New Features

The following two major changes have been implemented in iEdison:

- Updated look to the Main Menu and Patent Report Screens
- Ability to Create a Hierarchal Patent Parent/Child Linking Structure

iEdison Main Menu and Patent Report Screens have an Updated Look

The iEdison Main Menu screen has an updated look, but the functionality is the same. Instead of menu tabs across the top of the screen, they are now located above the words, Main Menu. These tabs appear across most iEdison screen. The Search menu tab is now replaced with the three new search tabs: Search Inventions, Search Patents, and Search Utilization. The About, Help, and Logout tabs are located to the right. All the iEdison screens look the same except for the Patent Search, the Patent Search Results, and the Create Patent Record screens.

Figure 1: iEdison Main Menu Screen Displaying the New Look

Patent Search Screen

The following Patent Search screen changes are:

1. On the Patent Search screen the patent and invention search criteria can be expanded (default) or collapsed by clicking the + View or – Close buttons respectively on the right.

2. The reset hyperlink and the Search button appear on the right at the top and the bottom of the screen.
Figure 2: Patent Search Screen Displaying New Look

When the **Search** button is clicked, the system performs the search and displays the appropriate search results. 10 patent records are displayed per page. The search results can be navigated by clicking the appropriate **Page Number**, **First**, **Next**, **First**, or **Last** hyperlinks.
Figure 3: Patent Search Screen Displaying Search Results

The **Modify** hyperlink option is in the **Actions** column.

**Modify Patent Record Screen**

By clicking the **Modify** hyperlink, the system displays *Modify Patent Record* screen.

Keywords and/or inventors can be added by typing the information in the appropriate field text box and clicking the **Add** button next to the field. Keywords and/or inventors can be deleted or modified by clicking the appropriate hyperlink.
Figure 4: Modify Patent Record Screen - Top Half
Figure 5: Modify Patent Screen - Bottom Half

By clicking the **Vertical** hyperlink at the top of the *Modify Patent Record* screen, the system displays hierarchical structure of the linked patents relating to the invention. Clicking the **Vertical** hyperlink again, the system closes the patent link structure.

For more information on linking multiple parent and child patents, please refer to the *Ability to Create Hierarchal Parent/Child Patent Structure for the Same Invention* topic below.
Figure 6: Modify Patent Record Screen Displaying a Patent Link Structure

If the **Cancel** button is clicked **Modify Patent Record** screen, the system displays a pop-up screen with the following message: *Are you sure you want to cancel and go back to the search results?* If the **No** button is clicked, the system returns to the **Modify Patent Record** screen. If the **Yes** button is clicked, the system returns to the **Patent Search** screen displaying the search results.

After the appropriate edits have been made and the **Save** button is clicked on **Modify Patent Record** screen, the system performs validations.

If there are no errors, the system displays a pop-up screen with the following message: *Are you sure you want to Save your changes?* If the **No** button is clicked, the system returns to the **Modify Patent Record** screen. If the **Yes** button is clicked, the system saves the changes and displays the **View Patent Record** screen with a successful save message.

The patent can be edited again by clicking the **Edit Patent** button on the right at the top or the bottom of the **View Patent Record** screen.
### View Patent Record

<table>
<thead>
<tr>
<th>Patent Record Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invention Report Number</td>
</tr>
<tr>
<td>DOE &quot;9&quot; Number</td>
</tr>
<tr>
<td>Grantor/Contractor/Organization</td>
</tr>
<tr>
<td>Patent Classification Number</td>
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<tr>
<td>Type of Patent Application</td>
</tr>
<tr>
<td>U.S. Patent Title</td>
</tr>
<tr>
<td>Inventor(s)</td>
</tr>
</tbody>
</table>

#### Provisional/Patent Application Number
- Filing Date of Provisional Patent Application: 1/02/2014
- Provisional Patent Application Number: 12345678

#### Non-Provisional/Patent Application Number
- Filing Date of Non-Provisional Patent Application: 1/02/2014
- Non-Provisional Patent Application Number: 12345678

#### PCT Patent Application Number
- Filing Date of PCT Patent Application: 1/02/2014
- PCT Patent Application Number: 12345678

#### Patent Number
- Patent Number: 12345678
- Patent Issue Date: 1/02/2014

#### Examining Attorney

**Figure 7: View Patent Record Screen - Top Half**
Figure 8: View Patent Record Screen - Bottom Half

Patent Transfer Screen

By clicking the Transfer hyperlink on the Patent Search screen, the system displays the Patent Transfer screen. The Transfer to Invention Number value is entered.

NOTE: Only IDO Admin and IDO User can transfer a patent to another invention.

Figure 9: Patent Transfer Screen Displaying Transferring a Patent

If the Cancel button is clicked, the system displays a pop-up screen with the following message: Are you sure you want to cancel and go back to the search results? If the No button is clicked, the system returns to the Patent Transfer screen. If the Yes button is clicked, the system returns to the Patent Search screen displaying the search results.
If the **Submit** button is clicked, the system displays a pop-up screen with the following message:

*Are you sure you want to submit the Transfer request?* If the **No** button is clicked, the system returns to the *Patent Transfer* screen. If the **Yes** button is clicked, the system displays the *Patent Search* screen with a confirmation message that the patent transfer was successful.

![Figure 10: Patent Search Screen Displaying Transfer Patent Successful Message](image)

**Create Patent Record Screen**

The *Create Patent Record* screen has similar features to the *Modify Patent Record* screen.

Keywords and/or inventors can be added by typing the information in the appropriate field text box and clicking the **Add** button next to the field. Keywords and/or inventors can be deleted or modified by clicking the appropriate hyperlink.

By clicking the **Vertical** hyperlink at the top of the *Create Patent Record* screen, the system displays hierarchical structure of the linked patents relating to the invention. Clicking the **Vertical** hyperlink again, the system closes the patent link structure.
Figure 11: Create Patent Record Screen - Top Half
Figure 12: Create Patent Record Screen - Bottom Half

If the **Cancel** button is clicked, the system returns to the **Invention Report Search** screen.

If the **Submit** button is clicked, the system performs validations. If there are no errors, the system creates the new patent report and displays the **View Patent Record** screen with a successful create patent message. The patent can be edited by clicking the **Edit Patent** button on the right at the top or the bottom of the **View Patent Record** screen.

**Ability to Create Hierarchal Parent/Child Patent Structure for the Same Invention**

There is the ability to link multiple patents to the same invention. Within those multiple parent patents child patents can be created and child patents can be created under those child patents. Thus a parent /child hierarchal structure can be created. Please refer to Figure 6 for an example of a parent /child hierarchal structure.

To link a **Patent Report** to an invention, please follow the procedures outlined in the iEdison online help **Link a Patent Report** topic.

**NOTE:** Only Agency users can create patent links for patents under different inventions.

**General Patent Linking Business Rules**

1. Any patent can be linked as a child to another patent derived from the same invention.
2. If the parent patent is derived from a different invention at the same institution, the child patent must be of type CIP.
   
   a. Only an IDO/ Super Admin user may create the link. (i.e. Only patents of type CIP can have an explicit link to a parent patent derived from a different invention).

3. If the parent patent is derived from an invention at a different institution, then only an IDO/Super Admin user can create the link.
   
   a. The child patent must be of type CIP.
   
   b. The parent patent must have been made visible to the extramural Institution of the user.

4. The system shall not allow establishment of a parent relationship from one patent to another that would include a circular reference within the full set of relationships.

5. The Confirmatory License of a parent patent shall propagate tot the child patent(s) for validations and notification.

6. If a user modifies an invention or parent such that an explicit parent/child relation would be broken, the system shall provide an appropriate warning message.

7. If a user modifies an invention or patent such that an explicit parent/child relation is broken, an email is sent and the occurrence is audited.

Implicit Patent Linking Business Rules

**NOTE:** Implicit patent linking involves a non-provisional patent application.

1. The first patent in an implicit patent link chain may not be CPA/RCE or CON type.

2. All but the first patent in an implicit patent link chain must be CPA or RCE type.

3. Only the last patent in an implicitly linked patent chain may be modified in a fashion that would break the parent/child relationship.

4. All patents in an implicitly linked (CPA/RCE) chain must be associated with a single invention.

5. Only NIH iEdison Accounts Administrators and IDO iEdison users can update a U.S. Patent Title in a patent that is parent in a continuation patent (CPA/RCE) chain. Only the last patent in the chain’s title can be modified by TTO user.

Ability to Provide a Date Range when Generating iEdison Invention Report

There is the ability to provide a date range when generating iEdison Invention Reports. On the Generate Invention Report screen, the Invention Report Date field has a Start and End date fields with a format of mm/dd/yyyy. The Invention Report itself looks the same. The Invention Report excludes transferred and voided inventions.
Fixes

**Confirmatory License now Propagating to the Child Patent Report when Linking Patents**

Previously when a child Patent Report was linked to a parent Patent Report messages were produced that stated to upload a Confirmatory License. The message should not have been produced because the Confirmatory License should have been propagated to the child Patent Report.

**Resolution**

The Confirmatory License is now being propagated to the child Patent Report when it is linked to a parent Patent Report.