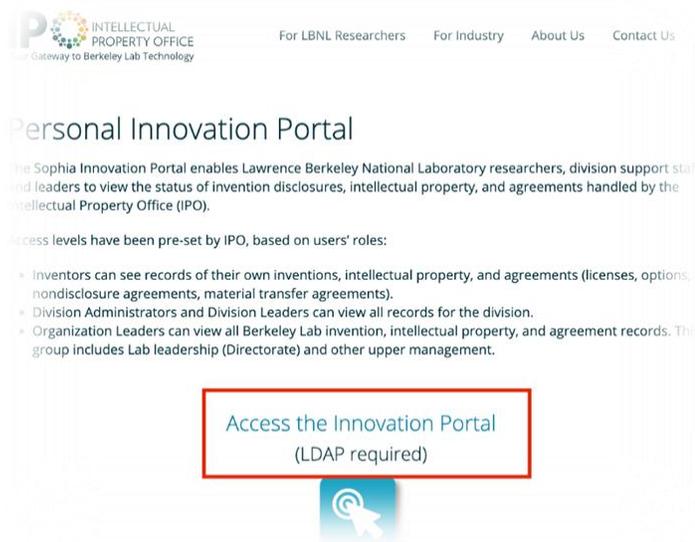


Innovation Portal Guide

Please follow these five (5) easy steps in order to track your agreement submissions requests in the Innovation Portal

1. Go to the [Innovation Portal](#) and log in



2. Once you log in, you should see three widgets titled, “Inventor Homepage”, “Inventor Agreements”, and “Inventor Submissions”. If you don’t see these, you can customize your homepage by clicking on “Customize Home Page” on the bottom right side of the “Tasks” box



3. Select the widgets you would like to display on your home page by clicking “Add to Home Page”. Sort the widgets by entering a number in the “Sort Order” section (the field with the lowest number will show first on the home page). When finished, don’t forget to click “Finish” to save your changes.

Home

Customize Home Page

Customize Page

▼ Available Home Page Widgets

Widget Name	Description	
Latest Agreements You Entered	None	Add To Home Page
Inventor Agreement	For inventors, a list of your agreements.	Add To Home Page
Inventor Homepage	For inventors, a list of your inventions.	Add To Home Page
Inventor Projects	For inventors, a list of your projects.	Add To Home Page
Latest Inventions You Entered	Latest Inventions You Entered	Add To Home Page
Your Submissions	Displays all submissions created by you.	Add To Home Page
Latest Assigned Projects	Show Projects where you are assigned as a Project Manager	Add To Home Page

▼ Current Home Page Widgets

Widget Name	Title	Sort Order	
Inventor Homepage	Inventor Homepage	10	✕
Inventor Agreement	Inventor Agreements	20	✕
Your Submissions	Your Submissions	100	✕

Customize Page
Finish

4. Your **submission** (“OA_ _ _”) number and **agreement** number (“2021- _ _ _”) are separate, but related. Once your *submission* request is accepted through the portal, it is assigned an *agreement* number.

Agreement Submissions

Track Code	Title
OA2021-04780	Material Transfer Agree
OA2021-04661	Nondisclosure Agree

↓

Rubys

Agreement Number	Effective Date
2021-0775	None
2021-0754	None

5. Click on the agreement number to see which licensing associate has been assigned to work on your agreement. Look for the “Agreement Process” section, also referred to as the “notes” section, to track the progress/updates of the agreement

Licensing Associate	Virginia de la Puente
Business Development Manager	Mark Menge

▼ Agreement Process

Step Name AKA “Notes” Section

Step 1 Drafted agreement, sent to “X” for review

Step 2 Emailed agreement to “X” party

Step 3 Received Fully Executed Agreement

You are now ready to keep track of your submissions and agreements.
 If you have additional questions regarding your NDA and MTA, email: NDAs-and-MTAs@lbl.gov