

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.

The screenshot shows the 'Team' tab selected in the SCOPE application. The interface is organized into four main sections: COLLABORATOR, REVIEWER, APPROVER, and TRAFFICKER. Each section contains a list of users with their roles and activities. A blue box highlights the REVIEWER and APPROVER sections, and a blue arrow points from the explanatory text on the left to the APPROVER section.

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

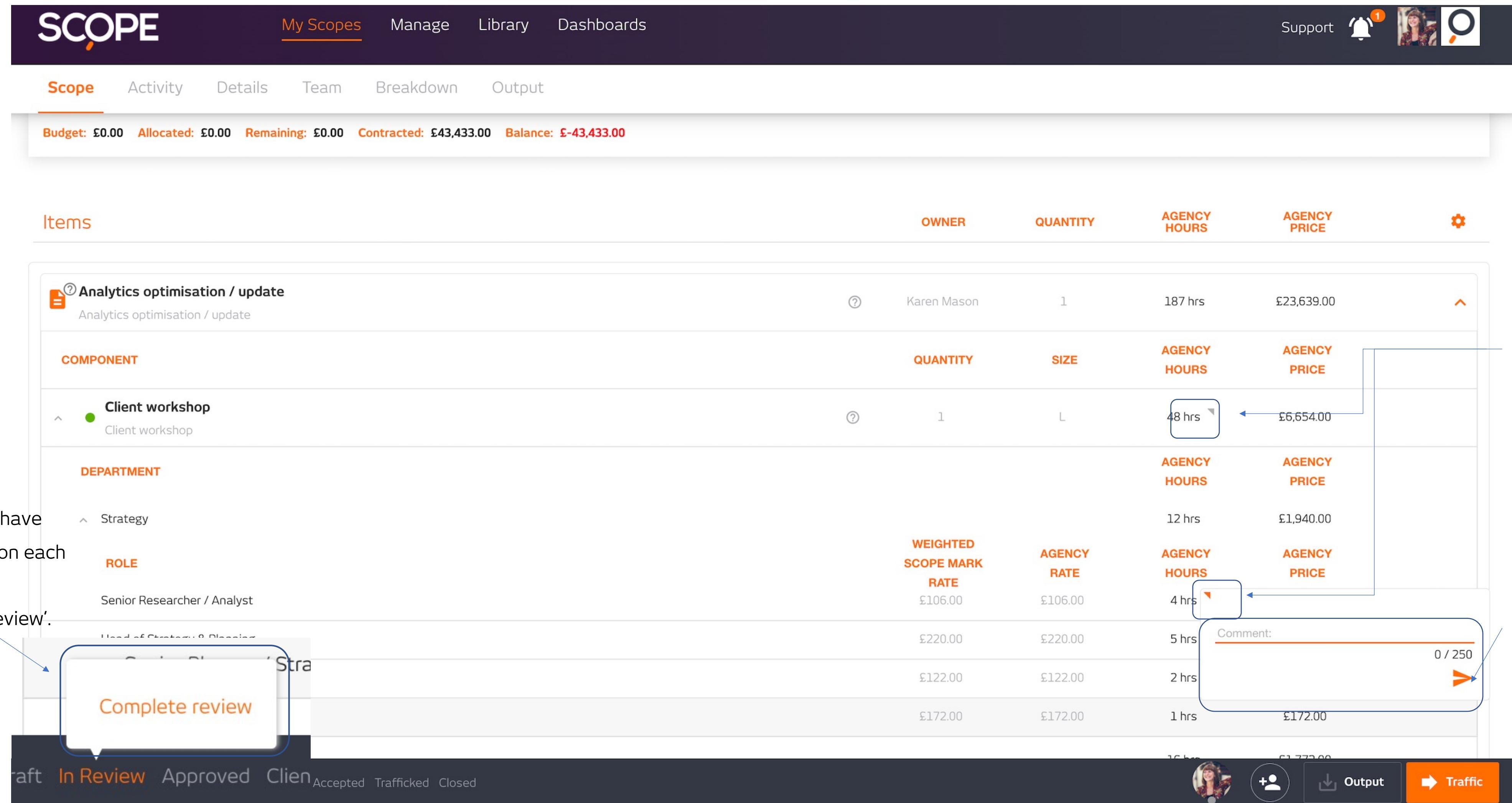
The screenshot shows the SCOPE software interface. At the top, there is a navigation bar with 'SCOPE' logo, 'My Scopes' (underlined), 'Manage', 'Library', 'Dashboards', a user dropdown 'McCore (Demo)', 'Support', and a notification bell with '135' notifications. Below the navigation is a project card for 'Project 1' (S-50) with 'Client: Acme Client', 'Rate Card: ScopeMark Ratecard', 'Rate Card Version: 4', and a 'View more' link. The card also shows 'DRAFT' status, 'S-136', and 'Date created: 02/02/23'. The main content area displays a scope titled 'Amneals Big Easter Campgin' with details like 'Scope Type: No Scope Type', 'Language: EN', 'Client: Demo Client', 'Start date: 02/11/21', 'End date: 05/11/21', and budget information. A 'Deliverables' table lists an 'Advisory Board' with 'Scope Support' assigned. A 'Scope Totals + Discount' section shows a total of '\$18,100.00'. A central modal window titled 'Submit Scope' contains a note: 'Sarah, please review this Scope and let me know if all ok. Thanks.' with a 'Submit' button. At the bottom of the screen, a status bar shows the scope's current status as 'Draft' (highlighted with a blue box and arrow), followed by 'In Review', 'To Agree', 'Client Approval', 'Approved', and 'Closed'.

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

A modal dialog box titled 'Export Statement of Work' is shown. It contains a sub-header 'Select which document file you want to output your scope:' and a list of five options: 'CSV Export as CSV', 'W Export as Word Document', 'PDF Export as PDF Document', 'DS Export to DocuSign', and 'X Export as Excel Document'. A large blue arrow points from the 'Output' button in the bottom right of the main SCOPE interface to this modal dialog.

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



The image shows the SCOPE application interface for reviewing a scope. The top navigation bar includes 'SCOPE', 'My Scopes' (which is highlighted in orange), 'Manage', 'Library', and 'Dashboards'. On the right, there are 'Support', a notification bell with 1 notification, a user profile, and a search icon.

The main content area shows a 'Scope' card with the following details:

- Budget:** £0.00 **Allocated:** £0.00 **Remaining:** £0.00 **Contracted:** £43,433.00 **Balance:** £-43,433.00
- Items** table with columns: OWNER, QUANTITY, AGENCY HOURS, AGENCY PRICE, and a gear icon.
- Analytics optimisation / update** component (under COMPONENT):
 - Owner: Karen Mason
 - Quantity: 1
 - Agency Hours: 187 hrs
 - Agency Price: £23,639.00
- Client workshop** component (under COMPONENT):
 - Owner: Karen Mason
 - Quantity: 1
 - Size: L
 - Agency Hours: 48 hrs
 - Agency Price: £6,654.00
- Strategy** role (under DEPARTMENT):
 - Owner: Karen Mason
 - Quantity: 1
 - Size: L
 - Agency Hours: 12 hrs
 - Agency Price: £1,940.00
- Senior Researcher / Analyst** role (under DEPARTMENT):
 - Owner: Karen Mason
 - Quantity: 1
 - Size: L
 - Weighted Scope Mark Rate: £106.00
 - Agency Rate: £106.00
 - Agency Hours: 4 hrs
 - Agency Price: £172.00
- Head of Marketing** role (under DEPARTMENT):
 - Owner: Karen Mason
 - Quantity: 1
 - Size: L
 - Weighted Scope Mark Rate: £220.00
 - Agency Rate: £220.00
 - Agency Hours: 5 hrs
 - Agency Price: £1,100.00
- Client** role (under DEPARTMENT):
 - Owner: Karen Mason
 - Quantity: 1
 - Size: L
 - Weighted Scope Mark Rate: £122.00
 - Agency Rate: £122.00
 - Agency Hours: 2 hrs
 - Agency Price: £244.00
- Client** role (under DEPARTMENT):
 - Owner: Karen Mason
 - Quantity: 1
 - Size: L
 - Weighted Scope Mark Rate: £172.00
 - Agency Rate: £172.00
 - Agency Hours: 1 hrs
 - Agency Price: £172.00

At the bottom, a status bar shows the scope's current status: **In Review** (highlighted in orange), followed by **Approved**, **Closed**, **Accepted**, **Trafficked**, and **Closed**. There are also buttons for **Output** and **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.

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

The screenshot shows the SCOPE software interface. At the top, there is a navigation bar with 'SCOPE' logo, 'My Scopes' (underlined), 'Manage', 'Library', 'Dashboards', and a dropdown for 'McCore (Demo)'. A 'Support' button with a bell icon and a '135' notification count is also present. The main content area shows a project titled 'Project 1' for 'Acme Client' using 'ScopeMark Ratecard' version 4. The status bar indicates the scope is 'Submitted' by 'Karen Mason' on '02/02/23'. A 'Complete Scope Review' pop-up is overlaid, containing instructions to review deliverables and two buttons: 'Accept all unreviewed deliverables' and 'Reject all unreviewed deliverables'. The main table lists scope items with columns: Deliverable, Quantity, Agency Hours, and Agency Price. The status bar at the bottom shows 'Submitted'.

DELIVERABLE	QUANTITY	AGENCY HOURS	AGENCY PRICE
Analytics optimisation / update	1	187 hrs	£23,639.00
Website	1	48 hrs	£6,654.00
Analytics optimisation / up...	1	12 hrs	£1,940.00
	1	4 hrs	£106.00
	1	5 hrs	£220.00
	1	2 hrs	£122.00
	1	1 hrs	£172.00
	1	16 hrs	£1,772.00

1. As a scope is submitted through approval, its 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

The screenshot shows the SCOPE software interface for a scope titled 'Project 1'. The top navigation bar includes 'My Scopes', 'Manage', 'Library', 'Dashboards', and a user dropdown for 'McCore (Demo)'. The scope details are as follows:

- Client: Acme Client
- Rate Card: ScopeMark Ratecard
- Rate Card Version: 4
- Scope Type: Digital Products
- Language: EN
- Traffic Status: Trafficable
- Last Trafficked: --
- Created By: Karen Mason
- Date created: 04/19/23
- Retained Hours Used: --
- Folder Retained Hours remaining: --
- Budget: £100,000.00
- Allocated: £10,300.00
- Remaining: £89,700.00
- Contracted: £13,155.00
- Balance: £86,845.00
- Third Party Cost Budget: --
- Third Party Cost Balance: £-2,600.00

The scope is in 'DRAFT' status, created by Karen Mason on 04/19/23. The version is 2, with a start date of 04/19/23 and an end date of 07/19/23.

The 'Scope' tab is selected, showing the following table:

Items	QUANTITY	START DATE	LAST EDITED	PROFIT	AGENCY HOURS	AGENCY PRICE	...
Website	1	2 weeks ago	04/19/23	£0.00	88 hrs	£11,955.00	
Maintenance fee	4	2 weeks ago	04/19/23	£1,200.00	0 hrs	£1,200.00	

Below the table, there are sections for 'SCOPE FEES' (No fees defined), 'Scope Margin' (9.12%, £1,200.00), and 'Scope Totals + Discount' (£1,200.00, 88 hrs, £13,155.00). The status bar at the bottom shows 'Total Complete Percentage: 0 %' and 'Total Actuals: 0 hrs'. The bottom navigation bar includes 'Draft' (highlighted), 'In Review', 'Approved', 'Client Approval', 'Client Accepted', 'Trafficked', and 'Closed'. There are also icons for 'Output' and user management.

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