

Technology Transfer Capability Model

This diagram describes the capabilities that support a technology transfer office from invention disclosure, technology management, protections, commercialization, and innovation tracking.

 Sales

 Industries

 Partners

 Experience

 Analytics

 Platform

 Commerce

 Integration

 Einstein AI

Industry Challenges & Opportunities

Security & Compliance

Tightening Regulations, Controls, Reporting

Operational Excellence

Consistent Data Capture & Tracking

Dynamic Experiences

Inventor, Founder, Legal, Commercial Self-Service

Finance Management

Traceability for Parties, Transactions, Payments

Competitive Commercialization

Increased expectations for ease-of-licensing

 **Invention Disclosure**

Invention Disclosure Capture
Disclosure Review
Inventor Self-Service
Invention History & Version Control
Domain-based Assignment
Approval & Communications

 **Technology Management**

Inventor Shares & Royalties
Signed Agreement Workflows
Viability Assessment
Compliance & Govt Reporting
Budget & Portfolio Mgmt
Auditing & Review
Automated Task Mgmt

 **Legal Protections**

Track Filings across Geo/Party roles
Patent Prosecution Workflow
Litigation Tracking
Initiate Legal Partner Processes
Request & Distribute financial transactions
Payment Contributors & Recipients
Applications & Claims Support

 **Commercialization**

Available to License Catalog
eCommerce Check-out
Bundling
Recommendation Engine
Propensity Insights
Design License Agreement Types
Licensee Relationship Mgmt
Licensee Terms & Conditions Tracking

 **Innovation**

Incubator Space Mgmt
Founder Mentorship
Makerspace Labs
Partnership Programs
Start-up / Spin-out
Tenant & Asset Tracking



Technology Transfer Solution Architecture

This document describes a common pattern for architecture



Sales



Industries



Partners



Experience



Analytics



Platform



Commerce



Integration



Einstein AI



Salesforce CRM

Shared data
Standardized processes
Single sign on
Shared apps
Business Unit custom apps



Experience Sites



Inventor Experience

Inventor Constituent Portal
Invention Disclosure
Inventor Self-Service
Royalty Payment Reminders
Protection Status' and Tasks
Technology Portfolio Analytics



Partner Experience

Legal Firm Partner Portal
Initiate Protection Workflow
Invoicing Automation
Docket Management
Patent Deadlines Tracking
Transactional Mgmt



License Catalog

University eCommerce
Industry-wide Catalog(AUTM)
3rd-party Sharing



Constituent Relationships



University Account



Inventor



Legal Firms



Lawyer



Start-Up / Spin-Out



Founder



Corporate Partner



R&D Director



Technology Transfer Starter

Invention Disclosure
Technology Lifecycle Mgmt
Protection Support
Innovation & Incubators
Industry Agreement Types
Multi-Party Transactions



Revenue Cloud

Invoice Workflow Mgmt
Contract Lifecycle Mgmt
Revenue Recognition & Distribution
Accounts Receivable/Payable Subledger
Royalty Calculation Processes
License Fee & Rebilling



Analytics

Disclosure Summary Reports
Annual Performance Metrics
Compliance Reporting
License Revenue
Patent Expenses
Benchmark Analysis



Trusted Enterprise Platform Services



Composable Integrations

External Systems

Finance & Accounting

Human Resource (HCM)

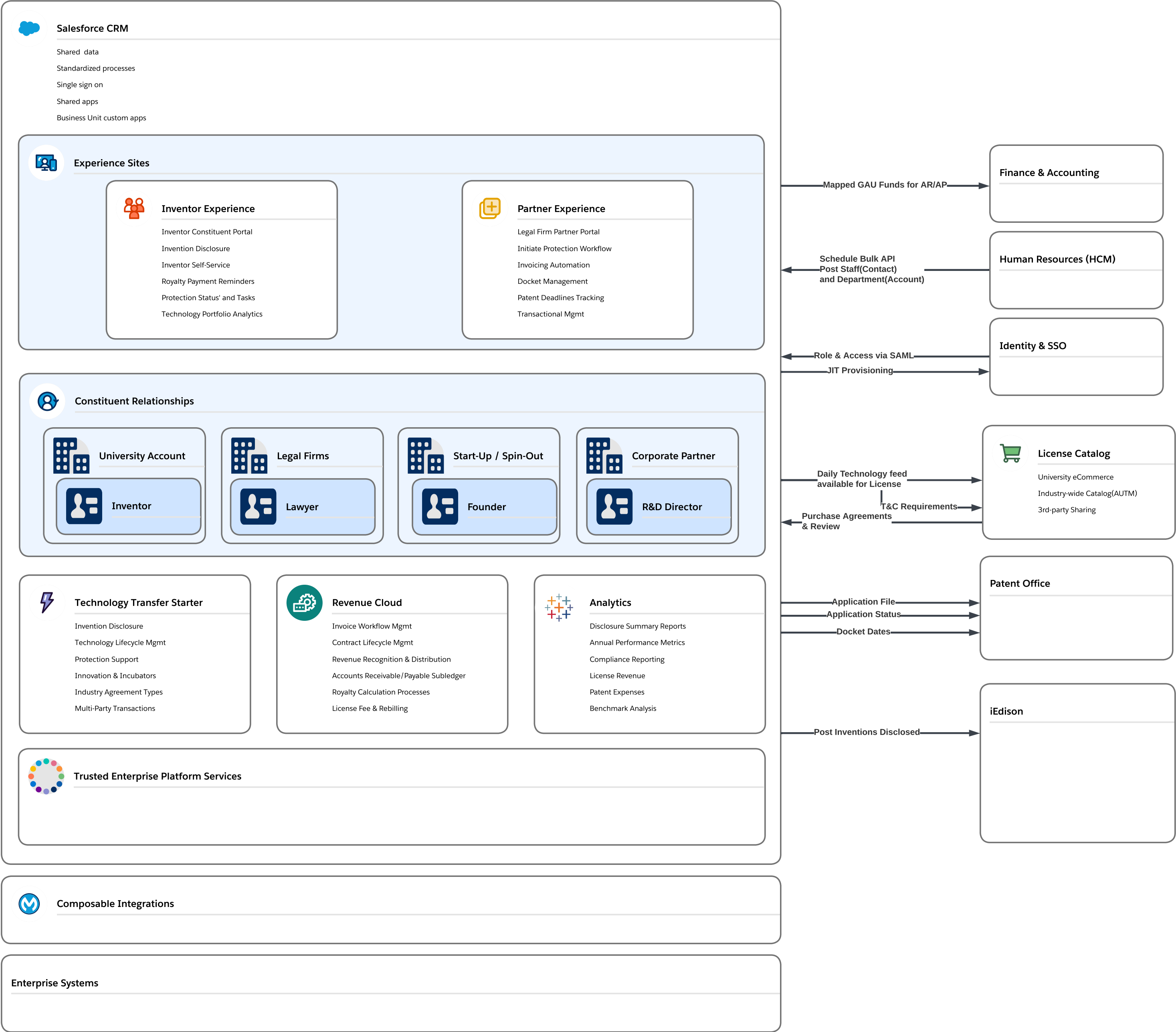
Identity & SSO

Patent Office

iEdison

Technology Transfer Solution Architecture

This document describes a common pattern for architecture

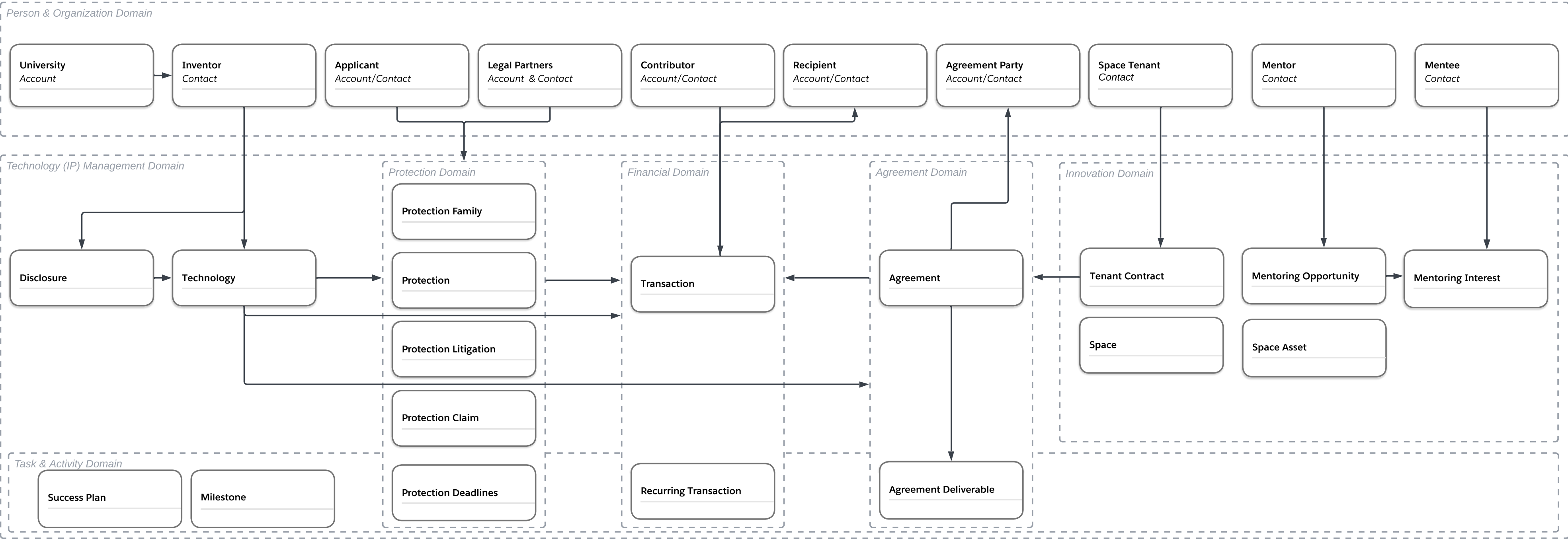


Technology Transfer Starter

Logical Data Diagram

Lifecycle support for Invention Disclosure, Filing, and Licensing workflow.

Process & Data Domains



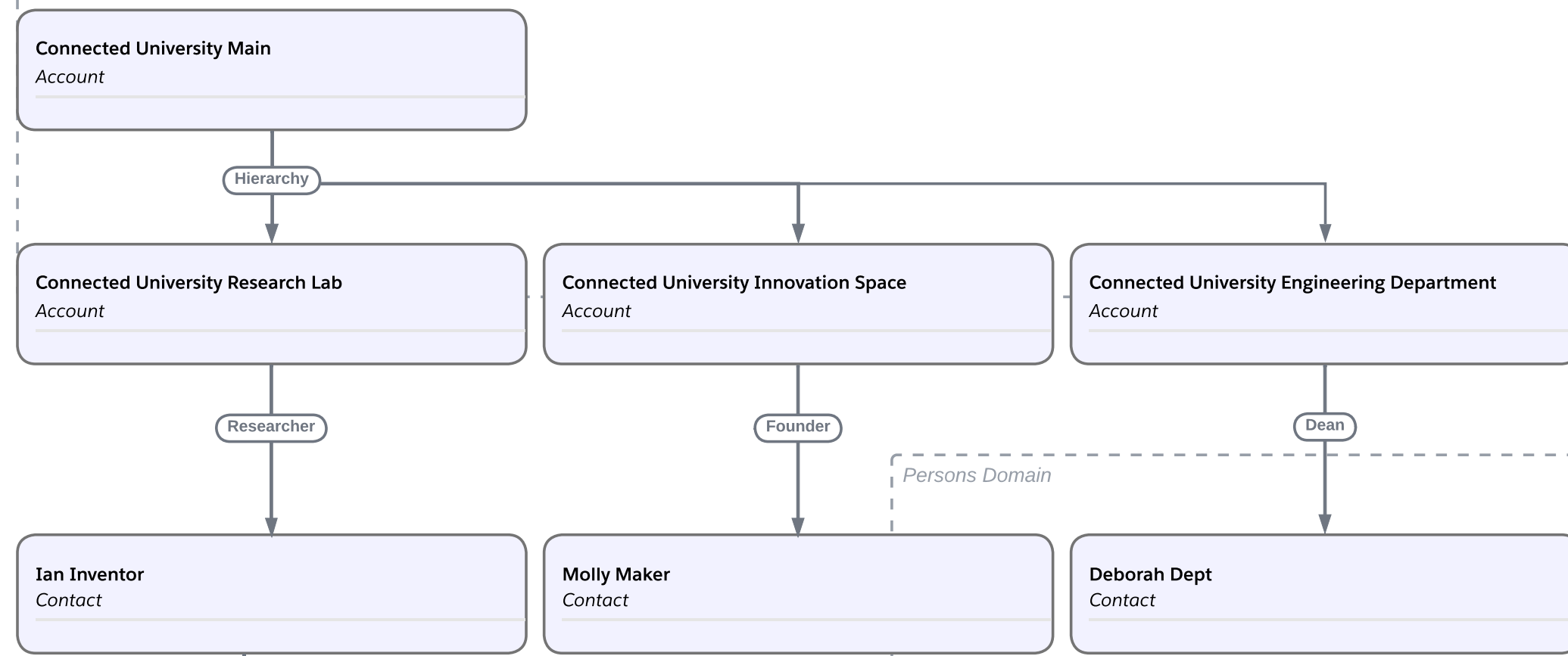
Lifecycle support for Invention Disclosure, Filing, and Licensing workflow.



Technology Lifecycle Management Process Flow

Support the entire lifecycle of your technology transfer operations from disclosure, assessment, decisions, partner processing, and financial mgmt.

Organization Domain

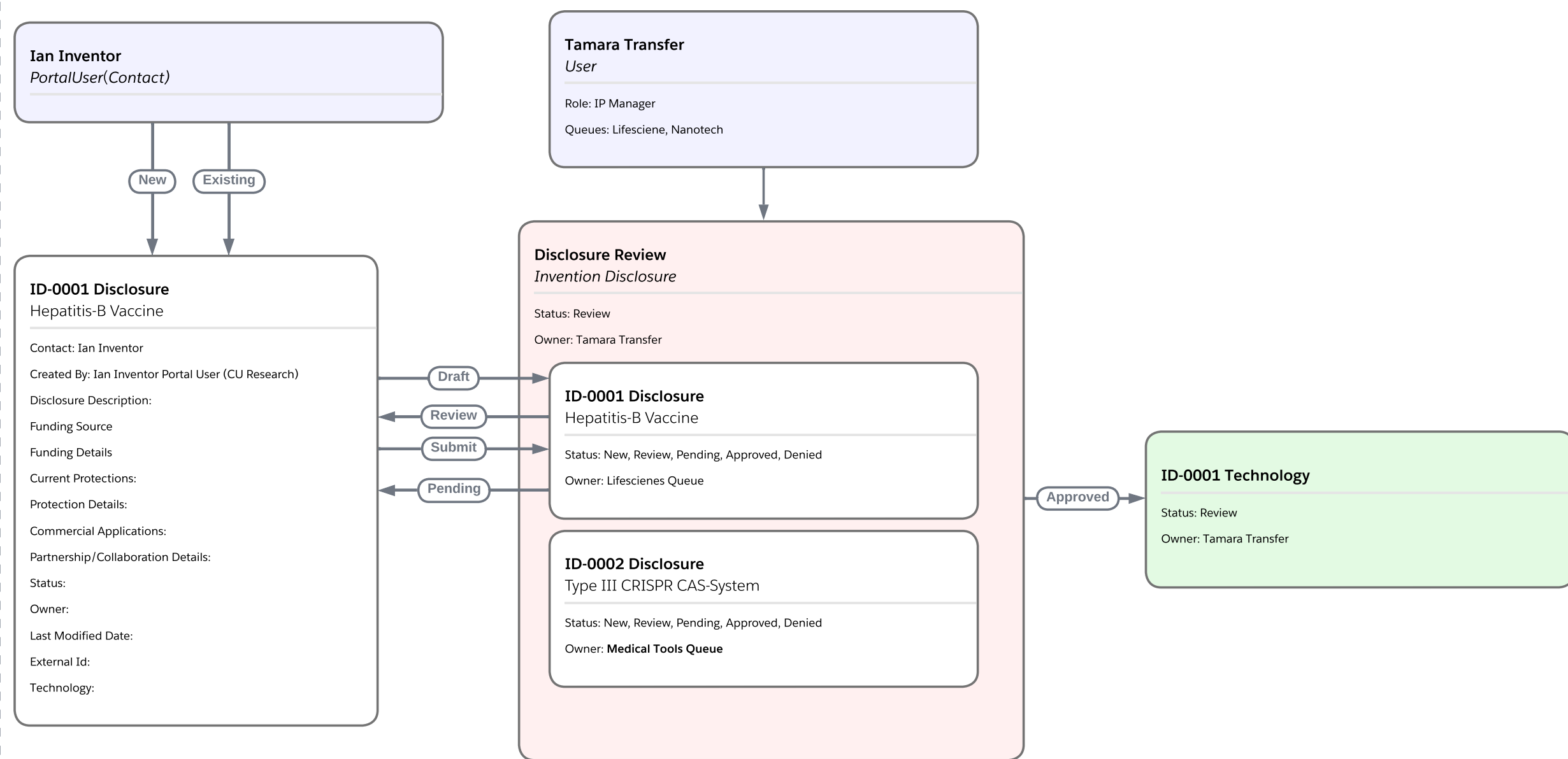


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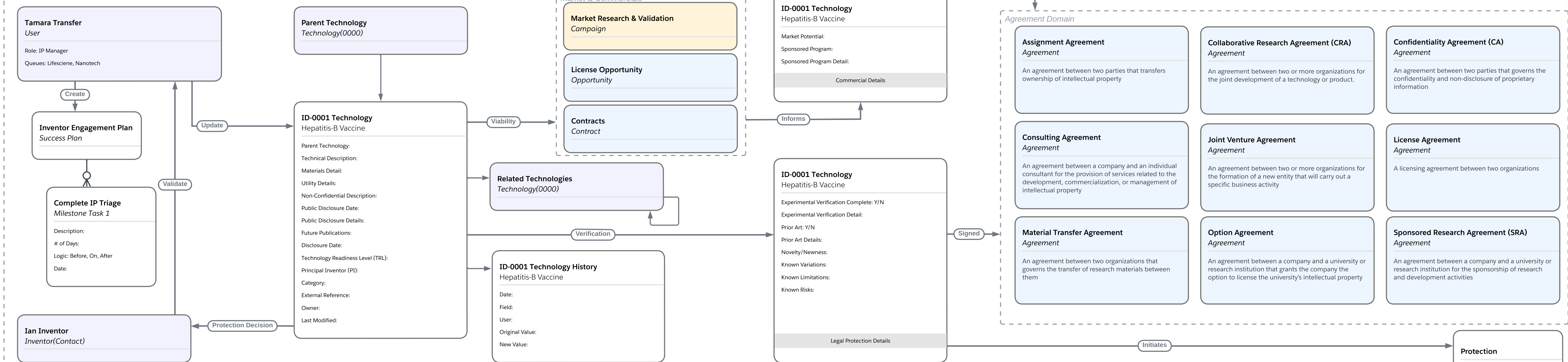


Reports To

Invention Disclosure Domain



Technology (IP) Management Domain



Assess & License

Agrees To

Files Application

Initiates

Signed

Verifies

Validates

Updates

Creates

Deletes

Archives

Restores

Exports

Imports

Transfers

Moves

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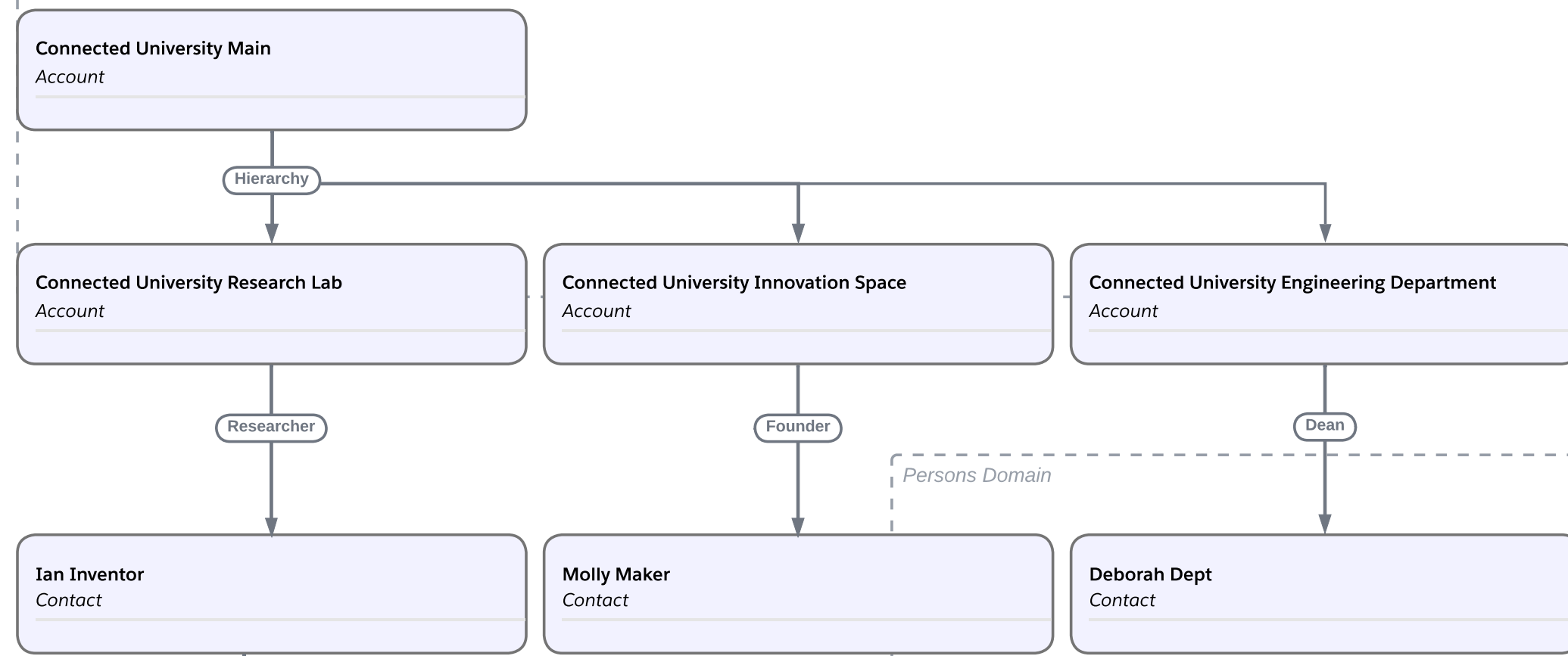
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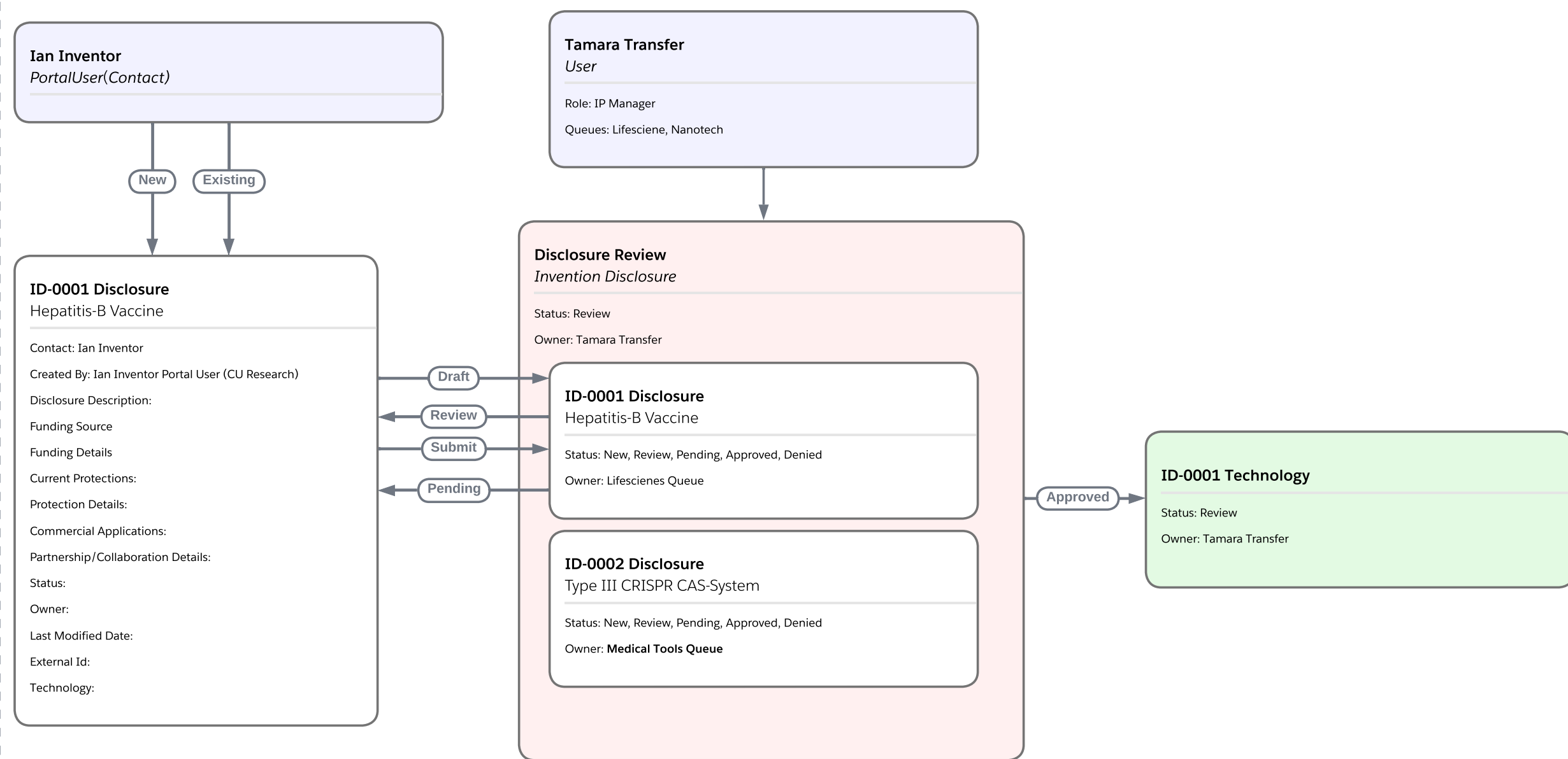


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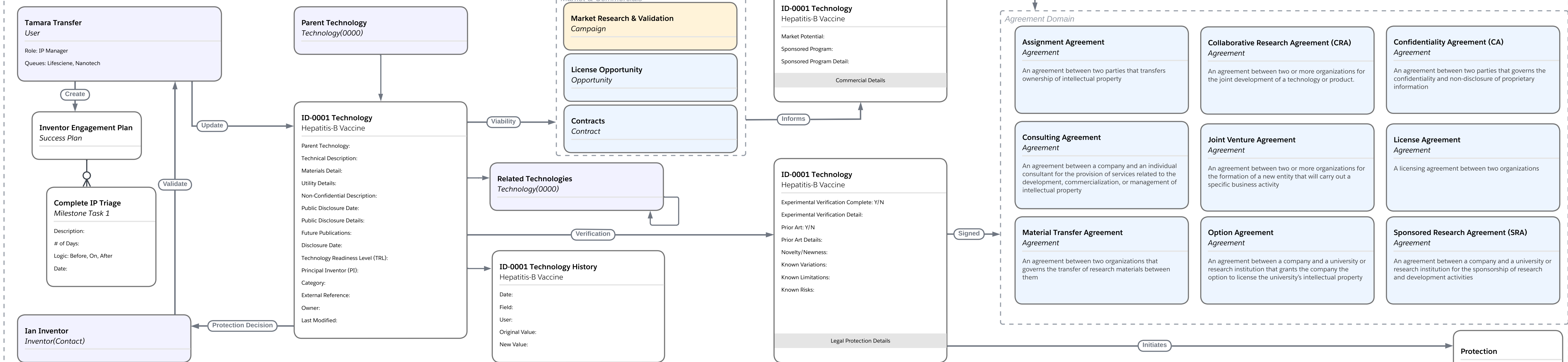


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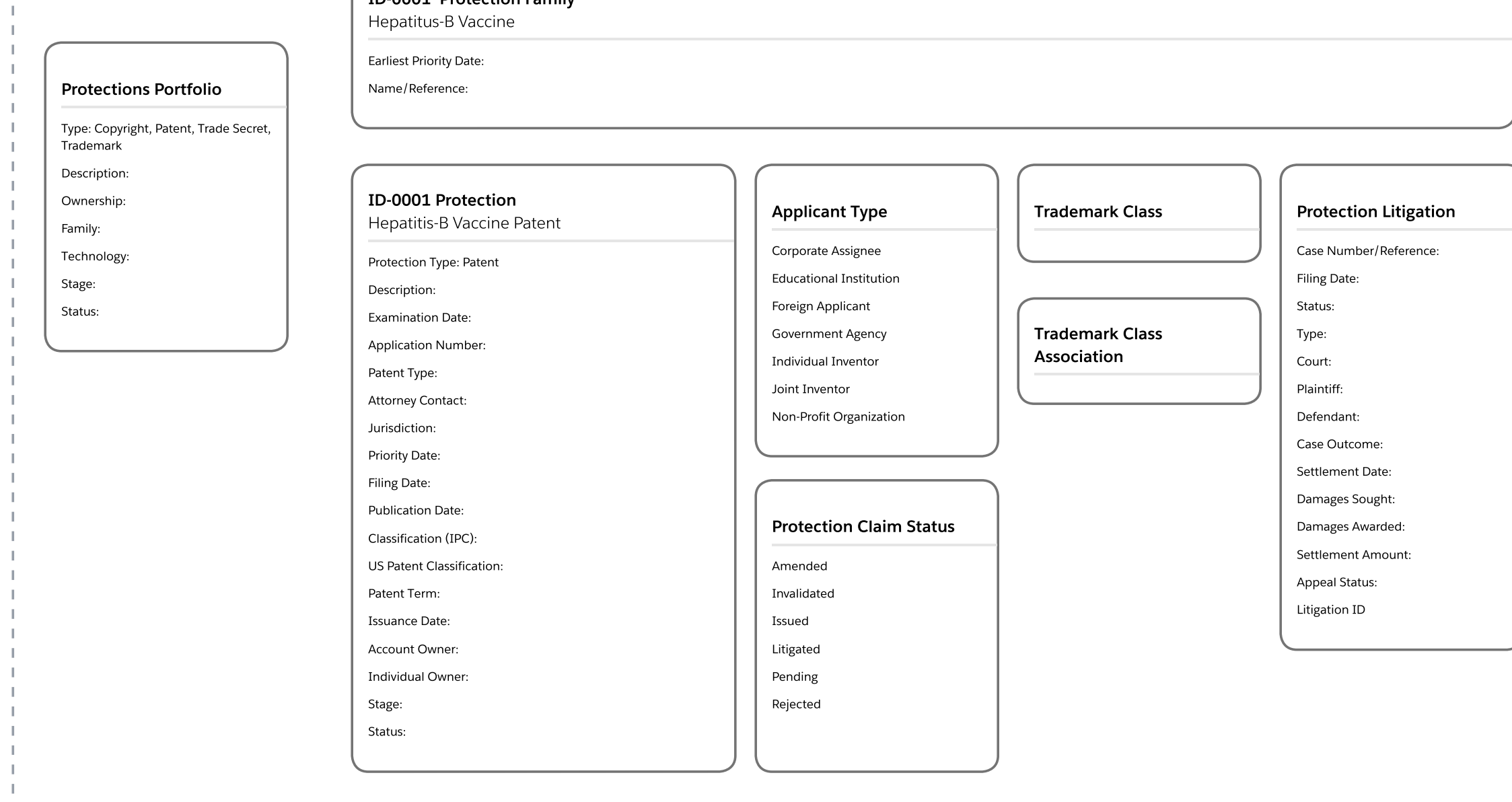
Invention Disclosure Domain



Technology (IP) Management Domain



Protection Management Domain



Feature Set

Invention Disclosure Invention Disclosure Flow Assignment Rules Inventor Self-Service Validation and Approvals	Technology Lifecycle Support Inventor Share Management Industry Agreement Type Support Licensee Management Compliance & Public Reporting	Integrated Protection Processes Applications, Claims, Family Support Patent, Trademark, Secret Types Litigation Tracking Legal Entity Tracking & Collaboration	Start-up Space Tracking Incubator & Spin-out Support Tenant Tracking Contract Lifecycle Asset Management	Partner & Mentorship Matching Interest Capture Matching Opportunities Related Technologies Corporate Tracking
Success Plans Templatize milestone tasks & activity	Process Flows TRLs, Patent Workflow, Shares Mgmt	Decision Assignment Configurable protection decisions	Agreements 9+ Common Agreement types	Opportunity Tracking Commercialization, Marketability

