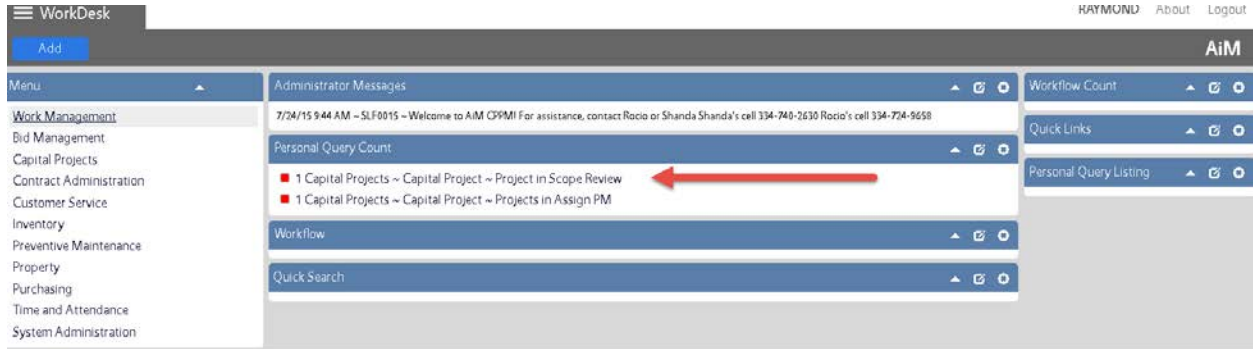


## SCOPE REVIEW

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.



The screenshot shows the WorkDesk interface. On the left is a navigation menu with categories like Work Management, Bid Management, Capital Projects, Contract Administration, Customer Service, Inventory, Preventive Maintenance, Property, Purchasing, Time and Attendance, and System Administration. The main content area is titled 'Personal Query Count' and displays two items: '1 Capital Projects ~ Capital Project ~ Project in Scope Review' and '1 Capital Projects ~ Capital Project ~ Projects in Assign PM'. A red arrow points to the first item. On the right, there are sections for 'Workflow Count', 'Quick Links', and 'Personal Query Listing'. The user's name 'RAYMOND' and 'Logout' link are visible in the top right corner.

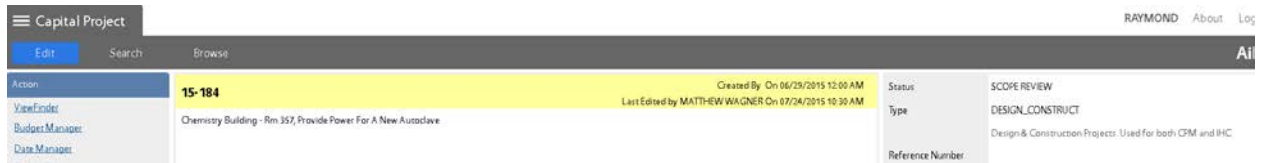
Clicking the name of the query will drill you down into a listing of the Query results



The screenshot shows the 'Capital Project' listing page. It features a table with columns for 'Action', 'Capital Project #', 'Description', 'Type', and 'Status'. The table contains one row with the project number '15-184', description 'Chemistry Building - Rm 357, Provide Power For A New Autoclave', type 'DESIGN\_CONSTRUCT', and status 'SCOPE REVIEW'. On the left, there are action buttons for 'Export', 'View', 'Projects in Assign PM', and 'Project in Scope Review'. The user's name 'RAYMOND' and 'Logout' link are visible in the top right corner.

The screenshot above show us that the 1 project in status SCOPE REVIEW is 15-184.

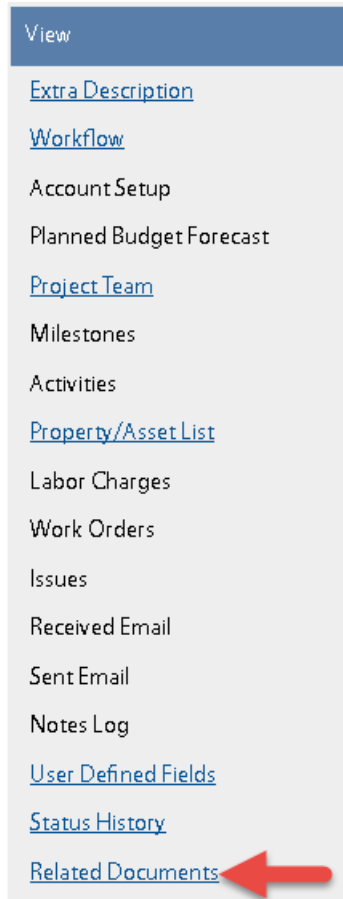
Click the project number to open the project. (REMEMBER: Anything that looks like a hyperlink, IS)



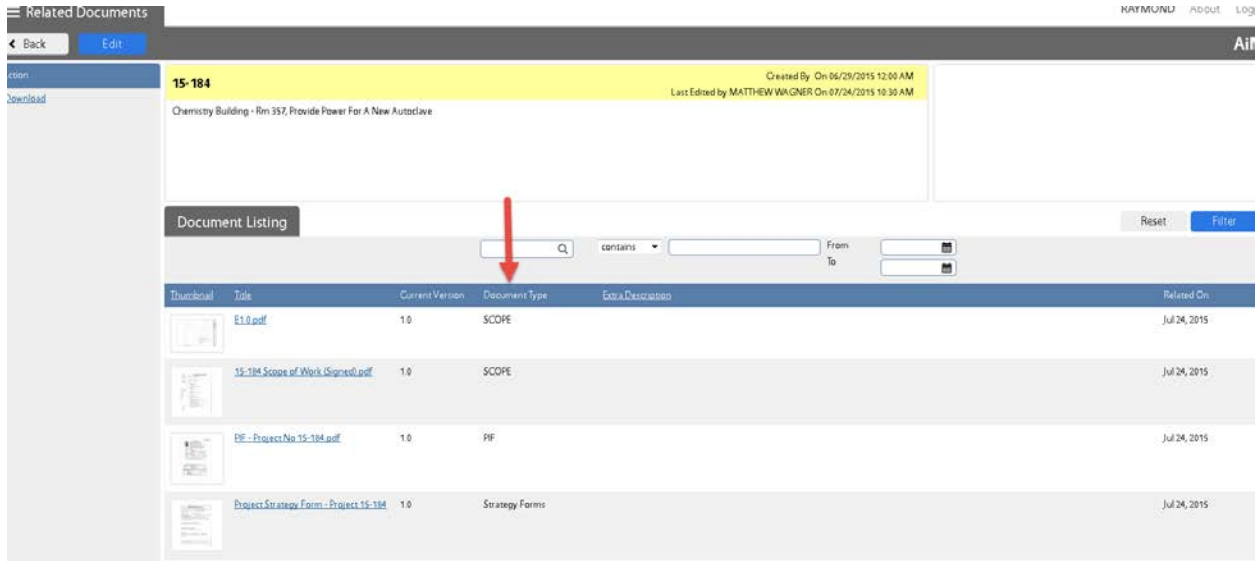
The screenshot shows the project details page for project 15-184. The page is titled 'Capital Project' and has a yellow header bar. The main content area displays the project number '15-184' and description 'Chemistry Building - Rm 357, Provide Power For A New Autoclave'. It also shows the creation and last edit dates, the user who last edited the project, and the project status 'SCOPE REVIEW' and type 'DESIGN\_CONSTRUCT'. The user's name 'RAYMOND' and 'Log' link are visible in the top right corner.

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:



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:

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

### **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