SCOPE USER GUIDE FOR REVIEWERS / APPROVERS

The scope creator may establish the approval team, or your business may have this approval flow pre-defined.

Users can invite others to collaborate, review or approver a scope from the 'Teams' page.

Always add/check/edit your collaborating team members before submitting your scope

1. When the scope is ready for review, the creator will select 'Submit' on the bottom left adding any comments for the reviewer.

Submit Scope

Add a note here to help other collaborators understand your work on this Scope and guide them with their next steps

Sarah, please review this Scope and let me know if all ok. Thanks.

Submit

Export Statement of Work

Select which document file you want to output your scope:

CSV — Export as CSV
W — Export as Word Document
PDF — Export as PDF Document
DS — Export to DocuSign
X — Export as Excel Document

Output

2. The SOW can be output by any of the collaborators, reviewers and approvers at any point in xls, .doc, PDF depending on permissions.
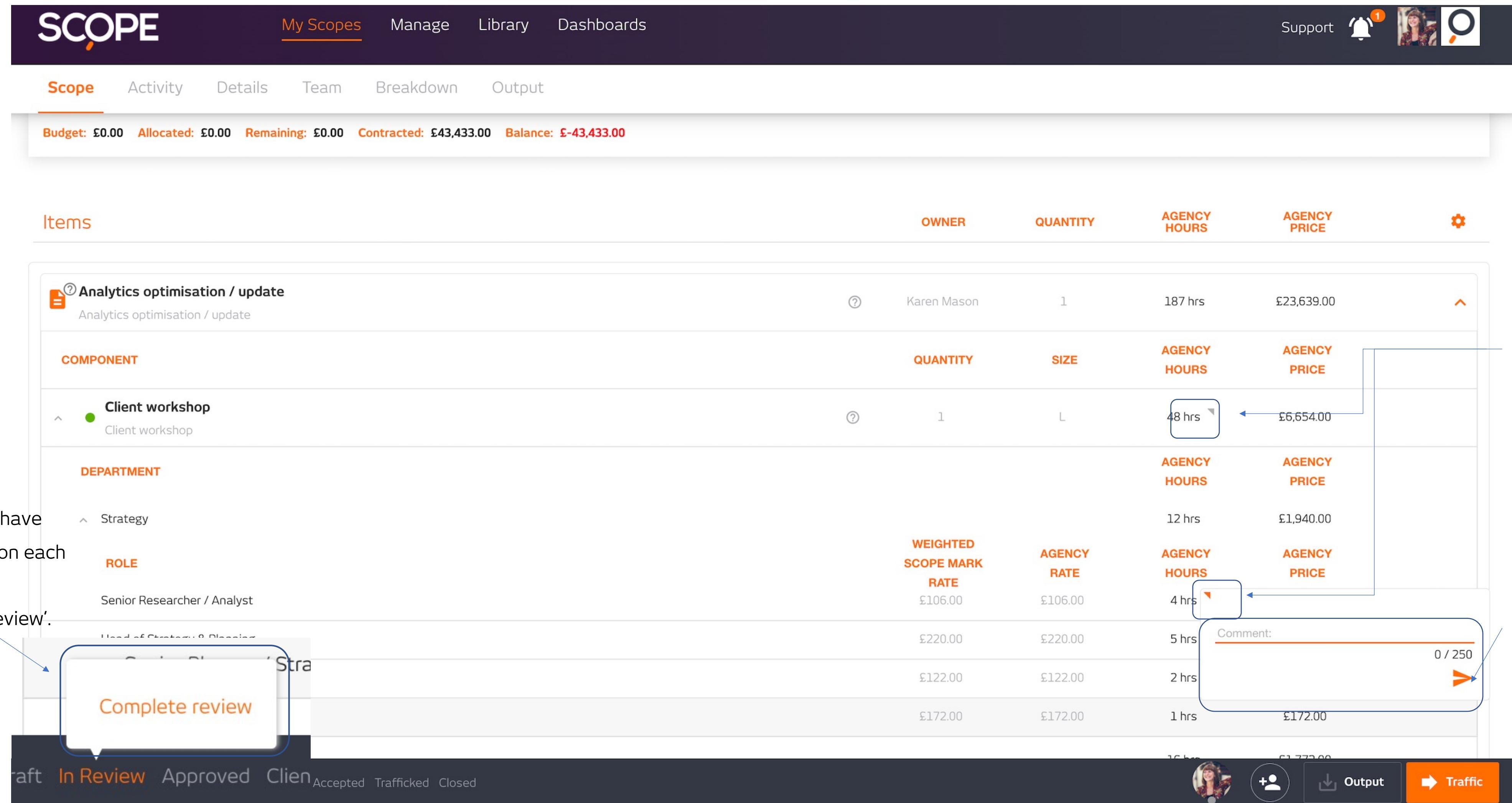
SCOPE

My Scopes   Manage   Library   Dashboards

Support

Scope   Activity   Details   Team   Breakdown   Output

Budget: £0.00   Allocated: £0.00   Remaining: £0.00   Contracted: £43,433.00   Balance: £-43,433.00

1. Once submitted, as a reviewer, you will receive a notification via email and in app to notify you that there is a scope ready for your review.

Items

	OWNER	QUANTITY	AGENCY HOURS	AGENCY PRICE	
Analytics optimisation / update Analytics optimisation / update	Karen Mason	1	187 hrs	£23,639.00	

2. Click on the orange corner arrow to comment on a section/component/deliverable.

COMPONENT	QUANTITY	SIZE	AGENCY HOURS	AGENCY PRICE
Client workshop Client workshop	1	L	48 hrs	£6,654.00

DEPARTMENT			AGENCY HOURS	AGENCY PRICE
Strategy			12 hrs	£1,940.00

ROLE	WEIGHTED SCOPE MARK RATE	AGENCY RATE	AGENCY HOURS	AGENCY PRICE
Senior Researcher / Analyst	£106.00	£106.00	4 hrs	
Head of Strategy & Planning	£220.00	£220.00	5 hrs	
	£122.00	£122.00	2 hrs	
	£172.00	£172.00	1 hrs	£172.00

3. Write in your comment for the creator and click the orange arrow. You can add comments at any level of the scope.

Comment:

0 / 250

4. Once you have commented on each section, click 'Complete Review'.

Complete review

raft   In Review   Approved   Clien   Accepted   Trafficked   Closed

Output   Traffic

SCOPE

1. As a scope is submitted through approval, it's status will change

2. You can review deliverables one by one, or accept all at once

3. The pop-up box will let you know if you have any deliverables to left review.

4. Once you've made all of your comments, if changes are required by the creator, select 'Reject'.

5. If you are happy with the scope, with no feedback or comments for changes, click 'accept'. Accepting the scope will push the scope through to the next level of approvers.

3.5.1 Reviewing or approving a scope. Version control

Rejecting the scope with comments will create a new version of the scope for the creator to work with, retaining the original for reference

1. When a scope is rejected, it will return to 'Draft' status

2. The rejected scope will create a new version of the scope

3. The scope creator can clearly see comments to adjust in the older version

4. Once adjustments have been made, the creator can 'submit' the scope again through the defined approval flow