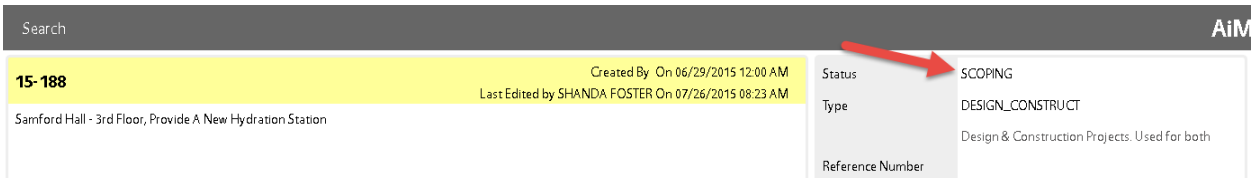
SCOPING



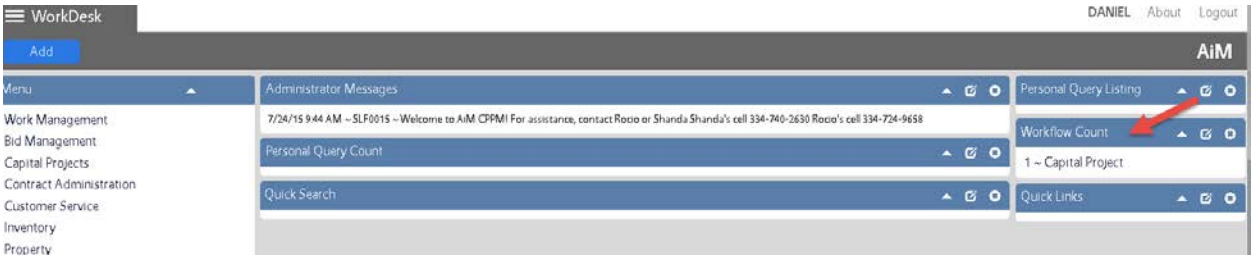
You will receive an email notification when a project has been assigned to you. The project will be in a Status of "SCOPING" (see red arrow above)

The project will remain in "SCOPING" status until you are ready to submit your Scope for Review.

Follow the steps below to submit your scope for reviw:

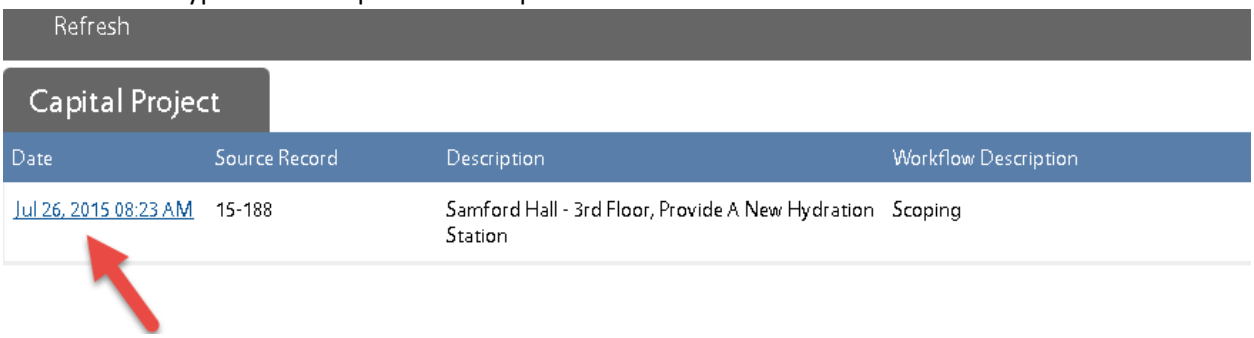
Login to AiM, and on your main WorkDesk, locate the "Workfow Count" channel.

The SCOPING workflow is a workflow attached to the <u>Project</u>, so you will see "Capital Project" listed. IN the example below, there is 1 pending Caplital Project Workflow for Daniel:

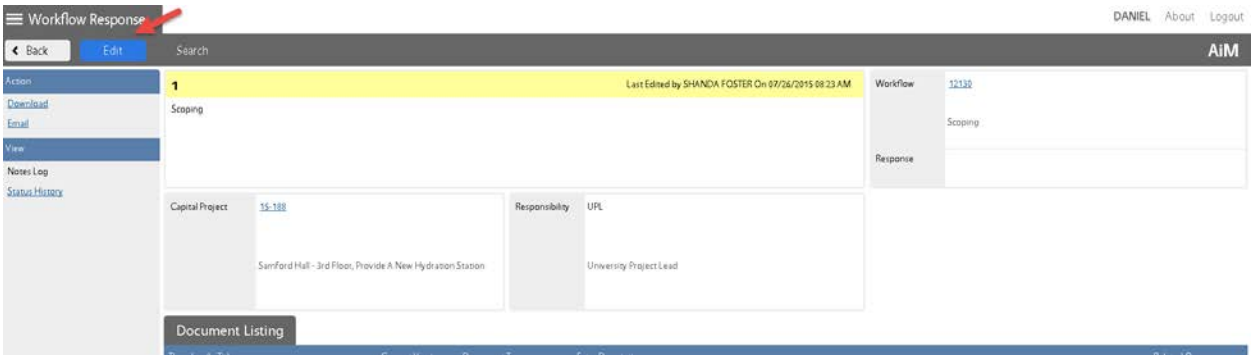


Click on the words "Capital Project" in the Workflow Count channel. This drills you into a list of Capital Project workflows assigned to you. In the screenshot below, we see there is only 1 pending workflow for Daniel. You see the date the workflow was assigned, the project number, project description, workflow description, and responsibility.
Therefore, the screenshot below tells:
<u>On Jul 26 project 15-188 was assigned to the UPL (Daniel) for Scoping.</u>

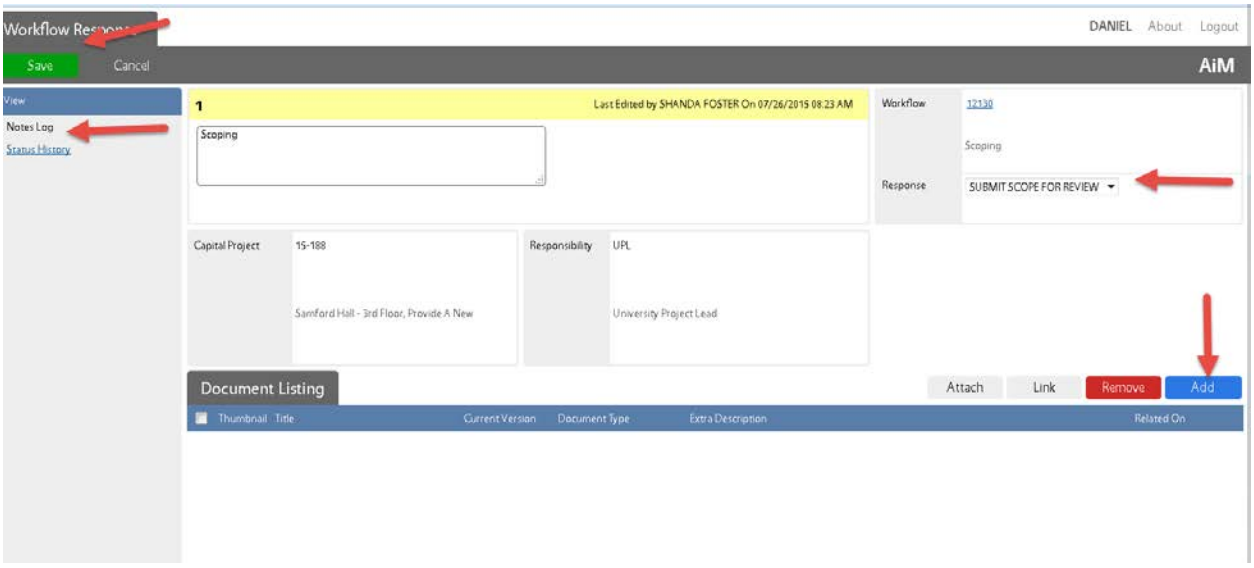
Click the date hyperlink to respond to this specific workflow:



1. Click Edit



2. Attach your Scope and any other relevant docs. Choose Document type "SCOPE"
   Add any relevant Notes to the Notes Log
   Change status to "Submit Scope for Review"
   Save



Your Scope has now been submitted to the AD Of Design for Review. After reviewing the scope, the AD will either Approve, or return to you for revisions.

If Approved, the AD Design will then determine if additional review of the Scope is required. If so, they will send the Scope forward. The table below contains the different status codes you may see your project in during Scope Approval.

Status Code	Purpose	Who has ball in court?
OUA Scope Review	Review by Office of Univ Architect	OUA Coordinator
AD Const Method	AD Design makes/confirms whether project will be IHC or CPM. AD Design ensures the AD CONSTR team member is set appropriately before sending Scope for Review	AD Design
CONSTR SCOPE REVIEW	Review by the AD Constr.	AD CONSTR team member. Note this could be either the AD IHC or AD CPM
AD EST METHOD	Determine type of estimate required: Internal, External or None	AD Design
EST SCOPE REVIEW	Review of scope by estimating; to ensure enough detail is included in scope to provide an estimate	Chief Estimator