

**Internet State Construction Office Project Environment
(InterScope)**

Electronic Change Order Processing

April 27, 2015

Abstract

This manual describes the process of electronic Change Order processing in InterScope Release 7.5

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Overview

InterScope Release 6.5 contains new features for the processing of electronic project documents.

These features include the ability to enter, edit, submit, accept and store *Cost Estimates (OC-25)*, *Designer and Contractor evaluations*, *Change Orders (OC-24)* and all supporting documentation electronically.

This manual deals only with the processing of electronic Change Orders. Comparable documents are available (or are soon to be available) for Cost Estimates and Evaluations.

Audience

This manual is intended for use by Designers, Contractors, Owner agencies and State Construction Office Project Monitors.

Since the Designer is the originator of change order requests, the bulk of this manual deals with the entry and edit of detail Change Order information from the Designer's viewpoint.

The roles of the Contractor, Owner and Monitor involve receiving and responding to email alerts, reviewing and approving change orders. These are described in later sections of the manual.

Workflow Automation

The business of processing electronic forms within InterScope is handled through the use of workflow automation.

This involves a sequence of steps which are executed by the various project participants.

In InterScope project roles are defined as: Designer, Contractor, Owner Agency and State Construction Office Monitor.

Workflow steps include such activities as creation, submission and approval of documents. As each step is completed, the workflow advances to the next step alerting the project participant responsible for the next step.

An audit trail is also kept identifying the user and completion time of each step. If at anytime, a step involves a rejection, the workflow is designed to return to a prior "restart" step for continued processing.

Email Alerts

A key element of workflow automation is the ability to communicate with workflow participants during workflow execution. InterScope uses email alert notifications defined for each workflow step.

Alert notifications can be based on workflow participation (or Role), User group, or specific UserId. They are sent to the email address registered to the user account of each project participant.

Change Order Workflow

The Workflow for the Change Order processing appears in the following diagram. The remainder of this document covers the details of the workflow processing and interactions with InterScope release 6.5.

State Construction Office - Interscope Change Order Processing					
WORKFLOW STEP	DESIGNER	CONTRACTOR	OWNER	MONITOR	INTERSCOPE
1 Designer creates Change Order	(1) Creates Change Order PCOs with Supporting documentation				
2 Designer submits CO for review	(2a) - Submits Change Order	(2c) Receives Alert	(2c) Receives Alert	(2c) Receives Alert	(2b) Sends Email Alert to: Contractor Owner Monitor
3 Contractor Reviews and Approves	(3c) Receives Alert	(3a) Approves CO			(3b) Sends Email Alert to: Designer
4 Designer Reviews and Approves	(4a) Approves CO		(4c) Receives Alert		(4b) Sends Email Alert to: Owner
5 Owner Reviews and Approves			(5a) Approves CO	(5c) Receives Alert	(3b) Sends Email Alert to: Monitor
6 Monitor Reviews and Approves	(6c) Receives Alert	(6c) Receives Alert	(6c) Receives Alert	(6a) Approves CO	(6b) Sends Email Alert to: Contractor Owner Designer

Figure 1

Getting Started

Each project participant must establish an active user account in InterScope.

This can be accomplished by accessing the following URL and completing the Request Logon sequence (Figure 8 on page 9)

<http://www.nc-sco.com/Interscope>

New Account Instructions for Designers

Follow these steps for creating a new Designer user account:

- 1 – Select **Designer** in the **User Type** field. This will display the entry form in Figure 2.
- 2 – Complete the form for the fields indicated.

Note: It is important that the email address entered for the Firm be one that represents the firm directly and is not necessarily defined for a particular individual since all communication from InterScope for this account will be sent to the email address on file.

3 – Click **Submit**. A request will be sent to the InterScope Administrator who will review your request, verify the information against the data in InterScope, activate your account and send an email notifying you that the account has been activated.

Note: A user account cannot be established for any firm that does not have prior or current approved and active construction projects setup in InterScope.

The screenshot shows a web form titled "InterSCOPE :: State Construction Office - Project Environment" with a sub-header "New User Logon". The form is divided into several sections. The first section has "User Type:" with radio buttons for "State Employee", "Designer" (which is selected), and "Contractor". Below this are input fields for "Design Firm:", "Address:", "City & State:", "Zip:", "Phone:" (with an example "(800) 555-1212"), and "License #:". The second section has "User Type:" with radio buttons for "NCBA", "NCBELS", "NCBOLA", and "Other". The third section has input fields for "Username:", "Full Name:", "Email:", "Phone:" (with an example "(919) 807-4100"), "Password:", and "Confirm Password:". At the bottom of the form are "Submit", "Cancel", and "Help" buttons, followed by the text "First Time Users Please see Help". A red warning message states "Enter Firm and User information. All fields are required." with a "Contact Administrator" link. The footer includes "Release: 6.5.1-20100226 Copyright © 2009, 2010" and "State of North Carolina :: State Construction Office".

Figure 2

New Account Instructions for Contractors

Note: Any Contractor requesting to use InterScope must first be registered with Vendor Link, the Interactive Purchasing System. InterScope uses Vendor Link to obtain verifiable name and address information.

To register with Vendor Link, access the following URL and complete the Vendor Registration process:

<https://www.ips.state.nc.us/IPS/vendor/vndpubmain.asp>

Once you have received notification that your Vendor Link registration has been completed, you may request a logon for InterScope.

Follow these steps for creating a new Contractor user account:

- 1 – Select **Contractor** in the **User Type** field. This will display the entry form (see Figure 3).
- 2 – Click on the **Search VendorLink** button. This will display the search page in (see Figure 4).
- 3 – Enter the first 3 letters of your company name and press **Search**. This will display search results (see Figure 5).
- 4 – Find your company listing in the search results and press **Select**. This will fill in your company information and return you to the account request form (see Figure 6).
- 6 – Complete the remaining fields on the form and press **Submit**.

Note: It is important that the email address entered for the Firm be one that represents the firm directly and is not necessarily defined for a particular individual since all communication from InterScope for this account will be sent to the email address on file.

7 - A request will be sent to the InterScope Administrator who will review your request, verify the information against the data in InterScope, activate your account and send an email notifying you that the account has been activated.

Note: A user account cannot be established for any contractor that does not have prior or current approved and active construction projects setup in InterScope.

The screenshot shows a web form titled "InterSCOPE :: State Construction Office - Project Environment" with a sub-header "New User Logon". The form includes several fields and buttons:

- User Type:** Radio buttons for "State Employee", "Designer", and "Contractor" (which is selected).
- HUB Vendor:** A text input field followed by a "Search VendorLink" button.
- Contact:** A section containing:
 - Username:** Text input field.
 - Full Name:** Text input field.
 - Email:** Text input field.
 - Phone:** Text input field with an example "(919) 807-4100".
 - Password:** Text input field.
 - Confirm Password:** Text input field.
- Buttons:** "Submit", "Cancel", and "Help". A red note next to "Help" says "First Time Users Please see Help".
- Footer:** A green box containing instructions: "Press 'Search VendorLink' to select your Contractor information. Only HUB Certified Vendors can request a logon. To register and become certified, go to [Vendor Link](#). [Contact Administrator](#)". Below this is the release information: "Release: 6.5.1-20100226 Copyright © 2009, 2010 State of North Carolina :: State Construction Office".

Figure 3

InterSCOPE :: State Construction Office - Project Environment

HUB VendorLink Search

Enter the first 3 letters of your company name, then press[Search] to locate your Vendor Link record.

Contractor Name:

All fields are required.

Figure 4

InterSCOPE :: State Construction Office - Project Environment

HUB VendorLink Search

Enter the first 3 letters of your company name, then press[Search] to locate your Vendor Link record.

Contractor Name:

[First/Prev] 1, 2, 3 [Next/Last]

	Company	Contact
<input type="button" value="Select"/>	Gene Jordan Appraisal Services P.O. Box 14108 Raleigh, NC 27620	Name: Jordan, Gene Phone: (919)231-3212 x Fax: (919)231-4077 TollFree: Email: genejrd@bellsouth.net
<input type="button" value="Select"/>	General ASP : ApplTrack 8001 Lincoln Avenue : Suite 704 Skokie, IL 60077	Name: Westman, Keith Phone: (847)475-2283 x 108 Fax: TollFree: Email: keith@generalasp.com
<input type="button" value="Select"/>	General Biomedical Service, Inc. 1900 25th Street Kenner, LA 70062	Name: Ortega, Ana Phone: (504)468-8597 x Fax: (800)558-9449 TollFree: Email: info@generalbiomedical.com

Figure 5

InterSCOPE :: State Construction Office - Project Environment

New User Logon

User Type: State Employee Designer Contractor

Username:

Full Name:

Email:

Phone: Example: (919) 807-4100

Password:

Confirm Password:

First Time Users Please see Help

[Contact Administrator](#)

Release: 6.5.1-20100228 Copyright © 2009, 2010
[State of North Carolina :: State Construction Office](#)

Figure 6

New Account Instructions for Owner Agencies

Follow these steps for creating a new Agency user account:

- 1 – Select **State Employee** in the **User Type** field. This will display the entry form in Figure 7.
- 2 – Select your Department and Agency from the drop down lists and complete the remaining fields as indicated.
- 3 – Click **Submit**. A request will be sent to the InterScope Administrator who will review your request, verify the information against the data in InterScope, activate your account and send an email notifying you that the account has been activated.

The screenshot shows a web form titled "InterSCOPE :: State Construction Office - Project Environment" with a sub-header "New User Logon". The form contains the following fields and controls:

- User Type:** Radio buttons for "State Employee" (selected), "Designer", and "Contractor".
- Department / Agency:** Two dropdown menus. The first is set to "Administration" and the second to "St. Construction".
- Username:** Text input field containing "newuser".
- Full Name:** Text input field containing "SCO General Account".
- Email:** Text input field containing "sco@doa.nc.gov".
- Phone:** Text input field containing "(919) 807-4100" with an example "Example: (919) 807-4100" to its right.
- Password:** Text input field with masked characters "••••••••".
- Confirm Password:** Text input field with masked characters "••••••••".

At the bottom of the form are three buttons: "Submit" (highlighted with a dashed border), "Cancel", and "Help". To the right of the "Help" button is the text "First Time Users Please see Help". Below the buttons is a link "Contact Administrator" and footer text: "Release: 6.5.1-20100226 Copyright © 2009, 2010" and "State of North Carolina :: State Construction Office".

Figure 7

Accessing InterScope

Once your account has been established, you may access InterScope to work on Change Orders.

Access the following URL to logon to InterScope: <http://www.nc-sco.com/InterScope>

The following screen will appear.

InterSCOPE
State Construction Office - Project Environment

STATE CONSTRUCTION OFFICE

Welcome to InterScope

Version: 7.5.1_20150424

Please Logon

User Name: mgioielli

Password:

Logon

Recover Password Request Logon

Please enter your Username and Password.

CONTACT ADMINISTRATOR
Copyright © 2015
State of North Carolina :: State Construction Office

Figure 8

Enter the username and password that has been established for your account.

The following screen will appear depending on the Role that has been established for your user account.

InterScope Roles are: **Designer**, **Contractor**, **Owner** (Agency) and **Monitor** (State Construction).

The Menu options shown on the page header are dependant on the type of logon, so different options will appear for each role.

InterScope always displays the **Home Page** immediately after logon. To view your Alerts, click on **Alerts!** on the Menu Bar.

Each Alert is intended as a shortcut to actions that required your attention. These may be, but are not limited to: Change Orders that need your approval, Notice of final Change Order Acceptance by State Construction, Notice of Change Order submission. Alerts are also provided for Evaluations and Cost Estimates.

The following is a typical screen display after a **Designer** logon.

The screenshot shows the InterSCOPE web application interface. At the top, the header includes the application name 'InterSCOPE :: State Of North Carolina - State Construction Office', the user 'USER: scodesigner', and the view 'VIEW: SCO Designer'. There is a 'Logout' button in the top right corner. Below the header, there are navigation tabs: 'Home', 'New', 'My Favorites', 'Active Design Contracts', 'Active Construction Contracts', 'Change Orders In Process', and 'My Projects'. The 'Change Orders In Process' tab is selected, displaying a table with the following data:

	SCO ID#	STATUS	LAST UPDATE	WORKFLOW STEP	AWAITING	CO AMOUNT	DAYS	PROJECT	AGENCY	DESIGNER
1	11-08024-01A-1-8	Created	3/15/2015	2	SCO Designer	\$476,044.00	28	SCO Change Order Test Project	Miscellaneous	SCO Designer
2	14-11274-01A-1-1	Submitted	3/15/2015	3	SCO Contractor	\$100.00	0	Change Order Test Project - ** NOT A VALID	Miscellaneous	SCO Designer

At the bottom of the table, it says '2 found' and there is an 'Export' button.

Figure 9

Entering Change Orders

Only Designers (or any InterScope user given the appropriate permission) are allowed to create and submit change orders for review, processing and approval.

Note: *Each Change Order proposal (PCO) requires supporting documentation to be uploaded for review and acceptance. A PCO cannot be added without supporting documentation. It is recommended that all supporting documentation be gathered prior to change order entry.*

To enter a Change Order for a given Construction Contract, perform the following navigational steps:

Step 1 – Finding the Construction Contract

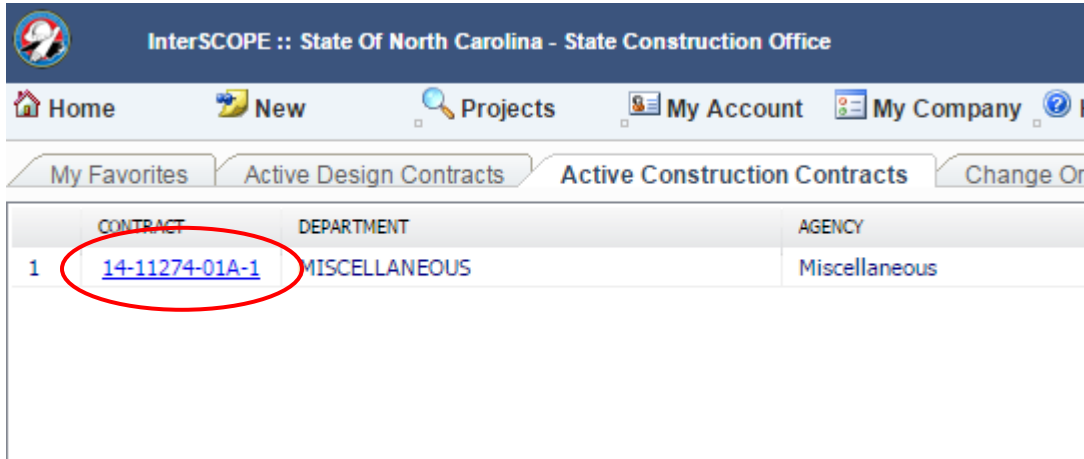
Click on the “**Active Construction Contracts**” clipboard to view construction contracts that are active.
(Note: to see all Construction contracts, use the search menu: **Projects-> Construction Contracts**)



CONTRACT	DEPARTMENT	AGENCY	DESIGNER	
1	14-11274-01A-1	MISCELLANEOUS	Miscellaneous	SCO Designer

Step 2 – Selecting and opening the Construction Contract

Click on the Contract# to open the Construction Contract.



The screenshot displays the InterSCOPE web application interface for the State of North Carolina - State Construction Office. The navigation bar includes links for Home, New, Projects, My Account, and My Company. Below the navigation bar, there are tabs for My Favorites, Active Design Contracts, Active Construction Contracts, and Change Or. The main content area shows a table with the following data:

	CONTRACT	DEPARTMENT	AGENCY
1	14-11274-01A-1	MISCELLANEOUS	Miscellaneous

The screenshot shows the Interscope web application interface. At the top, the browser address bar displays the URL: interscope2.doa.state.nc.us:88/Detail.aspx?p=ConstructionContractDetail&x=XOgS8AMFaHGfno7bwU1h7TP2aN0'. The application header includes the logo, 'InterSCOPE :: State Of North Carolina - State Construction Office', user information 'USER: scodesigner', and view information 'VIEW: SCO Designer'. A navigation menu contains 'Home', 'New', 'Projects', 'My Account', 'My Company', and 'Help'. Below the navigation, there are tabs for 'Design #', 'Package', and 'Construction Contract #'. The 'Change Orders' tab is highlighted with a red circle. The main content area is divided into several sections: 'Contract Summary', 'Contractor', 'Schedule Summary', 'Owner Contact', 'Safety Officer', 'Sheets', 'Surety', and 'Contract Details'. The 'Contract Summary' section shows 'Contract #: 14-11274-01A-1', 'Award Type: Other/None of the above', 'Formal Contract: Y', 'Status: Valid Contract', 'Contract Type: General Contract', 'Negotiation? N', and 'Bid Number: SCO-14-11274-01A'. The 'Contractor' section shows 'Name: SCO Contractor', 'Address: 301 N. Wilmington Street, Suite 450, Raleigh, NC 27601', 'License#:', and 'Contact:'. The 'Schedule Summary' section shows 'Approved For Bid: 2015-03-11', 'Actual Bid: 2015-03-12', 'Approved for Award: 2015-03-13', 'Construction Start (NTP): 2015-03-16', and 'Projected Completion: 2016-01-20'. The 'Contract Details' section shows 'Contract Date: 2015-03-13', 'Contracts Approved by Agency: 2015-03-13', and 'Contracts Approved by Atty Genl: 2015-03-13'. A table at the bottom right shows the change order commitment details:

	Amount	Days
Original Commitment:	\$310,000	310
Change Order:	\$0.00	0
Current Commitment:	\$310,000	310

At the bottom, there are tabs for 'Comments', 'Uploads', and 'Project Managers'. A table below shows the change order history:

DATE	NOTE	USER_ID	AUTHOR
2015-03-15 18:27:30	Change Order #1 created on Mar 15 2015 6:27PM by scodesigner	scodesigner	SCO Designer
2015-03-15 18:25:50	Change Order #1 created on Mar 15 2015 6:25PM by scodesianer	scodesianer	SCO Designer

Tip: From this screen you may view additional information by clicking on any tab (Package, Design)

Then click on the “Change Orders” tab to see the list of change orders.

Click on the **Action** menu and select **Add Change Order** to create a new change order.

The screenshot shows the Interscope web application interface. The browser address bar displays the URL: interscope2.doa.state.nc.us:88/Detail.aspx?p=ConstructionContractDetail&x=XOgS8AMFaHGfno7bwU1h7TP2aN0'. The page header includes the Interscope logo, the text 'InterSCOPE :: State Of North Carolina - State Construction Office', the user 'scodesigner', the view 'SCO Designer', and a 'Logout' button. A navigation menu contains 'Home', 'New', 'Projects', 'My Account', 'My Company', and 'Help'. The main content area shows details for a change order: Design # 14-11274-01, Package 14-11274-01A, and Construction Contract # 14-11274-01A-1. Below this is a table with columns: CHANGE ORDER #, DAYS, AMOUNT, RECEIVED, LAST STATUS, STATUS, and CONTRACTOR. A single row is visible with values: 1, 0, \$100.00, 03/15/2015 18:29, Submitted, and SCO Contractor. To the right of the table, an 'Action' menu is open, showing options: 'Add Change Order' (highlighted with a red circle), 'Export', and 'Close'. Below the table, there is a '1 found' indicator and tabs for 'Comments', 'Uploads', and 'Project Managers'. A table of comments is visible at the bottom, with columns: DATE, NOTE, USER_ID, and AUTHOR. The comments table contains three entries, all created on 2015-03-15 by scodesigner.

CHANGE ORDER #	DAYS	AMOUNT	RECEIVED	LAST STATUS	STATUS	CONTRACTOR
1	0	\$100.00		03/15/2015 18:29	Submitted	SCO Contractor

DATE	NOTE	USER_ID	AUTHOR
2015-03-15 18:27:30	Change Order #1 created on Mar 15 2015 6:27PM by scodesigner	scodesigner	SCO Designer
2015-03-15 18:25:50	Change Order #1 created on Mar 15 2015 6:25PM by scodesigner	scodesigner	SCO Designer
2015-03-15 18:15:47	Change Order #1 created on Mar 15 2015 6:15PM by scodesigner	scodesigner	SCO Designer

Step 4 – Entering Change Order Proposals (PCOs).

Designer Summary

1. Schedule items affected by this change:

2. Can Contractor mitigate the change without requiring a contract time extension:

3. Select the Contractors that will need a contract time extension due to this change:

4. Are additional costs incurred by reason of the time extension? (if so, include in items 5&6 below):

5. Estimated Cost of Change:

	Contractor	Designer
Estimated Cost of Change:	<input type="text" value="1000"/>	<input type="text" value="0"/>
Estimated time extension field cost (\$), if any:	<input type="text" value="1000"/>	<input type="text" value="0"/>

Cost Summary - Note: "Revised Contract" days and amounts are pending final approval.

	CONTRACT START	+	CHANGE ORDERS (APPROVED)	=	CURRENT CONTRACT	(+/-)	THIS ORDER	=	Revised Contract (PENDING)
Construction Days	310	+	0	=	310	(+/-)	0	=	310
Cost (\$)	\$310,000	+	\$0.00	=	\$310,000	(+/-)	\$0.00	=	\$310,000.00

Schedule Summary - Note: "Revised Completion" date is pending final approval.

CONTRACT START	+	ORIGINAL DAYS	=	ORIGINAL COMPLETION DATE	+	PRIOR APPROVED CO DAYS	=	PRIOR APPROVED COMPLETION DATE	+	THIS ORDER	=	Revised Completion (PENDING)
03/16/2015	+	310	=	01/20/2016	+	0	=	01/20/2016	+	0	=	01/20/2016

PCO Breakdowns

PCO #1

DESCRIPTION OF PCO	REASON(S) FOR CHANGE(S)	PCO COST	# DAYS
(Provide adequate detail to enable SCO to properly assign the cause codes) <input type="text" value="This is an example of a description"/>	(Provide adequate detail to properly justify cause codes) <input type="text" value="This is an example of a reason."/>	<input type="text" value="2000"/>	<input type="text" value="0"/>

DESCRIPTION	FILE NAME	UPLOADED BY	DATE	
Supporting documentation for PCO#1	CO_11-08024-01A-2_1_130730640422375736.docx			Delete

Figure 14

For each change order proposal, the following fields must be entered: **Description Of PCO**, **Reason(s) for Change**, **PCO Cost**, **#Days**. In addition, **supporting document must be attached** for each PCO.

As this information is provided, the figures in the **COST AND SCHEDULE SUMMARY** section will be updated under the **This Order** and **Revised Contract** columns. These columns reflect the summary of all items for the Change Order. These amounts will be applied to the Construction Contract once final approval is made by the Project Monitor (SCO).

To attach supporting documentation, click on the **Upload Files** button and the following window will appear:

File Uploader X

No file chosen [Add File to List](#)

[Cancel](#)

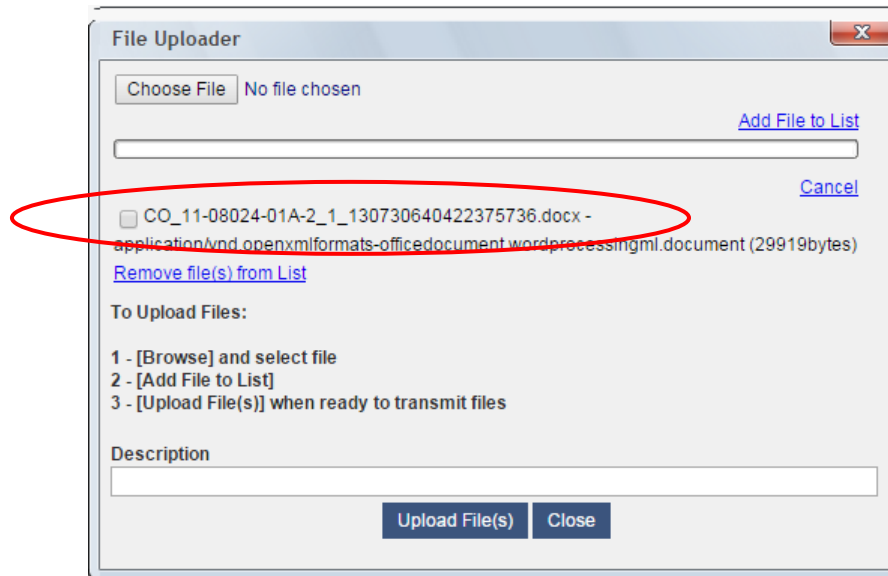
To Upload Files:

- 1 - [Browse] and select file
- 2 - [Add File to List]
- 3 - [Upload File(s)] when ready to transmit files

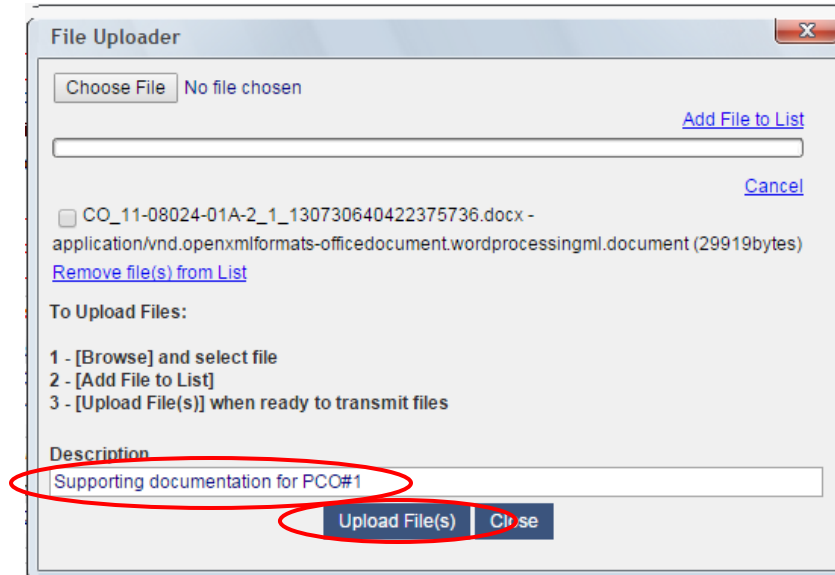
Description

Click on the **Choose File** button to browse and select a file to upload.

Once you select the file, it will appear in the list of files to upload:



Enter a **Description** and click on the **Upload File(s)** button to complete the upload and attach the files to the PCO.



Once the file is successfully uploaded, it will appear in the list.

PCO Breakdowns

[-] PCO #1

DESCRIPTION OF PCO <small>(Provide adequate detail to enable SCO to properly assign the cause codes)</small>	REASON(S) FOR CHANGE(S) <small>(Provide adequate detail to properly justify cause codes)</small>	PCO COST	# DAYS
<input type="text" value="This is an example of a description"/>	<input type="text" value="This is an example of a reason."/>	<input type="text" value="2000"/>	<input type="text" value="0"/>

DESCRIPTION	FILE NAME	UPLOADED BY	DATE	
Supporting documentation for PCO#1	CO_11-08024-01A-2_1_130730640422375736.docx			Delete

[Upload Files](#)

Figure 14

Attach as many files as necessary to complete the supporting documentation for the PCO. Each file provided will be accessible online by reviewers.

TIP: *It is strongly recommended to Save the Change Order (See Step 6) after each PCO has been completed. This will store the updated Change Order in InterScope for later retrieval and edits and prevent loss of data due to internet connection problems.*

To add more PCOs, click the **Add PCO** button on the **Action** menu.

Repeat the preceding steps for each PCO.

Step 5 – Saving the new Change Order

To save the new Change Order information, select **Save** from the **Action** menu.

InterSCOPE :: State Of North Carolina - State Construction Office USER: scodesigner VIEW: SCO Designer Logout

Home New Projects My Account My Company Help

Design #: 14-11274-01 - SCO Designer

Package: 14-11274-01A - Change Order Test Project - ** NOT A VALID PROJECT **

Construction Contract #: 14-11274-01A-1 - SCO Contractor

NEW CHANGE ORDER:

Detail

Action **Close**

Save

Status

Package Status: Under Construction Status: Creating Date Received: Total Day

Contract Status: Valid Contract Status Date: Last Update: Total Amount

Designer Summary

1. Schedule Items affected by this change:

2. Can Contractor mitigate the change without requiring a contract time extensions:

3. Select the Contractors that will need a contract time extension due to this change:

4. Are additional costs incurred by reason of the time extension? (if so, include in items 5&6 below):

	Contractor	Designer
5. Estimated Cost of Change:	<input type="text" value="1000"/>	<input type="text" value="0"/>
6. Estimated time extension field cost (\$), if any:	<input type="text" value="1000"/>	<input type="text" value="0"/>

Cost Summary - Note: "Revised Contract" days and amounts are pending final approval.

	CONTRACT START	+	CHANGE ORDERS (APPROVED)	=	CURRENT CONTRACT (+/-)	THIS ORDER	=	Revised Contract (PENDING)
Construction Days	310	+	0	=	310 (+/-)	0	=	310
Cost (\$)	\$310,000	+	\$0.00	=	\$310,000 (+/-)	\$0.00	=	\$310,000.00

Schedule Summary - Note: "Revised Completion" date is pending final approval.

CONTRACT START	+	ORIGINAL DAYS	=	ORIGINAL COMPLETION DATE	+	PRIOR APPROVED CO DAYS	=	PRIOR APPROVED COMPLETION DATE	+	THIS ORDER	=	Revised Completion (PENDING)
03/16/2015	+	310	=	01/20/2016	+	0	=	01/20/2016	+	0	=	01/20/2016

PCO Breakdowns

PCO #1

DESCRIPTION OF PCO (Provide adequate detail to enable SCO to properly assign the cause codes)	REASON(S) FOR CHANGE(S) (Provide adequate detail to properly justify cause codes)	PCO COST	# DAYS
<input type="text" value="This is an example of a description"/>	<input type="text" value="This is an example of a reason"/>	<input type="text" value="2000"/>	<input type="text" value="0"/>

Step 6 – Editing the new Change Order

The change order will be created and now the **Workflow Activity** section will appear.

Notice that the Workflow has advanced to the next step (2) and information for the preceding step has been generated.

A **Workflow** menu now appears on the page next to the **Action** menu.

Change Order added successfully

Design #: 14-11274-01 - SCO Designer
 Package: 14-11274-01A - Change Order Test Project - ** NOT A VALID PROJECT **
 Construction Contract #: 14-11274-01A-1 - SCO Contractor
 Change Order #: 1

Workflow Action Close

Status
 Package Status: Under Construction Status: Created Date Received: Total Days: 0
 Contract Status: Valid Contract Status Date: 4/27/2015 11:00:00 AM Last Update: 4/27/2015 11:00:00 AM Total Amount: \$2,000

STEP	ACTION	ACTIVE?	ROLE	FIRM/AGENCY	USER COMPLETING STEP	COMPLETED ON	ALERTED ON	RESULT	COMMENTS
1	CREATE	N	DESIGNER	SCO Designer	scodesigner	04/27/2015 11:00		Created	
2	SUBMIT	Y	DESIGNER	SCO Designer					
3	APPROVE	N	CONTRACTOR	SCO Contractor					
4	APPROVE	N	DESIGNER	SCO Designer					
5	APPROVE	N	OWNER	Miscellaneous					
6	APPROVE	N	SCO	St. Construction					

Designer Summary

1. Schedule Items affected by this change:

2. Can Contractor mitigate the change without requiring a contract time extension:

3. Select the Contractors that will need a contract time extension due to this change:

4. Are additional costs incurred by reason of the time extension? (if so, include in items 5&6 below):

	Contractor	Designer
5. Estimated Cost of Change:	<input type="text" value="1,000"/>	<input type="text" value="0"/>
6. Estimated time extension field cost (\$), if any:	<input type="text" value="1,000.00"/>	<input type="text" value="0.00"/>

Cost Summary - Note: "Revised Contract" days and amounts are pending final approval.

CONTRACT START + CHANGE ORDERS = CURRENT CONTRACT (+/-) THIS ORDER = Revised Contract (PENDING)

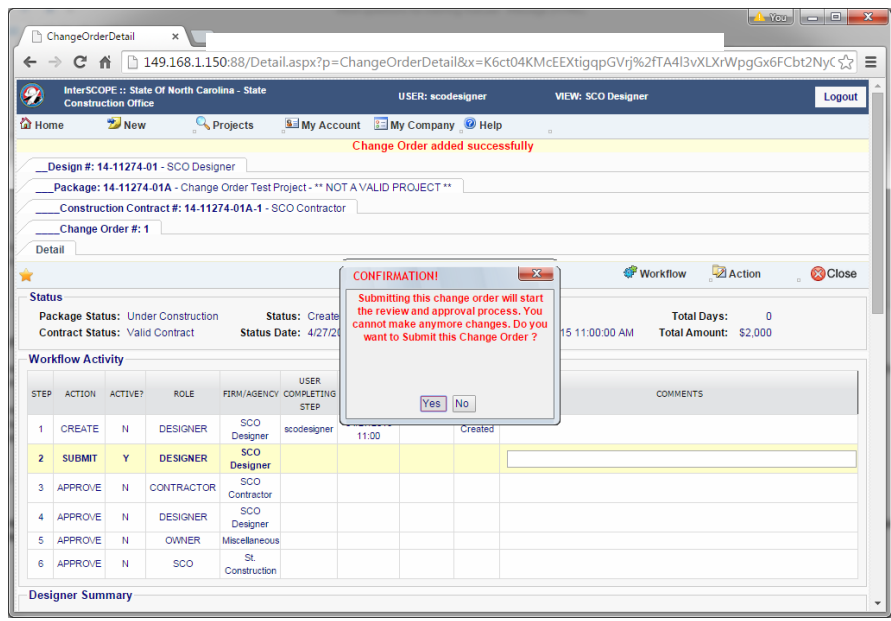
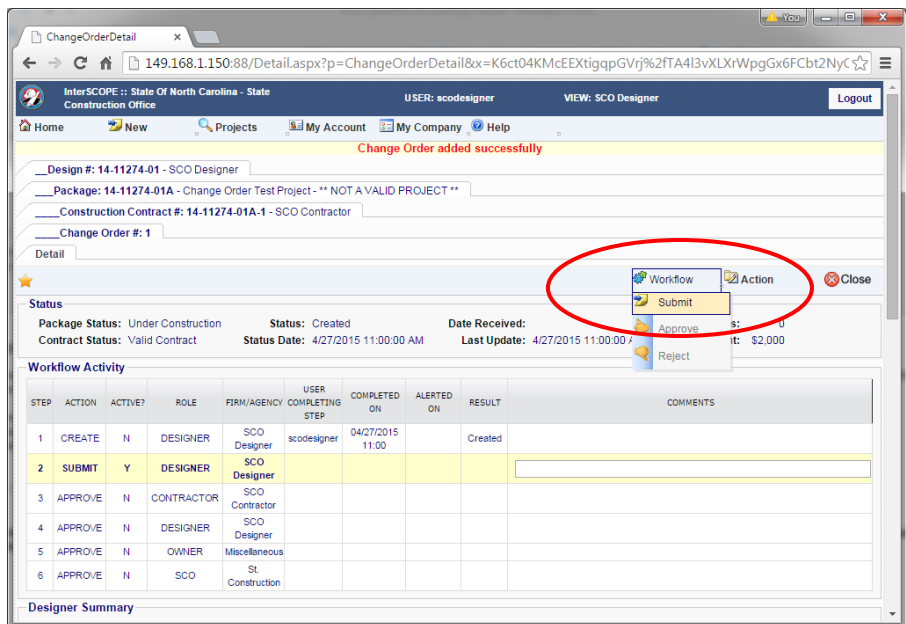
The Designer may continue to make changes to the Change Order using the **Save** option on the **Action** menu up until the time that the Change Order is submitted.

The Designer may choose to abandon or delete the Change Order using the **Delete** option from the **Action** menu. However, once it is submitted, no changes or deletions are allowed

Step 7 – Submitting the Change Order for review

To complete this workflow step, the Designer must submit the Change Order to initiate review and approval by other Project participants. Up to this point, no other Project participant has been involved in the Change Order processing.

Submit the Change Order by selecting the **Submit** option from the **Workflow** menu. A Confirmation window will appear to confirm this action. Select **Yes** to continue or **No** to return.



InterScope updates the Change Order workflow and processes any Alerts that are defined for this step.

The system is configured to send Alerts to the Owner, Contractor and Project Monitor. An Alert is sent for each logon associated with each project role.

InterScope then displays the Change Order screen and alert information. The Submit step has been updated with workflow information and the Workflow advances to the next step – Contractor Approval.

The screenshot displays the 'ChangeOrderDetail' page in a web browser. The page header includes the application name 'InterSCOPE :: State Of North Carolina - State Construction Office', the user 'scodesigner', and the view 'SCO Designer'. A navigation menu contains 'Home', 'New', 'Projects', 'My Account', 'My Company', and 'Help'. A yellow alert banner states: '1 alerts created for users: scocontract Change order has been submitted by scodesigner'. Below this, the change order details are shown: Design # 14-11274-01 (SCO Designer), Package 14-11274-01A (Change Order Test Project - ** NOT A VALID PROJECT **), Construction Contract # 14-11274-01A-1 (SCO Contractor), and Change Order # 1.

The 'Status' section provides the following information:

- Package Status: Under Construction
- Contract Status: Valid Contract
- Status: Submitted
- Status Date: 4/27/2015 11:00:00 AM
- Date Received:
- Last Update: 4/27/2015 11:00:00 AM
- Total Days: 0
- Total Amount: \$2,000

The 'Workflow Activity' table shows the following steps:

STEP	ACTION	ACTIVE?	ROLE	FIRM/AGENCY	USER COMPLETING STEP	COMPLETED ON	ALERTED ON	RESULT	COMMENTS
1	CREATE	N	DESIGNER	SCO Designer	scodesigner	04/27/2015 11:00		Created	
2	SUBMIT	N	DESIGNER	SCO Designer	scodesigner	04/27/2015 11:07		Submitted	
3	APPROVE	Y	CONTRACTOR	SCO Contractor					
4	APPROVE	N	DESIGNER	SCO Designer					
5	APPROVE	N	OWNER	Miscellaneous					
6	APPROVE	N	SCO	St. Construction					

Reviewing and Approving Change Orders

The following steps are completed for each Project participant in reviewing and approving a submitted Change Order.

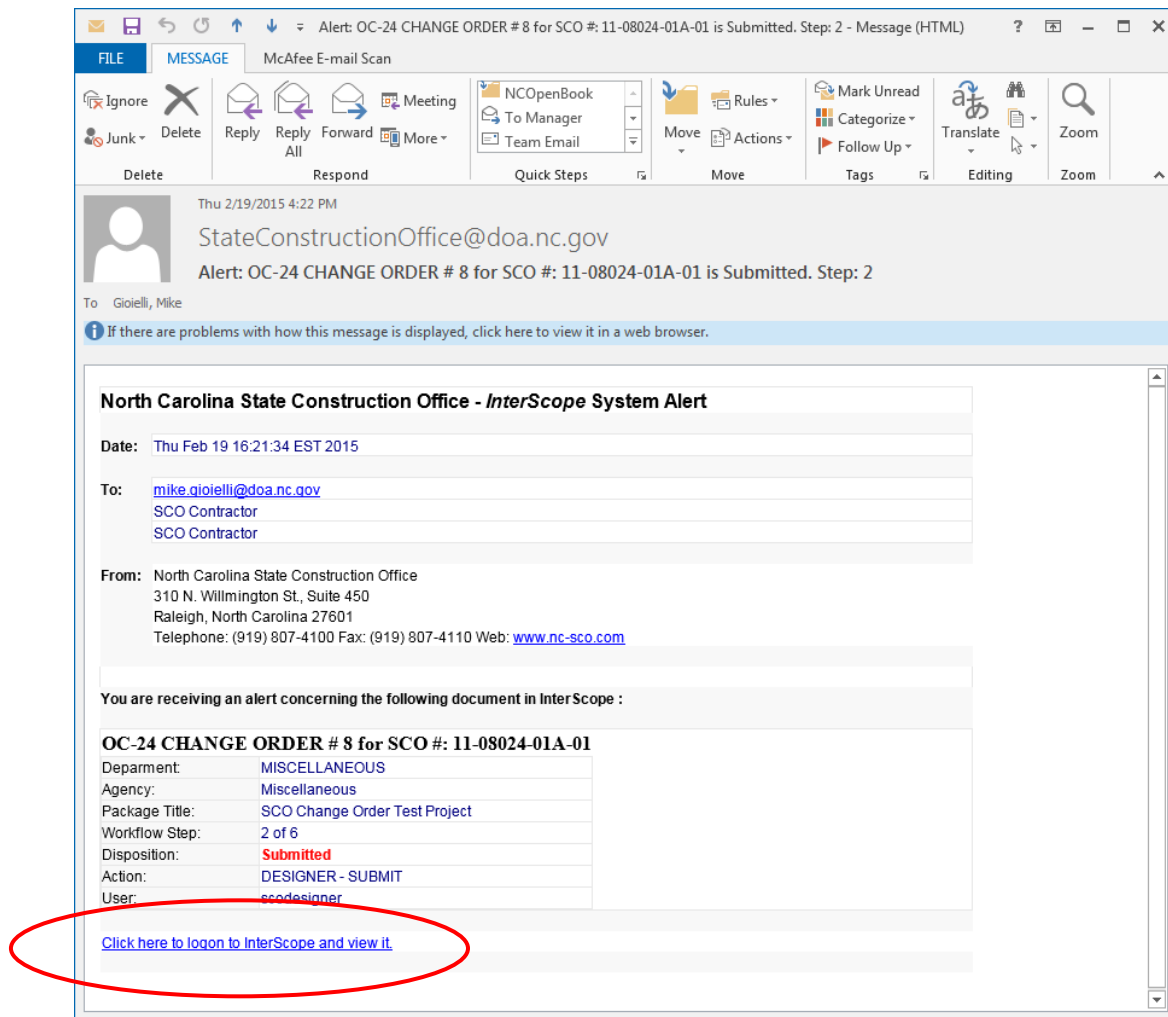
Change Order Sequencing

Change orders must be entered, submitted and approved in sequence. There are safeguards in place to check for any outstanding prior change orders before a newer change order can be approved.

Change orders may also be deleted at any time before submission. The system will review the current sequence of change orders and re-sequence them as appropriate to maintain a consistent ordering.

Step 1 – Receiving and responding to the Alert

Each participant will receive an alert via email concerning actions for each Change Order.



To access the Change Order, simply click on the link at the bottom of the Alert Email.

You will be prompted to Logon and are directed immediately to the Change Order page.

Step 2 – Approving or Rejecting the Change Order

At this workflow step there are only 2 options that can be performed – **Approve** or **Reject**. They are available from the **Workflow** menu.

Approving the Change Order moves the process along to the next step in the Workflow.

Rejecting the Change Order at any step in the Workflow causes the Change Order to be returned to Step 2 where the originator (Designer) can change and resubmit. The workflow is then reset and the audit trail (found at the bottom of the page) maintains a record of the prior workflow events.

This process continues until the final Workflow Step is completed and the Change Order is marked as Approved (See Status field).

Alerts are sent to all Project participants as a notification that the Change Order has been officially approved.

The screenshot displays the 'ChangeOrderDetail' page in the Interscope application. The user is logged in as 'scocontract' and is viewing the details for a change order. The 'Workflow' menu is highlighted with a red circle, showing 'Approve' and 'Reject' options. The page includes a status section, a workflow activity table, a designer summary, and a cost summary.

Status

Package Status: Under Construction Status: Submitted Date Received: 4/27/2015 11:00:00 AM
 Contract Status: Valid Contract Status Date: 4/27/2015 11:00:00 AM Last Update: 4/27/2015 11:00:00 AM

Workflow Activity

STEP	ACTION	ACTIVE?	ROLE	FIRM/AGENCY	USER	COMPLETING STEP	COMPLETED ON	ALERTED ON	RESULT	COMMENTS
1	CREATE	N	DESIGNER	SCO Designer	scodesigner		04/27/2015 11:00		Created	
2	SUBMIT	N	DESIGNER	SCO Designer	scodesigner		04/27/2015 11:07		Submitted	
3	APPROVE	Y	CONTRACTOR	SCO Contractor						
4	APPROVE	N	DESIGNER	SCO Designer						
5	APPROVE	N	OWNER	Miscellaneous St.						
6	APPROVE	N	SCO	Construction						

Designer Summary

- Schedule Items affected by this change: No
- Can Contractor mitigate the change without requiring a contract time extension: Y
- Select the Contractors that will need a contract time extension due to this change: SCO Contractor
- Are additional costs incurred by reason of the time extension? (if so, include in items 5&6 below): Y

	Contractor	Designer
5. Estimated Cost of Change:	\$1,000	\$0
6. Estimated time extension field cost (\$), if any:	\$1,000.00	\$0.00

Cost Summary - Note: "Revised Contract" days and amounts are pending final approval.

CONTRACT START + CHANGE ORDERS (APPROVED) = CURRENT CONTRACT (+/-) THIS ORDER = Revised Contract (PENDING)