Software for Managing R & D

Summary:
Air Products has developed a set of management tools that it has deployed across the enterprise to manage its ideas, projects, resources and patenting process more successfully. These tools have been deployed and in use since 2000. They are widely used in Air Products, and are now available for license.

Software Tools:

Idea Tracker
Idea Tracker solves the problem of “good ideas getting lost in the system”. Idea Tracker offers a central place for new ideas to be logged, categorized, sorted and submitted by contributors for review by a community administration team that decides if the idea should be further developed and made into a project or protected in a patent or archived because of lack of fit with company strategy. Options exist for the idea to be edited, merged with related ideas, and transferred to other communities who may be higher value developers for the idea. Each idea is submitted into an electronic form where conception date, idea description, point of entry in the development process, names of idea contributor(s) and economic benefits among others are entered. Ideas can also be searched in the repository. When Idea Tracker is globally deployed across the enterprise, any company employee is able to enter an idea(s).

Idea Tracker is a web-based application written using Microsoft technology. It runs on Microsoft Windows Server 2000; Internet Explorer serves as the user client. While the user interface is written in Microsoft ASP, Active-X components are developed in Visual Basic 6. SQL Server 2000 serves as the database. Transact SQL procedures are used to transfer data in and out of the database.

PRMS – Project and Resource Management System
PRMS is a management tool that helps to ensure that resources are being deployed on the right projects. PRMS tracks the projects being worked on by each organization in the company. It is meshed with work processes for managing the evaluation, selection, prioritization, resources and execution of projects.

PRMS is especially useful at budgeting time when R&D managers select and fund projects that support the company’s business and technology strategies.

In PRMS milestones are tracked for each stage of development (Idea, Concept, Feasibility, Prototype, Development, Commercialization), resources are allocated across functional areas for each project in the portfolio, and documents are attached including valuations of future earnings benefits. Individual access to project information is decided by the project leader on a need to know basis to ensure protection of proprietary information. PRMS is linked to Idea Tracker.
Technology Agreements Management System (TAMS)

TAMS stores information about contracts. It solves the problem of “not knowing what contracts are in force.” It is used to catalogue for future retrieval of all technical contracts including non-disclosure agreements, joint development agreements, licensing agreements and so on. It can send email reminders. Relevant files can be uploaded and attached to each contract.

Specific Functionalities include:

- General Contract Information – contract start & expiration dates, internal contacts, contract description
- External Parties – Corporations, universities, or government agencies
- Internal approvals to proceed to contract
- Disclosure period tracking
- Contract Deliverables with email reminders
- Disclosed or received information storage; memos & notes storage
- Allow managers to understand and manage contracts across their business
- Simplifies contract management for licensing and government contracting groups
- Drives compliance with corporate policy

Instar – Invention Status Reporter

Instar is a tool to manage the workflow of the idea to patent process divided into a range of business or technology areas. It starts with an idea which has been transferred from Idea Tracker. A review team then makes a decision on the idea such as: 1) requests the inventor to fill in an invention disclosure form that has enough detail to give to a patent attorney, 2) put idea on hold until more data are available, 3) reject the idea or 4) decide to protect by other means such as publication or trade secret. Instar is a companion tool to PRMS, tracking the patenting process of ideas-to-inventions.

Instar is the primary tool used by the intellectual asset teams that manage the creation and protection of intellectual assets within a business unit.

Instar is linked to Idea tracker. It is also linked to the IPMaster (© Master Data Center, Inc.) package to obtain information regarding status in the docket system, after the patent has been docketed.

Specific functionalities include:

- Input and storage of Invention Disclosures
- Committee review process
- Tracking of pending dockets
- On-going patent maintenance (annuity) decisions
- Foreign filing decisions on new dockets
- Portfolio segmentation by business area/ market/ technology
- Comprehensive view of IP Portfolio by segmentation area

INSTAR is a web-based application written using Microsoft technologies. It is a web-based application written in ASP; it uses a few custom-written activeX controls written in Visual Basic 6.0 to extend the user interface, and stores all its data in Microsoft SQL Server. It also requires Microsoft Word running on the client PC for a few of its features. Some of its newer reports are presented using Microsoft SQL Reporting Services. The newest features of INSTAR (portfolio segmentation, worldwide filing) are written in VB.NET, thus requiring the .NET framework on all client PCs. These features also store their data in SQL Server and use SQL Reporting Services for all reports.
Also Offered:
Technology transfer assistance may be provided with a license.

Availability:
Air Products is offering a suite of tools. You can acquire one, several or the whole suite of tools. We are offering the source code and documentation for a one-time paid-up license fee.

For more information on licensing this technology contact:

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