SCOPE REVIEW

AD Design will have a personal query on their Workdesk alerting them to Scopes pending their review. In the screenshot below, we see there is 1 project in Scope Review.

![Image of Workdesk with 1 project in Scope Review]

Clicking the name of the query will drill you down into a listing of the Query results.

![Image of Project Details for 15-184]

The screenshot above shows us that the project in status SCOPE REVIEW is 15-184.

Click the project number to open the project. (REMEMBER: Anything that looks like a hyperlink, IS)

You are now in the project details for 15-184. UPL’s will attach the Scope and any other relevant docs to the project prior to submitting for review.
To view the documents, click the “Related Document” link under the View section on the left hand side of the screen:

```
View
Extra Description
Workflow
Account Setup
Planned Budget Forecast
Project Team
Milestones
Activities
Property/Asset List
Labor Charges
Work Orders
Issues
Received Email
Sent Email
Notes Log
User Defined Fields
Status History
Related Documents
```
Clicking this link drills you into the Related Documents page, which will display a listing of all files attached to this project;

The screenshot above shows us a total of 4 files attached to this project. The “Document Type” column can be used to quickly identify the Scoping documents.

Click the thumbnail to open and review the attachments.

After reviewing the Scope, you can either return the project back to the UPL for revisions, or send the Scope forward for further review. To do so, you will manually change the project status to one of the codes contained in the table below:

<table>
<thead>
<tr>
<th>Status Code</th>
<th>Purpose</th>
<th>Who has ball in court?</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCOPING</td>
<td>Return to UPL for clarification/revisions</td>
<td>UPL</td>
</tr>
<tr>
<td>OUA Scope Review</td>
<td>Review by Office of Univ Architect</td>
<td>OUA Coordinator</td>
</tr>
<tr>
<td>CONSTR SCOPE REVIEW</td>
<td>Review by the AD Constr.</td>
<td>AD CONSTR team member. Note this could be either the AD IHC or AD CPM</td>
</tr>
<tr>
<td>EST SCOPE REVIEW</td>
<td>Review of scope by estimating; to ensure enough detail is included in scope to provide an estimate</td>
<td>Chief Estimator</td>
</tr>
</tbody>
</table>

**OUA SCOPE REVIEW**
Selecting this status will launch a workflow to the OUA Coordinator, who will ensure the scope is reviewed on behalf of their office. When the OUA Coordinator completes their review, if approved, the project will be returned in a status of AD CONSTR METHOD.
**AD CONSTR METHOD**

A query on your workdesk will alert you to projects in this status. Note that not all projects will enter this status. This status is the stopping point of the OUA Scope Review, and allows you (AD DESIGN) an opportunity to confirm the construction method (IHC or CPM) before sending the scope for review by the AD Construction. If a project is in this status, you need to:

- Review Project Team and confirm appropriate AD is entered.
- Review User Defined Fields page and confirm appropriate Construction Management Group is populated.
- Change status to CONSTR SCOPE REVIEW

**CONSTR SCOPE REVIEW**

Projects in this status are pending scope review by the AD Construction. When the AD completes their review, if approved, the project will be returned in a status of AD EST METHOD.

**AD EST METHOD**

A query on your workdesk will alert you to projects in this status. Note that not all projects will enter this status. This status is the stopping point of the CONSTR Scope Review, and allows you (AD DESIGN) an opportunity to determine what method will be used to obtain an estimate. If a project is in this status, you need to determine if an estimate will be done in house, externally, or if no estimate is required.

- If an Internal estimate is needed, change status to EST SCOPE REVIEW
- If an external estimate is needed, change status to EXTERNAL ESTIMATE
- If no estimate is needed, change status ORIG BUDG APPROVAL