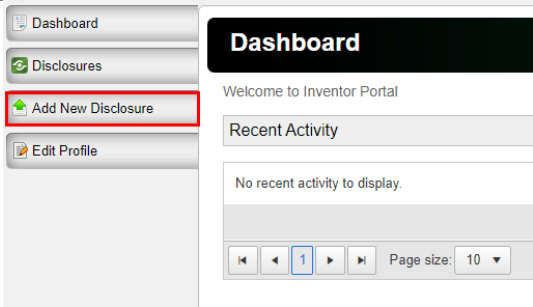
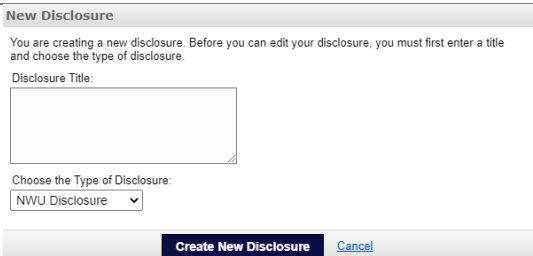
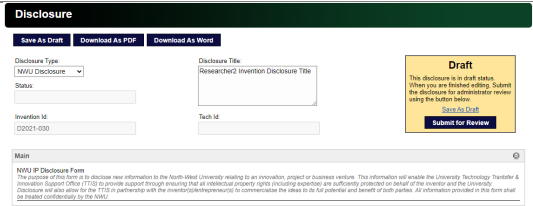
- Receive a pop-up message confirming that your password has been reset successfully.
- Click on 'Login here' link and login with your username and new password.

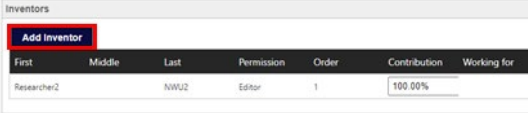
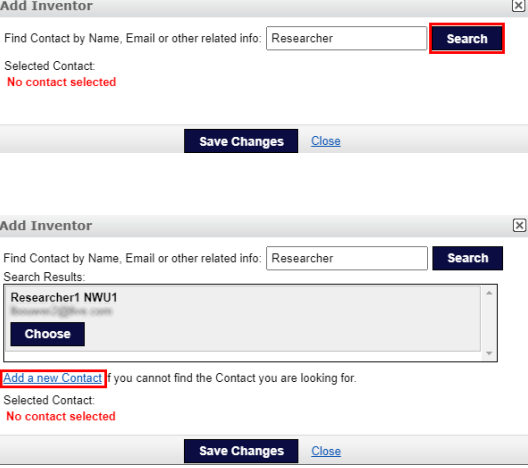
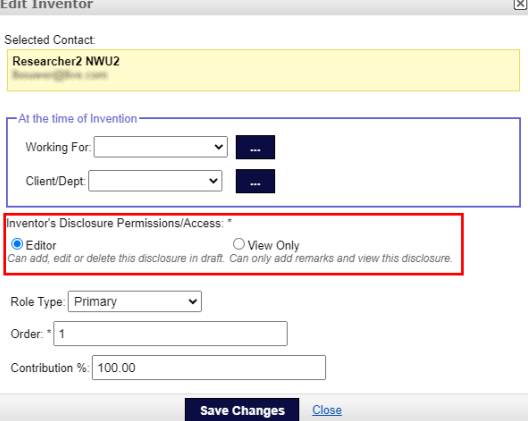

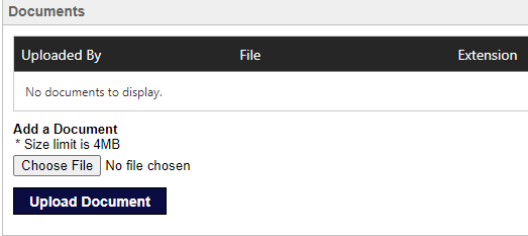


- If you still struggle logging into Inventor Portal, contact the TTIS administrator Mari Berner:
  - **Mari.Berner@nwu.ac.za**
  - **018-285 2007**

### 3 Completing a New Invention Disclosure Form

The following steps will guide the researcher on how to complete the online Invention Disclosure form on the Inventor Portal platform.

<ul style="list-style-type: none"> <li>After registering, the researcher logs into the Inventor Portal platform at the following link: <a href="https://nwu.inteum.com/nwu/inventorportal">https://nwu.inteum.com/nwu/inventorportal</a></li> <li>Type in User Name.</li> <li>Type in Password.</li> <li>Click on the 'Login' button.</li> </ul>	
<ul style="list-style-type: none"> <li>An empty dashboard page will appear.</li> </ul>	
<ul style="list-style-type: none"> <li>Refer to menu panel on the left of page.</li> <li>Click on 'Add New Disclosure' button.</li> </ul>	
<ul style="list-style-type: none"> <li>A 'New Disclosure page will appear.</li> <li>Type in a Disclosure Title.</li> <li>Choose the type of disclosure – by default you always choose the 'NWU Disclosure' option.</li> <li>Click on 'Create New Disclosure' button.</li> </ul>	
<ul style="list-style-type: none"> <li>A Disclosure form appears.</li> <li>Non-editable text fields are the Status, Invention Id and Tech Id.</li> <li>The yellow box on the right, shows the status of the Invention disclosure as a draft.</li> <li>There is an option to save the form at any time, by clicking on the 'save as draft' button at the top.</li> </ul>	

<ul style="list-style-type: none"> <li>To add co-inventors: <ul style="list-style-type: none"> <li>Click on the 'Add inventor' button</li> </ul> </li> </ul>	
<ul style="list-style-type: none"> <li>An 'Add Inventor' screen appears.</li> <li>Click 'Search' to find the co-inventor.</li> <li>If inventor is not on database, click on 'Add a new Contact' link at bottom.</li> <li>Complete the 'New Contact' form</li> <li>Click on 'Save Changes' to add the co-inventor.</li> </ul> <p><b>Note:</b> Before creating a new User, confirm with an Inventor Portal administrator that the user does not already exist on database, to minimize duplication of contacts.</p>	
<ul style="list-style-type: none"> <li>Under 'Edit Inventor': <ul style="list-style-type: none"> <li>Complete co-inventor's details.</li> <li>Choose the co-inventor's permissions / access: Click on 'Editor' or 'View Only'</li> </ul> </li> <li>Make sure that the total of all the inventors add up to 100%.</li> <li>'Click' on 'Save Changes'.</li> </ul>	
<ul style="list-style-type: none"> <li>Additional remarks can be added under 'Remarks', 'Add a Remark'.</li> <li>Type the remark in the 'Add a Remark' field</li> <li>Click on 'Save Remark' button.</li> <li>The purpose of the remarks is to send comments and messages regarding the disclosure form back and forth between the researcher and the TTIS office.</li> </ul>	
<ul style="list-style-type: none"> <li>Any supporting documents relating to the Invention disclosure can be uploaded under Documents:</li> <li>Click on the 'Choose file' button and select a document to upload on the Disclosure form.</li> <li>Click on the 'Upload Document' button.</li> </ul>	

- Add parties to receive viewer access to the Disclosure form, under 'Stakeholders'
- Stakeholders:
  - Receive e-mail updates regarding any changes to the Invention Disclosure.
  - Have the right to add remarks to the Invention Disclosure form.
- Examples of stakeholders are:
  - Line Managers
  - Commercialisation specialists from TTIS office.
- Click on the 'Add Stakeholder button and type in the First name, Last name, and e-mail address of the subscriber.
- Select the Stakeholder role
  - Commercialisation specialist – No signature required.
  - Line Manager – Signature required
  - Preparer – Signature required.
  - Other Stakeholder – No signature required.
- Click on 'Save changes' button.

Stakeholders

**Add Stakeholder**

First	Last	Email	Type
No Stakeholders to display.			

**Add Stakeholder**

Stakeholders do not need to be users of Inventor Portal. Add individuals that you would like to be notified by email of events and actions that take place for this disclosure.

First Name:  Last Name:

Email Address:

Stakeholder Role:

Commercialisation specialist - No signature required

Line Manager - Signature required

Preparer - Signature required

Other Stakeholder - No signature required

**Save Changes** [Close](#)

- To download a PDF or Word document version of the online Disclosure form, at the top of screen:
  - Click on 'Download as PDF' button,
  - or,
  - Click on 'Download as Word button.

**Disclosure**

**Save As Draft** **Download As PDF** **Download As Word**

Disclosure Type:  Disclosure Title:

Status:  Researcher/ Invention Disclosure Title:

Invention Id:  Tech Id:

**Draft**

This disclosure is in draft status. When you are finished editing, Submit the disclosure for administrator review using the button below.

**Submit for Review**

Main

NWU IP Disclosures Form

The purpose of this form is to disclose new information to the North-West University relating to an innovation, project or business venture. This information will enable the University Technology Transfer & Innovation Support Office (TTISO) to provide support through ensuring that all intellectual property rights (including inventions) are sufficiently protected on behalf of the inventor and the University. Disclosure will also allow for the TTISO in partnership with the inventor/entrepreneur(s) to commercialise the ideas to the full potential and benefit of both parties. All information provided in this form shall be treated confidentially by the NWU.

- After completing all the required fields on the Invention Disclosure form:
  - Click on the 'Submit for Review' button in the yellow block on the right.

**Disclosure**

**Save As Draft** **Download As PDF** **Download As Word**

Disclosure Type:  Disclosure Title:

Status:  Researcher/ Invention Disclosure Title:

Invention Id:  Tech Id:

**Draft**

This disclosure is in draft status. When you are finished editing, Submit the disclosure for administrator review using the button below.

**Submit for Review**

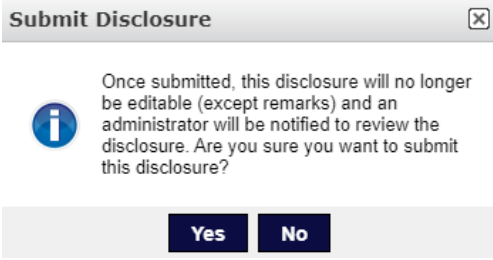
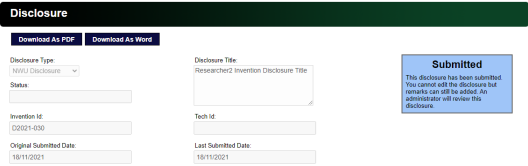
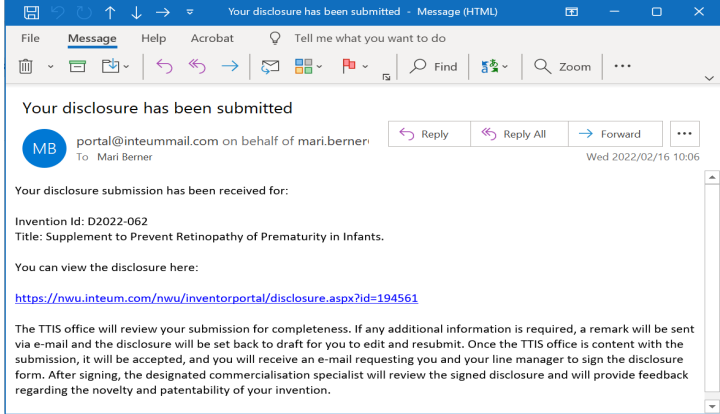
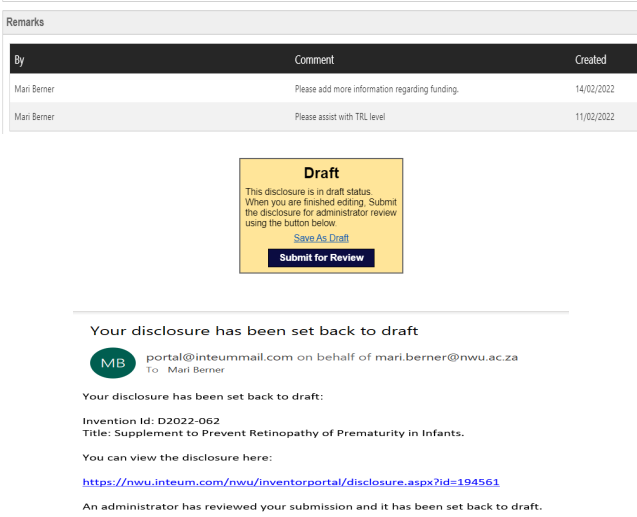
Main

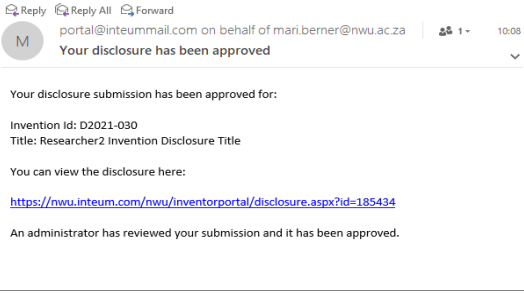
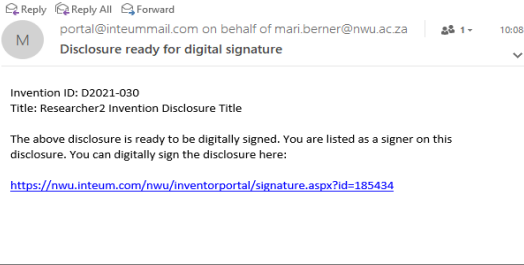
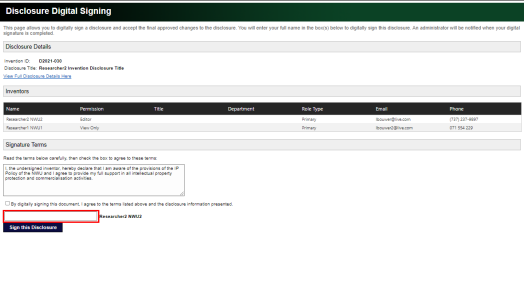
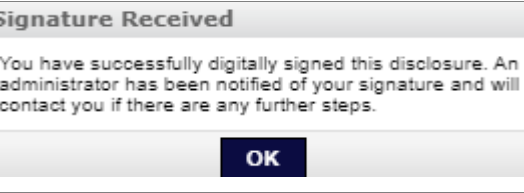
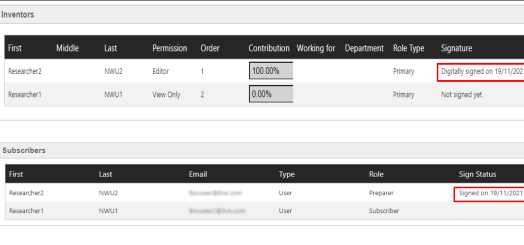
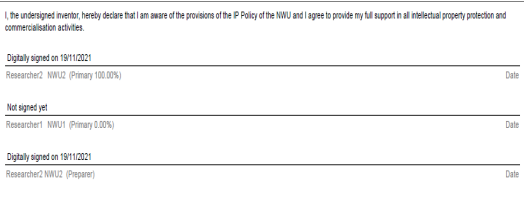
NWU IP Disclosures Form

The purpose of this form is to disclose new information to the North-West University relating to an innovation, project or business venture. This information will enable the University Technology Transfer & Innovation Support Office (TTISO) to provide support through ensuring that all intellectual property rights (including inventions) are sufficiently protected on behalf of the inventor and the University. Disclosure will also allow for the TTISO in partnership with the inventor/entrepreneur(s) to commercialise the ideas to the full potential and benefit of both parties. All information provided in this form shall be treated confidentially by the NWU.

## 4 Submitting a New Invention Disclosure Form for Review

After the Researcher submitted the completed online Invention Disclosure form for review, the following steps will follow:

<ul style="list-style-type: none"> <li>A 'Submit Disclosure; popup message appears, asking to confirm whether you want to submit the disclosure.</li> <li>Click 'Yes' to submit the disclosure.</li> <li>Click 'No' if you still want to edit the invention disclosure form.</li> <li><b>Note:</b> Once submitted, you will no longer be able to edit the Invention disclosure form.</li> </ul>										
<ul style="list-style-type: none"> <li>Once submitted, the status block on the right, will change to 'Submitted' with a blue background.</li> <li>The 'Submitted Date' field automatically updates with today's date.</li> </ul>										
<ul style="list-style-type: none"> <li>You will receive an e-mail, confirming that the submitted disclosure was received and will be reviewed.</li> <li>A link is provided, where the submitted disclosure can be viewed.</li> <li>The invention disclosure will be assigned to a commercialisation specialist at the TTIS office, who will review the completeness of the invention disclosure submission.</li> </ul>										
<ul style="list-style-type: none"> <li>If the submission lacks important information, the commercialisation specialist will add a remark to the online disclosure form, requesting the researcher to add the additional information.</li> <li>The status of the invention disclosure will be set back to 'draft' so that the researcher can continue to edit the form.</li> <li>The researcher will receive an e-mail notifying that the disclosure form has been set back to 'draft'</li> <li>The researcher makes changes and submit the disclosure form again.</li> </ul>	 <table border="1" data-bbox="730 1368 1370 1496"> <thead> <tr> <th>By</th> <th>Comment</th> <th>Created</th> </tr> </thead> <tbody> <tr> <td>Mari Berner</td> <td>Please add more information regarding funding.</td> <td>14/02/2022</td> </tr> <tr> <td>Mari Berner</td> <td>Please assist with TRL level</td> <td>11/02/2022</td> </tr> </tbody> </table>	By	Comment	Created	Mari Berner	Please add more information regarding funding.	14/02/2022	Mari Berner	Please assist with TRL level	11/02/2022
By	Comment	Created								
Mari Berner	Please add more information regarding funding.	14/02/2022								
Mari Berner	Please assist with TRL level	11/02/2022								

<ul style="list-style-type: none"> <li>Once the TTIS office is content with the submission, the Inventor Portal administrator approves the submitted Disclosure.</li> <li>Receive an e-mail stating that the Disclosure submission has been approved.</li> </ul>	
<ul style="list-style-type: none"> <li>Receive a second e-mail with a link to digitally sign the Disclosure.</li> <li>Click on the link provided.</li> <li>Additional stakeholders with signing roles, e.g. line managers, will also receive an e-mail requesting to digitally sign the disclosure form.</li> </ul>	
<ul style="list-style-type: none"> <li>A 'Disclosure Digital Signing' page will appear in the Inventor Portal.</li> <li>Type in your full name and surname in the red textbox just above the 'Sign this Disclosure' button</li> <li>Click on the 'Sign this Disclosure' button to process your digital signature.</li> </ul>	
<ul style="list-style-type: none"> <li>Receive a 'Signature Received' popup message, confirming that you have successfully digitally signed the disclosure.</li> </ul>	
<ul style="list-style-type: none"> <li>Two areas on the Disclosure Form indicate which parties digitally signed the Disclosure form and when: <ul style="list-style-type: none"> <li>Inventors Area</li> <li>Subscribers Area</li> </ul> </li> </ul>	
<ul style="list-style-type: none"> <li>Disclosure digital signatures are also available at the bottom of the PDF and MS Word documents when downloaded from the Inventor Portal.</li> </ul>	
<ul style="list-style-type: none"> <li>The submitted and signed invention disclosure will now be reviewed by the assigned commercialisation specialist, by performing prior-art searches, determining if the invention is novel.</li> <li>The commercialisation specialist will contact the researcher regarding the invention disclosure, discussing its novelty, patentability and possible commercial potential.</li> </ul>	
<ul style="list-style-type: none"> <li>When the NWU TTIS Office file patent applications to protect the new invention's IP, the researcher can follow the progress from the Inventor Portal as well.</li> </ul>	