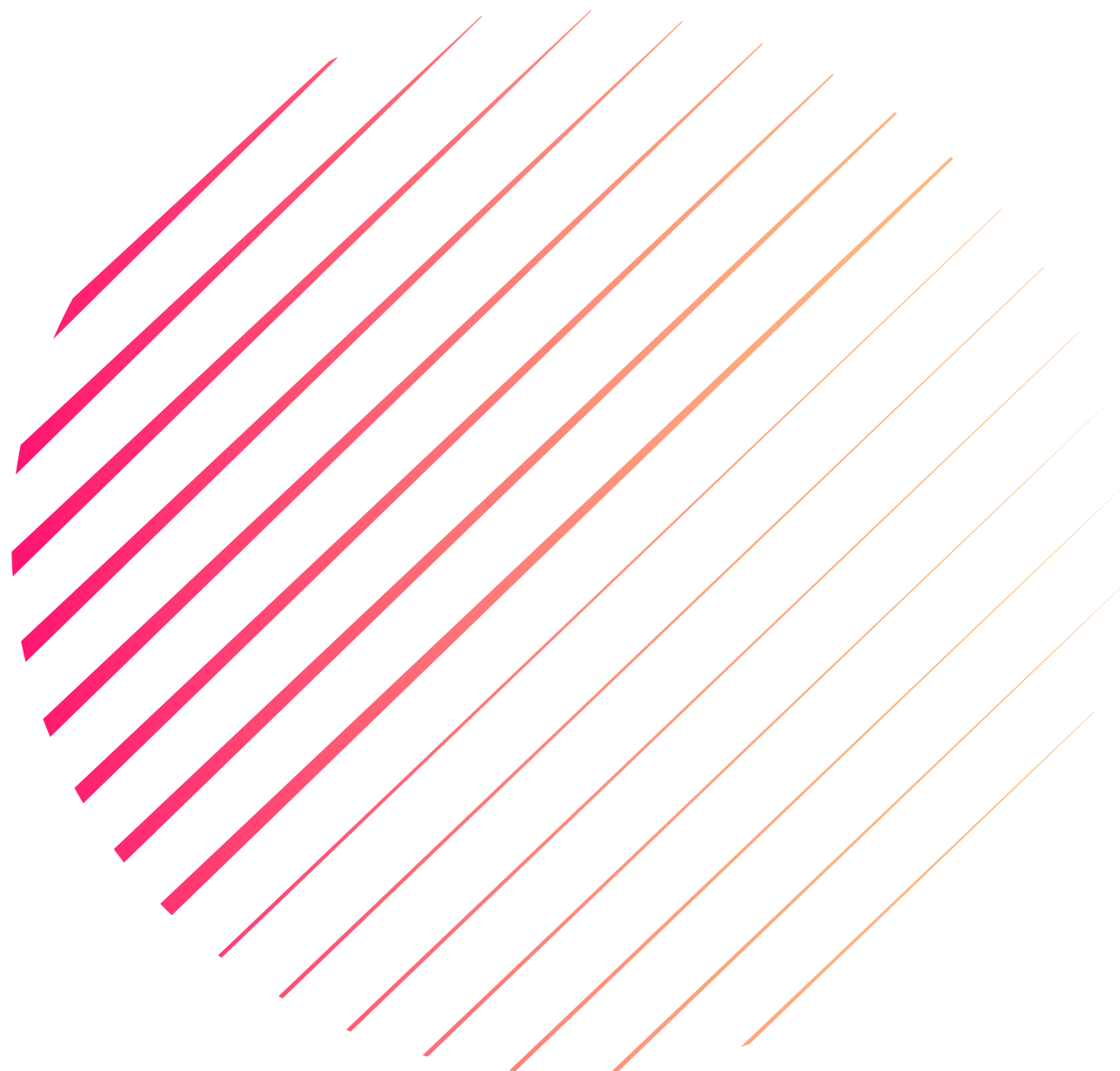# Overview of the Airtable Track of Jesus Docket at Cornell CTL

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Section I

Executive Summary

The "Track of Jesus' Dockets," developed by Jesús M. García-Figueroa during his postdoctoral fellowship at the Cornell University Center for Technology Licensing (Cornell CTL), is an efficient Airtable tool designed to track and organize marketing information for inventions, streamlining decision-making and enhancing marketing efforts.

This report is structured into key sections:

- Section III: About the Table "From Disclosure": About the table that tracks disclosed cases with market potential, documenting case status, evaluations, docket number, market date, assigned technology licensing officer, and NASA's Technology Readiness Level (TRL).

- Section IV: About the Table "Marketing of Tech-Briefs": About the table that monitors the marketing process for tech briefs, capturing essential fields like case stage, priority level, and key marketing dates to align stakeholder efforts.

- Section V: About the Table "From Email Campaigns": About the table organizes email marketing efforts, categorizing information by action tags and tracking resolution status to support effective outreach strategies.

- Section VI: Accomplishments and Advantages: About how the implementation of the "Track of Jesus Dockets" has transformed document management, improving accessibility, collaboration, accountability, and transparency. The system has significantly expedited marketing activities, with a five-fold increase in online presence for cases sent to market monthly.

- Section VII: Recommendations for Cornell CTL: The "Track of Jesus Dockets": Covers what should be implemented rather than recreated. That, centralizing the information that will foster institutional knowledge and reduce redundancy.

- Appendix A: Navigating NASA's Technology Readiness Levels: An appendix that outlines NASA's TRL framework, essential for assessing technology maturity from research to deployment, emphasizing standardized testing and documentation for successful commercialization.

- Appendix B: Understanding Tech-Brief Working Stage Statuses: An appendix that explains the various statuses within the Tech-Brief Working Stage, providing insights for effective project management and ensuring stakeholder alignment.

In summary, as "Track of Jesus' Dockets" proved to be vital for enhancing marketing strategies and managing technology information within Cornell CTL. It supports informed decision-making and continuous improvement, contributing to the long-term success of technology commercialization process from their disclosure up to the point in which those are market.

Section II

Introduction

The "Track of Jesus' Dockets" is an innovative Airtable file developed by Jesús M. García-Figueroa during his tenure as a postdoctoral fellow at the Cornell University Center for Technology Licensing (Cornell CTL). This powerful tool is specifically designed to assist the Physical Sciences Directorate at Cornell CTL in effectively tracking and organizing marketing information. Its primary goal is to streamline decision-making and enhance marketing efforts related to inventions, regardless of their intellectual property status. The file consists of three main tables: "From Disclosure," "Marketing of Tech-Briefs," and "From Email Campaigns."

This report offers a comprehensive overview of the functionality of Track of Jesus' Dockets, providing necessary instructions for inputting information on a case within the system. The report is organized into seven sections, with the next five focusing on specific aspects of the tool:

- Section III delves into the table "From Disclosure," outlining its structure and the specific sections that require user input.

- Section IV examines the table "Marketing of Tech-Briefs," detailing its layout and the necessary sections to be completed.

- Section V discusses the table "From Email Campaigns," describing its organization and the essential areas that need attention.

- Section VI highlights the advantages of utilizing Track of Jesus' Dockets and summarizes the valuable lessons learned from its implementation.

- Section VII provides practical suggestions for leveraging Track of Jesus' Dockets, whether for ongoing tracking of marketing cases or as a template for capturing information and managing marketing efforts across the entire Cornell CTL ecosystem.

Section III

About the Table "From Disclosure"

The "From Disclosure" table serves as a crucial tool for capturing and managing information related to cases that have been initially disclosed and are projected to have market potential. This table not only tracks the status of these cases but also identifies those that may need further evaluation or documentation, such as prior searches or reporting letters. It incorporates the perspectives of key stakeholders—Jesus, Martin, and Ryan—ensuring that case prioritization is conducted in an unbiased manner.

In addition to its purpose, the table includes specific elements that must be filled out to ensure comprehensive data collection. Key fields include the docket number, market by date, PCT application publication date, and the type of marketing needed. Other important elements include the assigned technology licensing officer, evaluation of technology readiness according to NASA's TRL scale, and the current working stage of the tech brief. Additional fields provide context regarding the tech brief's readiness, priority status, and any pertinent notes related to case management. This structured approach facilitates effective tracking and assessment of technology disclosures, ultimately enhancing decision-making processes within the organization.

III A. Purpose of the Table: "From Disclosure"

The "From Disclosure" table is designed to capture information from cases that were initially disclosed and that we project would be good for the market. It also includes cases that may require additional work, such as prior searches or reporting letters.

It features JESUS' VIEW, MARTIN'S VIEW, and RYAN'S VIEW, which are designed to facilitate Jesus's assessment of cases when prioritizing them from Martin or Ryan in an unbiased manner. Additionally, it provides the perspectives of both Martin and Ryan.

III B. Filling Elements on Table "From Disclosure"

The columns to fill in the table "From Disclosure" are:

- Docket: Docket number with the letter "D" followed by a five-digit number. For example, docket 12344 should be D12344, and docket 1234 should read D01234.

- Market by Date: This is twelve months after the filing date of the case specified in the Sophia cloud-based knowledge management system.

- PCT App Publication Date: Eighteen months after the filing date of the case specified in the Sophia cloud-based knowledge management system.

- Marketing Needed: Specify Tech-Brief, Marketing, Slide Deck, or None, depending on the specific case.

- TLO: Specify between the two technology licensing officer options we have at Physical Sciences: Ryan Luebke or Martin Teschl.

- NASA's TRL: Specify the scale of evaluation of technology according to NASA's Technology Readiness Level scale when applicable. See Appendix A for more instructions.

- TB/Working Stage: Specify between 00. Adopting Case, 010. Collecting Documents, 020. Bibliography In Progress, 030. Tech Brief In Progress, 040. Tech Brief Ready, 050. Tech Brief Under Review, 060. Marketing In Progress, 080. Hold, or 091. Agreement, depending on the specific case according to statements on Appendix B.

- Tech Brief Ready: The date when the tech brief is approved by the inventor and ready to be distributed to the public.

- Priority: Used to specify the priority of revising or working on the case as needed and beyond traditional expectations.

- Notes: Where instructions and updates about what is needed to work on that case and how it is handled are provided.

- Invention's Title: The title of the invention as noted in the Sophia cloud-based knowledge management system.

- Lead Inventor: Full name of the lead inventor specified in the Sophia cloud-based knowledge management system.

Section IV

About the Table "Marketing of Tech-Briefs"

The "Marketing of Tech-Briefs" table serves a crucial purpose in tracking the marketing process for cases with tech briefs that are prepared for market readiness. Its strategic placement alongside the "From Disclosure" table highlights its significance within the overall workflow. This table consists of several grids, including "No Licensed No Completed by IP's Stage," "No Licensed Completed by IP's Stage," "No Licensed by IP's Stage," "Licensed by IP's Stage," and "JESUS' VIEW." Each grid is specifically tailored to address distinct situations of interest, thereby facilitating effective case tracking and management.

In order to maintain clarity and organization, the "Marketing of Tech-Briefs" table requires the completion of various elements. These include essential information such as the docket number, technology licensing officer (TLO) designation, licensing contact person, intellectual property (IP) stage, case stage, tech brief working stage, priority level, NASA's Technology Readiness Level (TRL), licensing status, and completion status. Additionally, the table encompasses critical dates related to the tech brief's approval, marketing notifications to inventors, and publication on various platforms such as LinkedIn and IN-PART.

Furthermore, the table allows for the recording of notes and observations pertinent to the marketing efforts, ensuring that all stakeholders are informed and aligned throughout the process. By systematically documenting this information, the "Marketing of Tech-Briefs" table enhances the efficiency of case tracking and supports the advancement of inventions toward successful market entry.

IV A. Purpose of the Table: "Marketing of Tech-Briefs"

The "Marketing of Tech-Briefs" table is designed to track the marketing process for cases with tech briefs that are prepared for market readiness. Its placement alongside the "From Disclosure" table underscores its relevance in the workflow. The table features several grids: No Licensed No Completed by IP's Stage, No Licensed Completed by IP's Stage, No Licensed by IP's Stage, Licensed by IP's Stage, and JESUS' VIEW. Each grid is tailored to specific situations of interest, facilitating effective case tracking.

IV B. Filling Elements on Table "Marketing of Tech-Briefs"

The columns to fill in the table "Marketing of Tech-Briefs" are:

- Docket: Docket number with the letter "D" followed by a five-digit number. For example, docket 12344 should be D12344, and docket 1234 should read D01234.

- TLO: Specify between the two technology licensing officer options we have at Physical Sciences: Ryan Luebke or Martin Teschl.

- Licensing Contact: Specify person set for licensing the case, which is not necessarily the TLO, between Ryan Luebke, Maxim Shabrov, or Martin Teschl

- IP's Stage: Specify between 010. Disclosure/Unfiled, 020. Provisional Conversion, 031. PCT Entering National Phase, 032. In Prosecution, 040. Issued, or 050. Abandonment.

- Case's Stage: Specify between 1. On Review, or 2. Available as applicable for the case. Select option 1 when case's documentation is being revised for any reason. Select et option 2 when case's documentation is clear or does need to be revised.

- TB/Working Stage: Specify between 00. Case Adoption, 01. Collecting Documents, 021. Bibliography, 022. In Re-Draft, 03. Under Review, 04. In the Market, or 05. On Hold/Waiting, depending on the specific case according to statements on Appendix B.

- Priority: Used to specify the priority of revising or working on the case as needed and beyond traditional expectations.

- NASA's TRL: Specify the scale of evaluation of technology according to NASA's Technology Readiness Level scale when applicable. See Appendix A for more instructions.

- NASA's TRL Justification: This section is meant to explain the reasoning for assigning a determined TRL from 1 to 9 and to provide a plausible path of action to advance from the current TRL to NASA's TRL 9 in a succinct manner.

- Licensed: Specify Yes or No, depending on whether the case has been licensed.

- Completed: Specify Yes or No when the marketing assignment for the case is complete.

- Tech Brief Ready: The date when the tech brief is approved by the inventor and ready to be distributed to the public.

- Hit Company: Specify Yes, No, or N/A (Not Applicable) depending on the marketing nature of the case.

- Company Name: Write the names of companies that have responded to any marketing action.

- 1st Notice to the Inventors: Specify the date when the inventors are notified that the marketing material about their invention is available for accuracy review for the first time, when applicable.

- 2nd Notice to the Inventors: Specify the date when the inventors are notified that the marketing material about their invention is available for accuracy review for the second time, when applicable.

- Notes Notice to the Inventors: Record any responses, actions, or exchanges of information that occur while notifying the inventors of the need to review their inventions.

- IN MS TEAMS: Specify Yes or No if the tech brief or marketing material is in Microsoft Teams.

- In Flintbox: Specify the date the tech brief is available for public view on the Flintbox online licensing platform.

- Flintbox Link: Record the online address where the tech brief information is posted within the online licensing platform.

- Notes on Flintbox: Record any notes pertinent to the case concerning handling within the Flintbox online licensing platform.

- Sent to LinkedIn: Specify the date the tech brief was sent to be posted on social media.

- On LinkedIn: Specify the date the tech brief was posted on LinkedIn.

- LinkedIn Notes: Record any occurrences related to the case concerning LinkedIn.

- Published on IN-PART: Specify Yes, No, or N/A as applicable for each case in IN-PART.

- Sent to IN-PART: Date the tech brief was sent to be posted on IN-PART.

- On IN-PART: Date when the tech brief of the case is available in IN-PART.

- IN-PART Link: Online address where the tech brief is located within IN-PART.

- IN-PART Notes: Record happenings related to the case in connection with the IN-PART technology marketing platform.

- Email/Phone Campaign: Date when the email or phone campaign was scheduled.

- Campaign Started: Date when the campaign began.

- Campaign Ended: Date when the campaign ended.

- Campaign Notes: Record of occurrences related to the case's email or phone campaign, when applicable.

- Notes: Where instructions and updates about what is needed to work on that case and how it is handled are provided.

- Lead Inventor: Full name of the lead inventor as specified in the Sophia cloud-based knowledge management system.

- Invention's Title: The title of the invention as noted in the Sophia cloud-based knowledge management system.

- Countries of Interest: List any countries of interest as needed for marketing intellectual property purposes.

Section V

About the Table "From Email Campaigns"

The "From Email Campaigns" table serves as a vital tool for organizing and documenting the various aspects of email marketing efforts related to specific cases. It is designed to provide a comprehensive overview of the interactions and actions taken in the context of email campaigns, thereby enhancing the marketing process. This table not only captures essential data but also facilitates tracking by categorizing information into distinct grids such as By Action Tag, Unresolved By Action Tag, and others. Each grid is tailored to address specific scenarios, ensuring that stakeholders can easily navigate and understand the status of each case. The subsequent section outlines the key elements required to populate the "From Email Campaigns" table, detailing the information needed to maintain accurate records and support effective decision-making in the marketing strategy.

V A. Purpose of the Table: "From Email Campaigns"

The "From Email Campaigns" table aims to back up the recording of relevant information concerning the email campaigns for cases. It expands on the happenings related to email campaigns in the marketing of cases. The table includes the grids: By Action Tag, Unresolved By Action Tag, JG By Action Tag, MT By Action Tag, RL By Action Tag, Do Not Contact, and Delete Contact, which are specifically designated for each view.

V B. Filling Elements on Table "From Email Campaigns"

The columns to fill in the table "From Email Campaigns" are:

- On Market For: Case's docket number or marketing assigned number.

- TLO: Specify between the two technology licensing officer options we have at Physical Sciences: Ryan Luebke or Martin Teschl.

- Resolved: Indicate whether the action tag was resolved (yes or no).

- Person of Interest: Name of the person of interest.

- Company: Company of the person of interest.

- Email: Email address of the person of interest.

- POC: Specify whether the person of interest is a point of contact by choosing yes, no, or n/a (not applicable).

- Situation: Record the happenings and actions taken concerning the person of interest in regard to the case in question.

- First Contact: Date when the person of interest was contacted for the first time.

- Last Contact: Last date when the person was contacted.

- Action Tag: Specify between 1. Provide Information, 2. Follow Up Email, 3. Delete Contact, 4. Do Not Contact, 5. Inactive, 6. Reserved, 7. Hiatus, as applicable for the case.

- Suggested Action: Justification of the action to be taken according to the situation and pertaining to the case.

- Assigned To: Specify the person that will be assigned to take action on the case.

Section VI

Accomplishments and Advantages

Before the implementation of the "Track of Jesus Dockets," our document management processes were fragmented and often chaotic. The introduction of this system has significantly improved the situation, resulting in increased efficiency in accessing documents, a reduction in lost or misplaced dockets, and enhanced collaboration among team members. These changes have transformed our documentation management, leading to a more organized and productive work environment.

The advantages gained from the "Track of Jesus Dockets" system are numerous. It has streamlined our processes, improved accountability, and enhanced transparency in our operations. By creating a structured environment for storing and accessing dockets, the system complements existing efforts in document management and tracking. Additionally, it has improved our ability to monitor progress and performance, enhancing our auditing capabilities and strategic planning when it comes to speeding up the marketing of cases for licensing purposes.

This initiative, driven by three primary goals—efficiency, collaboration, and accountability—has guided the Physical Sciences Directorate toward improved case management, which is accessible and aligned with the needs of team members. The "Track of Jesus Dockets" promoted the creation of a systematic folder organization within the SharePoint cloud-based platform that, as of the date of this report, allows for easy navigation and retrieval of documents, clear categorization of cases and associated materials, and consistent naming conventions that reduce confusion regarding those cases.

All of this has led to a more intuitive layout, making it easier for users to find and manage dockets. This initiative also supports other organizational strategies by providing a cohesive framework for document management. With the new system in place, we can monitor progress more effectively, ensuring that all cases are kept up to date. Additionally, the structured approach facilitates better auditing processes and enables more informed strategic decisions.

Through the implementation of the "Track of Jesus Dockets," we have learned valuable lessons. We recognized the importance of user training to maximize system utilization, the need for regular updates and maintenance of the system, and the value of user feedback for continuous improvement. These insights will help us refine our processes and ensure the long-term success of the initiative.

For example, recently, the "Track of Jesus Dockets" has expedited the paperwork concerning Marketing Activity for FY 2024. Similarly, it has the potential to accelerate our internal processes related to intellectual property, agreements, invention reporting letters, and non-disclosure agreements.

As of July 29, 2024, the integration was successful. Regarding the Marketing List - RTL, it remains the primary table for tracking cases that need to be marketed, cases undergoing filing decisions at the Physical Sciences Directorate, and cases that require materials for marketing preparation. Concerning the Track of Jesus' Dockets, it supports and accelerates the processing of cases pending for market entry on the Marketing List - RTL. Specifically, eight to twenty cases per month are sent to market, which represents eight to twenty cases per month above the previous norm, achieving approximately a five-fold increase in online presence. This encompasses the entire timeline from when a case is initially assigned to the completion of its email marketing campaign.

Lastly, the efforts carried out through the Track of Jesus Dockets have facilitated the ownership of cases and associated records to be transferred among members of the Physical Sciences Directorate with just a couple of clicks. This has allowed for more cases to be added on a continuous basis and can be extended or used as a template for marketing and licensing cases without losing track of their progress.

Section VII

Recommendations for Cornell CTL

"Track of Jesus Dockets" has already proven effective and does not require re-creation; instead, it should serve as a template for managing cases. By conducting periodic reviews of the file's structure, providing ongoing training sessions for users, and implementing a feedback mechanism for continuous improvement, we can enhance its capabilities for expediting the processing of agreements, invention reporting letters, non-disclosure agreements, and other licensing-related processes, all while maintaining clear records for auditing purposes. Furthermore, centralizing information within the "Track of Jesus Dockets" to foster institutional knowledge is not just a possibility but a necessity. By integrating additional functionalities—such as linking relevant resources and templates directly within the dockets—we can create a streamlined, one-stop platform for all case-related documentation, reducing redundancy and facilitating easier access for every team member at CornellCTL. Lastly, we encourage everyone within CornellCTL to develop their own versions of the "Track of Jesus Dockets" that contribute to and support our organizational structure, thereby enhancing our operational efficiency, accountability, and strategic planning capabilities. As we continue to adapt and enhance this system, we will ensure its long-term success and relevance within Cornell CTL.

"Track of Jesus Dockets" already works and does not need to be recreated; it should be used as a template for handling cases. While doing that, one can conduct periodic reviews of the folder structure, provide ongoing training sessions for users, and implement a feedback mechanism for continuous improvement. Thus, in order to extend the capabilities of the "Track of Jesus Dockets" for speeding up the processing of agreements, invention reporting letters, non-disclosure agreements, and other processes related to the licensing of technologies, we must ensure clear tracking of what has been completed for auditing purposes.

Additionally, "Track of Jesus Dockets" centralizes information for institutional knowledge, which is essential. This reality should be continued by integrating additional functionalities—such as linking relevant resources, templates, and guidelines directly within the dockets—creating a one-stop platform for all case-related documentation. This centralization will not only streamline access but also reduce redundancy in the information currently found in formalities at Cornell CTL, making it easier for each team member to find the resources they need.

We, the physical sciences team, also welcome anyone within CornellCTL to create   their own versions of the "Track of Jesus Dockets" for their purposes, as long as it contributes   to, sustains, and supports the CornellCTL structure as the original "Track of Jesus Dockets"   has. By establishing a clear and organized system within SharePoint, we have signifcantly   improved our operational eficiency, accountability, and strategic planning capabilities.   Continued adaptation and enhancement of this system will be essential to ensuring its long- term success and relevance in our organization.

Appendix A

Navigating the NASA's Technology Readiness Levels for Cornell's Licensing Purposes

In the rapidly evolving landscape of technological advancement, understanding the progression from concept to operational deployment is essential for anyone engaged in research and innovation. The Technology Readiness Levels (TRL), as defined by NASA, provide a comprehensive framework for assessing the maturity of a technology, ranging from initial scientific research to full operational capability. This appendix delves into NASA's TRL framework in detail, elucidating the significance of each level (in Appendix A I) and demonstrating its progression through a hypothetical case study (in Appendix A II). The aim of this appendix is to underscore the critical milestones and rigorous testing processes that must be documented to ensure successful technological deployment and commercialization, emphasizing the importance of adhering to standardized practices in the assessment process.

A I. The NASA's TRL

The NASA's TRL illustrate the progression of technology from initial research to operational deployment, and are evaluated as follows:

At TRL 1, scientific research is in its early stages, focusing on fundamental concepts and theories that will guide future technological advancements. This stage involves preliminary findings being translated into potential research and development initiatives.

As the project evolves, it moves to TRL 2, where the principles derived from TRL 1 are further analyzed, leading to the identification of practical applications. At this level, the technology remains largely speculative, lacking experimental proof of concept to substantiate its feasibility.

When the team begins active research and design, the technology advances to TRL 3. This stage typically involves analytical studies and laboratory experiments aimed at assessing the viability of the technology. A proof-of-concept model is created to demonstrate the proposed solution's feasibility.

Once the proof-of-concept is validated, the project progresses to TRL 4. At this level, multiple components are tested together to ensure they function effectively as a cohesive system. This testing is crucial for confirming interactions between different parts of the technology.

The technology then advances to TRL 5, which signifies that it has been developed into a breadboard model. This stage requires more rigorous testing than TRL 4, including simulations in environments that closely mimic real-world conditions to verify performance and reliability.

Upon successful testing at TRL 5, the technology may reach TRL 6. At this stage, a fully functional prototype is developed, demonstrating the technology's operational capabilities. This prototype is essential for showcasing the technology to potential investors and collaborators.

For a technology to achieve TRL 7, its working model or prototype must be demonstrated in a relevant environment, validating its performance under conditions encountered in actual applications. This demonstration is critical for gathering data on the technology's reliability and effectiveness.

At TRL 8, the technology has undergone rigorous testing and is considered "flight qualified." It is ready for integration into existing systems, marking a significant milestone toward operational use.

Finally, once the technology has been successfully demonstrated during a mission, it is classified as TRL 9. This designation indicates that the technology is fully operational and has proven its reliability in real-world scenarios.

A II. A Hypothetical Case Study on NASA's TRL

In a hypothetical scenario, a research team at a university develops a new type of solar cell technology. The project begins at TRL 1, where researchers conduct fundamental scientific research to understand the basic principles of solar energy conversion. They investigate various materials and their properties, establishing a foundation for future development.

As the research progresses, the team reaches TRL 2, identifying potential applications for their findings. They speculate on how their new solar cell technology could be integrated into existing energy systems, although they have not yet conducted any experimental validation to support these ideas.

Once active research and design efforts commence, the project advances to TRL 3. At this stage, the team conducts analytical studies and laboratory experiments to evaluate the viability of their solar cell technology. A proof-of-concept model is created to demonstrate that their approach can produce energy more efficiently than current technologies.

With the proof-of-concept established, the project moves to TRL 4. The researchers test various components of the solar cell system together, ensuring they work harmoniously. They assess the interactions between the solar cells, inverters, and energy storage systems to verify overall functionality.

As the technology develops further, the team reaches TRL 5, creating a breadboard model of the solar cell technology. They conduct rigorous testing in simulated environments that closely mimic real-world conditions, evaluating durability, efficiency, and performance under various environmental factors, such as temperature and sunlight intensity.

Upon completing the testing at TRL 5, the solar cell technology advances to TRL 6. Researchers develop a fully functional prototype that operates as intended, showcasing the technology's capabilities in a controlled setting. This prototype is vital for attracting potential investors and collaborators.

The project progresses to TRL 7 when the team successfully demonstrates their working prototype in a controlled outdoor environment that simulates actual conditions. This demonstration allows them to gather data on the solar cells' performance and reliability in real-world scenarios.

After thorough testing and evaluation, the technology reaches TRL 8, as it is now "flight qualified." The researchers prepare for integration into existing energy systems, collaborating with industry partners to ensure that the solar cells can be seamlessly incorporated into commercial applications.

Finally, after successful deployment in a pilot project and positive results from several energy generation missions, the solar cell technology is classified as TRL 9. This designation signifies that the technology has been proven in real-world applications, demonstrating its reliability and effectiveness as a viable energy solution. The research team can now market their innovative solar cell technology to a broader audience, significantly impacting the renewable energy sector.

Appendix B

Understanding the Tech-Brief Working Stage Statuses

Appendix B provides a comprehensive explanation of each of these statuses, offering insights into the processes and considerations involved at each stage of the Tech-Brief (TB) Working Stage, as outlined in the table titled 'From Disclosure.' Understanding these statuses is essential for effective project management, ensuring that all team members and stakeholders are aligned and aware of the project's current status.

In the context of technology development and deployment, the Tech-Brief (TB) Working Stage plays a pivotal role in tracking the various phases associated with a specific case and its related tasks. Depending on the nature of the project, the TB Working Stage can be categorized into several distinct statuses, each reflecting the current progress and focus of the work. These statuses include:

- Adopting Case: This status indicates that the project is in the initial phase where stakeholders are considering the adoption of a particular technology or approach. Folders for organizing all documentation related to each case are created using the case's docket number. Simultaneously, an email folder and bookmarked records about the case are established using the same docket number.

- Collecting Documents: At this stage, relevant documents, research materials, and resources are being gathered to inform the project and support decision-making processes. A document labeled "0. DXXXXX" is used to track the documents downloaded for preparing the case's marketing materials.

- Bibliography In Progress: This status signifies that a comprehensive bibliography is being compiled, documenting all sources and references that will be utilized in the Tech-Brief. This is accomplished using a Bibliography template labeled "DXXXXX Biblio."

- Tech Brief In Progress: At this stage, the development of the Tech-Brief is actively underway, with the team working on drafting and compiling essential information about the technology.

- Tech Brief Ready: This status indicates that the Tech-Brief has been completed and is now prepared for review or dissemination to stakeholders.

- Tech Brief Under Review: At this stage, the completed Tech-Brief is undergoing a thorough review process to ensure accuracy, completeness, and alignment with project goals.

- Marketing In Progress: This status reflects that marketing efforts are being initiated to promote the technology or solution outlined in the Tech-Brief, targeting potential users or investors. Detailed information about marketing should be presented in the tables "Marketing of Tech-Briefs" and "From Email Campaigns," as applicable.

- Hold: This indicates that the project has been temporarily paused, possibly due to resource constraints, strategic reevaluation, or external factors affecting progress.

- Agreement: This status is used when documents related to a technology agreement are needed.