

The DATA CAPTURE Report

Since 1977, the premier management & marketing newsletter of automatic data capture: Bar Coding, RF and related technologies.

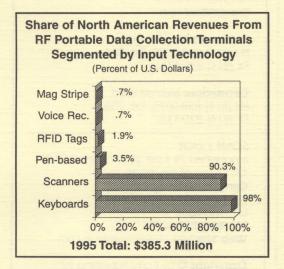
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November 22, 1996

DID YOU KNOW?

HUGE GROWTH PROJECTED FOR VOICE RECOGNITION

According to **Venture Development Corporation** (Natick, MA), sales and purchases of voice recognition input technology is expected to grow 300% per year through 1998. VDC also says penbased input technology will grow 250% per year through 1998 and RFID will climb 115% per year through the same time frame.



Estimates are based on respondents' anticipated future revenues and/or purchase of portable data collection terminals and terminal systems (PDCTs) with integrated input technologies. "Integrated" is defined as being either hard wired (tethered) connection, wireless direct connection or incorporated into the PDCT.

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SCAN-TECH 96: A Personal Journal

by George Goldberg

It became readily apparent, after just a few hours at this year's automatic data capture exposition at Chicago's McCormick Place, that **SCAN-TECH** 96 would not be remembered for any technological breakthroughs. There was much huffing and puffing on the exhibit floor and at special press conferences about "new products" but, on closer examination, almost all turned out to be upgrades, lower price points, applications of existing technology to niche markets, or software implementation.

What really caught our attention was more eventoriented than product-oriented; i.e., significant news that related to corporate developments, trade association activities, and the possible realignment of the industry's shows and exhibitions.

Come along with us, then, as we walk the exhibition floor, attend special conferences and seminars, and meet one-on-one with some of the industry's top executives.

Tuesday, November 5, 1996

1430 hours: Landed at O'Hare early afternoon and were pleasantly surprised when our taxi whisked us — at 65 mph on the Kennedy Expressway — to our downtown hotel in 30 minutes. There was still time to catch the tail-end of the **AIM International** (AIMI) meeting at McCormick Place, just a few minutes south along the lake. We did not reckon, however, with the start of the evening rush hour and the continuing construction on Lake Shore Drive, which stretched the trip to 40 minutes. (The time spent shuttling to and from McCormick — at \$8-10 per trip, if you did not have time to wait for the free bus — was a constant complaint among attendees.)

<u>1600 hours</u>: Arrived at McCormick just as the AIMI meeting adjourned, but we had a few minutes to visit with AIMI's retiring President, John Cribb (**Telxon/UK**). Cribb led AIMI for three years during its critical period of

reestablishing itself as the coordinating organization for all of the worldwide AIM affiliates. During his tenure, AIMI made significant progress: AIM/USA and AIM/Europe settled their 1992-93 messy dispute; AIMI undertook new responsibilities as the custodian of international ADC standards and specifications; and as the designated licensor for AIM, AIM International expanded corporate and regional affiliates to 1,000 members in more than 30 countries.

As Cribb stepped down from his leadership position — to the accolades of his associates — Mike Hone (**PSC**) moved in as the new AIMI president. (Hone is just completing his two-year stint as chairman of AIM/USA).

1900 hours: At dinner with "semi-retirees," Ben Nelson and Chet Benoit, the AIDC Pioneers were born. These two industry stalwarts had recently retired from active duty: Nelson from **Markem** and Benoit from **Welch Allyn**. Nelson continues to lead an active ADC life, lecturing up to 50 times a year at government, association and corporate venues. Benoit is now a marketing consultant to **Sensis**, the company that reads "Bumpy Bar Codes."

The objective of the AIDC Pioneers is to gather together those individuals who contributed to the growth of the ADC industry during the past 25 years. Lacking a clear-cut definition of what constitutes a "pioneer" — e.g., 15 years in the industry; present at the first three SCAN-TECHS; founding member of AIM — it was decided that anyone from the vendor community who believes that he or she is an industry pioneer will be self-qualified.

The first meeting of the AIDC Pioneers will be at **ID Expo** in Philadelphia in May 1997. There will be additional announcements in this journal as well as other ADC trade publications.

Wednesday, November 6

<u>0700 hours</u>: Woke up to learn — from the *Show Daily* placed at our hotel room door — that while we were sleeping, someone changed the name of the industry to "Automatic Identification and Data Capture (AIDC)."

In the 1970s, "Automatic Identification" — soon to be shortened to Auto ID — characterized the handful of companies in the industry. Auto ID stuck for 20 years until mid-1994 when AIM promoted "Automatic Data Collection" (ADC) as a more inclusive description of the expanded technologies. (SCAN Newsletter, among a few others, preferred "Automatic Data Capture" as a more active, dynamic phrase.) There were a few who clung to the combination term ADC/ID for a while, but that never caught on.

AIM/USA has now decided to follow the lead of the **International Standards Organization** and the **International Electrotechnical Council** which have adopted AIDC as "recognition of a common name to represent all of the various aspects of the industry...along the road toward full global standardization." The new moniker doesn't

SOLO The DATA CAPTURE Report

Since 1977, the premier management & marketing newsletter of automatic data capture, including:

- Bar coding, 1-D & 2-D symbologies
- Bar code printers, scanners, terminals, verification products and labels
- Wireless (RFDC & RFID)
- Magnetic stripe
- OCR products
- Voice recognition systems
- Vision systems, video scanners
- FDI
- Smart cards & optical cards
- Memory tags
- Biometrics
- Application software
- Peripherals or supplies for the above

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fall trippingly off the tongue, but that's the price we pay for progress.

0800 hours: At a special breakfast meeting, AIM/USA launched its program to develop meaningful statistics for the AIDC industry. Presentations were made demonstrating the value of this new project to corporate management, marketing and sales personnel, and to financial analysts who follow the AIDC industry. These are the major points that were made in support of this new program:

- 1. Current available statistics are woefully inadequate.
- 2. All companies must participate in order to provide accurate data.
- 3. Procedural steps will insure total confidentiality of all company information.
- 4. In addition to sales revenues, significant data will be developed reflecting industry profitability, average management and executive compensation, and other important benchmarks.

AIM does not plan to conduct the statistical

programs in-house but will contract the work out to an experienced organization. Larry Roberts, AIM president, is personally handling this project and welcomes all comments and suggestions.

1000 hours: The exhibition floor was officially opened for visitors. The crowds were a bit thin in the morning but built to more respectable numbers as the day wore on.

The most active spot on the floor seemed to be the Eastman Chemical booth where, at times, the visitors crowded three-deep into the aisle. Eastman, a major supplier of chemicals, fibers and plastics, was a first-time exhibitor at SCAN-TECH and was demonstrating the "Invisible Bar Code." This is the same technology that was announced with much fanfare by the Battelle Memorial Institute in January 1991 (SCAN 2/91). The accompanying technical paper issued by Battelle at that time had described a dye that "fluoresces in the near-infrared when stimulated with a 633nm light from a helium neon laser." The problem was that the fluorescent properties of the ink lasted about 10 minutes after printing.

In 1991, Accu-Sort was designated as the first licensee to build fixed-position scanners to read the invisible code and has since waited patiently for a company to develop a suitable ink. Eastman now claims to have produced a commercial-quality ink which was demonstrated at the show. The company is seeking resellers for its product, and other scanning hardware licensees.

We took two Battelle representatives aside to discuss this new development. Project Manager John Garvey, Jr. quickly disavowed earlier Battelle claims that the invisible bar code would replace the obtrusive UPC/EAN symbol. He admitted that although the Battelle/Eastman bar code can be printed over other copy and graphics, and still be readily scanned, an invisible UPC symbol would present significant problems to the retail checkout personnel. Garvey does see large potential markets in the cosmetic and pharmaceutical industries for packaging verification and expects many other applications to develop.

1200 hours: Symbol Technologies' chairman/CEO Jerry Swartz and President/COO Tomo Razmilovic were very optimistic about the current performance and future profitable growth of the company. It was difficult for them to ignore that while some of their primary competitors had

> stumbled this past year — notably Telxon, Norand and PSC — Symbol continued to post impressive revenue and earnings growth.

> Razmilovic was very enthusiastic about the potential sales from the roll-out of Symbol's retail selfscanning system (SCAN/DCR 11/8/96). Although no hard numbers or timetable were given, there are a number of retail

chains currently testing the system. At 150-200 scanners per store, the potential volume for this application adds up quickly.

Razmilovic revealed that Symbol's model 3100 portable, swivel-top, scanner-integrated terminal is the fastest selling product in the company's history. This model is now being shipped at the rate of 30,000 to 40,000 units per quarter.

As for the larger picture, Swartz sees Symbol's continuing strength based on three internal factors: Balance, achieved through emphasis on technology research, product development, and systems concentration; Breadth, reflected by attention to markets and applications; and Stability, supported by Symbol's financial strength.

Although there was no hint of any pending targets, the impression remained that Symbol would not be



George Goldberg, Contributing Editor SCAN/DCR, industry maven and founding member of the AIDC

adverse to entering the acquisition arena. It has been more than eight years since Symbol purchased **MSI Data**, and its rapid growth since then has been internally generated. The company may be ready for its next external move.

1500 hours: Following RVSI's acquisition of ID Matrix last year, we have seen a rare sense of amiability emerge between Pat Costa, President of RVSI and Dennis Priddy, President of IDM. RVSI bought Computer Identics this past summer and merged IDM and CI into one operating company. Priddy was recently moved to the CI facility in Canton, MA and is now the CEO [Richard Close is President] of this new division.

Costa is clearly pleased with his company's rapid entry into the AIDC marketplace. He has positioned RVSI as the only available source for 1-D, 2-D and 3-D (machine vision) systems.

Priddy expressed optimism about the future success of CCD-array cameras, which he feels will be more successful than lasers in 2-D symbology applications. He described a futuristic automated postal service based on a postage-stamp size 2-D symbol printed at the source on each envelope. The symbol would contain complete ID and destination information for that piece — including postage charged through Internet access — and the U.S. Postal Service will be able to track the envelope from source to delivery using "more than 200 thousand scanners located throughout the USPS system."

1600 hours: When we asked **Norand**'s President, Bob Hammer, to explain why his company stumbled this past year, he replied, bluntly, "We didn't stumble; we fell flat on our ass." Hammer made it clear, however, that this past year's troubles are history and that Norand is now moving forward on solid ground.

There were three major problems that caused Norand's sales and profits to falter and its stock value to plunge. The most serious difficulty was encountered in the development of a new class of pen-based portable computers to replace their old line. Design, manufacturing and parts problems combined to leave the company with limited RF terminals to ship. "We were fortunate to retain a loyal group of core customers who waited for us to overcome our difficulties — or who bought interim products while we struggled. We are now back strong and looking forward to increased sales and market share. An improved bottom line will follow."

Norand's second problem related to a costly fraud scheme uncovered at its Italian subsidiary. The company is still sorting this one out. In the meantime, it has restaffed, moved its Italian office to

a different city and is back in business in that country.

Finally, a stockholders' class-action suit was settled last September when Norand agreed to pay \$9 million to the disgruntled shareholder group.

With all this behind him, Hammer expects his company to climb back into market position as the leading provider of route accounting systems and is looking for new applications such as the utilities and home services industries.

....to be continued

Will End-Users Ever See True Interoperability In RF LAN Systems?

If you've been waiting for complete interoperability between radio frequency [RF] components, brace yourself for a long haul. According to what we heard from vendors at the recent **SCAN-TECH** show, it could be as long as 12 to 18 months before a true industry-wide standard is adopted. Even if the IEEE 802.11 interoperability specification passes, it is doubtful that end-users will see plug-and-play compatibility.

The Wireless LAN Interoperability Forum [WLIF] made its presence known at the show with its own booth and a press conference for media members. During the press conference, **Proxim's** Brian Button and **Data General's** Jeff Tingley [chairman of the WLIF] told listeners that the Forum will offer a published specification by the end of this year. Immediately following the Forum update, the WLIF presented an interoperability demonstration at its booth.

Editor's note: For our new readers, the WLIF is a group of RF component manufacturers that joined together to offer "interim" interoperability in wireless LAN systems. Interim refers to the time before the IEEE 802.11 standard is passed.

New members that have joined since the Forum's initial introduction in May 1996 are: **Andrew Corporation**, **BASS**, **BreezeCOM**, **Fujitsu**, **Intermec**, **Nomadic Technologies** and **WaveNet**.
WLIF members responded to our questions almost in a rehearsed fashion when we asked why they have not embraced the IEEE 802.11 standard which is currently in the middle of a ratification process.
Each time the question was asked, the member

would tell us the WLIF contends that 802.11 is at least 12 to 18 months from completion. Hence, there is still a need for interim interoperability.

Attendees of the show who visited the Aironet Wireless Communications booth could easily have confused it with the WLIF group. The Aironet booth displayed the company's ARLAN 3000, 2.4 GHz, frequency-hopping radio surrounded by a variety of manufacturers' terminals and peripheral devices. A prominently-placed sign told visitors that all these products operate with the ARLAN 3000 radio.

We saw products from Dauphin Technologies, Epson, Fujitsu, IBM, Motorola, Norand, TelePad, Telxon, Itronix, Microslate, Walkabout Computers, ICL Retail Systems, NCR, and Siemens Nixdorf. We also saw products from LXE, Symbol Technologies, Trigon International, Data Net, Linx, MaxiLAN, Zebra Technologies, Comtec, and Monarch Marking Systems. Interestingly, some of these companies are members of the WLIF as well.

"The WLIF is attempting to offer customers a form for interoperability until something better comes along."

Aironet's director of product marketing, Todd Smith told us his company's frequency-hopping radio [access point] is based on IEEE 802.11 protocols. However, since 802.11 has not been ratified, no company can claim compliance to the standard. It is possible Telxon and its subsidiary, Aironet, will use the same marketing philosophy as the WLIF and capitalize on their list of products that operate with each other.

We also talked to Bill Wise, LXE's advertising/sales promotion manager, who was at the show for the introduction of LXE's new 2330 Handheld Computer. LXE is a member of the WLIF [although its products also operate with the Aironet radio] so we asked him for his take on the interoperability issue. Wise was very candid in his reply. He told us that in his opinion there may never be total mix-andmatch interoperability. Vendors may always retain some form of proprietary edge on their competitors.

"The WLIF is attempting to offer customers a form of interoperability until something better comes along," said Wise. "IEEE 802.11 could easily be another 12 to 18 months before ratification and who knows how long it will take for implementation of

the specification into vendors' products. Customers deserve to have a choice in the meantime."

Telxon recently released a "position paper" on the proposed 802.11 standard. Among other things, the paper quotes a release from the Gartner Group Research Notes that states, "The standard [802.11] is unfinished and what does exist does not provide enough guidance for interoperability." The paper also states that the 802.11 subcommittee voted to approve the Draft version D4. The specification has moved to the main 802 group for a vote and possible proposal modification. The main 802 committee has made several minor language changes and at this point, the standard currently exists as Draft version D6. It is highly possible that a version D7 or D8 could result prior to final approval.

The position paper is loaded with statements which support SCAN/DCR's position that there may never be true interoperability. Some of those statements

"The network protocols that enable seamless roaming [communication between access points] are outside the scope of the current proposed 802.11 specification. Therefore, ratification of the 802.11 specification will not necessarily free wireless LAN buyers from proprietary technology."

"The proposed standard will provide a good foundation for an open-system environment but no guarantee can be made that compliant products from different suppliers will be interoperable."

"The wireless LAN user needs to understand that in the initial days of 802.11-based systems, overthe-airwaves interoperability will require cooperation between wireless manufacturers. The only way to make these systems communicate together is through cooperative testing and "tweaking" of each other's equipment."

"The proposed [802.11] standard will provide a good foundation for an opensystem environment but no guarantee can be made that compliant products from different suppliers will be interoperable." **Telxon's Position Paper**

Aironet's Todd Smith told us that although his company's policy is to support 802.11, the type of true interoperability end-users are searching for may never be a reality. Aironet, Lucent Technologies

and **Digital Ocean** are trying to solve the communication problem between access points by developing an Inter-Access Point Protocol. The problem is not all manufacturers have joined in this effort even though most agree that true interoperability can never be achieved until the inter-access point, communication problem is solved.

Comment: We believe end-users of radio frequency LAN systems are being taken on the "ride of their lives." Manufacturers of radio frequency LAN components are providing so much hype about interoperability that it's a mystery how any of their customers can sort through the propaganda.

End-users are asking for out-of-box, mix-and-match, plug-and-play systems. We believe it is unlikely they will ever have this kind of interoperability.

Manufacturers of RF components are providing state-of-the art technology through the new products they are offering. But providing the total interoperability consumers are demanding will require much more of a cooperative effort than they are willing to make. Vendors of wireless LAN products do not seem to be able to rid themselves of old proprietary policies.

The actions of groups like the WLIF show that manufacturers know what their customers want because they are using the appearance of interoperability to market their products. And other major vendors of wireless LAN components have shown the same thing to be true through numerous press releases announcing their support for 802.11.

True interoperability [the kind end-users are demanding] will take more than lip-service, press releases and marketing gimmicks. Manufacturers will have to share technology and really work together to give customers what they want.

Companies may hesitate to expose what they feel is their company's competitive edge. However, we believe the entire industry will benefit through increased sales of RF products if they are willing to take that chance.

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Intermec And Computer Identics Announce Strategic Alliance

At a press conference held on Nov. 7 during the recent **SCAN-TECH** trade show in Chicago, IL, **Intermec Corp.**, a **Western Atlas** company and **Computer Identics/I.D. Matrix**, a subsidiary of **RVSI** [Robotic Vision Systems Inc.] announced they had formed a strategic alliance. By sharing technologies, the companies intend to address the two-dimensional [2-D] symbology market.

Under the new agreement, Intermec will have marketing rights to Computer Identics' fixed-position, laser scanners and network connectivity software. Computer Identics in turn can now market Intermec's hand-held terminals, portable readers, laser scanners and label printing systems. The two companies plan to market their combined products worldwide.



Michael Ohanian, president/CEO, Intermec Corp.

In an interview with Michael Ohanian, president/CEO of Intermec, he told SCAN/DCR there are many synergies that exist between the two companies. "We have a line of CCD vision systems [charged couple device scanners] that Computer Identics needs," said

Ohanian. "Computer Identics has a line of laser scanners that we need.

"With the 2-D matrix code developed by Dennis Priddy, CEO of Computer Identics/I.D. Matrix, we can combine our products to offer a more-complete AIDC system than we could as individual companies. Now we are well-positioned to meet the total needs of the industrial world."

Each company's products will continue to be marketed under its respective name. Ohanian did not rule out a future sharing of research and development functions between the two companies. "RVSI has captured a large part of the market in the material handling industry," Ohanian continued. "With our new alliance, we hope to improve on this by offering one-stop shopping."

Pat Costa, RVSI president/chairman/CEO, was also very upbeat about the alliance. "There is great synergy between the products and technologies within the family of RVSI companies and Intermec's broad data collection product line," Costa asserted. In pursuit of government business, our companies will implement joint strategies to

increase sales through Intermec's Government and Strategic Programs Group.

Comment: In the past 24 months we've seen 30 mergers and acquisitions take place in the AIDC industry. Companies are becoming larger and more powerful everyday. RVSI has acquired at least three companies in the last several years.

Now we are witnessing "strategic alliances" that are making the major players even more powerful as they combine technologies. But the AIDC industry is made up of many businesses that were started in someone's garage. The presence of these giant companies could intimidate some entrepreneurs from starting new businesses.

The important questions are, "Will the AIDC industry become dominated by a small number of giant vendors and will this hamper innovation?"

For more information: **Computer Identics/I.D. Matrix**, Canton, MA, PH (617) 821-0830,
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E-mail: cgoetz@intermec.com.

INDUSTRY AWARDS

Connie Vinck Receives Percival Award For Bar Code Asset Tracking Program

The votes are in and the 1996 winner of the annual Percival Award is Connie M. Vinck of the **Federal Aviation Administration's Airways Facilities Division**. Vinck received the award on Thursday, November 7 at the annual **SCAN-TECH** automatic data capture trade show in Chicago, IL.

As program manager for the FAA's new Bar Code Asset Tracking System (BCATS), Vinck was cited for her vision and tireless efforts to make bar code control the backbone of the FAA Airways Facilities' mission.

The Percival Award, named in memory of early ADC supplier, Don Percival, is given annually by **AIM Inc.** and **SCAN: The DATA CAPTURE Report**. This is the highest award a member of the ADC user community can receive. It honors excellence, innovation and dedication in using ADC tools to develop new answers to business problems.

BCATS gives the FAA the ability to track assets

from the time of acquisition until retirement -crucial data for high productivity and accurate
financial reporting. The end result will be that every
location and every replacement part for every radar
system in the country is traceable, with the history of
each immediately available. As there are some
11,000 radar, communication and navigational-aid
sites in the U.S., one can readily envision the scope
of this undertaking.

BCATS is a direct response to challenges facing the FAA in recent years. First among these challenges is the aging national air space (NAS) equipment, resulting in escalating maintenance data reporting, and a lack of spare parts availability. Other problems include increasing pressure to keep commercial, off-the-shelf components [inventory] moving, as new NAS system technologies emerge. There is also growing demand for visibility/control of life-cycle cost and performance data stemming from the Government Performance and Results Act (GPRA).

Vinck was initially involved with ADC as an FAA team leader studying the benefits of bar coding to enhance physical inventory practices. BCATS was born out of this study, with the goal of forcing the government to operate more like an efficiently-run business. Understanding the benefits the private sector has achieved through ADC and following Vice President Al Gore's directive to cut waste and overhead, Vinck is determined to bring these business practices to government.



Connie Vinck, the 1996 Percival Award Winner, receives her plaque from SCAN/DCR editor, Rick Morgan at the annual SCAN-TECH trade show in Chicago, IL.

BCATS is built upon permanent bar code asset labels, portable data assistants (PDAs) equipped with laser scanners, and wide-area RF networks which report all asset activity to an "events database." This data-warehouse technology permits continuous cost and performance reporting, continuous site inventory management and many other essential, new functions.

Vinck's 22 years of experience with the government logistics community include six years as a real estate specialist with the U.S. Air Force and

five years as a contract officer, processing written agreements for the Department of Interior. In 1985 she became a general supply specialist for the FAA, working out of Baltimore-Washington International Airport, before being promoted to FAA Headquarters in Washington, D.C. She is currently completing the Certification in Inventory Management from **APICS** [American Production & Inventory Control Society].

In addition to her work on BCATS, Vinck has been instrumental in initiating a government equivalent of the UCC -- the Government Uniform Code Council (GUCC), which will act as a source for other government agencies to retrieve information about the best automatic identification processes.

Vinck presented the BCATs program at SCAN-TECH on Thursday, November 7 (3:30-5:00) in the Assets Tracking Session. She will make the same presentation at SCAN-TECH Europe in Paris and has been invited to meet with EAN representatives in London and Paris to formally introduce the BCATS program.

Comment: This is our first year of involvement with the Percival Award as SCAN: The DATA CAPTURE Report (previously the award was presented by AIM, Inc. and SCAN Newsletter). We are happy to be a part of the data capture industry and feel privileged to present this award to such a deserving candidate. Our warmest congratulations go to Ms. Vinck on receiving this honor.

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AIM USA Changes Board Members - Hone Assumes Position With AIM International

AIM USA's Board of Directors is about to change members. AIM's board consists of seven members including Larry Roberts. Three are scheduled to step down: Scott Cardais, Dave Collins and John Paxton.

The nominating committee has offered the names Michael R. Lowry, president/CEO, **Lowry Computer Products, Inc.**; Michael Ohanian, president/CEO, **Intermec Corporation**; and William L. Rowland, president/CEO, **Microcom Corporation**, to fill the openings on the board. In addition to these nominations, John Paxton has been nominated for a second term by the general membership.

L. Michael Hone, chairman/CEO of **PSC Inc.**, will remain on the board for one more year as the immediate past chairperson. In addition to his position with AIM USA, Hone recently accepted the position of president of the AIM International board of directors.

For more information: **AIM USA**, Pittsburgh, PA, PH (412) 963-8588, FX (412) 963-8753, E-mail: larry.roberts@aimusa.org.

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