



The evolution of R&D Credit Services

# Axiom Advantage

- Service integrates Axiom's proven study methods with Web based software technologies to significantly improve documentation process
- Provides a higher degree of business component nexus in the event of an IRS review
- Lowers cost of studies by leveraging the efficiency and affordability of online application
- Technology is accessible through a browser and supports any operating platform – Windows, Mac, Linux – requires no IT support

# Business Drivers

- Tier 1 Issue intensified requirement for contemporaneous documentation
- SaaS based applications such as Salesforce.com have evolved as stable, secure and cost effective enterprise applications
- Market maturity, experience and technology drive down the cost of R&D services – allows a larger percentage of businesses to take advantage of the credit

# Axiom Advantage Benefits

- We integrated proven R&D study methodologies with industry's only easy to use project tracking software designed to track R&D QRE
- Includes quarterly review and annual calculations with study and supporting documentation
- Affordable monthly billing

# Dashboard

SETTINGS | LOGOUT | Dunright Engineering



Dashboard

Resources

Meetings

My Tasks

My Projects

Timecard

Reports

Dunright Engineering

Dunright Engineering

Information

[Edit](#)

Name  
Dunright Engineering

Type  
Company

Logo  
None

## Manage Resources

▶ **GL Accounts**  
Add or edit ledger accounts

▶ **Employees**  
Add or edit employees; view activities by employee

▶ **Vendors**  
Add or edit vendors / contractors; view activities by vendors

## R&D Activities

▶ **Projects**  
Create and manage projects; view status of projects

▶ **Tasks**  
Create and manage tasks; view task activities

## Manage Organization

▶ **Contacts**  
Create and manage company contacts

▶ **Personal Settings**  
Change your personal settings, preferences, or password

- Fast, easy to use and accessible from any browser with internet access
- Allows unlimited users and projects
- 3 levels of access – controller, operations manager, task manager

# Resources - Employees

Dashboard **Resources** Meetings My Tasks My Projects Timecard Reports **Dunright Engineering**

## Employees

Show  With Access

First Name	Last Name	E-Mail	Title	Access as
Rich	Grainger	richgrainger@dunright.com	Sales Manager	Task Manager
Nick	Kromenacker	nickk@axiomsolutions.com	Operations Manager	Ops Manager
Jose	Madera	josemadera@dunright.com	Equipment Operator	Task Manager
Phil	Brown	philbrown@dunright.com	Production Manager	Ops Manager
Glenn	Stimpson	glenstimpson@dunright.com	VP Operations	Ops Manager
Dennis	Kim	denniskim@dunright.com	Chip Programmer	Task Manager
Stephanie	Wilson	stephaniewilson@dunright.com	Software Developer	Ops Manager
Dave	Lynch	davelynch@dunright.com	Electrical Engineer	Ops Manager
John	Chambers	johnchambers@dunright.com	VP Engineering	Ops Manager
Dolly	Jensen	dollymadison@dunright.com	Adminstrator	Customer Service Manager
Miles	Jensen	milesjensen@dunright.com	Controller	Controller
Steve	Dunright	stevedunright@dunright.com	President/Owner	Controller

### Add an employee:

Supervisor

Account

First Name

Last Name

Title

Date of Hire

Access system as

E-Mail Address

### Upload employee list:

Excel file

- Employees, Suppliers and Contractors are Resources
- Resources can be added on the fly, or bulk loaded from an Excel spreadsheet
- All data can be sorted by any field

# Employee Detail

Dashboard Resources Meetings My Tasks My Projects Timecard Reports **Dunright Engineering**

**Dennis Kim** [Delete](#) [Edit](#)

Information

**Name**  
Dennis Kim

**E-Mail**  
denniskim@dunright.com

**Title**  
Chip Programmer

**Date of Hire**  
March 1, 2006

**Supervisor**  
John Chambers

**GL Account**  
None

**Active?**  
Yes

**System Access?**  
Yes, as Task Manager

**Hours Summary**

**Product**  
21.75

Show  Performed On  For Task Component

Date	Hours	Performed for Task	Activity Description
06/22/2009	3.00	<a href="#">Begin Project development</a>	Develop software specs for quoting
06/22/2009	12.00	<a href="#">Software Development</a>	Outline general requirements
06/22/2009	3.50	<a href="#">Provide IP Spec Feasibility to project team</a>	Review current IETF documentation and forum commentary
06/22/2009	3.25	<a href="#">Develop Hypothesis</a>	Provide current IP specs in bandwidth aggregation

- Shows employee tasks with hours spent on tasks
- Summarizes hours on qualified research
- Employee profile with complete edit capability

# Vendor Resources

## Vendors

Name ▾x	Description	GL Account	...
Chips Unlimited	Santa Ana, CA - Programmable Chips Distributor	None	
ETD	Chicago, IL - Electronics equipment manufacturing	None	
PCB Supply	Irvine, CA - PCB Components supplier	None	
Premier Packaging	Los Angeles, CA - Plastic enclosure manufacturing	None	
Prototronics Consulting	Fountain Valley, CA - Provides prototype hardware	None	
Software Masters	San Jose, CA - Programming Consulting Services	None	

### Add a vendor:

Vendor Name

Description

Account   

### Upload vendor list:

Excel file

## Prototronics Consulting

### Activities

June 22, 2009 (2 weeks, 1 day ago) - [Test FPGA with vendor](#)

Meeting set for 7/8

- Vendors and contractors are added under single category
- Click on vendor to see activities summary

### Information

[Edit](#)

**Name**  
Prototronics Consulting

**Description**  
Fountain Valley, CA - Provides prototype hardware

**GL Account**  
None

**Active?**  
Yes

# Meetings Tab

Dashboard Resources **Meetings** My Tasks My Projects Timecard Reports

Dunright Engineering

Start new meeting

### Meetings

Date ▲x	Description	Project #	...
07/07/2009	Streaming data tests	0407	
06/22/2009	Product Concept	0202	

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- The Meetings Tab will show a list of meetings held on active projects.
- Clicking on the meeting takes you to the meeting minutes providing a view into what was discussed, issues that were raised, solutions, etc.

# Meetings are key component to documentation

Dashboard Resources **Meetings** My Tasks My Projects Timecard Reports

Start Meeting

Meeting Description  
Streaming data tests

Project  
0407

Available Attendees

Rich Grainger  
Nick Kromenacker  
Jose Madera  
Phil Brown  
Glenn Stimpson  
Dolly Jensen  
Miles Jensen  
Steve Dunright

Chosen Attendees

John Chambers  
Stephanie Wilson  
Dave Lynch  
Dennis Kim

Choose all Clear all

Start meeting

- Meetings are an essential part of documenting activities
- A meeting identifies what the meeting is about and who attended
- Clicking the start meeting button will timestamp the meeting creating “contemporaneous documentation”

# Meetings capture crucial info

## Meeting Minutes: Streaming data tests, July 7, 2009

**Project #:** 0407      **Customer:** NewTele - a media communications platform - San Diego, CA      **Project Name:** MultiStream - distributes media to wireless remote units off router

### Meeting Attendees

- Dave Lynch
- Stephanie Wilson
- Dennis Kim
- John Chambers

**Minutes**

Dave described shielding constraints in new device.

Stephanie provided code solution to check for environmental factors.

Dennis provided cost components of PCB for device

End meeting

- Meeting notes show what's discussed and tasks assigned
- Clicking the End meeting button will finish the timestamp, send emails to task managers and log the meeting

### Open Tasks

Manager	Project	Description	Start Date	Due Date	
Dave Lynch	0407	check with Phototronics re: PCB	07/07/2009	07/10/2009	
John Chambers	0407	verify budget allocation for new PCE	07/08/2009	07/17/2009	
Dave Lynch	0407	reset antenna requirements	07/07/2009	07/17/2009	
Stephanie Wilson	0407	set up demonstration steps	07/07/2009	07/10/2009	

Add another task

# Task Management

Dashboard Resources Meetings **My Tasks** My Projects Timecard Reports

**Dunright Engineering**

### My Tasks

Show **Active Tasks** Currently Due On **Any Date** Managed By **-Anyone-**

Task Manager	Project #	Task Description	Start Date	Originally Due	Currently Due
Dave Lynch	0407	check with Phototronics re: PCB	07/07/2009	07/10/2009	07/10/2009
John Chambers	0407	verify budget allocation for new PCB	07/08/2009	07/17/2009	07/17/2009
Dave Lynch	0407	reset antenna requirements	07/07/2009	07/17/2009	07/17/2009
Stephanie Wilson	0407	set up demonstration steps	07/07/2009	07/10/2009	07/10/2009
Steve Dunright	0202	Product Concept	06/01/2009	10/01/2009	08/14/2009
John Chambers	0202	Develop Hypothesis	06/22/2009	06/29/2009	06/29/2009
Rich Grainger	0202	Speak to customer engineering manager for technical input	06/22/2009	06/24/2009	06/24/2009
Dennis Kim	0202	provide IPV7 specs	06/24/2009	06/30/2009	06/30/2009
Glenn Stimpson	0202	Provide 3 month workflow estimate	06/22/2009	06/24/2009	06/24/2009
Steve Dunright	0202	Get with Miles to set up budget	06/22/2009	06/24/2009	06/24/2009
Glenn Stimpson	0202	Begin Project development	06/29/2009	07/17/2009	07/17/2009
John Chambers	0202	Deliver Testing workflow	06/30/2009	07/10/2009	07/10/2009
Dennis Kim	0202	Provide IP Spec Feasibility to project team	06/25/2009	06/25/2009	06/25/2009
Dennis Kim	0202	Software Development	07/01/2009	07/31/2009	07/31/2009

#### Add new task:

Task Manager

Project

Task Description

Start Date

Due Date

#### Upload task list:

Excel file

- This user is an operations manager and can see all tasks assigned on projects
- This view helps the manager understand where time and tasks may require adjustment or balancing

# Managing and editing task details

Dashboard Resources Meetings My Tasks My Projects Timecard Reports

Project: 0202 > Task: Provide IP Spec Feasibility to project team

Task Manager	Start Date	Original Due Date	Current Due Date	
Dennis Kim	June 25, 2009	June 25, 2009	June 25, 2009	<a href="#">Edit</a>

**Add Resources**

**General**  
Checking with IETF to ensure latest specs are in house [Save](#)

**Add Employee**  
John Chambers [Search](#) [X](#) Checking into current forums for new uploads 2 [Save](#)

**Add Supplier**  
[Search](#) [X](#) [Save](#)

**Add Contractor**  
[Search](#) [X](#) [Save](#)

**Task Journal**

June 22, 2009

**Dennis Kim** (3.50 hours) Review current IETF documentation and forum commentary [\(Delete\)](#)

**Dunright Engineering**

**Regulatory Questions**

Type  
Product [v](#)

174 Test  
[v](#)

Technological in Nature  
Computer Science [v](#)

research current version of IPv6 [v](#)

Discovering Info  
research applicability of new IETP factors [v](#)

New/Improved BC  
functional with new hardware [v](#)

Qualified Purpose  
New Functionality [v](#)

Process of Experimentation  
[v](#)

Substantially All  
[v](#)

Qualified Research

[+ Save questions](#)

- You can edit a task, add resources to a task and tag it with QRE components
- As tasks are assigned – an email is sent to task manager with details.
- All tasks are updated in the Gantt Chart

# Projects

Dashboard Resources Meetings My Tasks My Projects Timecard Reports

Dunright Engineering

## My Projects

Show Active Projects Due On Any Date

Due Date	Project #	Customer	Project Description
01/05/2009	0111	Defensive Communications	CommShield - communications shielding packaging
02/11/2009	0201	LANCom	Speedbox - network accelerator for private networks
08/14/2009	0202	LANCom	BigPipe - terabyte throughput small business router
05/01/2009	0331	SniffCo	LinguaChip - a dynamic re-programmable translation chip
04/15/2009	0333	SniffCo - An email security hardware company - Denver, CO	eSmell - hardware component that filters email for trade secrets only
03/01/2009	0404	NewTele - a media communications platform - San Diego, CA	MPCrunch - a media compressor/decompressor
03/11/2009	0110	Defensive Communications	Blackbox encrypting project
05/15/2009	0407	NewTele - a media communications platform - San Diego, CA	MultiStream - distributes media to wireless remote units off router
02/15/2009	0501	Cablestuff - a cable company - Rochester, NY	IPads - personal ad management system by IP address
06/01/2009	0502	Cablestuff - a cable company - Rochester, NY	TurboX - optimizes downloadable media storage

## Add new project:

Start Date

Due Date


Project #

Customer

Project Description

## Upload project list:

Excel file

 [Download excel template](#)

- Viewing, selecting and adding projects is easy to manage
- View active or all projects
- Project info can be loaded via Excel spreadsheet

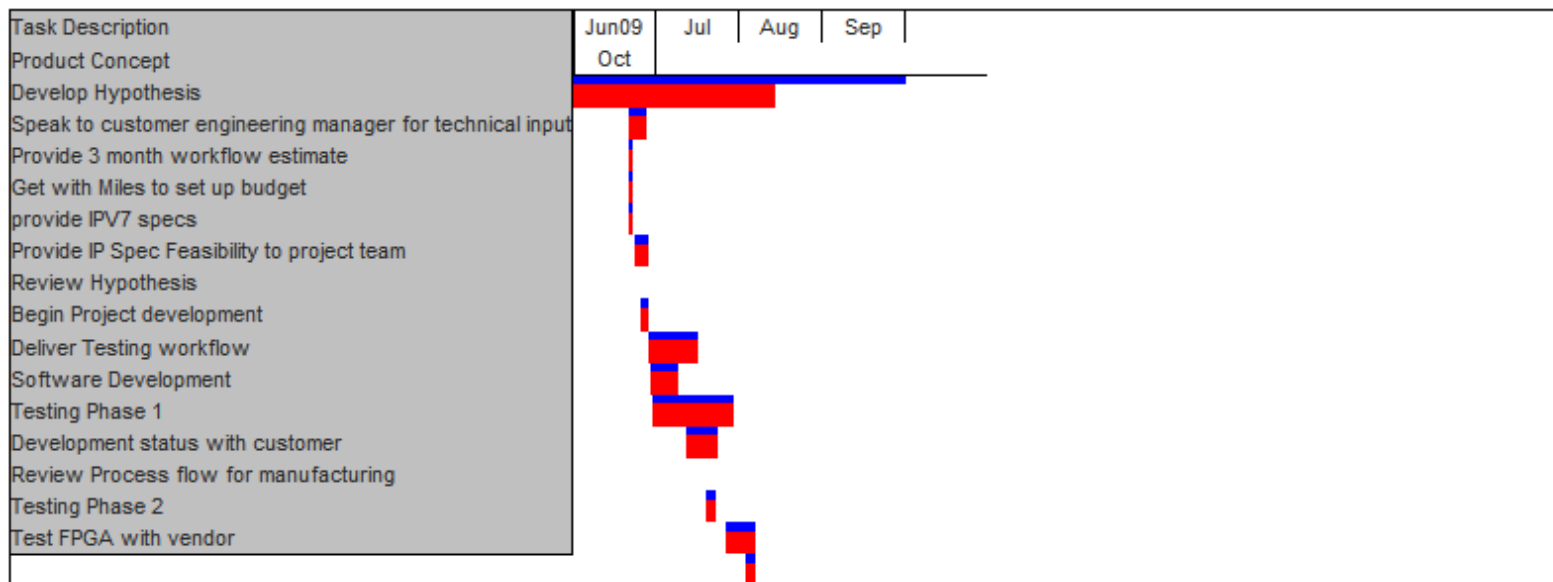
# Gantt Charts

Dashboard Resources Meetings My Tasks My Projects Timecard Reports

Project 0202: BigPipe - terabyte throughput small business router

Created by Danielle Daru Customer LANCom Start Date June 1, 2009 Due Date August 14, 2009 Edit

## Project Overview



- Gantt chart provides status of all tasks associated with a project
- Management has visibility on resource load
- Clicking on a task will take you to the task details

# Timecards

Dashboard Resources Meetings My Tasks My Projects Timecard Reports **Dunright Engineering**

**Timecard: Nick Kromenacker**

▶ June 22, 2009 — June 28, 2009 Week 26

▼ June 29, 2009 — July 5, 2009 Week 27

Project	Task	Activity Description	Mon 29	Tue 30	Wed 01	Thu 02	Fri 03	Sat 04	Sun 05	Total
----	----									
0202	Begin Project development	established development specs				2.00	6.00			8.00
0202	provide IPV7 specs	developed spec details	3.00	1.00	4.00	1.00				9.00
0202	Develop Hypothesis	hypothesis details		4.00	1.00	2.00	1.00			8.00
0202	Product Concept	worked with Frank on concept	3.00	1.00						4.00
<b>Daily Totals &gt;</b>			6.00	6.00	5.00	5.00	7.00			29.00

▶ July 6, 2009 — July 12, 2009 Week 28

- In the event an employee does not have access to a computer, a timecard can be completed with up to three weeks visibility

# Reporting

Dashboard

Resources

Meetings

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Dunright Engineering

## Resources Grouped by Project/Task

### Business Component Type

#### Project Name

#### Task Description

#### Date

#### Resource

#### Hours

#### Journal Entry

#### Product

BigPipe - terabyte throughput small business router

Provide IP Spec Feasibility to project team

06/22/2009

Dennis Kim

3.50

Review current IETF documentation and forum commentary

Software Development

06/22/2009

Dennis Kim

12.00

Outline general requirements

Begin Project development

07/03/2009

Nick Kromenacker

6.00

established development specs

07/02/2009

Nick Kromenacker

2.00

established development specs

06/22/2009

Dennis Kim

3.00

Develop software specs for quoting

Develop Hypothesis

07/03/2009

Nick Kromenacker

1.00

hypothesis details

07/02/2009

Nick Kromenacker

2.00

hypothesis details

07/01/2009

Nick Kromenacker

1.00

hypothesis details

06/30/2009

Nick Kromenacker

4.00

hypothesis details

06/22/2009

Dennis Kim

3.25

Provide current IP specs in bandwidth aggregation

06/22/2009

Glenn Stimpson

4.00

Provide current operational constraints that may affect ability to research

BigPipe - terabyte throughput small business router

Product Concept

07/07/2009

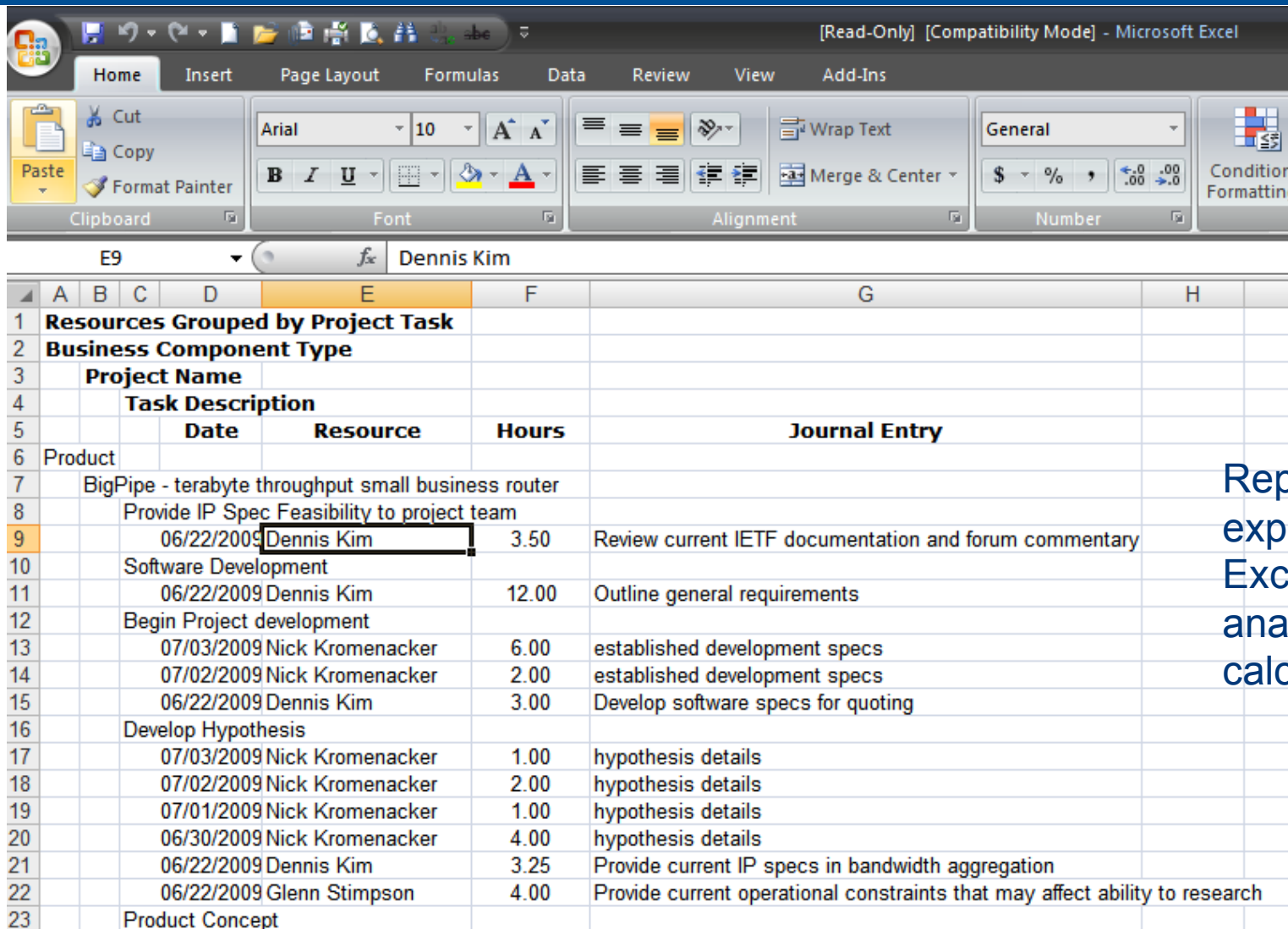
Glenn Stimpson

0.50

reviewed concept details

- Reports are available on demand
- Provides basis for quarterly reviews which ensure optimum usage and quarterly estimates of credit

# Reports can be exported



The screenshot shows the Microsoft Excel interface with the following data:

	A	B	C	D	E	F	G	H
1	<b>Resources Grouped by Project Task</b>							
2	<b>Business Component Type</b>							
3	<b>Project Name</b>							
4	<b>Task Description</b>							
5				<b>Date</b>	<b>Resource</b>	<b>Hours</b>	<b>Journal Entry</b>	
6	Product							
7	BigPipe - terabyte throughput small business router							
8	Provide IP Spec Feasibility to project team							
9				06/22/2009	Dennis Kim	3.50	Review current IETF documentation and forum commentary	
10	Software Development							
11				06/22/2009	Dennis Kim	12.00	Outline general requirements	
12	Begin Project development							
13				07/03/2009	Nick Kromenacker	6.00	established development specs	
14				07/02/2009	Nick Kromenacker	2.00	established development specs	
15				06/22/2009	Dennis Kim	3.00	Develop software specs for quoting	
16	Develop Hypothesis							
17				07/03/2009	Nick Kromenacker	1.00	hypothesis details	
18				07/02/2009	Nick Kromenacker	2.00	hypothesis details	
19				07/01/2009	Nick Kromenacker	1.00	hypothesis details	
20				06/30/2009	Nick Kromenacker	4.00	hypothesis details	
21				06/22/2009	Dennis Kim	3.25	Provide current IP specs in bandwidth aggregation	
22				06/22/2009	Glenn Stimpson	4.00	Provide current operational constraints that may affect ability to research	
23	Product Concept							

Reports are exported to Excel for analysis and calculation