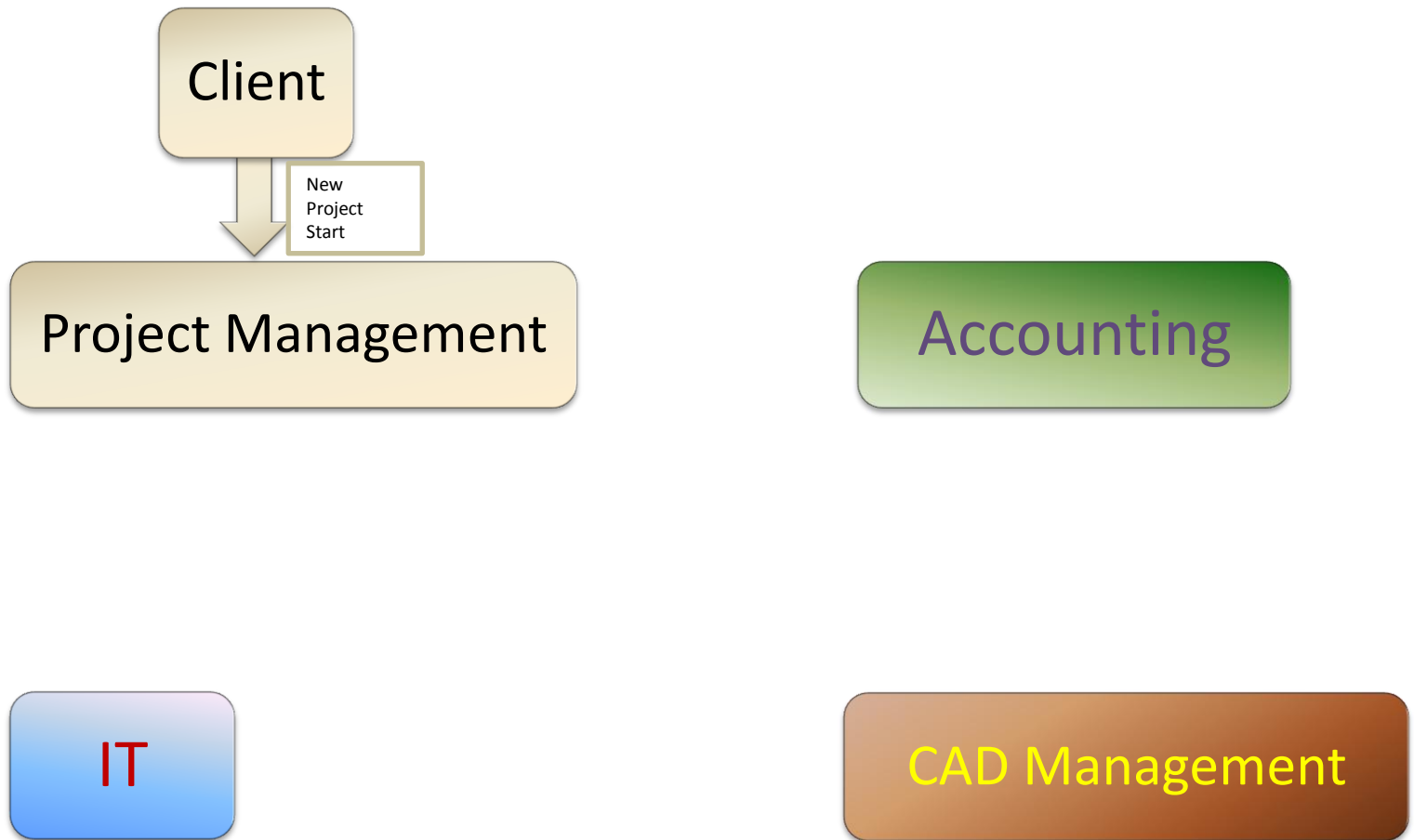# Current Project Creation Workflow (Manual)
Phase 1

Client commits to a new project.

Current Project Creation Workflow (Manual)

Client

New Project Start
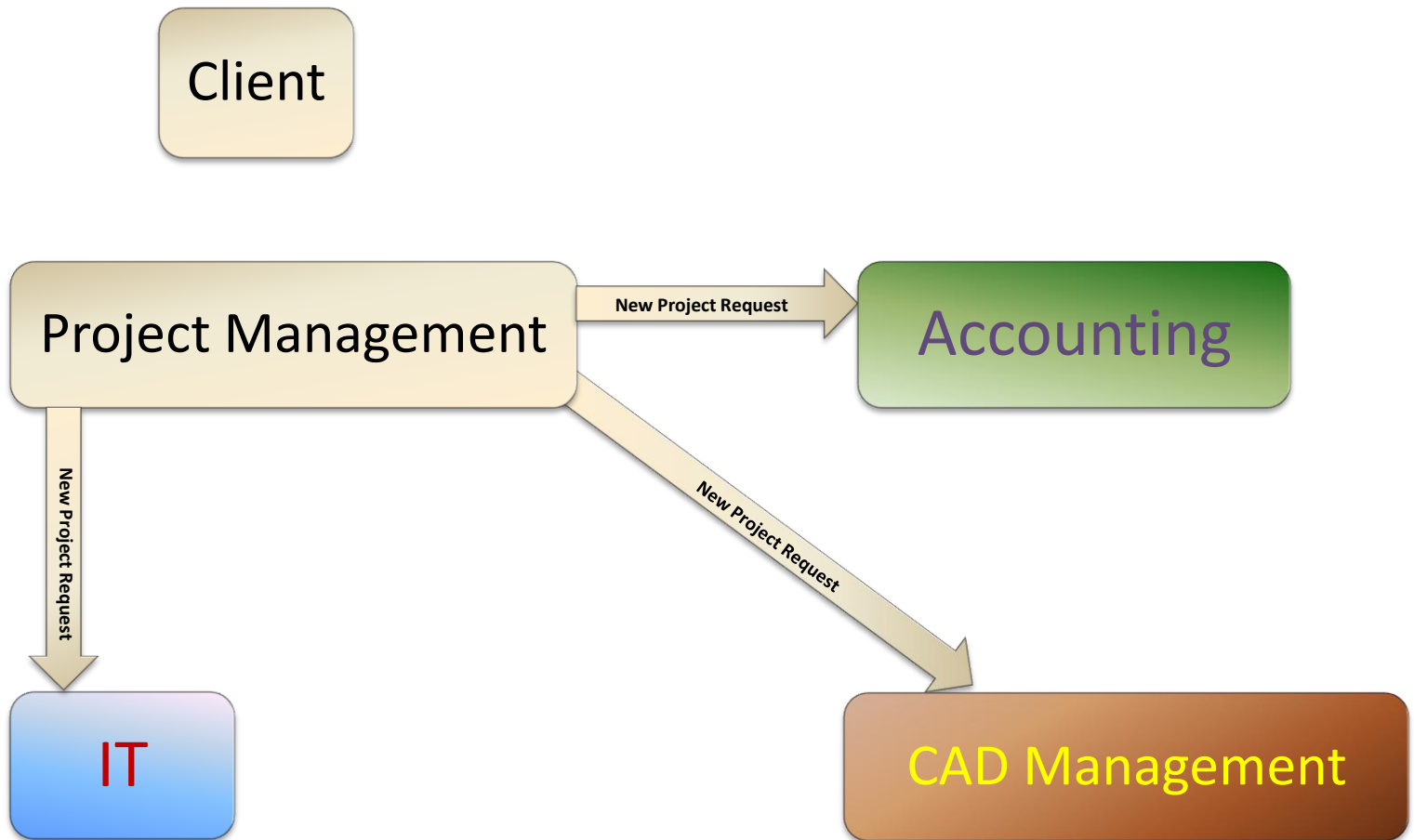
Project Management

Accounting

IT

CAD Management

Phase 1

Current Project Creation Workflow (Manual)
Phase 2

Project Management e-mails requests to Accounting, CAD Management, and IT to create new project resources.
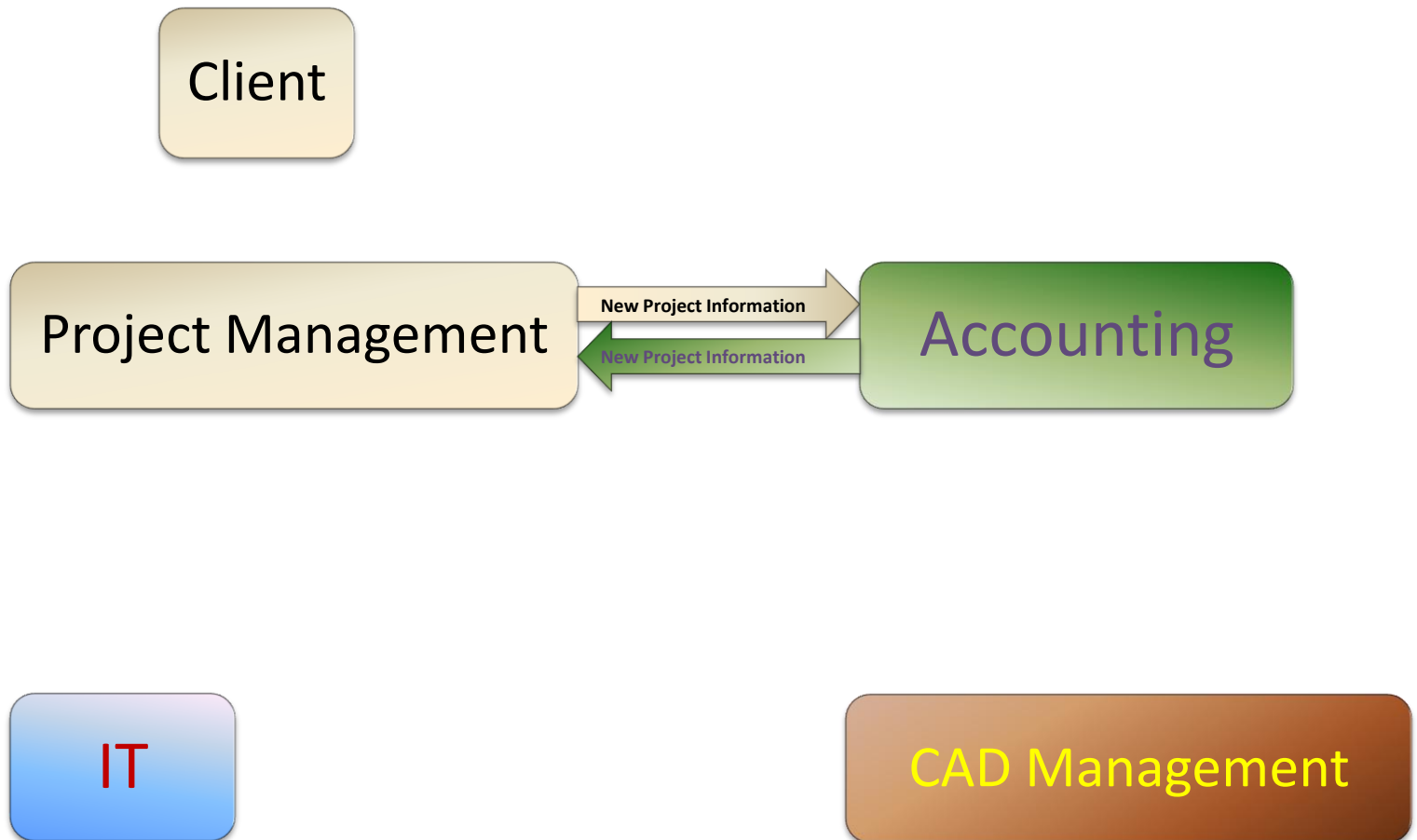
Current Project Creation Workflow (Manual)

Client

Project Management → New Project Request → Accounting

Project Management → New Project Request → IT

Project Management → New Project Request → CAD Management

Phase 2

Current Project Creation Workflow (Manual)
Phase 3

Accounting exchanges e-mails with Project Management for additional project information.
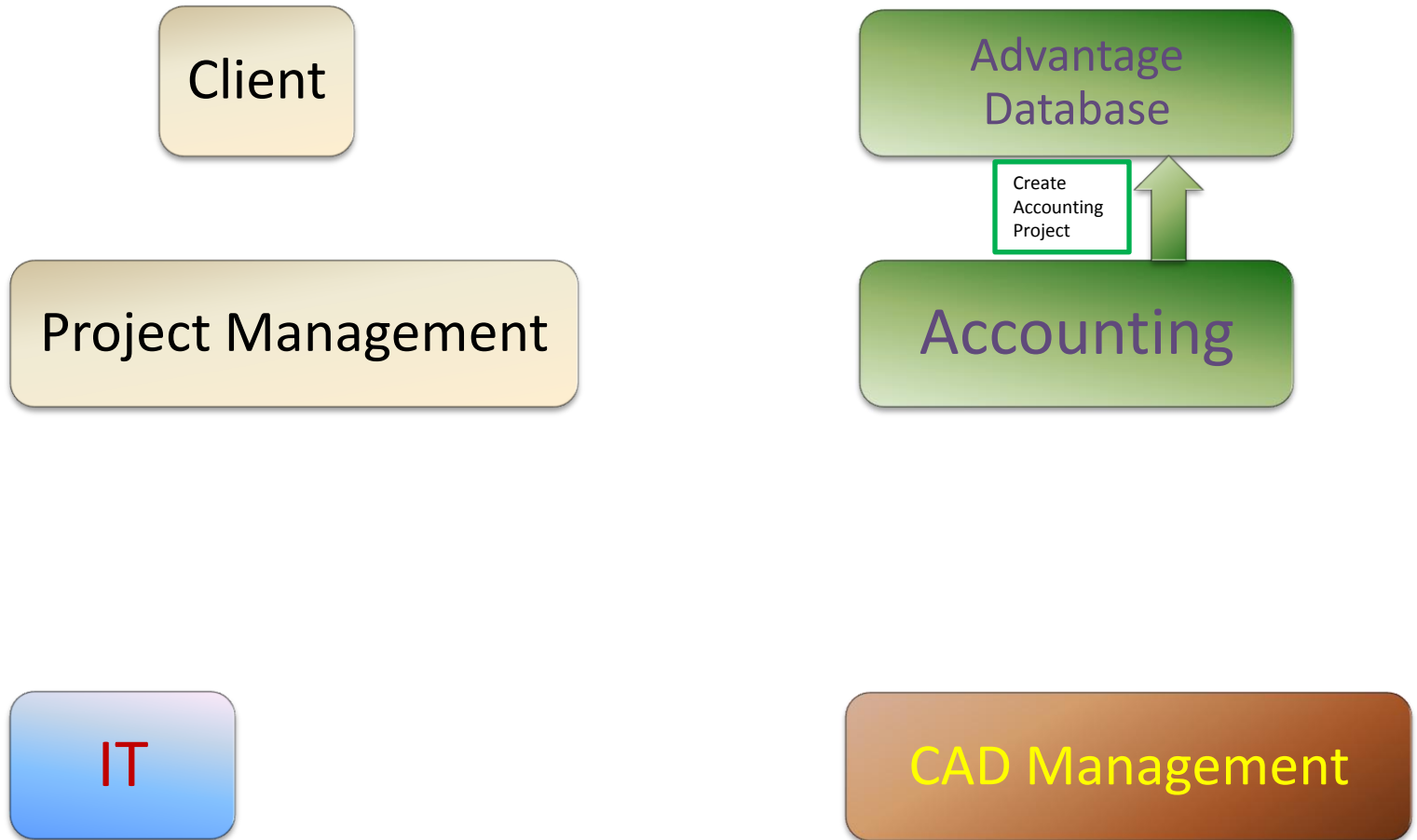
Current Project Creation Workflow (Manual)

Client

Project Management → New Project Information → Accounting

Accounting → New Project Information → Project Management

IT

CAD Management

Phase 3

Current Project Creation Workflow (Manual)
Phase 4

Accounting creates a new project in the Advantage database.

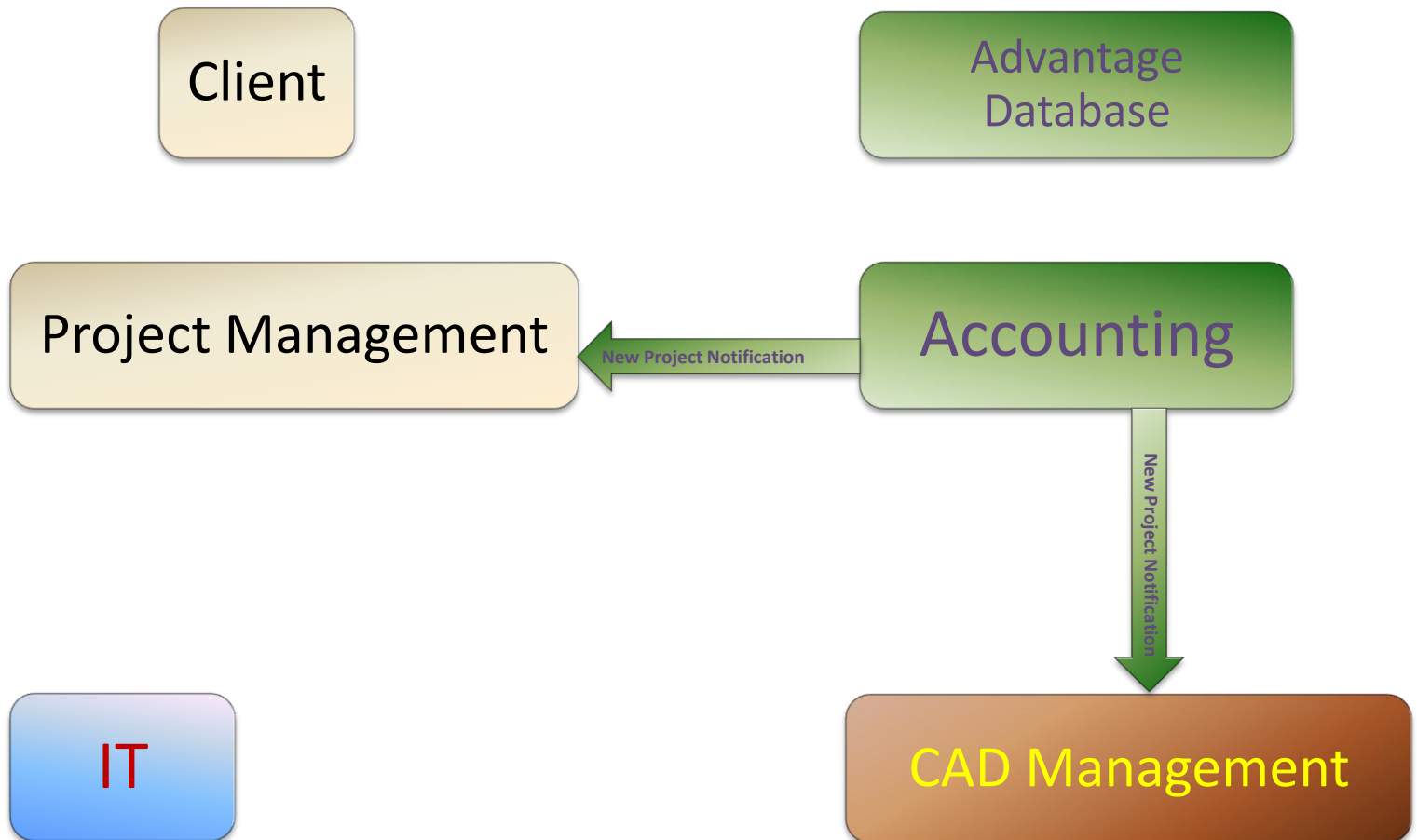# Current Project Creation Workflow (Manual)

Client

Advantage Database

Create Accounting Project

Project Management

Accounting

IT

CAD Management

Phase 4

Current Project Creation Workflow (Manual)
Phase 5

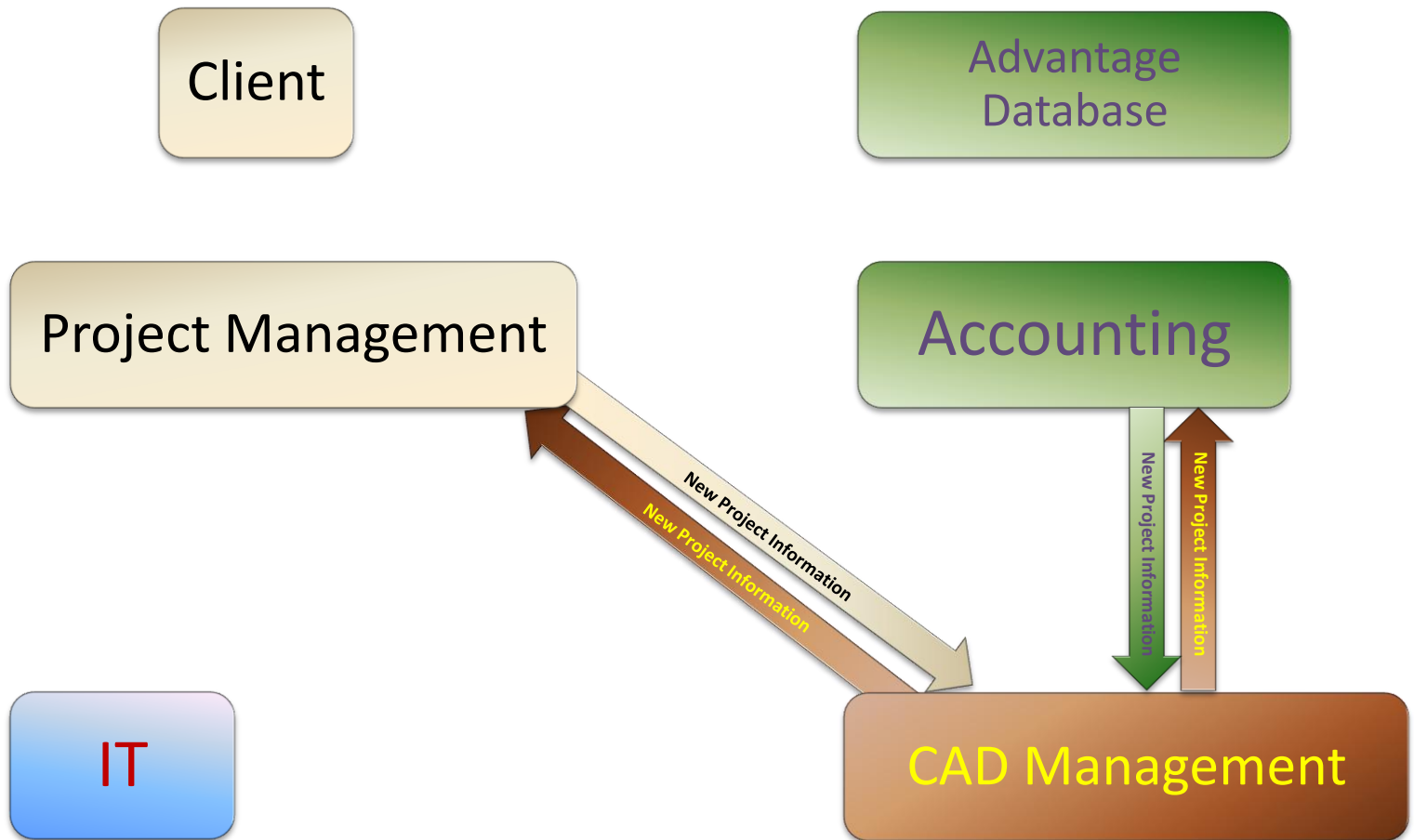Accounting e-mails new project notification to Project Management and CAD Management.

Current Project Creation Workflow (Manual)

Client

Advantage Database

Project Management ← New Project Notification — Accounting

New Project Notification

CAD Management

IT

Phase 5

Current Project Creation Workflow (Manual)
Phase 6

CAD Management exchanges e-mails with Project Management and Accounting for additional project information.
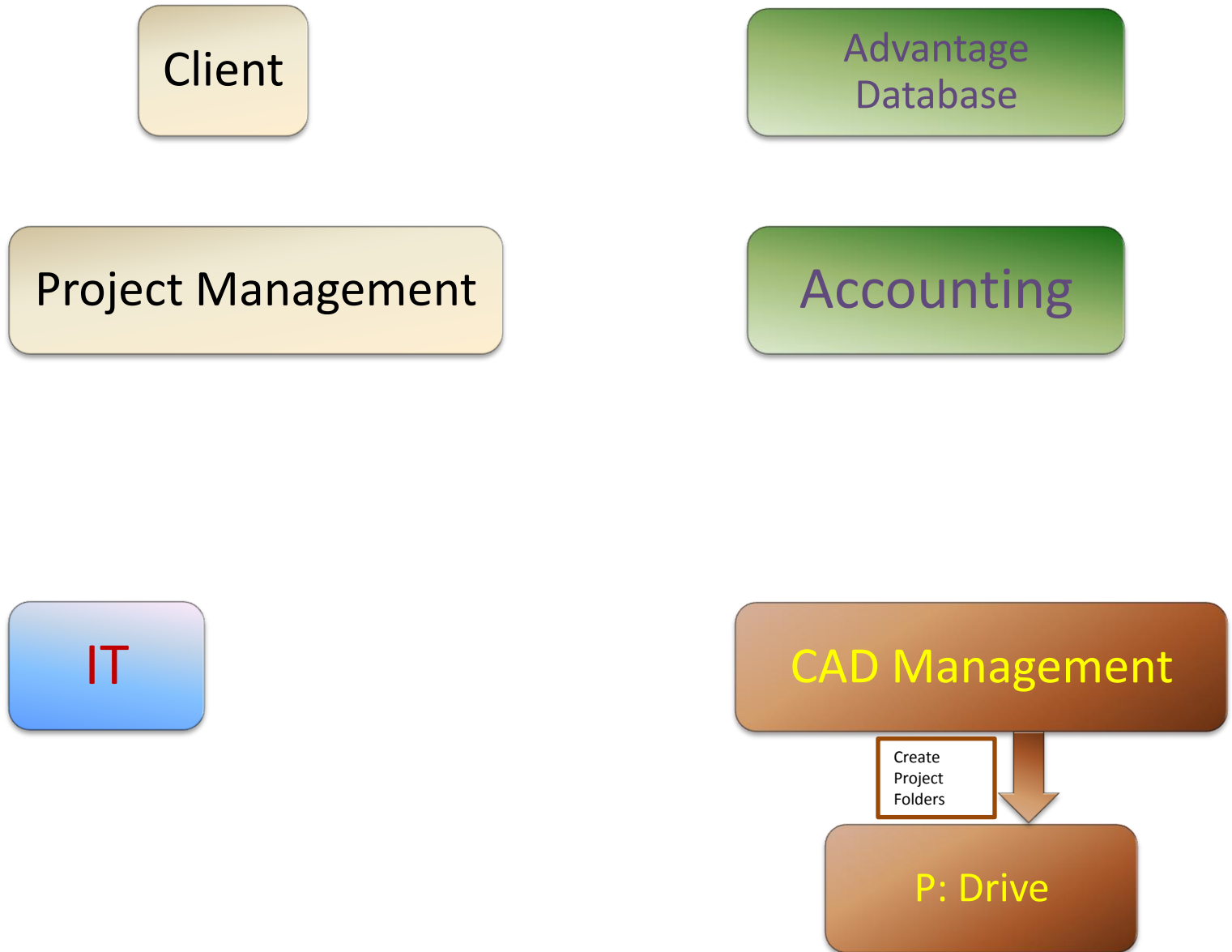
Current Project Creation Workflow (Manual)

Client

Advantage Database

Project Management

Accounting

New Project Information

New Project Information

New Project Information

New Project Information

IT

CAD Management

Phase 6

Current Project Creation Workflow (Manual)
Phase 7

CAD Management creates new project folders on the P: drive.
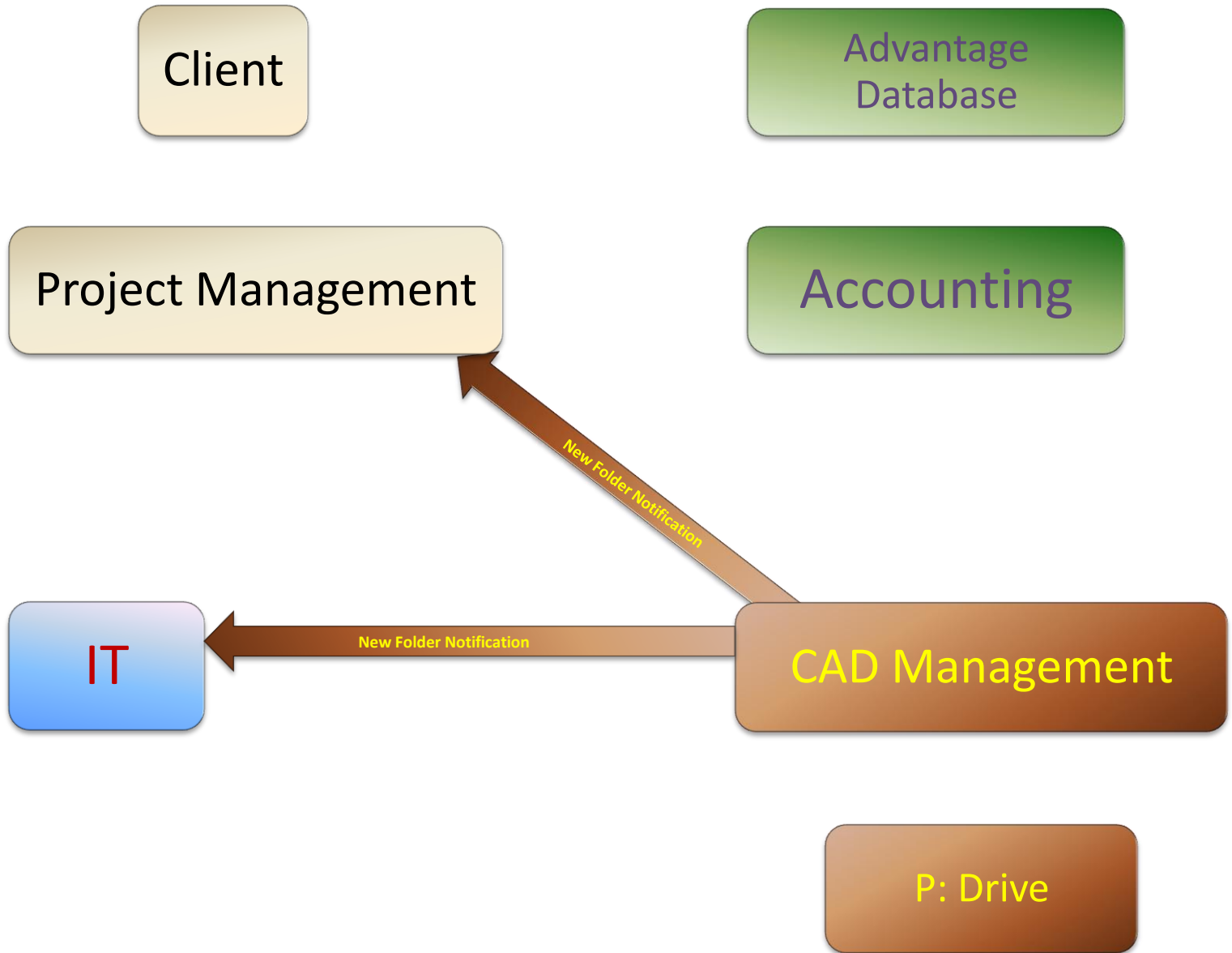
Current Project Creation Workflow (Manual)

Client

Advantage Database

Project Management

Accounting

IT

CAD Management

Create Project Folders

P: Drive

Phase 7

Current Project Creation Workflow (Manual)
Phase 8

CAD Management e-mails new folder notification to Project Management and IT.

Current Project Creation Workflow (Manual)

Client

Advantage Database

Project Management

Accounting

New Folder Notification

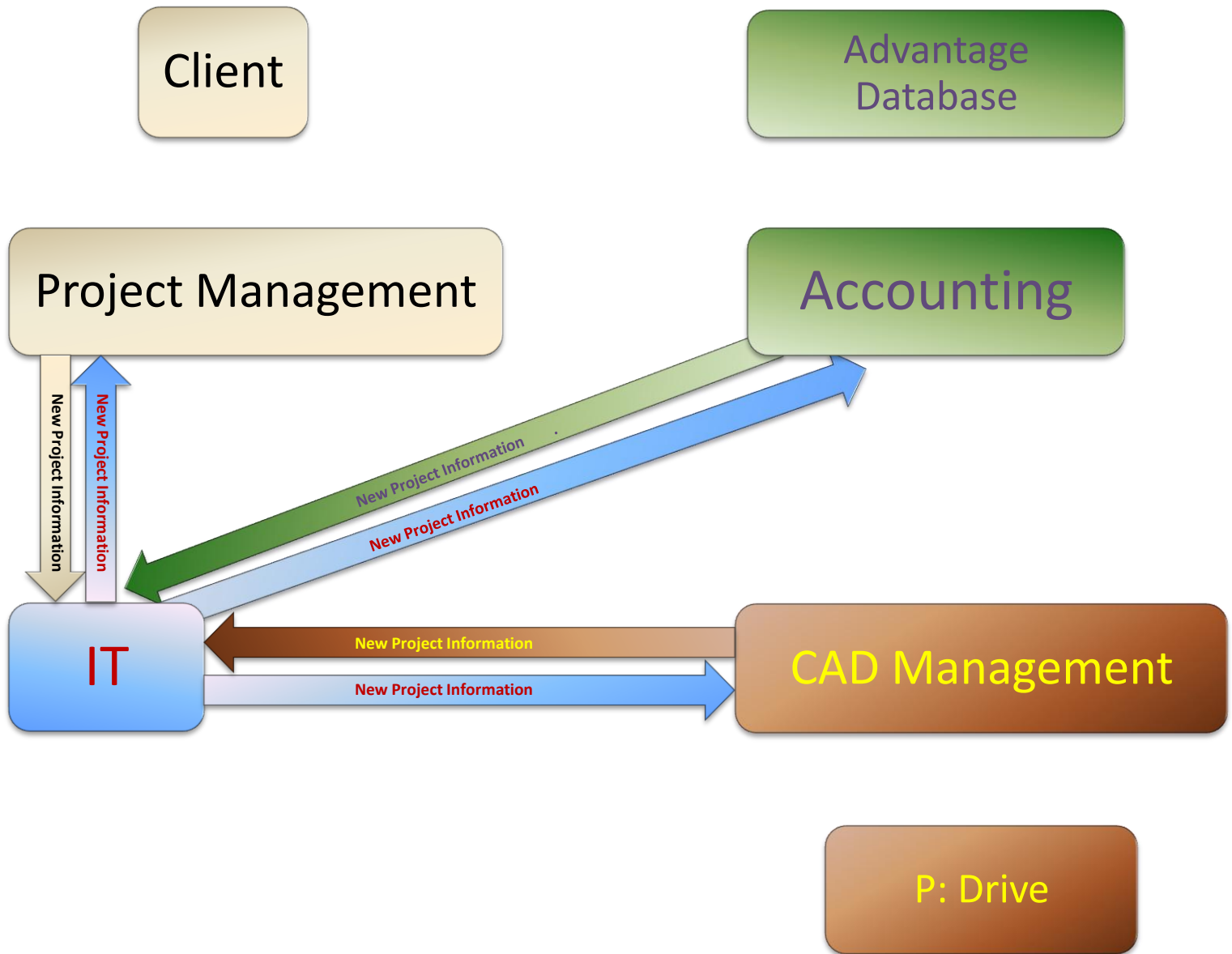**IT** ← New Folder Notification ← **CAD Management**

P: Drive

Phase 8

Current Project Creation Workflow (Manual)
Phase 9

IT exchanges e-mails with Project Management, Accounting, and CAD Management for additional project information.

Current Project Creation Workflow (Manual)

Client

Advantage Database

Project Management

New Project Information

New Project Information

Accounting

New Project Information

New Project Information

IT

New Project Information

New Project Information

CAD Management

P: Drive

Phase 9

Current Project Creation Workflow (Manual)
Phase 10

IT looks up additional project information in the Davis database.

Current Project Creation Workflow (Manual)

Client

Advantage Database

Project Management

Accounting

IT

CAD Management

Look Up Project Information
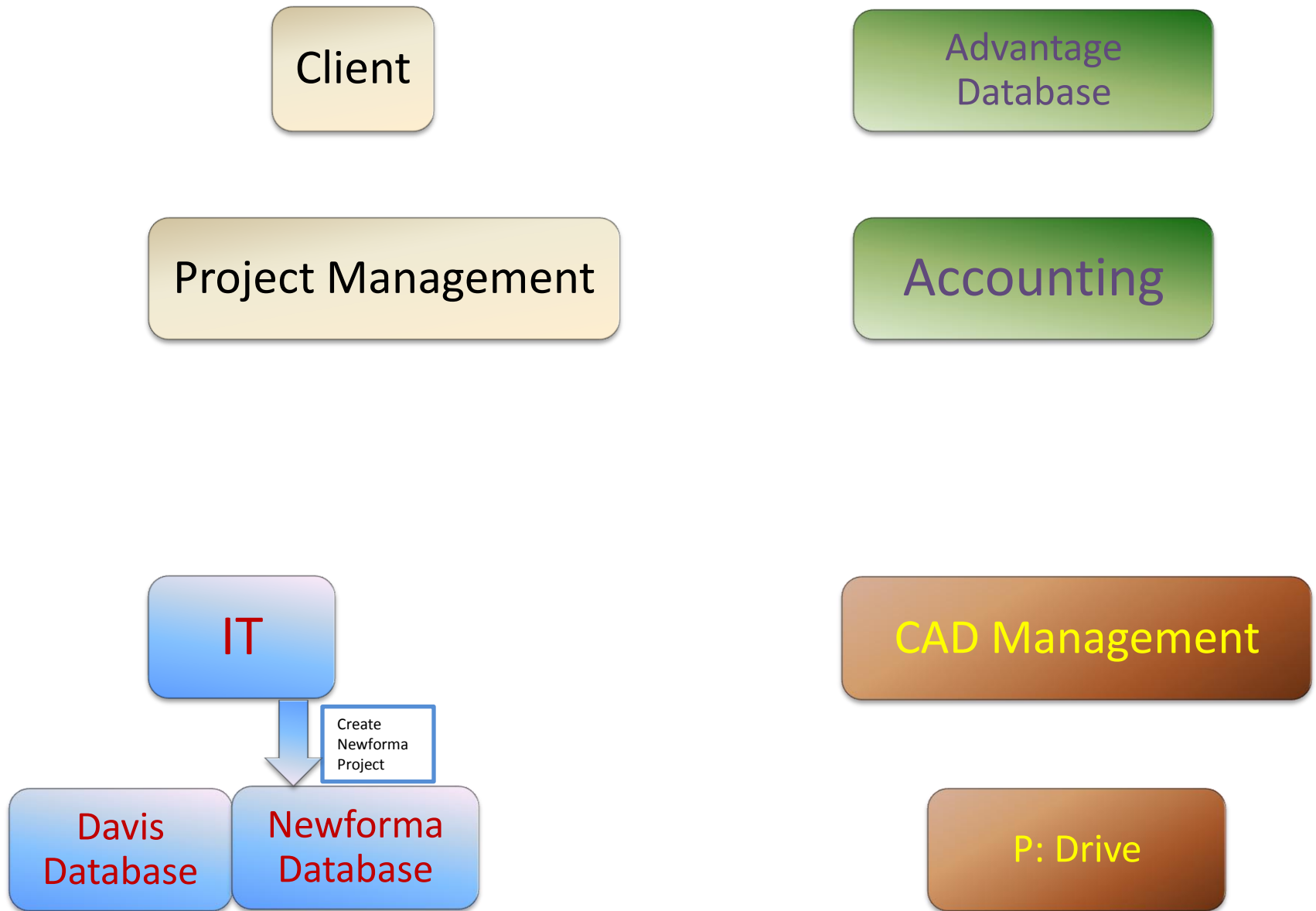
Davis Database

P: Drive

Phase 10

Current Project Creation Workflow (Manual)
Phase 11

IT creates a new project in the Newforma database.
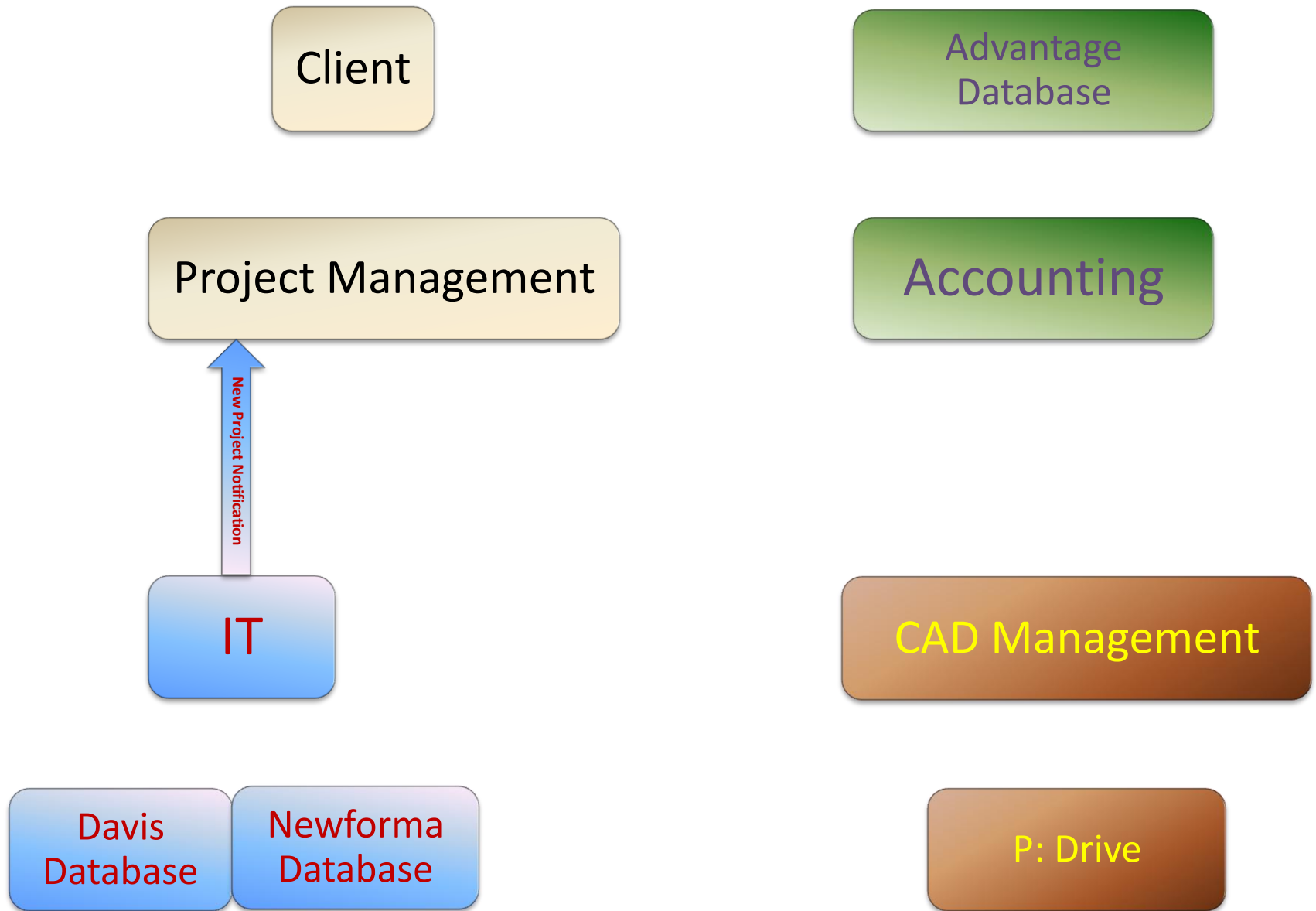
Current Project Creation Workflow (Manual)

Client

Advantage Database

Project Management

Accounting

IT

CAD Management

Create Newforma Project

Davis Database

Newforma Database

P: Drive

Phase 11

Current Project Creation Workflow (Manual)
Phase 12

IT e-mails new project notification to Project Management.

Existing Project Creation Workflow (Manual)

Client

Advantage Database

Project Management

New Project Notification

Accounting

IT

CAD Management

Davis Database

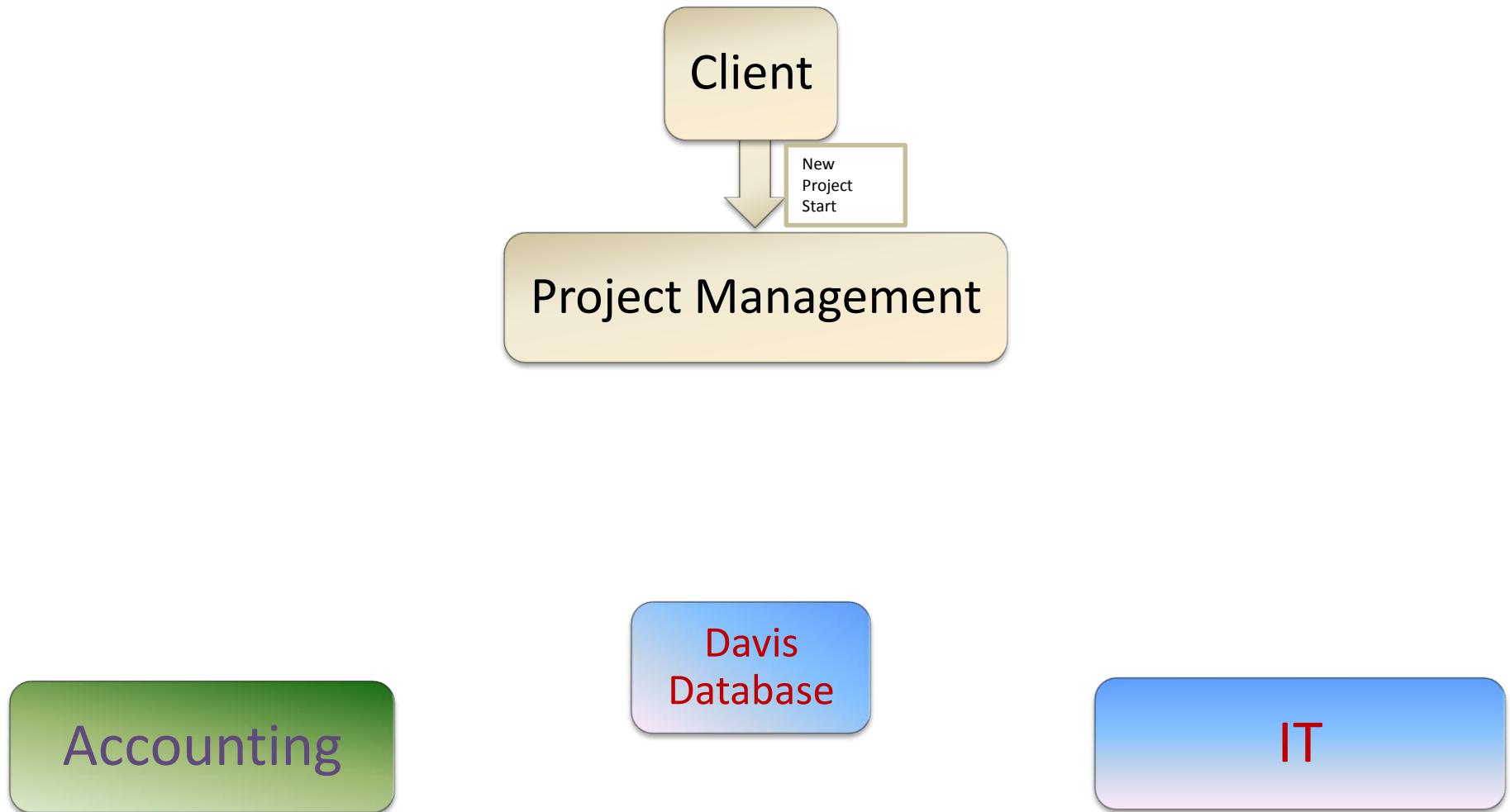Newforma Database

P: Drive

Phase 12

Enhanced Project Creation Workflow (Automated)
Phase 1

Client commits to a new project.

Enhanced Project Creation Workflow (Automated)

Client

New Project Start

Project Management

Davis Database

Accounting

IT

Phase 1

Enhanced Project Creation Workflow (Automated)
Phase 2

Project Management completes the New Project Creation Request form in the Davis database. All the necessary information is required on the form.

Enhanced Project Creation Workflow (Automated)

Client

Project Management

New
Project
Request

Davis
Database

Accounting

IT
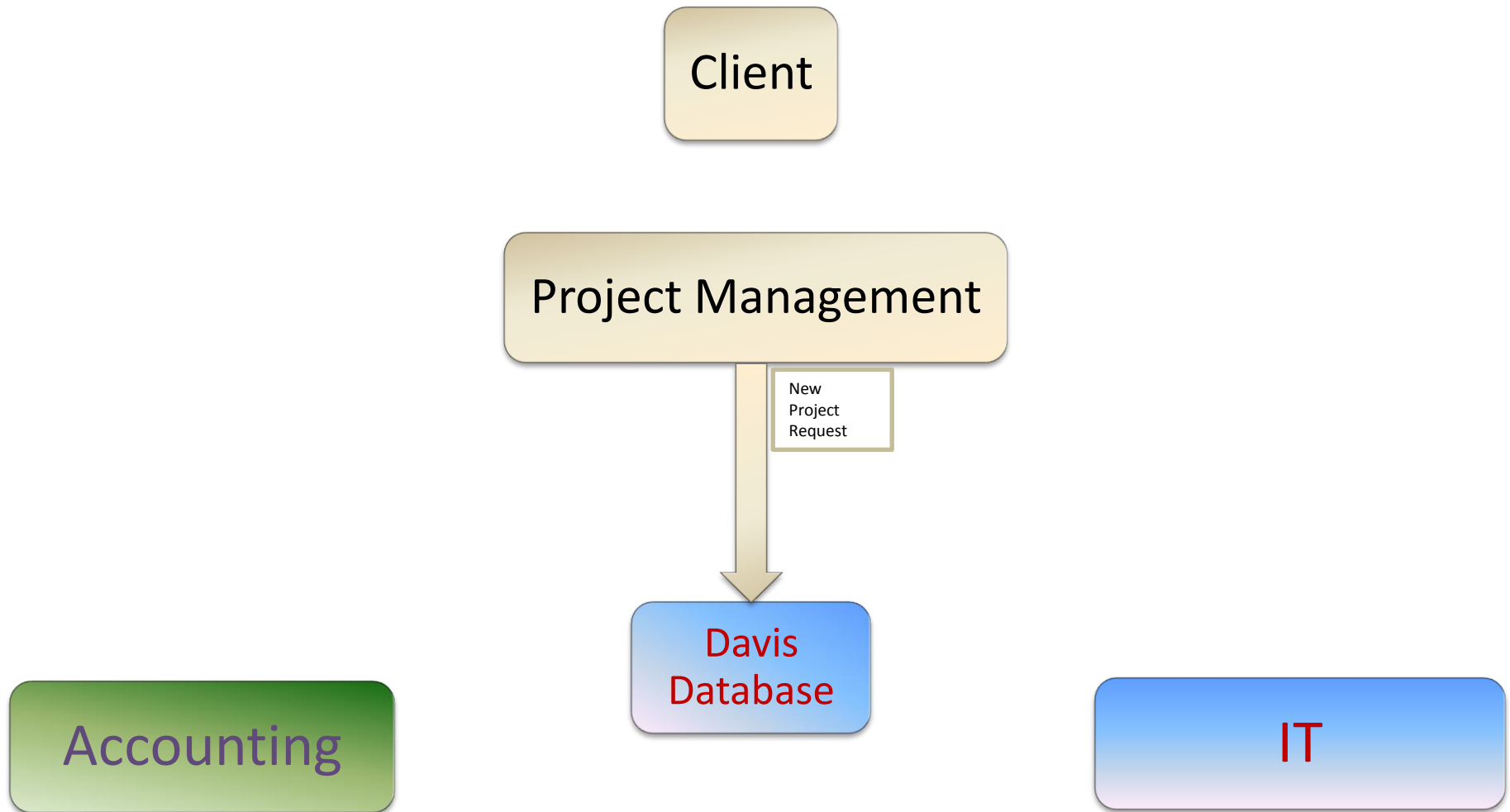
Phase 2

Project Creation Request

Date: 11/1/2008

Select Request Type

(•) New Base Project   ( ) New Phase   ( ) Service/Subproject   ( ) Marketing

Davis Project Information

Project [ ]

Project Name [ ]

Project State [▼]

Project Partner [▼]

Project Manager [▼]

Project Directory [▼]   [ ] New Project Directory

Phase [ ]   Phase Name [ ]

Service [ ]   Service Name [ ]

Submitted By [▼]

Comment [ ]

[Clear Project]

Client Information

Company Name [▼]   State [ ]

Contact [ ]   Zip [ ]

Address [ ]   Phone [ ]

[ ]   Fax [ ]

[ ]   E-mail [ ]

City [ ]   [ ] New Client

Note: All fields marked in RED are required. Project, Phase, and Service Names are limited to 40 characters. Names can include all alpha-numeric characters and these five special characters, @ & ( ) - .

[Submit]   [Close]   [Cancel]

Record: |◄ ◄ [1] ► ►| ►* of 1

Enhanced Project Creation Workflow (Automated)
Phase 3

Davis database sends automatic e-mail notification to Accounting to create a new project.

Enhanced Project Creation Workflow (Automated)

Client

Project Management

Accounting

New Project Notification

Davis Database

IT
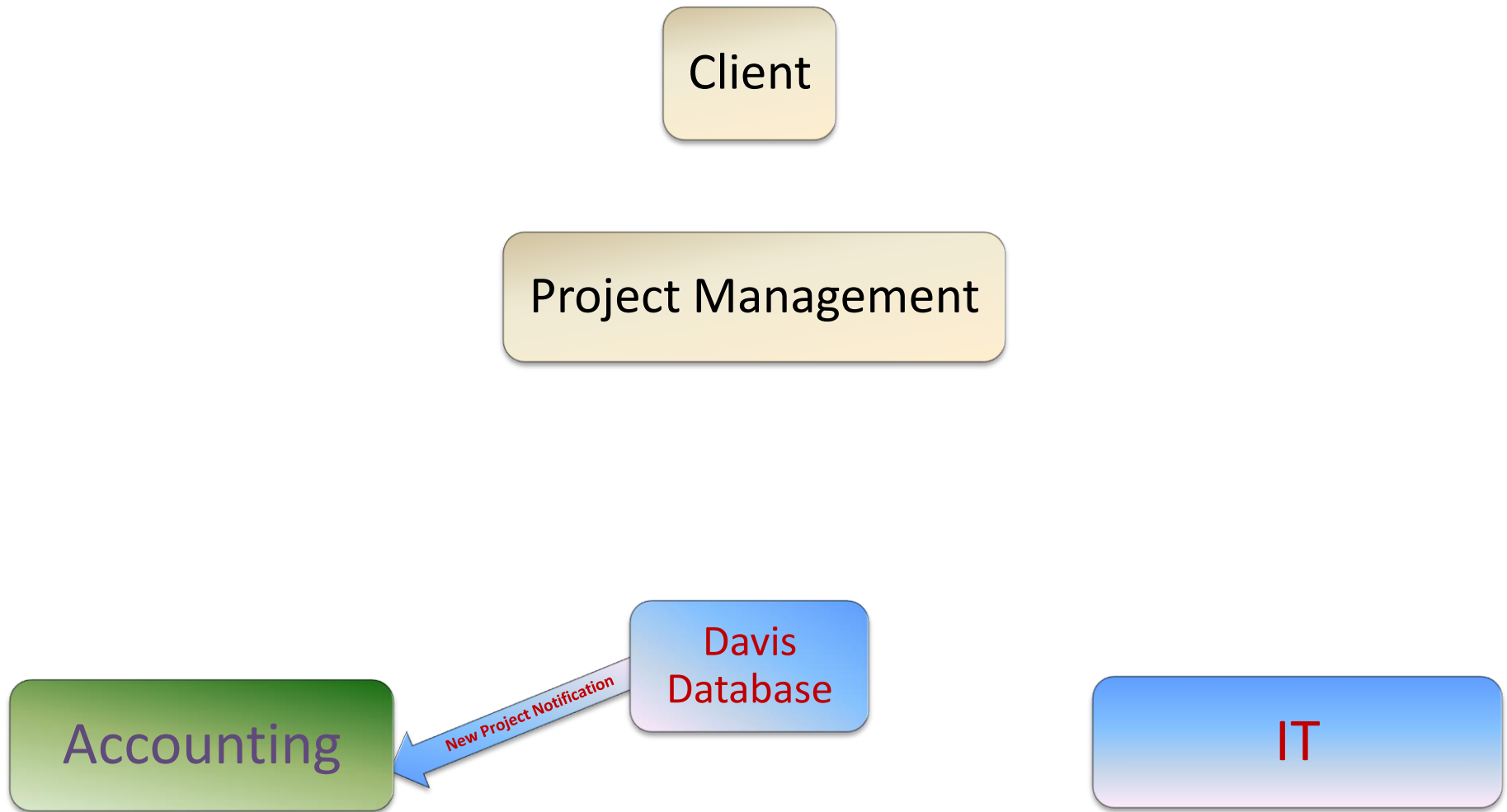
Phase 3

Enhanced Project Creation Workflow (Automated)
Phase 4

Accounting creates a new project in the Advantage database using the information from the New Project Creation form.

Enhanced Project Creation Workflow (Automated)

Client

Project Management

Davis
Database

Accounting

Create
Accounting
Project

Advantage
Database
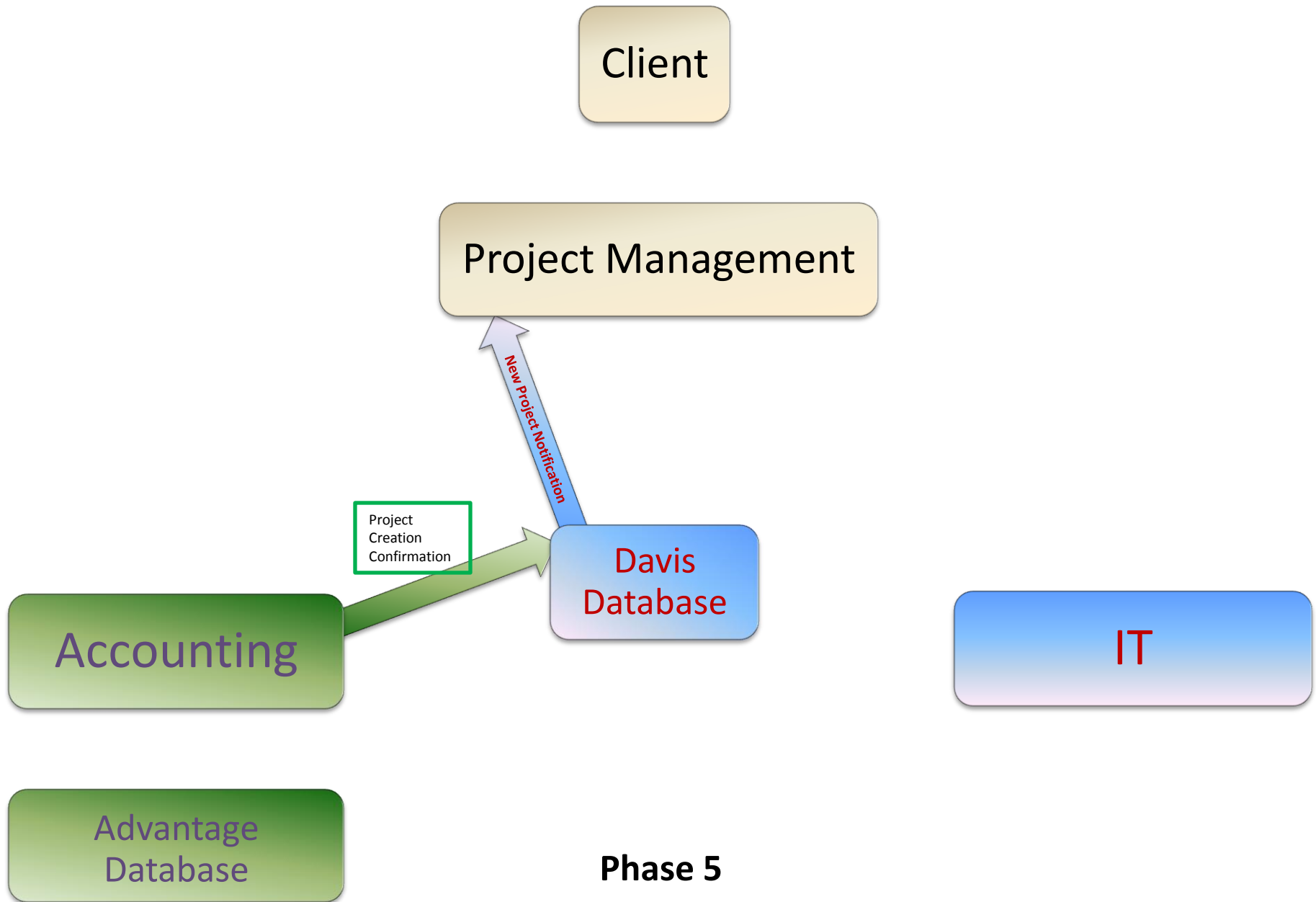
IT

Phase 4

Enhanced Project Creation Workflow (Automated)
Phase 5

Accounting enters the new project information on the New Project Creation form. Davis database automatically e-mails new project notification to Project Management.

Enhanced Project Creation Workflow (Automated)

Client

Project Management

New Project Notification

Project Creation Confirmation

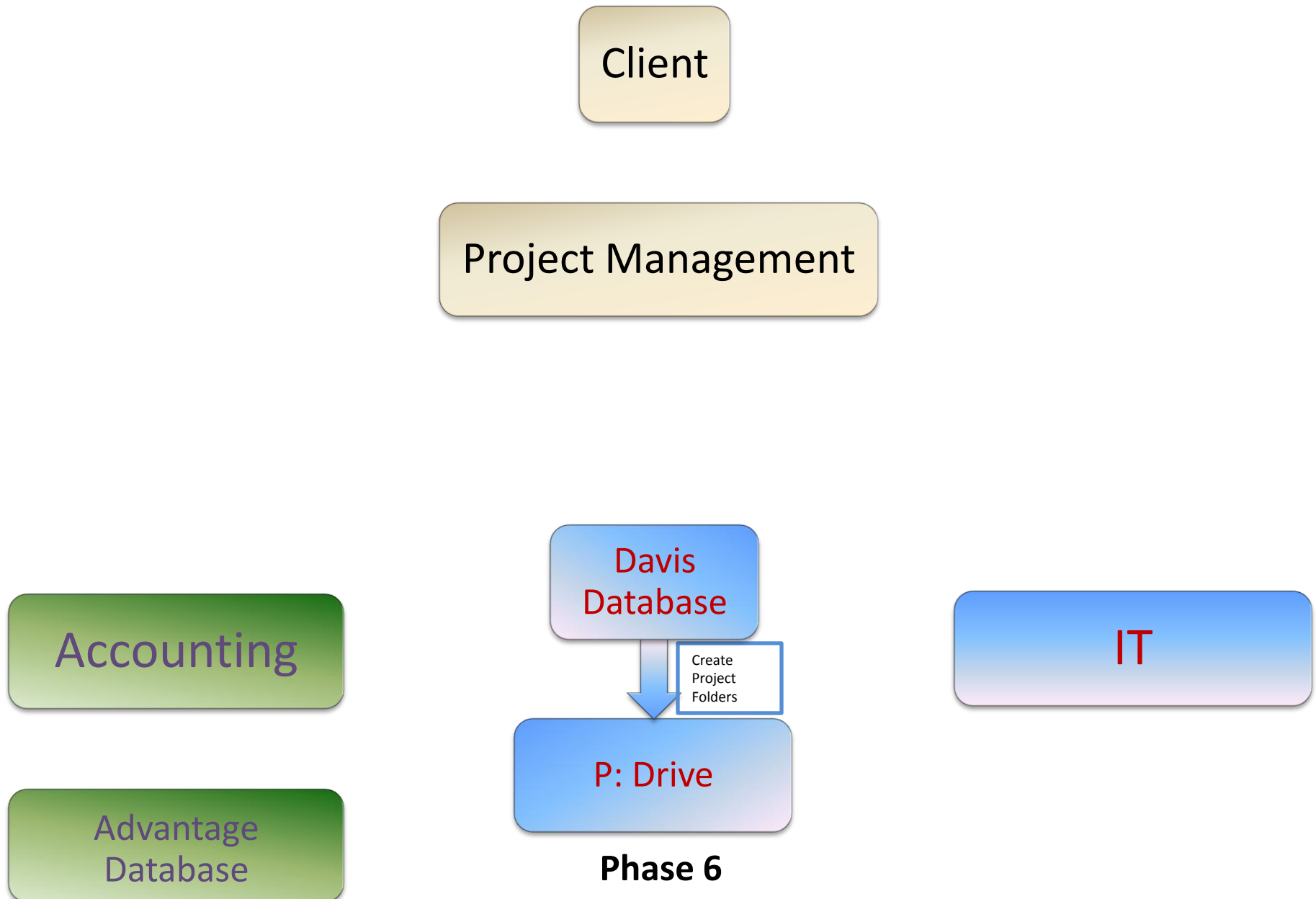Davis Database

Accounting

IT

Advantage Database

Phase 5

Enhanced Project Creation Workflow (Automated)
Phase 6

Davis database automatically creates new project folders on the P: drive.

Enhanced Project Creation Workflow (Automated)

Client

Project Management

Accounting

Advantage Database

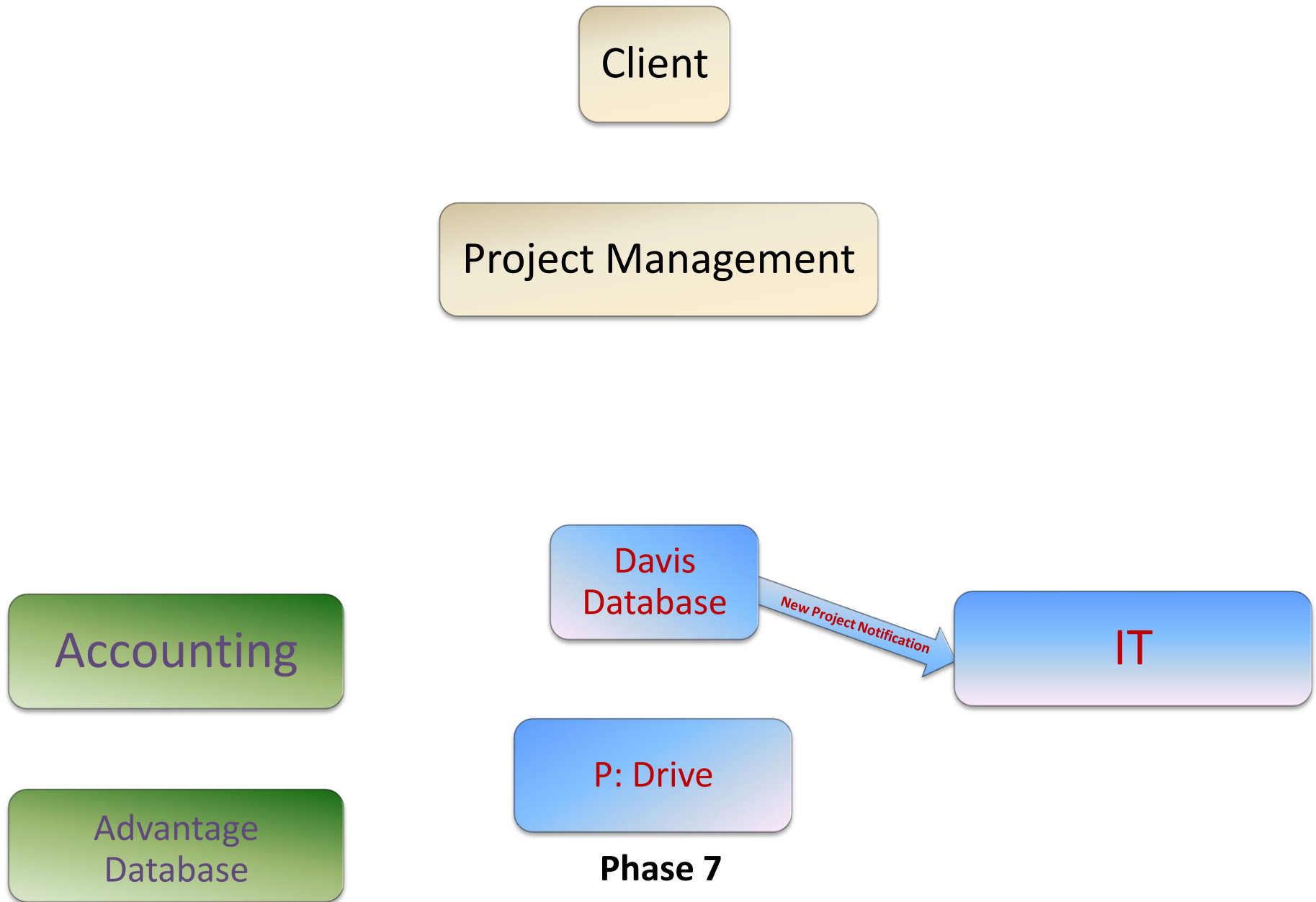Davis Database

Create Project Folders

P: Drive

Phase 6

IT

Enhanced Project Creation Workflow (Automated)
Phase 7

Davis database sends automatic e-mail notification to IT to create a new project.

Enhanced Project Creation Workflow (Automated)

Client

Project Management

Davis
Database

New Project Notification →
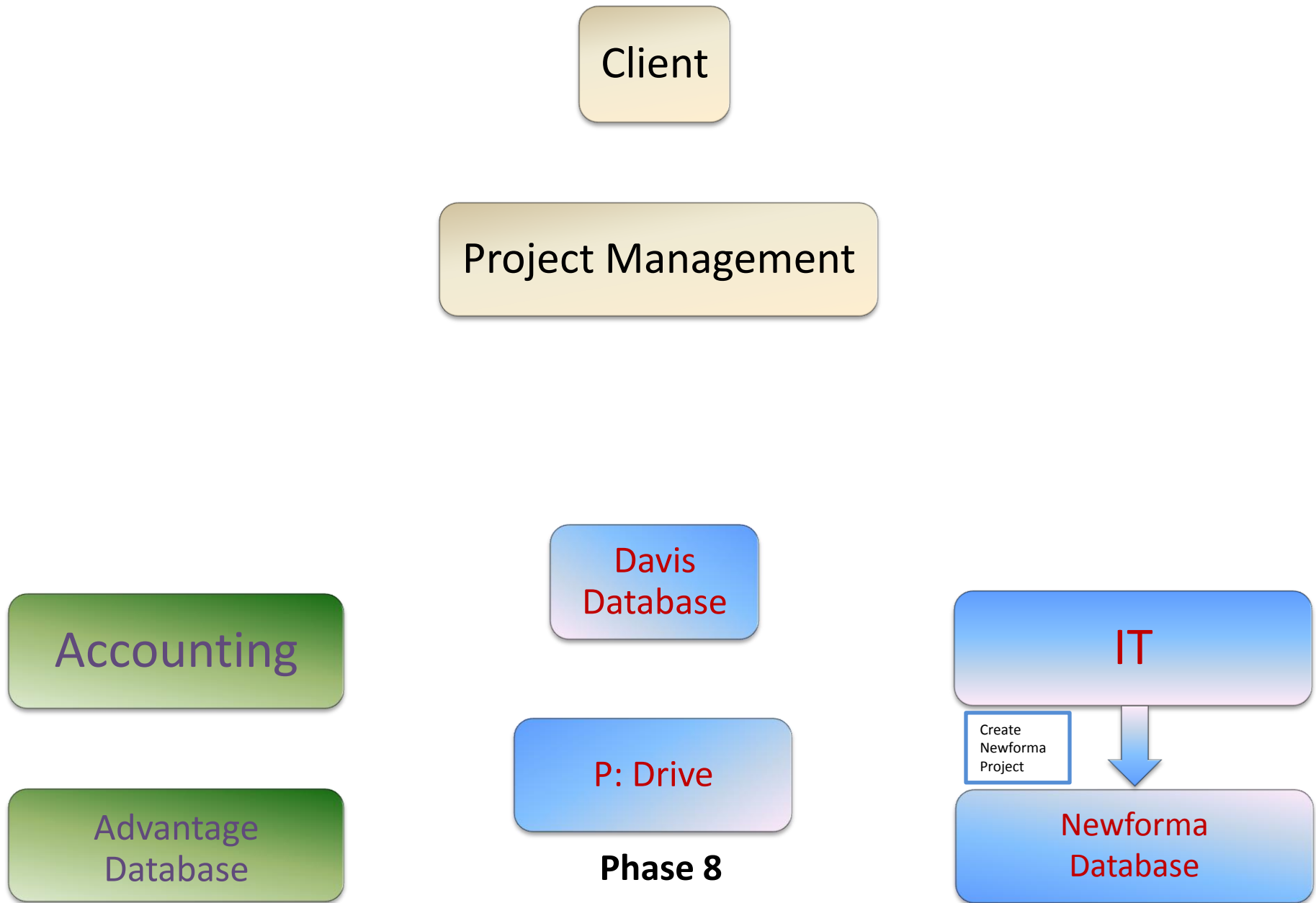
IT

Accounting

Advantage
Database

P: Drive

Phase 7

Enhanced Project Creation Workflow (Automated)
Phase 8

IT creates a new project in the Newforma database using the information from the New Project Creation form.

Enhanced Project Creation Workflow (Automated)

Client

Project Management

Davis
Database

Accounting

P: Drive

Phase 8

Advantage
Database

IT

Create
Newforma
Project

Newforma
Database

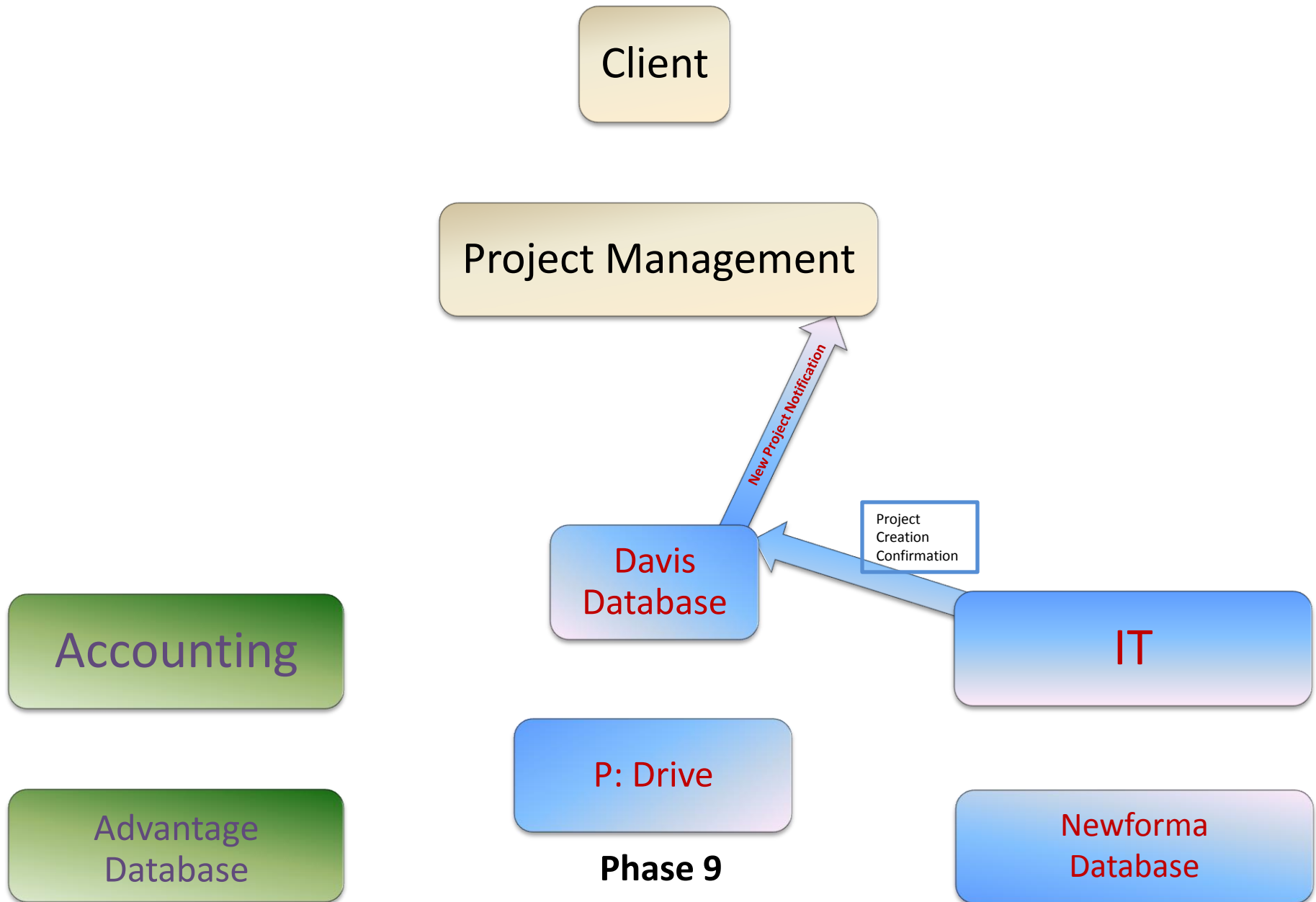# Enhanced Project Creation Workflow (Automated)
Phase 9

IT enters the new project information on the New Project Creation form. Davis database automatically e-mails new project notification to Project Management.

Enhanced Project Creation Workflow (Automated)

Client

Project Management

New Project Notification

Davis Database

Project Creation Confirmation

IT

Accounting

Advantage Database

P: Drive

Phase 9

Newforma Database

Current Project Creation Workflow (Manual)
All Phases

Current Project Creation Workflow (Manual)
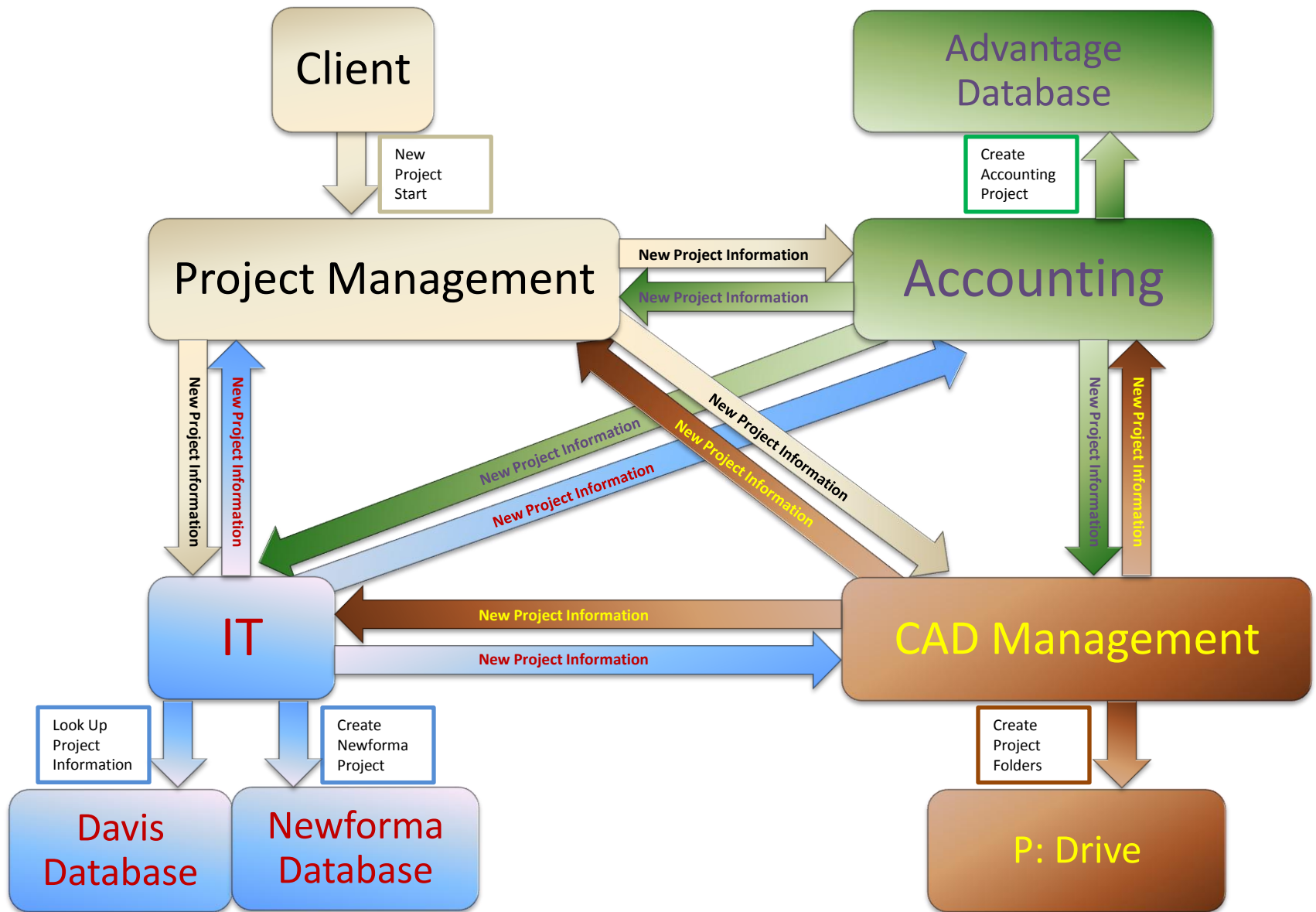
All Phases

Enhanced Project Creation Workflow (Automated)
All Phases

Enhanced Project Creation Workflow (Automated)

Client

New Project Start

Project Management

New Project Request

New Project Notification

New Project Notification

Project Creation Confirmation

Davis Database

Project Creation Confirmation

Accounting

New Project Notification

New Project Notification

IT

Create Project Folders

Create Accounting Project

Create Newforma Project

Advantage Database

P: Drive

Newforma Database

All Phases