Based on the sources, the following user journeys represent the sequential and interdependent activities required to move an engagement from its initial vetting through to project execution.

1. The Requester Journey: Initiating Vetting

The journey begins with a Director or an authorised team member who has finalized a service scope and pricing manually outside the system 1-3.

- **Step 1: System Entry:** The Requester logs into the Conflict of Interest (COI) system to initiate a new request 4, 5.
- **Step 2: Client Selection:** Instead of typing a name, the user selects the client from a predefined dropdown list to maintain data integrity; if the client is new, they must first request its creation in the master database 6-8.
- **Step 3: Data Submission:** The user enters the exact description of the service and mandatory compliance data, including the full legal name, commercial registration, and complete ownership structure 9-11.
- **Step 4: Conflict Resolution:** If the system detects a similar name or an active engagement via automated checks, the user is blocked from submitting until they provide a formal written justification for the potential conflict 12-14.

2. The Compliance Officer Journey: Regulatory Vetting

Once a request is submitted, it enters the Compliance Workspace for a formal review 15, 16.

- **Step 1: Detailed Review:** The Compliance Officer evaluates the provided ownership structure, PIE (Public Interest Entity) status, and related entities 10-12.
- **Step 2: Independence Verification:** If the client has international operations, the officer verifies that mandatory Global independence clearance has been obtained 9, 14, 17.
- **Step 3: Decision Making:** The officer selects a status: Approved, Approved with Restrictions, Need More Information, or Reject 18, 19.
- **Step 4: Rerouting:** If more information is required, the request is sent back to the Requester; otherwise, approved requests move forward in the hierarchy 20, 21.

3. The Partner Journey: Final Authorisation

The Assigned Partner uses a "One-Click Dashboard" to oversee the pipeline and grant final business approval 15, 22, 23.

- **Step 1: Strategic Oversight:** The Partner reviews the complete request, including the compliance decision and any comments regarding business context 20, 21.
- **Step 2: Authorisation:** The Partner performs the final sign-off; if the Partner requires further clarity, the request is returned to the Compliance Department rather than the original Requester 20, 24.

4. The Finance Officer Journey: Financial Coding

Following Partner approval, the request is routed to the Finance Team to formalise the engagement's financial tracking 20, 24.

- **Step 1: Risk Assessment:** The Finance Officer reviews the client's payment history and assesses credit risk 21, 25.

- **Step 2: Parameter Entry:** The officer enters essential financial details such as credit terms and the chosen currency 24, 25.
- **Step 3: Code Generation:** The system automatically generates a unique, permanent Engagement Code (e.g., ENG-2025-TAX-00142) which is essential for all future project operations 20, 26, 27.

5. The Admin Team Journey: Execution and Monitoring

The Admin Team manages the transition from a cleared request to an active engagement 16, 20.
- **Step 1: Document Preparation:** Upon receiving COI clearance, the Admin team prepares the formal proposal or engagement letter, incorporating the new Finance Code 25, 28.
- **Step 2: Response Tracking:** The team records the execution date, which triggers a 30-day monitoring window 24, 25, 28.
- **Step 3: Alert Management:** The system automatically sends reminders to the Requester and Admin every 10 days; if no response is received by day 31, the Admin observes the system automatically lapsing and closing the request 19, 29, 30.
- **Step 4: Activation:** Once the client signs the documents, the Admin uploads the file and updates the status to "Active", which triggers a three-year renewal alert for future auditing 29, 31, 32.

6. The Project Manager Journey: Operational Setup

With a valid Finance Code, the journey moves to the Project Resource Management System (PRMS) for execution 1, 27, 33.
- **Step 1: Project Initialization:** The Project Manager begins the project creation process in PRMS by entering the authorised Finance Code 15, 34, 35.
- **Step 2: Validation:** PRMS checks the code against the COI database; if the code is missing or invalid, the user is blocked from creating the project 15, 33, 35.
- **Step 3: Resource Mapping:** The manager maps independently created tasks and teams to the newly validated project 36-38.
- **Step 4: Operational Control:** The manager monitors timesheet entries, noting that the system automatically blocks any entries made after the project's targeted end date unless a formal revision is approved 27, 38, 39.

Analogy for the Integrated Process: Think of the **COI System** as an **Embassy** issuing a visa. You must provide extensive documentation (ownership, registration) and pass a background check (conflict vetting) before you are granted a unique visa number (Finance Code). The **PRMS** is the **Border Control** at your destination; you may have a suitcase full of resources (tasks and teams), but you cannot pass the gate or start your journey (the project) until your visa number is verified as valid and current.