Canadian Industrial
Innovation Centre
Waterloo

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June 6, 1996

Dear Fellow AUTM Member:

I would like to take this opportunity to introduce you to our organization and two of our services that will be of interest to you.

Partially funded by the Government of Canada, the Canadian Industrial Innovation Centre is a national, not-for-profit organization with over twenty years experience in assisting innovators and entrepreneurs.

For technology developers, we offer our Inventor's Assistance Program, a well-established, technology assessment tool. To-date, the Innovation Centre has formally reviewed over 50,000 new product ideas.

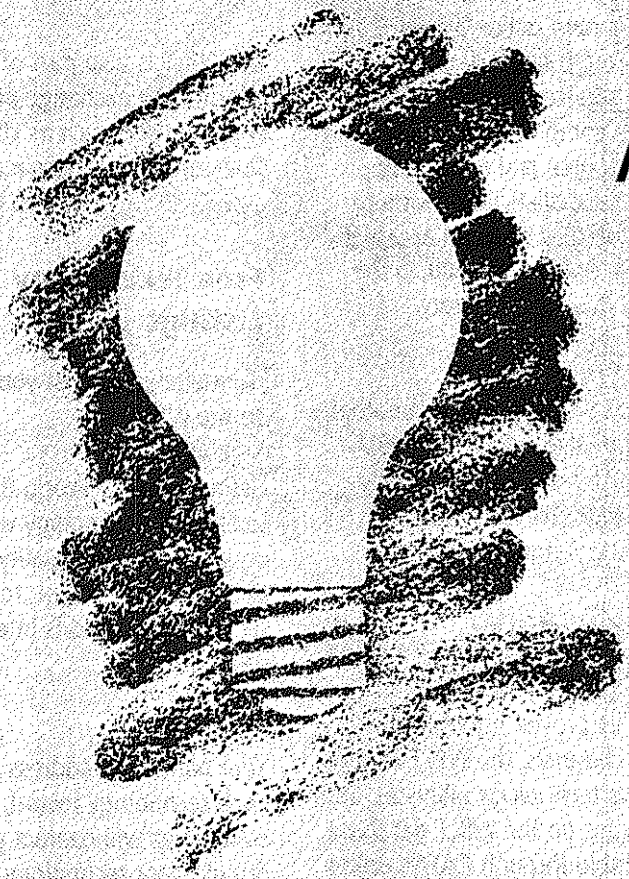
For those of you involved in the transfer of technology, we can offer listing in our technology information service. This is an excellent method of promoting your technology information to technology seekers around the world. The World Bank of Licensable Technology is marketed through a number of distribution channels, as well as on-line with DIALOG in over 150 countries.

I invite you to examine the enclosed brochure. Please feel free to contact me, or John Cherry, Manager of the assessment program at 1-800-265-4559 for more details.

Sincerely,

Susan J. White
Manager

P.S. I'll also be at the AUTM conference in Halifax -- perhaps we might have the opportunity to meet then!



Announcing Two New Services for AUTM Members...

Now There's Help For New Technology Developers...

Who We Are and How We Can Help

Universities have traditionally been involved in the protection, transfer and commercialization of new technologies. However, assessing these ideas and technologies can be an expensive, exhaustive process.

Now, the Canadian Industrial Innovation Centre can help. Affiliated with the University of Waterloo in Waterloo, Ontario, the Innovation Centre has helped innovators and new product developers for over twenty years.

Introducing the Inventor's Assistance Program

Since 1976, the Innovation Centre has assisted over 50,000 inventors and entrepreneurs and formally evaluated over 11,000 technologies and new product ideas. Through the Innovation Centre's Inventor's Assistance Program, we can help universities with new technologies in two ways:

1 For ideas and new products generated from within your university, the Innovation Centre's assessment team acts as an unbiased, outside third party to assess your innovation and advise you regarding your possible next steps.

2 In many cases, people with new technologies from outside the university come to you for help. The Innovation Centre's Inventor's Assistance Program offers these inventors the help they need in a customized idea assessment.

The Critical Factor Assessment

Titled the Inventor's **Critical Factor Assessment**, the Innovation Centre's idea assessment and advisory service is a customized report filled with directed advice based on our years of experience.

If you have a new technology or an idea for a new product, the Critical Factor Assessment answers the critical questions proven to effect the success of your invention. The resulting 20-25 page report highlights the strengths and potential weaknesses of the invention and offers recommendations on how to proceed.

The Key Issues...

The report will advise you on key issues such as technical feasibility, manufacturing processes, intellectual property options, market readiness, potential competition and possible business objectives.

The Critical Factor Assessment provides an objective review of your invention by the Innovation Centre's experienced team. A reasonable fee is charged and a written report is sent to you within six to eight weeks.

Your Critical Factor Assessment report will advise you how to proceed with your technology based on the **37 critical factors** proven to effect the success of a new product.

The 37 Critical Factors Include:

- The main strengths and possible weaknesses of your invention.
- Is your invention technically feasible, or was something overlooked?
- Can your idea be manufactured economically, using current technology, or must new processes be developed?
- Is there potential for a patent or other legal protection, and would this be worthwhile?
- Does your invention meet the needs of the proposed market, and might there be any other applications?
- What are your possible business objectives and options, and what is your best strategy?

For more information, please contact the Innovation Centre's Inventor's Assistance Program.

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InfoEd™

World Leader in R&D Information, Systems and Support Services

February, 1997

Dear AUTM Members,

This has been a very exciting time for InfoEd International, Inc.! We are experiencing rapid growth in our products and services and in our staff, and we are going to share all the good news with you at the AUTM San Francisco conference February 19-23.

Technology Transfer™ is being released in the PC format as of February 10, with the MAC format released by the end of February. The differential of just one week is due to the fact that the program features have expanded beyond our original vision thanks to our Beta Testers, who were very thorough in their testing and very clear in stating their needs and concerns.

As a result, Technology Transfer™ is more than a data collection tool; it is a comprehensive management tool. In addition to automatic generation of electronic data transfer reports for NIH as well as automatic print-outs for your annual AUTM report, you now have the capability to run standard lists at the touch of a button to track deadlines, procedures, and financial information. And, you can now enter legal invoices in batch mode and have the system automatically create your invoices by case number. Finally, you have increased security with a two-level password system. It is our goal to make all your tracking of critical information, data entry and retrieval, as simple and as accessible as possible.

I am relating this to you for two reasons. First, if you have been following our progress on Technology Transfer™, it should be clear to you that InfoEd is not just another software company. We are your advocate. As your needs were relayed to us, they were added to the system. When we heard your concerns, we addressed them. We are a customer-driven organization, building a product for the sole purpose of helping you do your job better through easy and logical data entry, data retrieval, data searching and data reporting.

And, second, we deliver, and we deliver more than we promise. This first full release is even more functional in many respects than we originally anticipated. Again, we have had to make some decisions, this time based on time constraints. We have chosen to bring you greater control in your day to day operations rather than focus on the word-processing interface. As a result, the MS Word interface will be completed and available this spring.

InfoEd is aware that this is not yet a perfect system, and in the scheme of things, we are simply talking about matter of time, not possibilities. We intend that the system will have all its components in place and in your hands within the year and at no additional cost to you. Think of it -- as our customer you will not only be using the system but also helping to determine its direction and increasing functionality.

In closing, we are making up our Technology Transfer™ Information & Demo Packets now. If you haven't already, please register for your "live" demo today to make sure you receive it as soon as possible. I will be available for both "telephone" demos and on-site demos, which will be scheduled on a regional basis. Let me know what is best for you and what your time frame is. I will be happy to work with you to meet your decision schedules and your budgeting requirements.

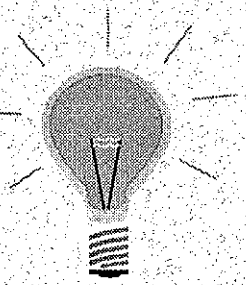
I look forward to hearing from you, working with you and meeting you at AUTM.

Sincerely,

Carol L. Bluestein
Product Manager, Technology Transfer ™
InfoEd International, Inc.
Cbluestein@infoed.org

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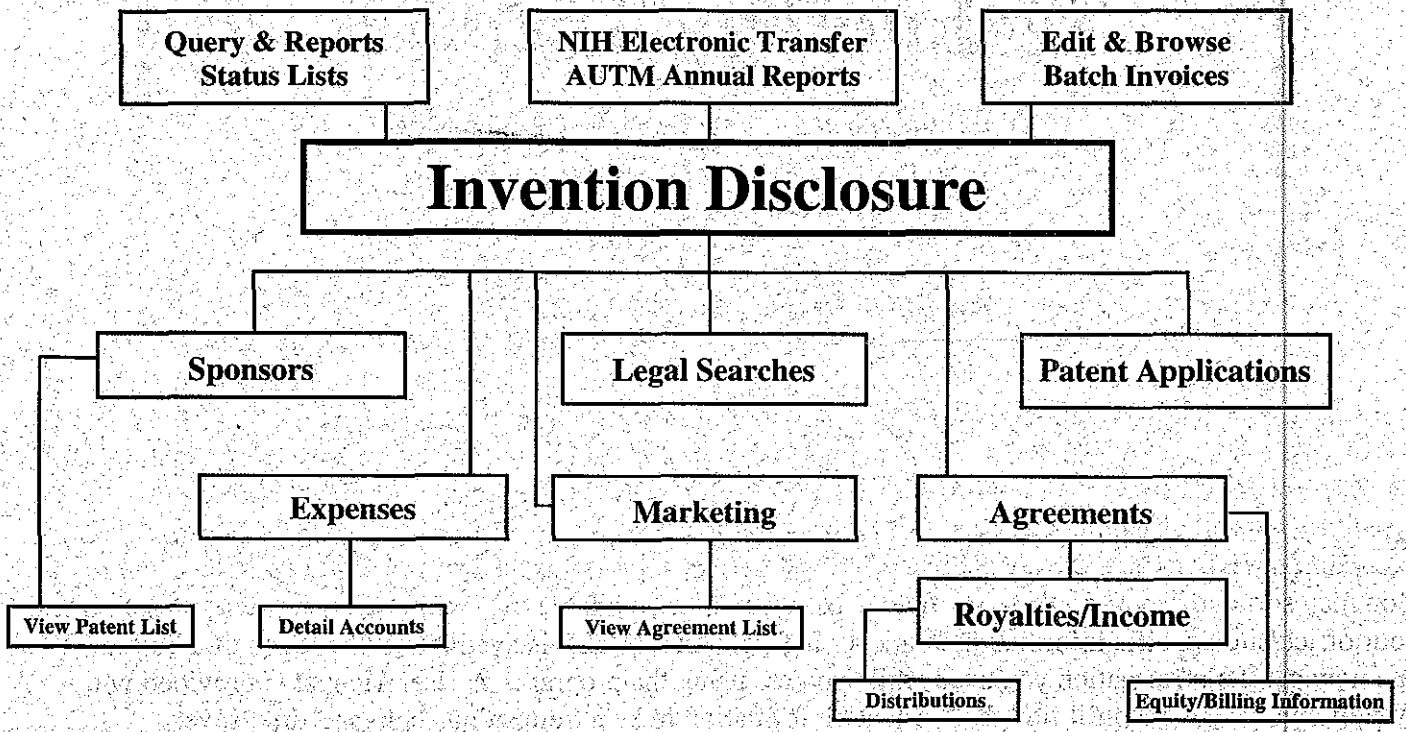
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InfoEd

Technology Transfer System



EXPENSES - Through this screen, you may elect to maintain a summarized or detailed accounting of all expenses, incurred and reimbursed in connection with this disclosure. Technology Transfer will keep a running balance and simplify the whole tracking process for you. For quick entry of legal invoices, use the Batch Entry system available in our Edit mode. Invoices may be entered and when items are posted, they will create an expense entry for each Case Number, automatically posting each detail entry correctly.

MARKETING - Never misplace important contact information again! This screen keeps track of who you talked to, when, and where you can reach this contact again - an "on-line" contact resource that is invaluable when you need to reach someone quickly, and includes a free text comment field and six user-defined fields.

AGREEMENTS - No matter what kind of agreement you enter into, you can track the details on this screen. There is a free text area for agreement details. In addition, there is an Agreement Detail screen to track contacts, license equity, and billing information. This gives you the ability to know when to expect what from whom for current receivables and forecasting. To track the royalties and other income, select the Royalty button. In addition, there are six user-defined fields and a free text comment field on both Agreements and Royalties.

ROYALTIES AND OTHER INCOME - Now there is a better way to track royalties and other income generated by each agreement. You may track the purpose for which you received the money, date received as well as posting date, and after subtracting direct expenses, the program will calculate the amount available for distribution. You then have the option of tracking distributions to inventors, departments, and other institutions, with the un-allocated balance calculated and available on screen.

InfoEd™

Technology Transfer™

An Invention Disclosure Information System

Designed by Technology Transfer Office Administrators

- ☑ Sponsors
- ☑ Inventors
- ☑ Searches
- ☑ Invention Disclosures
- ☑ Patent Applications
- ☑ Agreements & Licensing
- ☑ Marketing
- ☑ Expenses
- ☑ Royalties

Designed with Your Data Collection Needs in Mind

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- ☑ On-The-Fly Additions to Tables
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Designed with Your Needs in Mind

- ☑ FTP Instant Updates as well as Periodic Updates on Disk by Mail
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  Friendly, Knowledgeable, Courteous and Responsive; Real People in Real Time

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isers) - $9,995 (*annual maintenance fee of $995; 1st year free)

all system updates and unlimited customer support.

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InfoEd™

Technology Transfer

- **Flexible**
- **Intuitive**
- **Versatile**
- **Comprehensive**
- **Detailed**
- **Easy to Use**

ALL MODULES - As you review the highlights of each module, be aware that in addition to the critical management information fields, all standard information fields required by US Federal Government reporting (**NIH EDISON** and **AUTM**) have been included. This means that the system has electronic reporting capability as well as hard copy generation. Furthermore, on each of the module data entry screens, with the exception of Expenses, there are **six user-defined fields: three standard test fields and three label fields.** You may sort and report on these six fields. Now you have available more capability and flexibility in tracking your office/site-specific information than ever before! And, **HELP** is available at the touch of a button. You can now get the information you need while you are using the program. A User Manual is provided with each system, but we think you'll find the "instant" information to be a tremendous help and time-saver.

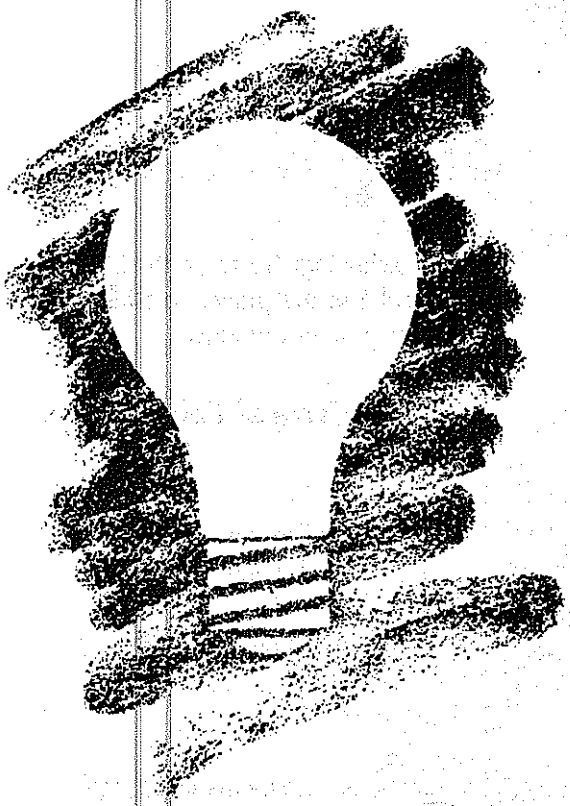
INVENTION DISCLOSURE - Through this main information screen you can track all the details pertaining to the original disclosure, including an unlimited number of inventors and office staff, date of public disclosure, assigned rights, and keywords (used for searches as well as bundling technologies). There are three free text areas: disclosure title, a non-confidential description (i.e., precis), and general comments.

SPONSORS - From the sponsor database provided, you may add sponsors as needed and then assign one or more to a specific Invention Disclosure. All sponsor information is tracked, and you may use the user-defined fields and free text comment fields for further pertinent information. While you are in this screen, you may also view the list of Agreements you have on file for this sponsor for this invention disclosure.

LEGAL SEARCHES - Once the disclosure is complete (see date on Disclosure Screen), and you decide to have a legal firm perform a search, this screen tracks the process. It keeps track of which firm(s) you use, the attorney assigned to the search, and the dates associated with tracking the process. And, as with other modules, it gives you six additional user-defined fields and a free text comment field. Keep in mind that all information collected can be retrieved through the Query/Report module.

PATENT APPLICATIONS - Organizing applications and insuring that all comply with government regulations by specific dates is made simple through this screen. Coupled with the Status Lists (office reminders) and the Query/Report module, Technology Transfer can become your complete in-house "tickler system"; no more missed dates or last minute scrambles to meet deadlines!

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See Inside for New Services Available to Fellow AUTM Members...

The **World Bank of Licensable Technology** and the **Inventor's Assistance Program** are two of the services provided by the **Canadian Industrial Innovation Centre.**

With over twenty years of experience, the Innovation Centre is a not-for-profit organization partially funded by the Government of Canada. Dedicated to helping inventors and entrepreneurs, the Innovation Centre has formally reviewed over 50,000 new product ideas.

As **a fellow AUTM member**, the Innovation Centre is associated with the University of Waterloo in Waterloo, Ontario. Innovation Centre services include:

- The Inventor's Assistance Program
- The World Bank of Licensable Technology
- Market Preview
- Licensing Consulting Services
- Market Research
- Product Engineering
- Education Programs
- Information for Innovation (Publications)

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We Can Promote Your Technologies Around the World

Our mission is to get your technology information "out there" in front of technology seekers around the world.

List your technologies in the World Bank of Licensable Technology. The World Bank of Licensable Technology (WBLT) is an international technology information service. Over 27,000 technologies from around the world are listed, ranging from pharmaceuticals and fibre optics to computers and software.

Online to the World...

Information specialists use the WBLT as a central point for technology information. This focused technology source allows "one stop searching" of over 27,000 technologies in 56 categories.

The World Bank of Licensable Technology is now online in over 150 countries through the DIALOG information service. DIALOG is the world's most comprehensive online information source and is used by information specialists worldwide to locate technologies. You can access the WBLT through DIALOG file 760, in the International Business Directory.

Organizations seeking new technologies for license can also access the WBLT through Industry Canada's business information site STRATEGIS on the internet at http://strategis.ic.gc.ca

You might remember the World Bank of Licensable Technology name - it was originally part of the Dvorkovitz network. Today, the WBLT is exclusively owned and operated by the Innovation Centre, giving us control of key elements such as worldwide distribution, age of technology and quality of service. Our technical staff examine each technology for quality and categorization requirements.

The focus here at the Innovation Centre is on gathering and updating technology, and we have negotiated partnerships with respected organizations such as Knight-Ridder Information, Inc. of California, the Canadian Advanced Technology Association, Micromedia and the Government of Canada to distribute this information worldwide.

New Distribution Channels...

Building on its proven information distribution channels, the WBLT is now expanding its technology alliances. Soon all technologies on the WBLT database will be available through CATA's online internet site TechnoGate. As well, your technology information will be available through Micromedia's Internet site and on CD-ROM in a SilverPlatter Environment.

How We Market Your Technologies

We participate in events such as Technology Transfer Conferences, AUTM events (see you in Halifax!) and LES. We are members of over twenty associations across North America. In addition to the marketing efforts of our distribution channels, we use paid advertising to promote the WBLT to information seekers worldwide.

The WBLT is also part of a technology information exchange program with organizations such as UNIDO and the Governments of Russia and Singapore.

Free Technology Listings

We invite you to list your technologies on the WBLT.

Listing with the World Bank of Licensable Technology will provide you with quality inquiries, and there is no fee to you to promote your technologies on this international database.

Your name and address are included in each technology record, so interested companies will contact you directly to discuss your technology offer.

Try Us!

For more information, please contact Sue White or Ann Reid at the World Bank of Licensable Technology.

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