

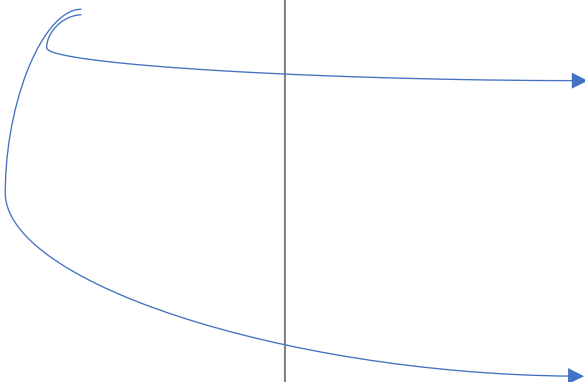


## SCOPE USER GUIDE FOR REVIEWERS / APPROVERS

# 3.4 Reviewing or approving a scope. Establishing the scopes approval team

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 approve a scope from the 'Teams' page.



SCOPE

My Scopes

Manage

Library

Dashboards

System Admin

Support

Scope

Activity

Details

Team

Breakdown

Output

COLLABORATOR

Support Admin

Support System Admin

REVIEWER

Support System Admin

Support Admin

APPROVER

Support System Admin

Support Admin

TRAFFICKER

Support System Admin

COLLABORATOR	ROLE	ACTIVITY
Support Admin	Super Collaborator	--
Support System Admin	Collaborator	--

REVIEWER	ROLE	ACTIVITY
Support System Admin	Reviewer	--
Support Admin	Super Reviewer	--

APPROVER	ROLE	ACTIVITY
Support System Admin	Approver	--
Support Admin	Super Approver	--

TRAFFICKER	ACTIVITY
Support System Admin	--

# 3.5. Reviewing or approving a scope. Submitting a scope for internal review

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.

SCOPE

My ScopesManageLibraryDashboards

McCore (Demo)Support135

Project 1

Client: Acme ClientRate Card: ScopeMark RatecardRate Card Version: 4View more

DRAFTS-136

Date created: 02/02/23

S-50

+ Add deliverable

Amneals Big Easter Campgin

Scope Type: No Scope TypeLanguage: ENClient: Demo C

Start date: 02/11/21End date: 05/11/21

Budget: \$0.00Allocated: \$0.00Remaining: \$0.00Contracted: \$1

Deliverables

OWNERSTART

Advisory Board

Advisory Board

Scope Support

02/11

Scope Totals + Discount

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

AGENCY HOURS

AGENCY PRICE

110 hrs

\$18,100.00

\$18,100.00

Draft

In Review

To Agree

Client Approval

Approved

Closed

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.



# 3.5.1 Reviewing a scope. Reviewing / Approving a scope

SCOPE

My ScopesManageLibraryDashboards

Support

1

Scope

Activity

Details

Team

Breakdown

Output

Budget: £0.00

Allocated: £0.00

Remaining: £0.00

Contracted: £43,433.00

Balance: £-43,433.00

Items

OWNER

QUANTITY

AGENCY HOURS

AGENCY PRICE

Analytics optimisation / update

Analytics optimisation / update

?

Karen Mason

1

187 hrs

£23,639.00

^

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

16 hrs

£1,772.00

Complete review

raft

In Review

Approved

Client

Accepted

Trafficked

Closed

Output

Traffic

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.

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

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

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

# 3.5.1 Reviewing or approving a scope. Reviewing / Approving a scope

SCOPE

[My Scopes](#)[Manage](#)[Library](#)[Dashboards](#)

McCore (Demo)Support135

Project 1

Client: Acme ClientRate Card: ScopeMark RatecardRate Card Version: 4View more

SUBMITTEDS-136Created By: Karen MasonDate created: 02/02/23

Items

Analytics optimisation / update

Analytics optimisation / update

COMPONENT

Client workshop

DEPARTMENT

Strategy

ROLE

Senior Researcher / Analyst

Head of Strategy & Planning

Planner / Strategist

Complete review

Complete Scope Review

Check your summary below before submitting. Please note you will be unable to make review amendments once submitted.

You must review all deliverables in the scope in order to submit your scope review. Please review the un-reviewed deliverable(s) by clicking on a deliverable which displays a ? symbol.

DELIVERABLE

REVIEW STATUS

Website

Not Reviewed Yet

Analytics optimisation / up...

Not Reviewed Yet

Accept all unreviewed deliverables

Reject all unreviewed deliverables

QUANTITY

AGENCY HOURS

AGENCY PRICE

1

187 hrs

£23,639.00

SIZE

48 hrs

£6,654.00

12 hrs

£1,940.00

4 hrs

£106.00

5 hrs

£220.00

2 hrs

£122.00

1 hrs

£172.00

Comment:

0 / 250

Draft

In Review

Approved

Client Approval

Client Accepted

Trafficked

Closed

Output

Traffic

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.

SCOPE



# 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

SCOPE

My ScopesManageLibraryDashboards

McCore (Demo)Support135

Project 1

Client: Acme ClientRate Card: ScopeMark RatecardRate Card Version: 4View less

Scope Type: Digital ProductsLanguage: ENTraffic Status: TrafficableLast Trafficked: --Created By: Karen MasonDate created: 04/19/23Version: 2Start date: 04/19/23End date: 07/19/23

Retained Hours Used: --Folder Retained Hours remaining: --

Budget: £100,000.00Allocated: £10,300.00Remaining: £89,700.00Contracted: £13,155.00Balance: £86,845.00Third Party Cost Budget: --Third Party Cost Balance: £-2,600.00

ScopeActivityDetailsTeamBreakdownOutput

+ Add Item

Items	QUANTITY	START DATE	LAST EDITED	PROFIT	AGENCY HOURS	AGENCY PRICE	
<div>Website</div> <div>Website</div>	- 1 +	2 weeks ago	04/19/23	£0.00	88 hrs	£11,955.00	<div><div>1</div><div></div><div></div><div></div></div>
<div>Maintenance fee</div> <div>Maintenance fee</div>	- 4 +	2 weeks ago	04/19/23	£1,200.00	0 hrs	£1,200.00	<div><div></div><div></div><div></div><div></div></div>
SCOPE FEES						AMOUNT	PRICE
No fees defined							£0.00
Scope Margin					9.12%	£1,200.00	
Scope Totals + Discount				£1,200.00	88 hrs	£13,155.00	
Total Complete Percentage: 0 %				Total Actuals:	0 hrs		

Submit

DraftIn ReviewApprovedClient ApprovalClient AcceptedTraffickedClosed

+ Person

Output

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