FF AND E PROJECT FLOW

1. **INITIATION**: FF&E projects are launched into AiM by the program manager, and initially saved in an INITATION status. Once the program manager has completed the initial project setup, he will change the status to ASSIGN PM
2. **ASSIGN PM:** The AD Design will have a query on their workdesk alerting them to projects in this status. AD Design will be responsible for updating the project, updating the project team (DESIGN PM and UPL responsibilities) as well as the EMPLOYEE field on the main project screen. Once those updates are complete, they will manually change the status to SCOPING
3. **SCOPING**: The UPL will receive a workflow when a project assigned to them enters this status. At this point, the UPL will review the PIF, meet with the client, and develop a scope. When ready to submit the scope for review, the UPL will attach the scope and any other related documents, and respond to the Worklfow; selecting Submit Scope for Review
4. **SCOPE REVIEW** – The AD Design will have a personal query on their workdesk alerting them to projects in this status. Once scope & dealer quote have been reviewed, AD Design will change status to ORIG BUDGET APPR
5. **ORIG BUDGET APPR** – The UPL will have a personal query on their workdesk alerting them to projects in this status. When the project reaches this status, the UPL should:
    a. If not already launched, Launch the budget approval workflow
    b. Wait for original budget to be approved through manual workflow
    c. Once the budget has been approved through the workflow change to the following status: DESIGN, PURCHASING, FINANCIAL CLOSEUT, CANCELED (request Canceled through Program Manager)
6. **DESIGN:** The UPL will have a personal query on their workdesk alerting them to projects in this status. During this status, the UPL will prepare/design furniture layout. Once complete, the UPL will manually change the status to Purchasing.
7. **PURCHASING** – The UPL will have a personal query on their workdesk alerting them to projects in this status. During this status, the UPL will prepare requisitions, and receive final Quotes/Purchase Orders. Once complete, they will manually change the status to MFG/INSTALLATION
8. **MFG/INSTALLATION** - The UPL will have a personal query on their workdesk alerting them to projects in this status. During this status, the UPL will coordinate installation with the dealer, and perform final walkthrough. Once Installation is complete, change status to CLOSEOUT
9. **CLOSEOUT** - The UPL will have a personal query on their workdesk alerting them to projects in this status. During this status, the UPL will reconcile the budget with revisions, and compile closeout documents. When complete, the UPL will manually change change status to FINANCIAL CLOSEOUT
10. **FINANCIAL CLOSEOUT** – Financial Services will reconcile and financially close project. When complete, they will manually change status to change status to CLOSED
11. **CLOSED**

Additional Status Codes

CANCELED: Up until the point that a budget has been approved, a project can be canceled. However, If money has been spent projects must go to FINANCIAL CLOSEOUT status.

HOLD: A project may be placed on HOLD at any time.