



PI Portal  
Invention Disclosure Forms Feature Guide  
March 2021

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*Information/Help:*  
*[RAPIDFeedback@Research.ucla.edu](mailto:RAPIDFeedback@Research.ucla.edu)*

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## PI Portal Invention Disclosure Forms: Introduction

PI Portal was designed by PIs, for PIs. The system provides PIs and their delegates the ability to view all of their research data in one place. Now PIs and their delegates can also complete, execute, and submit Invention Disclosure Forms, Software Disclosure Forms, and Associated Technology Disclosure Forms to the UCLA Technology Development Group (TDG).

Hints and Tips to using PI Portal:

1. All required questions for the forms **must** be completed in order to submit.
2. Email notifications will be sent to the Lead, Primary Contact, and Form Creator on submission of each form.

### Roles and Permissions related to PI Portal Invention/Software/Technology Forms

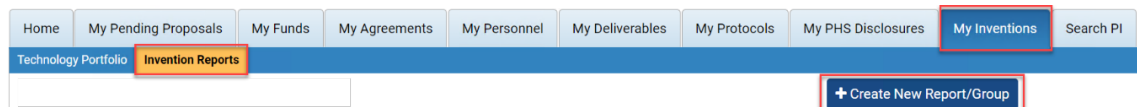
| Role                                    | Description   | Permission  |
|---|---|---|
| Lead                                    | The Lead Inventor, Lead Software Author, or Lead Creator of Associated Technology | <ul style="list-style-type: none"> <li>• View/edit forms and attachments where they are listed as the Lead</li> <li>• Submit forms where they are listed as the Lead</li> <li>• Execute forms where they are listed as the Lead</li> </ul>                                  |
| Creator                                 | The person who created the form   | <ul style="list-style-type: none"> <li>• View/edit forms and attachments they have created</li> <li>• Submit forms they have created</li> </ul>   |
| Primary Contact                         | The person listed on the form as Primary Contact (via checkbox)                   | <ul style="list-style-type: none"> <li>• View/edit forms and attachments where they are listed as the Primary Contact</li> <li>• Submit forms where they are listed as the Primary Contact</li> <li>• Execute forms where they are listed as the Primary Contact</li> </ul> |
| Collaborating Inventor/ Author/ Creator | Any other person listed on the form as another Inventor, Author, or Creator       | <ul style="list-style-type: none"> <li>• View forms and attachments where they are listed</li> <li>• Execute forms where they are listed</li> </ul>   |
| TDG                                     | Member of the UCLA Technology Development Group that reviews forms                | <ul style="list-style-type: none"> <li>• View all forms and attachments</li> </ul>  |

## 2A. PI Portal Invention Disclosure Forms: Login and Navigation

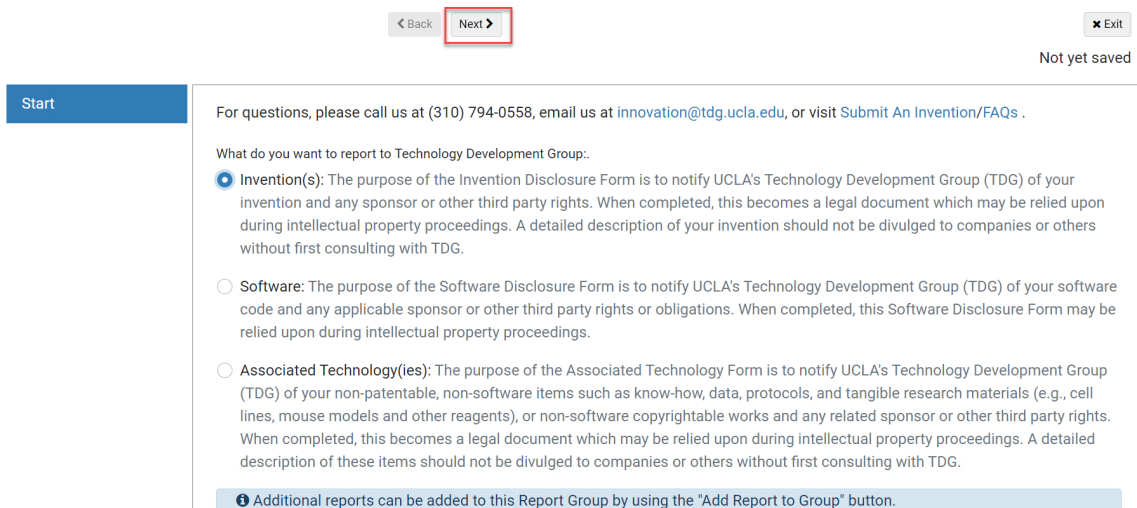
2A-01 Log in to the PI Portal [<https://piportal.research.ucla.edu/>] using your UCLA Single Sign-On Credentials and Multi-Factor Authentication.



2A-02 Navigate to the My Inventions Tab, and then to the Invention Reports Subtab. Use the Create New Report/Group to start a new report:



2A-03 This will open a screen describing the types of reports and asking you to choose which report you would like to add – Invention, Software, or Associated Technology:



Select one type of form, and then click the Next button to move to the next step.

2A-04 Complete the fields in each page of the form, using the navigational tools to progress. Please note the following characteristics of the forms:

1. Title and Lead Inventor are required before the form can be fully saved. Until those two minimally viable elements are entered, you will see the Exit button, as well as a “Not yet saved” indicator:

1. INVENTION TITLE

\*Please create a concise title that does not contain sufficient details to enable others to reproduce the invention.

2. Once the minimum viable fields are completed, the Exit button becomes Save and Exit, and all pages in the form are active. At this point, you can use the following features to navigate from page to page or exit the form:

- Back
- Next
- Save and Exit
- Page Navigation

3. FUNDING SUPPORT & THIRD PARTY MATERIALS USED

Indicate all funding (e.g., federal, corporate, foundations, etc.) and/or materials used to create the invention.

PI Names and Project Titles displayed in dropdowns below are tied to the inventor named in the **Inventors** section of this form. If you do not see your project listed, please ensure that all inventor are named.

Funding Source

\*Project Title

PI Name (Last, First)

Sponsor

Last Saved: 1 min(s) ago at 11:44 AM 02/23/2021

## 2B. PI Portal Invention Disclosure Forms: Smart Features

### 2B-01 Inventors/Software Authors/Associated Technology Creators ("Personnel")

Information that is available from UCPATH will be **automatically pulled** into the form once the individual is identified.

When navigating to the Personnel page, if you indicate that you are the Lead, PI Portal will populate your UCPATH information into the Lead fields:

2. IDENTIFICATION OF INVENTORS

Are you the lead inventor?

☒ Yes ☐ No

**IMPORTANT NOTE:**

Additional inventors may fill out the form, but only lead inventors may submit the form.  
All additional inventors will have access to edit the saved Invention Disclosure Forms until submission.

For all Personnel, there is a handy **search field** that allows you to search by Name or UID to find the individual. Once the individual is identified, PI Portal will populate the UCPATH information associated with that individual into the corresponding fields:

There is a button at the bottom of the Personnel screen that allows you to **add as many individuals as needed**. The search feature and automated data population for all person-related fields is available for every individual that is added to a form:

[+ Add Additional Author](#)

2B-02

## **Funding Information**

Information from extramurally funded research projects tracked in the Proposal and Award Tracking System (PATS) associated with all Personnel listed on a form are available for selection in the Funding Support & Third Party Materials Used page ("Funding"). When a project is selected, the relevant Title, PI, Sponsor, Grant/Contract Number, and Administering Department are **automatically populated** in the form for your convenience:

### **4. FUNDING SUPPORT & THIRD PARTY MATERIALS USED**

List all funding (e.g., non-profit, federal, for-profit, foundations, etc.) and any materials used to create the software (incorporation of third party software).

PI Names and Project Titles displayed in dropdowns below are tied to the author named in the [Authors](#) section of this form. If you do not see your project named.

Funding Source

\*Project Title

A Phase 1b Open-Label, Dose Escalation Study to Assess Safety, Pharmacokinetics, and Efficacy of PF-04518600 in Subjects With Advanced Solid Tumors

If you select *No*, indicate the *PI* and *Project Title* in the *Comments* field.

PI Name (Last, First)

Sponsor

Grant/Contract Number

Administering Dept./Center

No Funding Was Used  
(PQD5) Mass Profiling Melanoma Responses to Improve Therapy Choices and Prognosis  
A Multicenter, Open Label, Phase III Extension Trial to Study the Long-term Safety and Efficacy in Patients With Advanced Solid Tumors  
A Multi-center, Open-label Study to Investigate the Pharmacokinetic Interaction of RO5185426 with Pembrolizumab  
A Multicenter, Open-Label, Phase 1B Clinical Study of CMP-001 in Combination With Pembrolizumab  
A Multicenter, Randomized, Controlled, Three-Arm, Phase III Study to Evaluate the Safety and Efficacy of Atezolizumab in Combination With Carboplatin and Paclitaxel in Patients With Advanced Solid Tumors  
A Multicenter, Two Part, Phase 1B Study Evaluating Alternative Routes of Administration of CMP-001  
A Phase 1 Dose Escalation and Cohort Expansion Study of TSR-022, an anti-TIM-3 Monoclonal Antibody, in Patients With Advanced Solid Tumors  
A Phase 1 Open-label Study of Safety and Tolerability of MEDI4736 in Subjects With Metastatic or Unresectable Solid Tumors  
A Phase 1 Study of Gene Modified Immune Cells and a CTLA4 Antibody in Patients with Advanced Solid Tumors  
A Phase 1 Study to Evaluate the Safety, Tolerability and Efficacy of SCH 900353 in Subjects With Advanced Solid Tumors  
A Phase 1, Open-Label, Dose Escalation Study of PF-04518600 as a Single Agent and in Combination With Pembrolizumab in Subjects With Advanced Solid Tumors

There is a button at the bottom of the Funding section that allows you to **add as many funding sources as needed**. The drop-down and automated data population for all funding fields is available for every funding source that is added to a form:

[+ Add Additional Funding](#)

2B-03

## Attachments

There is a maximum attachment size of 20MB for the total of all documents attached to each form. This is because the forms are submitted to UCLA Technology Development Group (TDG) via email, and the email system has this limitation. PI Portal keeps track of the total size of the attachments on your forms, and **warns you when the limit is exceeded**. This helps to ensure successful submission of your forms to TDG.

PI Portal also keeps track of and provides a warning for documents with **duplicative names**, to help avoid uploading the same document more than once.

### 5. ATTACHMENTS

You may upload attachments that add up to 20MB in size. Please contact [innovation@tdg.ucla.edu](mailto:innovation@tdg.ucla.edu) to coordinate file sizes or total submissions over this limit.

The file you are trying to upload already exists.

Total size: 6.92 MB

| File               | Size (KB) | Actions                  |                        |
|--------------------|-----------|--------------------------|------------------------|
| 2020_ORG_42200.xls | 1,765 KB  | <a href="#">Download</a> | <a href="#">Delete</a> |
| data.xlsx          | 7 KB      | <a href="#">Download</a> | <a href="#">Delete</a> |

2B-04

## Dates

Any time you see a date field, it will have a **smart calendar** feature so that you can easily identify the correct date. Click the calendar icon to pop up the feature – you can use the month/year selectors and click on the numeric date to populate the field.

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02/23/2021

### TIMELINE

| Event   |
|---|
| *Initial Conception                                       |
| First description of complete invention (oral or written) |

2B-05

## Required Fields

Required fields are identified with a **red asterisk**:

## TIMELINE

| Event               | Date       |
|---------------------|------------|
| *Initial Conception | mm/dd/yyyy |

Some fields are **conditionally required**—that is, required ONLY if another question is answered a certain way. These fields are not marked with a red asterisk, but based on the language of the related questions, it should be clear when the conditional field is required:

### Was the Invention developed at/with any of the following?

- ☒ Using materials received from a third party under an **MTA (e.g. equipment, cell lines, antibodies, software)**.

If yes, please indicate the (1) material name, (2) provider and (3) material transfer agreement number.

This field is required because I have checked the box indicating I used materials from a third party provider under an MTA. If I had not checked the box, this field would not be required.

If any required fields (whether marked with a red asterisk or conditionally required) are not completed, the form cannot be submitted to TDG until the fields are completed.

PI Portal provides several helpful features to indicate what fields need to be completed, and help facilitate completing your form, on the **Review and Submit** page:

- If any required fields need to be completed, there will be a **message at the top** of the page
- If any required fields need to be completed, the **Submit button is disabled**
- Each required field that is not completed is marked with a **red indicator** and a **link to edit the field**
- Each field whose requirement has been met is marked with a **green indicator**

[Back](#) [Next >](#) [Submit](#) **B**

[Save and Exit](#)

Report Group Id # 875

Last Saved: 1 min(s) ago at 12:08 PM 02/23/2021

Please complete all required fields. **A**

### 1. INVENTION TITLE

\*Please create a concise title that does not contain sufficient details to enable others to reproduce the invention.

testing

|                     |        |          |   |
|---------------------|--------|----------|---|
| *First Name         | Joseph | <b>D</b> | ✓ |
| *Last Name          | Bruin  |          | ✓ |
| *Company/University |        |          | ⓘ |
| *Work Email         |        | <b>C</b> | ⓘ |
| Work Address        |        |          | ✓ |
| Work City           |        |          | ✓ |

## 2C. PI Portal Invention Disclosure Forms: Submission

### 2C-01 Submitting the Invention Disclosure Form:

When all required fields are completed and your Form is ready to submit to TDG, navigate to the Review and Submit page, and click the Submit button at the top:

Report Group Id # 858

Last Saved: 1 min(s) ago at 12:51 PM 02/23/2021

1. INVENTION TITLE

\*Please create a concise title that does not contain sufficient details to enable others to reproduce the invention.

ML testing - It's workflow time, Let's go!

2. IDENTIFICATION OF INVENTORS

Note authorship and inventorship are not the same. Rather, inventorship is a legal determination. Generally, inventors are those who made a non-trivial intellectual contribution to the invention as claimed in the patent. Simply contributing to the invention's reduction to practice (e.g., testing the invention or producing a physical embodiment of the invention) is generally not enough to qualify as an inventor. **In case of doubt, please speak with TDG.**

List the lead inventor, inventor/primary contact first

☐ Primary Contact

\*UCLA ID: 60266597

UCPath ID:

\*First Name: Antoni

\*Position: Faculty

\*Last Name: Ribas

Department(s): MEDICINE-HEMATOLOGY-ONCOLOGY

If you are submitting a **Software Disclosure Form** or an **Associated Technology Disclosure Form**, you will see a confirmation window pop up. Software and Associated Technology Disclosure Forms require all UCLA Personnel listed on the form to Execute an Assignment Form, which can be done electronically in PI Portal by all Personnel who are UCLA employees.

- Click "I'm not ready" to cancel the submission.
- Clicking "Submit" will automatically notify TDG and route the form to all UCLA Employees listed on the form for Execution:

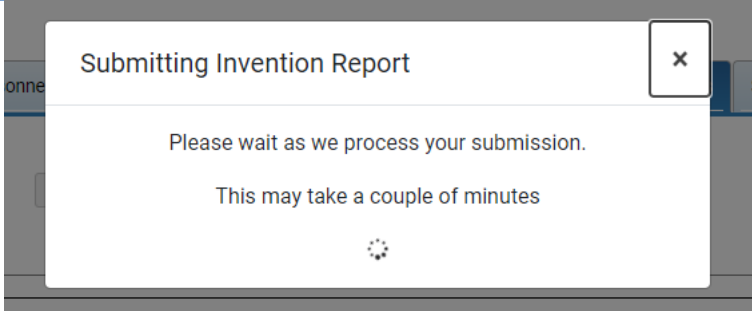
Report Submission Confirmation

When you click the Submit button, this form will be routed to all required UCLA Employees who are Creators for Execution of Assignment prior to the form being submitted to TDG.

I'm not ready Submit

If you are submitting an Invention Disclosure Form, Personnel will not have to Execute an Assignment Form is not done.

Once you click Submit on the Invention Disclosure Form, or click Submit in the confirmation pop-up for the Software Disclosure Form or Associated Technology Disclosure Form, you'll see this message confirming that your form is being submitted:

|  |   |
|--|---|
|  |   |
| 2C-02  | <p><b><u>Email Notifications</u></b></p> <p>Once a form has been submitted, the following email notifications are sent:</p> <p><b>Submission Notification:</b> Notifies the recipients below that the form has been submitted. Includes the form itself and all attachments.</p> <ul style="list-style-type: none"> <li>• TDG</li> <li>• Lead</li> <li>• Primary Contact</li> <li>• Person who created the form</li> </ul> <p><b>Execution Notification (Software and Associated Technology Disclosure Forms only):</b> Notifies the UCLA Employee that execution of an assignment form is requested.</p> |
| <b>2D. PI Portal Invention Disclosure Forms: Execution of Assignment</b> |   |
| 2D-01  | <p><b><u>Executing Assignment: Navigating to the Form – Via Email Link</u></b></p> <p>Each UCLA Employee whose Execution of Assignment Form is requested on a Software or Associated Technology Disclosure Form will be sent an email from PI Portal with a link to the form.</p> <p>The Subject is in the format: Execution Notification: Lead Author/Creator Last Name Report Group ID Type of Form (Software or Associated Technology)</p> <p>The body of the email looks like the example below, and includes a link to the form for the Signer to click:</p>   |

The Disclosure form referenced below has been submitted to TDG, and your execution is requested. Please click on the following link (authenticate using your UCLA Single Sign On credentials) to execute the Assignment:

<http://piportaluat.research.ucla.edu/Inventions/Reports/view/?id=0abf5265-95f3-4074-a991-14cf9bfe9d3a>

When completed and submitted, this Disclosure becomes a legally signed document which may be relied upon during patent prosecution. A detailed description of this invention should not be divulged to sponsors or others without first consulting TDG. Sponsors whom the University may owe rights in patents will be notified of this invention in confidence by the University.

|                            |   |
|----------------------------|---|
| <b>Report Group ID</b>     | 858                                     |
| <b>Lead</b>                | Joseph Bruin                            |
| <b>Type of Disclosure</b>  | Associated Technology                   |
| <b>Title of Disclosure</b> | Title of the Associated Technology Form |
| <b>Submission Date</b>     | 02-23-2021                              |

If you have any questions prior, please email [innovation@tdg.ucla.edu](mailto:innovation@tdg.ucla.edu).

Clicking on the link will bring the Signer to the PI Portal login page, where the individual's UCLA Single Sign-On credentials should be entered:

### Sign In with your UCLA Logon ID

SIGN IN

- [Forgot your UCLA Logon ID or Password?](#)
- [Need a UCLA Logon ID?](#)

or

Are you a member of UCLA Health Sciences?

[Sign in with your Mednet username and password](#)

Once the Signer is logged in, he/she will be automatically directed to the form requiring Execution of Assignment.

2D-02

### **Executing Assignment: Navigating to the Form – Via PI Portal Navigation**

A UCLA Employee whose execution of assignment is requested on a form can log into PI Portal:  
<https://piportal.research.ucla.edu/>

Clicking the Sign In button brings the Signer to the PI Portal login page, where the individual's UCLA Single Sign-On credentials should be entered:

## Sign In with your UCLA Logon ID

[Forgot your UCLA Logon ID or Password?](#)  
[Need a UCLA Logon ID?](#)

or

Are you a member of UCLA Health Sciences?  
[Sign in with your Mednet username and password](#)

Once logged in, the Signer can navigate to the My Inventions Tab and then to the Invention Reports Subtab.

If there is a form that requires execution by this individual, there will be an “Execute” action in the Actions column for that form. Only an individual whose execution is requested will see this Execute button. Clicking the Execute button will bring the Signer to the form requiring Execution of Assignment.

| Report Group Id # 858 |  |               |           |                |                    |  |
|-----------------------|--|---------------|-----------|----------------|--------------------|--|
| Type of Report        | Title                                      | Lead          | Status    | Submitted Date | Execution Progress | Actions  |
| Software              | Adding Software to 858                     | Ribas, Antoni | Draft     |                | N/A                | <a href="#">Edit</a> <a href="#">Delete</a>      |
| Associated Technology | ML Add Report to Group 858                 | Ribas, Antoni | Submitted | 2/23/21        | 0 of 1             | <a href="#">Execute</a> <a href="#">Download</a> |
| Invention             | ML testing - It's workflow time, Let's go! | Ribas, Antoni | Submitted | 2/23/21        | N/A                | <a href="#">View</a> <a href="#">Download</a>    |

2D-03

## Executing Assignment – Review and Execute

When the Signer has been brought to the form requiring his/her execution, the top of the form indicates the execution progress (who has already executed, whose execution is still pending):

[< Back](#) [Next >](#) [Exit](#)

**Execution progress:**  
☐ Antoni Ribas awaiting execution  
 Please review the report below, and click the **Execute** button:

[+ Add Report to this group](#) Report Group Id # 858 Submitted on 2/23/21

[Adding Software to 858](#)  
[ML Add Report to Group 858](#)  
[Review](#)  
[ML testing - It's workflow time, Let's go!](#)

### 1. TITLE

\*Create a concise title describing the associated technology.

ML Add Report to Group 858

### 2. IDENTIFICATION OF TECHNOLOGY CREATORS

Please list the individuals that created the tangible materials, developed the protocols or know-how, data, etc., as relevant. Students must list a faculty advisor. ALL LISTED PEOPLE MUST SIGN AND DATE THE LAST PAGE OF THIS FORM.

**\*\*ALL INDIVIDUALS LISTED IN THIS SECTION MUST SIGN AND DATE THE ASSIGNMENT ON THE LAST PAGE OF THIS FORM.**

The Signer should scroll down to review the form. In the Attachments section, the Signer will have access to open and review all attachments. Once the review is complete, the Signer can use the **Execute** button at the bottom of the form to Execute the Assignment Form:

Each person (each a "Creator") signing below hereby represents she/he has contributed to the creation of the technology described in the related Associated Technology Disclosure Form (the "Technology") and, to her/his reasonable knowledge, that the set of individuals identified as authors in the Technology Disclosure Form is accurate and complete. The Technology contains or may contain subject matter that is subject to assignment to the University of California ("University") pursuant to University policies, employment, funding or otherwise.

Creator represents to the best of her/his knowledge, their interest in the Technology is unencumbered, other than with respect to any funding support or third party materials identified the Associated Technology Disclosure Form, if applicable. Creator further represents that she/he has good and full right and lawful authority to assign, sell and convey the same in the manner herein set forth. And for the same consideration Creator hereby covenants and agrees to sign all papers and documents, take all lawful oaths, and do all acts necessary as required to be done for the procurement, maintenance, enforcement, and defense of such intellectual rights without charge to the University, but at the cost and expense of the University, and Creator hereby covenants that they have not executed and will not execute any agreement in conflict herewith.

In consideration of the benefits for Creator stipulated in the applicable University policies, which policies are made by reference part hereof, and other good and sufficient considerations, the receipt of which is hereby acknowledged – to the extent all right, title and interest in and to such Technology is not already owned by or assigned to the University – Creator hereby assigns and does assign to the University all of their right, title and interest in and to the Technology, including any copyrights and other property rights contained therein. This assignment applies to the University, its successors and assigns.

The following Creator hereby executes this Assignment as of the date the **Execute** button is clicked below:

Ribas, Antoni (602666597)

Execute

Once the execution is complete, the Signer will be brought back to the Invention Reports Subtab under My Inventions, and a Disclosure Execution Completed message will appear. The Execution Progress will also be updated to reflect the execution (e.g., 1 of 1 execution is complete).

**Disclosure Submission Execution Completed**
×

Execution has been recorded for Ribas, Antoni on 2/23/2021

[Home](#)
[My Pending Proposals](#)
[My Funds](#)
[My Agreements](#)
[My Personnel](#)
[My Deliverables](#)
[My Protocols](#)
[My PIHS Disclosures](#)
[My Inventions](#)
[Search PI](#)

[Technology Portfolio](#)
[Invention Reports](#)

Viewing Report Queue for Ribas, Antoni + Create New Report/Group

Report Group id # 858

+ Add Report to this group

| Type of Report        | Title                                      | Lead          | Status    | Submitted Date | Execution Progress | Actions        |
|-----------------------|--|---------------|-----------|----------------|--------------------|----------------|
| Software              | Adding Software to 858                     | Ribas, Antoni | Draft     |                | N/A                | Edit  Delete   |
| Associated Technology | ML Add Report to Group 858                 | Ribas, Antoni | Submitted | 2/23/21        | 1 of 1             | View  Download |
| Invention             | ML testing - It's workflow time, Let's go! | Ribas, Antoni | Submitted | 2/23/21        | N/A                | View  Download |

## 2E. PI Portal Invention Disclosure Forms: Groups

### 2E-01 Adding Forms to Report Groups:

Once your form has been created, you can create additional forms that are related to each other. For example, if you have an Invention that also has a Software component, you can complete both an Invention Disclosure Form and a Software Disclosure Form and relate them to one another by placing them within the same Report Group.

There are two ways to create a form that is related to another form:

1. From inside the form, use the + Add Report to this group button:

### **Viewing Forms in Report Groups – Invention Reports Subtab**

The main Invention Reports Subtab under My Inventions is where you can find information about forms that are in draft, are waiting for Execution, or have been submitted to TDG. There are several useful features in this screen that provide information about the forms:

- A. Report Group ID
- B. Type of Report (Invention, Software, Associated Technology)
- C. Title
- D. Lead
- E. Status (Draft, Submitted)
- F. Submitted Date (Date the report was submitted, if applicable)
- G. Execution Progress (X of Y: X number of executions completed, Y number of executions requested)\*\*
- H. Actions for Lead, Creator, and Primary Contact:
  - Draft Status: Edit, Delete
  - Submitted Status: View, Download
- H. Actions for Signers: Execute, Download

| Report Group Id # 875 <span>A</span> |                                    |                 |        |                |                    |   |  | + Add Report to this group |  |
|--------------------------------------|------------------------------------|-----------------|--------|----------------|--------------------|---|--|----------------------------|--|
| Type of Report                       | Title                              | Lead            | Status | Submitted Date | Execution Progress | H |  | Actions                    |  |
| B Invention                          | C This is an Invention Report Form | D Ribas, Antoni | Draft  |                | N/A                |   |  | Edit Delete                |  |

| Report Group Id # 872 <span>E</span> |                         |               |           |                |                    |   |  | + Add Report to this group |  |
|--------------------------------------|-------------------------|---------------|-----------|----------------|--------------------|---|--|----------------------------|--|
| Type of Report                       | Title                   | Lead          | Status    | Submitted Date | Execution Progress | H |  | Actions                    |  |
| Invention                            | one more invention 12/4 | Ribas, Antoni | Submitted | 12/4/20        | N/A                |   |  | View Download              |  |

| Report Group Id # 858 <span>G</span> |  |               |           |                |                    |   |  | + Add Report to this group |  |
|--------------------------------------|--|---------------|-----------|----------------|--------------------|---|--|----------------------------|--|
| Type of Report                       | Title                                      | Lead          | Status    | Submitted Date | Execution Progress | H |  | Actions                    |  |
| Software                             | Adding Software to 858                     | Ribas, Antoni | Draft     |                | N/A                |   |  | Edit Delete                |  |
| Associated Technology                | Associated Tech with Multiple Executors    | Ribas, Antoni | Submitted | 2/23/21        | 0 of 3             |   |  | Execute Download           |  |
| Associated Technology                | ML Add Report to Group 858                 | Ribas, Antoni | Submitted | 2/23/21        | 1 of 1             |   |  | View Download              |  |
| Invention                            | ML testing - It's workflow time, Let's go! | Ribas, Antoni | Submitted | 2/23/21        | N/A                |   |  | View Download              |  |

\*\* Execution of the Assignment Form can only be done by UCLA Employees in PI Portal. Execution Progress counts those UCLA Employees who have executed as X, and the UCLA Employees who are requested to execute as Y. Only the individual Signer can execute their own assignment – this action cannot be delegated to another individual on behalf of the Signer.

### Viewing Forms in Report Groups – Report Form

All forms in a Report Group are accessible from within any form, via the left page navigation. If you are editing or viewing a form, all the other forms in that same group are visible in the left page navigation:

- A. Draft forms can be edited, and appear blue
- B. Submitted forms can be viewed but not edited, and appear gray
- C. Click on the title of the form to view it or edit it
- D. Icons next to the title of the form indicate the type of form

➕ Add Report to this group

⚙️ One more associated technology report for group 858

1. Title

2. Creators

3. Funding & Resources

4. Technology Details

5. Attachments

6. Review and Submit

⚙️ Adding Software to 858

⚙️ Associated Tech with Multiple Executors

⚙️ ML Add Report to Group 858

💡 ML testing - It's workflow time, Let's go!

Report Group Id # 858

1. TITLE

\*Create a concise title describing the associated technology.

One more associated technology report for group 858

💡 Invention

⚙️ Associated Technology

⚙️ Software