RDBASE · FREE TOOLS

Using the SR&ED tools

Two AI tools that build the technical half of a claim: quantified objectives, benchmarks of the knowledge base, technological uncertainties and the record of experimentation.

Version 0.9.0-beta · Free to download at rdbase.ca

Two tools, one claim file

Planner

Work starting or still running. Objectives, the state of the technology, what is uncertain, and a research plan.

Intake

Work already done. Builds the project outline from papers, reports and notes, then asks for what they leave out.

They share one Excel claim file

One file per company per fiscal year, holding every project. What one tool records, the next builds on.

The method they follow

Step	What it establishes	The question it answers
1a	Benchmark the knowledge base and its limits	Could standard practice have removed it?
1b	Quantify objectives vs current performance	Can the advance be measured?
2	Tie experiments to uncertainties	Were hypotheses formed to reduce it?
3a	Record the work and how much was tried	Did it follow the scientific method?
3b	Report results against each objective	How far did it get against the target?
3c	Conclude on each variable and interrelation	Did it result in an advancement?

The order matters. The advancement is the **conclusion** after all six steps, never the starting point. Three to five key variables per uncertainty are what make it provable, and work that correlates to no uncertainty is routine engineering.

Setting them up

About five minutes, once.

1

Turn on file creation

Settings, then Capabilities. Switch on code execution and file creation. They will not run without it.

2

Upload both files

Customize, then Skills. Add each downloaded file separately. They stay private to your account.

3

Keep one claim file

Put it in a Claude Project, so every conversation starts from the current version. That one file holds all your projects for the year.

Then just describe what you are doing. You do not have to name a tool: Claude picks the right one from what you say.

Which tool, and when

The difference is whether the research is still ahead of you.

Planner

RESEARCH STILL TO DO

- Searches out relevant articles, patents and comparable products
- Reports what already exists and where it stops short of your target
- Asks questions as the work proceeds, to sharpen the research itself
- Builds the record while the work is happening

Intake

RESEARCH ALREADY DONE

- Takes everything you already have: papers, reports, notes, protocols
- Identifies the SR&ED components inside that material
- Prompts you for what the material does not say
- Assembles the project outline from both

The planner helps you **do** the research. The intake makes sense of research you have **already done**.

CHECKS AND FINDINGS

Review what the checks flag

Every project is checked against the method and the patterns that decide cases. Findings land in the claim file, ranked, with the reason stated.

Blocking

No quantified objective. No benchmark. An uncertainty with no experiment. Fix before filing.

Warning

No class A qualification in the field. A variable with no conclusion. Accept with a stated reason.

Information

A reconstructed logbook entry. A benchmark searched rather than done by the team.

Eligibility is still yours. The tools record facts and flag doubt. They do not rule, sign off, file, or represent anyone in a review.

WALKTHROUGH · NEW WORK

Starting a project

You say	“We’re building a sensor that has to read in under 30 seconds. Current lab method takes five minutes.”
It does	Records the objective as 30 seconds against 300. Searches patents, published work and comparable products. Comes back with four existing approaches and what each one cannot do.
It asks	“None of these work without a stain. Is label-free detection the uncertainty, or is it the sample handling? Which three variables worry you most?”
You get	A claim file with the objective, the benchmarks and their limits, the uncertainty, the ranked variables, and a draft experiment per variable with its predicted outcome written down first.

WALKTHROUGH · FINISHED WORK

Documenting what is already done

What it takes from the material

- The uncertainty, from the knowledge gap
- The methods and the counts, exactly as stated
- The results, and what contradicted expectation
- The variables the work actually tested

What it has to ask you

- What number were you aiming at?
- What work fell inside the fiscal year?
- Who performed it, and in what role?
- Who funded it, and who owns the results?

A report says what was found. It almost never says what was targeted before the work began, and that number is what the advance has to be measured against.

What a strong project has

Element	Weak	Strong
Objective	“Faster and more reliable”	30 seconds, against 300 today
Knowledge base	“Nothing like this exists”	Four approaches reviewed, each with its stated limit
Uncertainty	“We didn’t know how to build it”	A named variable the field could not predict
Work	“We iterated until it worked”	Six configurations, 120 runs, against a control
Conclusion	“The product now works”	What each variable did, including what surprised you

The one most often missed

A relationship *between* variables that nobody knew beforehand: one that only matters in the presence of another, two that trade off, a threshold where behaviour changes. That is an addition to the general understanding, which is what an advancement is.

Where the tools stop

They do

- Structure the technical record as work happens
- Search and record the state of the technology
- Check every project against the method
- Say plainly when work looks routine

They do not

- Decide eligibility or give tax advice
- Calculate costs, credits or overhead
- File anything, or meet any deadline
- Represent anyone in a CRA review

Everything they produce is draft

They are built to flag gaps rather than fill them, and they can be wrong. Treat the output as working papers and check it against what you know. The judgment, the sign-off and the filing belong to a qualified practitioner.

Free to download

Both tools, at rdbase.ca. Five minutes to set up, and they run in your own Claude account.

Planner
Work starting now

Intake
Work already done