



(Company Name)

Business Process Flow – January 1, 2008

General Process and Rules

There are basically two separate processes/division of work at XXX– Design and Accounting.

Design:

1. Specifications are received from the project Architect (1 - TYPICAL ARCHITECTURAL SPEC.pdf) - usually in a Word document.

PROJECT CREATION

2. The designer in charge will set up the project
 - a. In the new project entry screen, add:
 - i. Project Name
 - ii. Project Number (is this sequential based on client projects – need numbering scheme?)
 - iii. Choose client from list in Contact – Companies
 - iv. Choose related individual from Contacts – People
 1. Show phone, cell phone and email address
 - v. Choose Architect from list in Contact – Companies
 - vi. Choose related individual from list in Contact – People
 1. Show phone, cell phone and email address
 - vii. Project Start Date
 - viii. Client contract/PO number
 - ix. Architects' Project Number (if needed)
 - x. Project Budget
 - xi. Classification for Project (e.g. Casino, Hotel, etc... - add to the value list options for user configuration)
 - xii. Status (Auto set to Active, drop down value list for Complete, Pending)
 - xiii. Lead Designer on project (choose from active staff drop down list – relate by ID in case the staff person's name changes)
 - xiv. Estimated Completion Date (Date)

- xv. Project description or scope of work (allow for 5-10 lines of text)

CREATE PROJECT SECTIONS

3. Designer will add the sections and locations from the specifications
 - a. Choose from the value list of specification sections (VALUE LIST - SPEC TYPE NUMBERS.PDF) to add the sections to the project, e.g. TS – Tile Surfaces (Section), L/LD – Lighting, etc...

ADD LOCATIONS TO THE PROJECT

4. Designer will add the related locations to the project (e.g. Kitchen, Main Entry, Garage, etc....)

CREATE PROJECT BUDGET

5. Designer will create a general budget for the project based on location (e.g. Kitchen = \$50,000, Main Entry = \$12,500, etc...)

-or-

6. Designer will create the original budget/estimate for the project (3 - CASINO FFE BUDGET ITEMIZED.pdf) based on location
 - a. Location Name (e.g. Gaming Floor)
 - b. Spec Section (e.g. AA – Art & Accessories
 - i. Column Surrounds
 - ii. Quantity for location (e.g. 2)
 - iii. Unit (e.g. Each, Lot, etc...)
 - iv. Budget per Unit (e.g. \$13,302.50)
 - v. Line Item Extended (e.g. ii x iv = \$28,605.00)
 - c. Subtotal per Spec Section/Location (e.g. total of all items budgeted in the AA section of the Gaming Floor)
 - d. Subtotal per Location (all budgeted items for the Gaming Floor)
7. Total Budget for project

SELECTING PRODUCTS AND SPECIFICATIONS

8. Specifications will be entered using a similar entry screen that matches the spec sheet (4 - 10262-CORNER GUARDS.pdf), but will have tabs at the bottom to enter/view budget information, notes, linked documents, etc...
 - a. Fields needed for all specifications are:
 - i. Location (multiple (join table))
 - ii. Manufacturer (select from drop down looking at contact companies)
 - iii. Supplier (select from drop down looking at contact companies)
 - iv. Supplier contact (related contact to Supplier contact company)
 - v. Supplier Phone and email address

- vi. Manufacturer's Item number
- vii. Item description
- viii. Size
- b. Each Specification Section type will have certain fields that are needed for that section only:
 - i. ARCHITECTURAL WOODWORK : A
Manufacturer, Paint, Sheen, Size, Species, Supplier, Supplier Contact,
 - ii. ART & ACCESSORIES : AA
Finish, Mirror, Size, Stain,
 - iii. RESILIENT BASE & ACCESSORIES : B
Color, Size,
 - iv. CARPET : C
Backing, Color, Construction, Content, Gauge, Pile Height, Pile Weight,
 - v. CEILING : CE
Color, Size,
 - vi. CORNER GUARDS : CG
Color, Finish, Item, Manufacturer, Size, Supplier, Supplier Contact,
 - vii. DECORATIVE DOORS : D
Finish, Size,
 - viii. DRAPERY : DT
Class, Cleaning, Color, Finish, Finish Width, Finished Height, Fire Rating, Fullness, Headings, Overlaps, Repeat, Returns, Seams, Stack Width, Style, Test Method, Weight,
 - ix. FIREPLACES : FP
Combustion Duct Size, Combustion/Vent, Depth, Electrical, Electrical Power, Finish, Height, Makeup Air Vent, Natural Gas Input, Power Venter HP, Weight,
 - x. GLASS : G
Color, Finish - Back, Finish - Front, Pattern, Size,
 - xi. HARDWARE : H
Finish - Front, Size,
 - xii. LIGHTING : L/LD
Finish - Front, Lamp, Shade Color, Size, Voltage, Watt,
 - xiii. ORNAMENTAL METALS : O
Color, Finish - Front, Size,
 - xiv. PAINT : P
Color, Finish - Front,
 - xv. PLUMBING FIXTURES : PF
Color, Size,
 - xvi. RESTROOM ACCESSORIES : R
Finish - Front,
 - xvii. RESILIENT FLOORING : RF
Color, Content, Ratings, Size, Thickness,

- xxviii. SOLID SURFACES & LAMINATES : S
Cut, Finish - Front, Size,
 - xix. STONE FLOORING : SF
Color, Content, Finish - Front, Grout - Color, Grout - Item, Grout -
Manufacturer, Grout - Supplier, Grout - Thickness, Size, Thickness,
 - xx. STONE SURFACES : SS
Color, Content, Finish - Front, Size, Thickness,
 - xxi. TEXTILES : T
Class, Color, Content, Finish - Front, Fire Rating, Pattern, Repeat, Test
Method, Width,
 - xxii. TILE FLOORING : TF
Color, Content, Grout - Color, Grout - Item, Grout - Manufacturer,
Grout - Supplier, Grout - Thickness, Size,
 - xxiii. TILE SURFACES : TS
Content, Grout - Color, Grout - Item, Grout - Manufacturer, Grout -
Supplier, Grout - Thickness, Size, Thickness,
 - xxiv. WALLCOVERING : W
Color, Content, Repeat, Type, Weight, Width,
 - xxv. BEDDING : X
Cleaning, Color, Content, Pattern, Size,
 - xxvi. GUEST AMENITIES : Y
Finish - Hardware, Finish - Metal,
 - xxvii. FURNITURE : Z
Color, Content, Finish - Fabric, Finish - Front, Hide Dimensions,
Pattern, Size,
9. Once the first pass of the specification process is complete, the specs will be reviewed by the architect/owner and selected items are updates as “accepted”
 10. These will be sequentially numbered using their spec codes when each item has been marked “accepted”
 11. The costing information will be dynamically related to the project budget – each entry screen will show the ongoing total for both the current section as well as the entire project.