# Creating a new customised SOW output in Word

Using the Manage/Outputs area of SCOPE, users (permission based) are able to create an unlimited number of customised output templates i.e. SOW, Change request documents, Quotes and more.

Creating an output template

1. Go to Manage
2. Got to Outputs
3. Click 'add template' and select 'Scope Word Template (for scope level outputs/single scopes) or Folder Word template (for folder level outputs/multiple scopes)
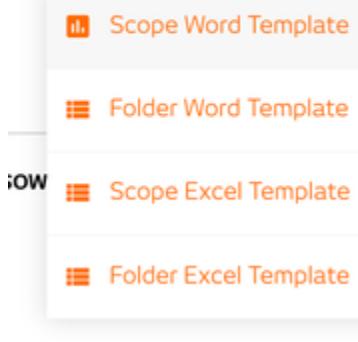
4. To create a custom (not use an out-of-the-box) template) give your output a name, and select 'Blank Template'
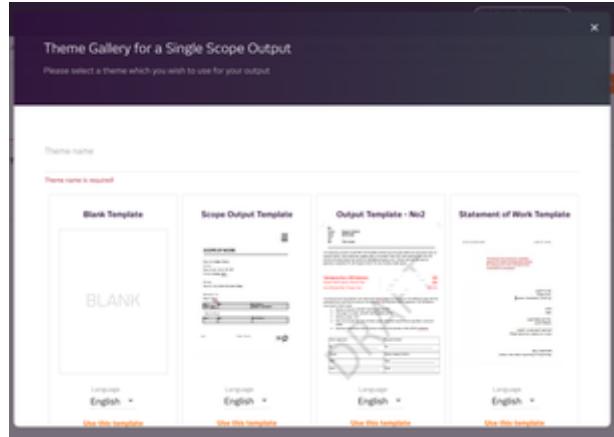
5. You will be presented with the beginnings of an output template

The editor is designed to be used by a non-technical person with the icon selector to support the build of the styles and formats required. Some technical support (HTML) may be required for some styles/formats.

Populating your template

1. Editing the Header/Footers
   a. Click the padlock to unlock
   b. Click into the Header/Footer content block
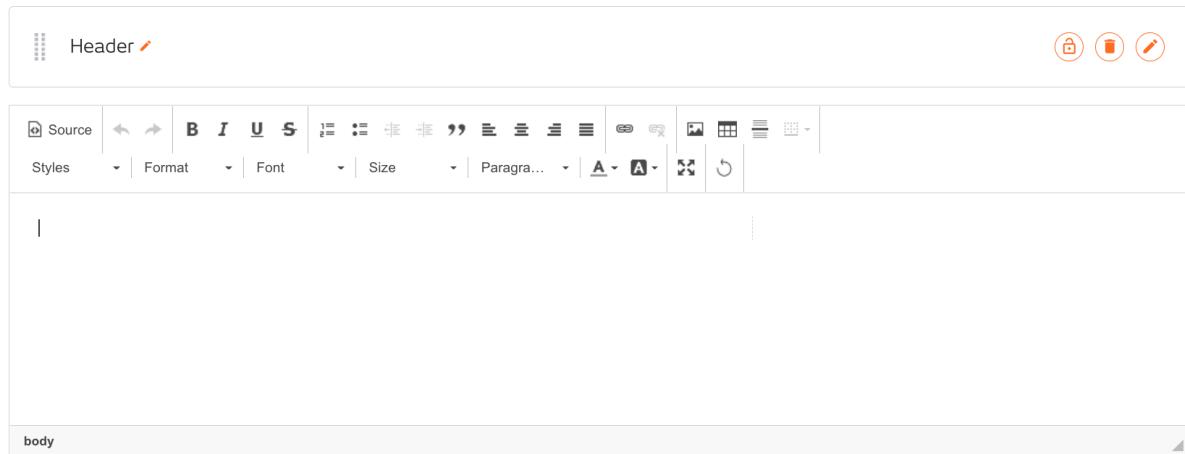
   c. Begin to type the content of your output into the blank area (see below example of a conent block populated.
   d.
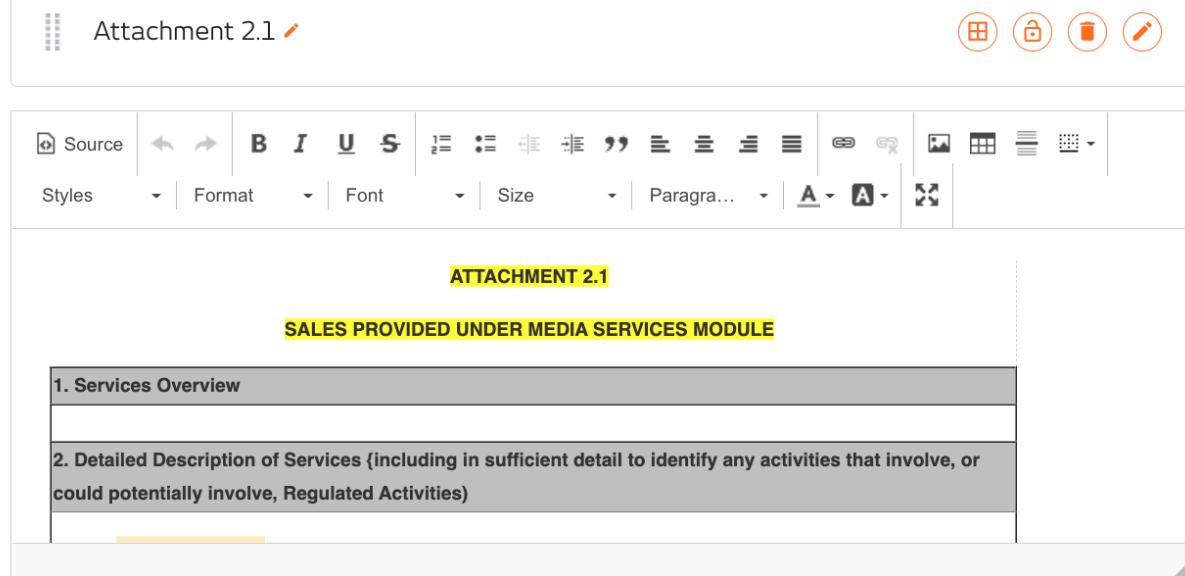
   e. Format the text using the formatting bar at the top of the area (bold, italics, paragraph spacing). Use the below icon for a full page view of your content block

Formatting your contents within the content block
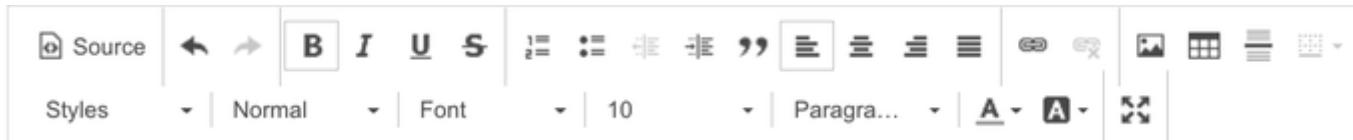
Top left to bottom right, in order of view:

1. Source - to edit the content block using HTML
2. Undo

3. Bold
4. Italics
5. Underline
6. Strikethrough
7. Numbering
8. Bullet points
9. Indent
10. Insert Quote section
11. Text alignment (left, centre, right, full width)
12. Add link to item/text
13. Insert image
14. Insert table
15. Insert horizontal line to page
16. Table Borders on/off
17. Styles (pre-set options)
18. Format (Heading 1, Heading 2, Normal, etc)
19. Font size (pixel not point size)
20. Paragraph spacing
21. Font/text colour
22. Highlight colour
23. Expand pag

📄 Use the icon with 4x corner diagonal arrows for a full page view of your content block

Inserting Variable scope data

This is the data that makes up you users scope/quote/estimate/output. The information is set in the output template, and when populated within the scope, the detail from that scope will pull into the selected output.

For example:

In the output template, the variable data selected to be pulled from the scope in this example is 'Client Name', 'Deliverable name' and 'Component Name'.
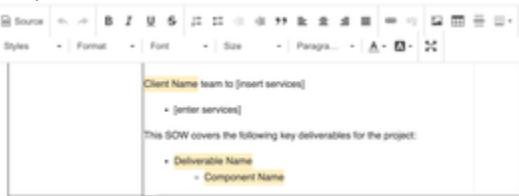
When the scope is output, this is what is visible in the final word/PDF document:

The below table aims to support you with your choice of variable data field. To insert a variable, use the function **${.**

Variable Name - Use function ${	Description of action
Scope ID	This is the ID given to each scope (S-x)
Scope Name	This is the name your user gage your scope e.g. 'Campaign for Summer 2022'
Scope version	This is the version for the scope that has been output (V1, V2, V3).
Scope Author	The name of the person who created the scope
Scope created date	The date the scope was created
Scope start date	The start date of the project being scoped

Scope end date	The end date of the project being scoped
Scope total resource selling price	This is the total price of all of the roles utilised within the scope
Scope total Third Party Cost selling price	Pulls in the sum total of all TPC/OOP's included in the scope
Scope total discount name	Pulls in any discount line item name
Scope total discount percentage	Pulls in the total discount percentage set in the line item for a discount
Scope total discount value	The total value of the discount applied to the scope
Scope MSA value	The price/total value of the MSA line item applied to that scope
Scope MSA name	The name of the MSA line item fee
Scope total selling price	The total price of the full scope to include all discounts, TPC/OOP items, fixed fees etc.
Scope Mark total selling price	The selling price of ScopeMark (out of the box data) deliverable
Scope budget	The budget value given to the scope
Scope approvers name	The name(s) of the persons who approved the scope
Scope duration	The length of time the project is due to run for - start and end date calculation in days /months.
Scope resource hours	The total number of role hours applied to the scope
Scope type	The name of the scope type label associated with the scope
Scope fixed fee	Name and price of a fixed price line item at scope level (not at deliverable level)
Scope fixed fee total	The total value/price of fixed price items listed at scope level (not within a deliverable)
Scope deliverables total value	The total price of all items in the scope added together
Scope TPC total value	This is the total value of all Third Party Costs / OOPs listed in the scope
Scope deliverable total quantity	The number of deliverables / items contained within the scope
Scope components fixed cost total value	This shows a sum value of any components that are fixed price components within the whole scope
Scope department cost total	This lists the total cost of each department (roll up roles to dept) in the scope
Ratecard Name	The name of the ratecard used for the scope
Client Name	The name of the client the scope has been produced for
Brand Name	The name of the brand that the scope has been produced for
Client location name	Pulls in the client location name as selected in the scope, if present on the client card (Manage/Clients)
Client location address 1	Lists the first line of the clients address if present on the client card (Manage/Clients)
Client location address 2	Lists the second line of the clients address if present on the client card (Manage/Clients)
Client location city	Lists the City address as set in the client card for the location if present on the client card (Manage/Clients)
Client location Country	Lists the client Country set in the client card for the location if present on the client card (Manage/Clients)
Client location phone	Lists the phone number set in the client card for the location if present on the client card (Manage/Clients)
Client location postcode	Lists the post code or area code as set in the client card for the location if present on the client card (Manage/Clients)
Client contact	Lists the client contacts name as set in the client card for contact and as selected as the 'contact' when scope is created - if present on the client card (Manage/Clients)
Client contact role	Lists the client contact job role as set in the client card for contact. if present on the client card (Manage/Clients)
Client contact phone	Lists the phone number set in the client card for the contact selected in the scope. if present on the client card (Manage/Clients)
Client contact email	The email address of the client contact if present on the client card (Manage/Clients)
Creator email	The email address of the person who created the scope
Company Name	Shows the name of your business
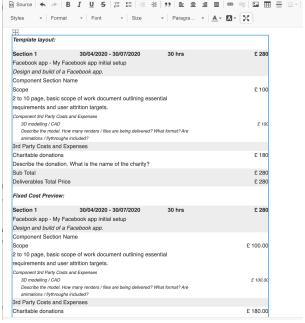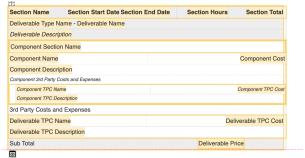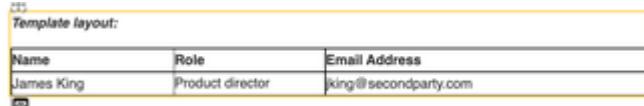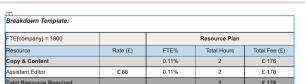
Document generation date	Shows the date the document was generated
Document update date	Includes the date the document was updated
Todays date	Automatically adds the date to your document
Page No	Includes page numbers on your document
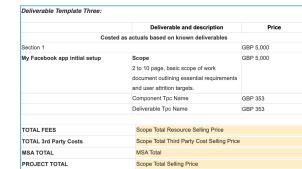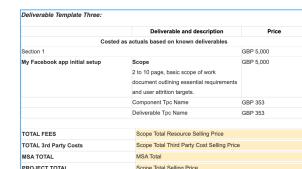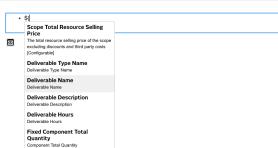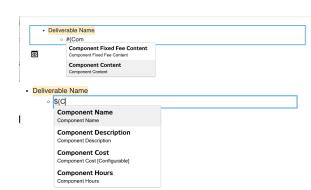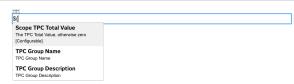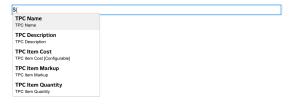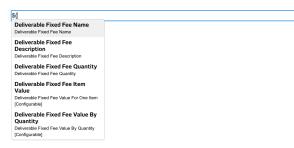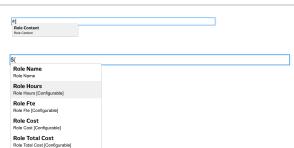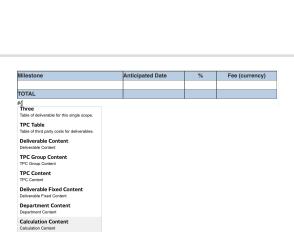
Inserting a pre-set or customised Widget (group of data variables)

A widget is a pre-defined group of data grouped into either a pre-defined table or a customisable table format. To insert a widget, use **#{**

For example, a table containing data around roles used in the scope, can be set in the output as a 'widget'. These are often in a set format that can be styled, but not changed.

These fixed widgets include:

Widget - Use function #{	Description	Comment	Preview
Deliverable Resource Table One	A pre-set table of deliverables, with descriptions, components with descriptions and prices (selectable options of what is viewable)	You are able to turn different variables on/off and format the date view and decimal formats by double clicking on the table.	
Deliverable Resource Table One	A pre-set table of all roles /departments/hours etc used in the scope but where sections of the table can be removed	Ability to change style of table by right clicking on inserted table once widget is selected	
List of Collaborators Table	Presents a table with the names of all of the scope collaborators included	Double clicking on the table allows the user to adjust the border styling	
List of Second Party Contacts Table	Presents a table with the names of all of the client contacts as listed in the client card associated with this scope	Double clicking on the table allows the user to adjust the border styling	
Breakdown Table	A list of departments, roles, hours, FTE %, Rates of roles as used at scope level	Double clicking on the table allows the user to hide unwanted fields or style the table	
Role Table	A table of all roles, rates, by deliverable	Ability to change style of table by right clicking on inserted table once widget is selected	
Deliverable Resource Table Two (different layout to Table One)	A pre-set table of deliverables, with descriptions, components with descriptions and prices (selectable options of what is viewable)	Double clicking on the table allows the user to hide unwanted fields or style the table	

| Deliverable Resource Table Three (different layout to Table One and Two)	A pre-set table of deliverables, with descriptions, components with descriptions and prices (selectable options of what is viewable)	Double clicking on the table allows the user to hide unwanted fields or style the table		
TPC Table	A pre-set table of Third Party Costs/Out Of Pocket costs including mark-up	Double clicking on the table allows the user to hide unwanted fields or style the table		
Deliverable Content	Allows the user to add variables around deliverables without using a table. I.e. a bullet point list of deliverables, with associated components	For example: To add deliverables name and associated component names in a bullet pointed list - add the **#{Deliverable Content** widget, then add the **bullet point formatting**, then add in the variables e/.g. **${DeliverableName** Then enter to create the new bullet underneath, and indent as desired. Select the next widget type i.e. **#{Deliverable, #{Component, #{Role, #{Deliverable TPC**. Then select the associated variables **${Component Name** for example	1. a.	
TPC Group Content	Ability to add any of the TPC group information into the document	Double clicking on the inserted variables to adjust the format of a date or decimal		
TPC Content	Ability to add any of the TPC variables into the document	Double clicking on the inserted variables to adjust the format of a date or decimal		
Deliverable Fixed Content	Provides all of the fixed price items available to be formatted as required - lists, in tables, bullet points, numbers etc	Add the widget. Select your format style. Click into the row created, add your variable **${xx**		
Department Content	Provides variables to select relating to the business departments - such as department names and total value. Also by adding a widget of '#{Roles' into this '#{Department widget can provide roles to those departments	Add the widget. Select your format style. Click into the row created, add your variable **${xx**		
Calculation Content	Provides the ability to add in specific % values against a milestone			

When inserting a widget, if you double click or right click once inserted to the content block, you are able to adjust the styling (fonts, borders, cell colours) or de-select/select the different elements to be visible in the final output.

Unable to format via the general user view?

Where formatting cannot be achieved using the normal view, amends can be made to the HTML using the 'Source' option directly.

Click into the Content Block in question.

Select 'Source' to view the HTML of the content that has been created and make the required code adjustments to achieve the requirements.

Setting default templates by client

Outputs created in the Manage area of SCOPE can be applied to specific client(s) within the client card (Manage/Clients).
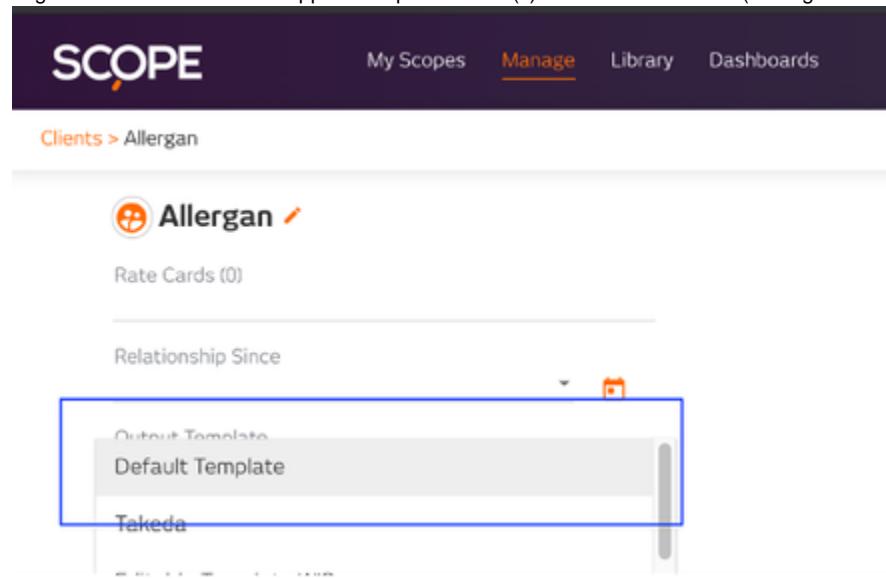
To do this, go to MANAGE/CLIENT and select your client and/or brand. Click on the drop down next to 'Output Template' and select the required template from the listed options.

When a user creates a scope for this client, the applied Output will automatically be selected. A user can change the selected template when scoping.

Applying the output to a scope

In the MY SCOPES/OUTPUT section of your Scope, users will see the applied output but can also change this selection manually using the the pencil under 'Output Template'. They will see a gallery of additional templates to choose from.

Once applied a user can open any of the unlocked content blocks and make edits – adding text, and project specific detail as required. The changes and edits made by the user here will only affect their Scope document - not the whole template.

Previewing an output

To preview your output click 'Preview' in the thumbnail image to the right side of the editing section.

Clicking on 'Preview' will output the final document in MS Word for a full preview of the document.


> NOTE: the thumbnail image (to the right of the editing section of the screen) does not match your template.

Generating the final Output

When the user is happy with their output edits/additions/preview they can then output this as a final document (Word or PDF) that can be shared with the client for approval/filed onto your internal systems or sent out via DocuSign (if configured in SCOPE).

Go to 'Scope', bottom right, select Output and choose the option required.

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