

# InterscopePlus User Manual

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## I. InterscopePlus Overview

Interscope was originally created in 1999 for the State Construction Office for internal use in tracking projects as they moved through the office. In 2012, the decision was made to incorporate the functionality of the University System's "CAPSTAT" Capital Project Status software into Interscope, and then further to create a state-wide Capital Project System that would be used by the University System, Community College System, and all State Agencies. InterscopePlus is now that system.

InterscopePlus is designed to track the life cycle of Capital Projects from the time they are authorized until they are closed out, including funding sources and HUB data. It is not intended to be an accounting system.

## II. Definitions and Terminology

**Allocate:** Designating funds from an authorization to a program. All funds must be allocated to programs before the programs are active so that funds may be used for projects.

**Amendment:** A change to a design contract.

**AP:** Advance Planning

**Assign:** Designating funds from a program for use in a project. Funds must be assigned to a project before they can be committed or obligated for contracts or other expenses.

**Authorization:** Approval by the relevant State governing body(ies) (legislature, OSBM, UNC Board of Governors) or County to execute a project. It includes title, description/scope, amount, funding type (general fund, non-general fund, state debt, non-state debt, R&R, R&R debt), budget code, item, center, and date. Community Colleges may have authorizations approved by the County. Authorizations may be allocated to one or more Programs.

**Category:** Project cost estimates are delineated by 4 categories: Design, Construction, Contingency, and Other.

**Design** represents the estimated cost of the design contract

**Construction** represents the estimated cost of all construction contracts

**Contingency** represents the estimated cost of construction contingency

**Other** represents the estimated cost of project related or owner costs, such as soils exploration, advertising, fixed furnishings and equipment (FF&E), etc.

**CD:** Construction Documents

**Change Order:** A change to a construction contract, either to the dollar amount, duration or both.

**Code:** A 5 digit number that designates the funding authorization assigned by OSBM. The first digit is a 4, which signifies capital project. The second and third digit represents the fiscal year that the project is authorized (14 = 2014). The last two digits indicate the state agency or UNC institution. For Community Colleges that are authorized funding by the County a 5 digit number that does not start with 4 will be used.

**Commitment:** A signed contract or Purchase Order for which the State or County is obligated to pay the stated amount.

**COPS:** Certificates Of Participation, Special Indebtedness

**DD:** Design Developer

**Estimated Cost:** Total estimated cost of the project, broken down by category. Typically, this would come from the State Construction Office OC-25 form or, for Community Colleges the NCCCS 3-1 Form.

**Expenditure:** A dollar amount that has actually been paid.

**FF&E:** Fixed Furnishings & Equipment

**FD:** Final Documents

**Fund Source:** There are 6 different sources of funds defined:

**General Fund:** Appropriated funds

**Non-General Fund:** Receipts, grants, gifts, cash, County appropriated funds, etc.

**State Debt:** State Bonds, COPS, or Special Indebtedness

**Non-State Debt:** Bonds issued by Institutions, county, or self-liquidating funds

**R&R:** Funding for R&R from appropriations

**R&R Debt:** Funding for R&R from State Debt, such as Special Indebtedness or COPS.

**HUB:** Historically Underutilized Businesses, and commonly used to refer to Minority Participation or Minority Business Enterprises (MBE).

**Item:** A 3-digit number assigned by OSBM in combination with the code to form a unique identifier for an authorized capital project. Item numbers are assigned sequentially within each fiscal year.

**MBE:** Minority Business Enterprises

**Milestone:** Key date that is used to measure progress of a contract or project.

**NCAS Center:** A unique data item of up to 8 alphanumeric characters that identifies the financial account in the North Carolina Accounting System (NCAS) related to a capital code-item.

**Non-Code-Item Project:** A project that does not have, nor require, a capital code-item (<\$300,000). These are typically small informal projects that are accomplished with local or operating funds, but recording HUB participation is required.

**Non-General Fund:** Receipts, grants, gifts, cash, County appropriated funds, etc.

**Non-State Debt:** Bonds issued by Institutions, county, or self-liquidating funds

**Package:** A “process container” for a construction project within the InterscopePlus system which provides a place to record detailed information captured during design review, bidding, award, and the construction administration phases of a construction project.

**Primavera (P6):** Statewide project scheduling system. Schedules are required for projects with estimated costs over \$500,000, based on Project Type.

**Program:** A collection of one or more projects closely related by initial authorization, by the related nature of their execution, and/or having multiple funding sources for a single project. The program serves as a “bucket” for funds from different authorizations that can then be assigned to projects as needed. Program IDs are generated and assigned by the system.

**Project:** A project is typically any work requiring a design and construction contract, and may involve construction or renovation of a single building or repairs to numerous buildings as authorized in “R&R” funding. Project IDs are generated and assigned by the system. Projects must be created in the Program from which they will be funded.

**Project Type:** A designation based on agency/institution, dollar amount of project, funding type, and other factors that determines what oversight role SCO will exercise, such as managing design and construction contracts, reviews, etc. and the P6 schedule requirements. There are different project types based on the department/agency, authorization, and dollar amount of the project.

**R & R:** Repairs and Renovations Funding for R&R from appropriations

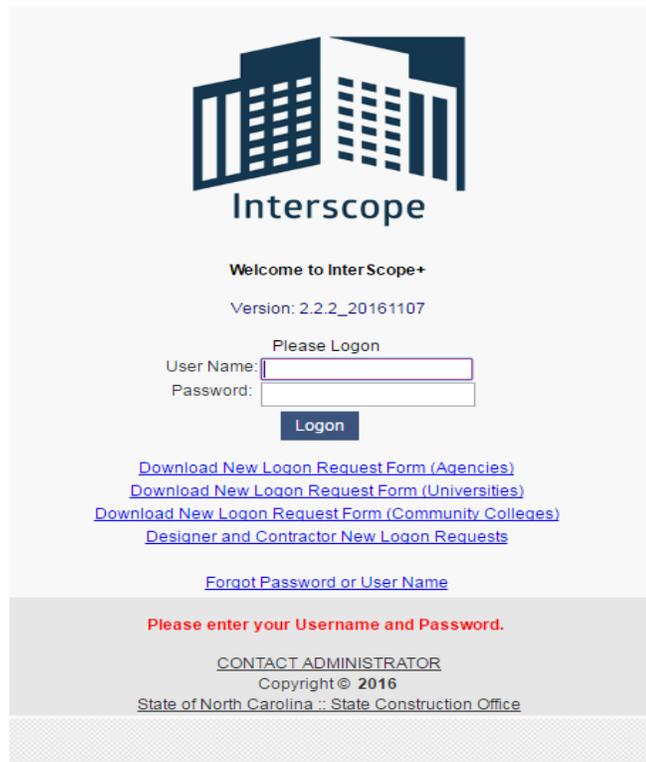
**R&R Debt:** Funding for R&R from State Debt, such as Special Indebtedness or COPS.

**Special Project Designation:** Classification of certain projects that are not given an OSBM code-item and do not follow the typical financial controls. These include Guaranteed Energy Savings Performance Contracts, Foundation Projects, Non-Code-Item Projects, and HUB only.

**State Debt:** State Bonds, COPS, or Special Indebtedness

## III. Users, Roles and Permissions

Every user must have a username and password. If you do not have one, refer to the State Construction Office Website <http://www.interscope.nc.gov/Interscope/Logon.aspx> Download the appropriate form – Agencies; Universities; Designer/Contractors, for requesting a logon.



The image shows a web page for logging into Interscope. At the top is the Interscope logo, which consists of a stylized building icon above the word "Interscope". Below the logo, the text reads "Welcome to InterScope+", "Version: 2.2.2\_20161107", and "Please Logon". There are two input fields: "User Name:" and "Password:". Below these fields is a blue button labeled "Logon". Underneath the button are four blue hyperlinks: "Download New Logon Request Form (Agencies)", "Download New Logon Request Form (Universities)", "Download New Logon Request Form (Community Colleges)", and "Designer and Contractor New Logon Requests". Below these links is another blue hyperlink: "Forgot Password or User Name". At the bottom of the page, there is a red error message: "Please enter your Username and Password." followed by the text "CONTACT ADMINISTRATOR", "Copyright © 2016", and "State of North Carolina :: State Construction Office".

### A. 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.
- 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 InterscopePlus for this account will be sent to the email address on file.**

- 2 – Click **Submit**. A request will be sent to the InterscopePlus Administrator who will review your request, verify the information against the data in InterscopePlus, 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 InterscopePlus.**

User Logon Request

Organization

\* User Type: DESIGNER

\* Designer Name: Required

\* Designer Address: Required

\* Designer City & State: Required

\* Designer Zip: Required

\* Designer Phone #: Required

\* Designer License Type:  NCBA  NCBELS  NCBOLA  Other

\* Designer License #: Required

**IMPORTANT:** Each logon allows access to the projects contracted from one office. If your company has multiple locations, please request a separate logon for each location.

Office/Location: \_\_\_\_\_

User Profile

\* Username: Required

\* User Full Name: Required

\* User Email: Required

\* User Phone#: \_\_\_\_\_

\* Password: Required

\* Confirm Password: Required

Comments: \_\_\_\_\_

Submit Cancel

**Instructions For Designers**

Designer Users are those Companies that have engaged the State of North Carolina under contract for building projects. Designers will only be allowed to access the data available for their company.

To create a Designer Logon:

1. Select User Type of **Designer**
2. Fill in all fields for your Designer.
3. You must specify a valid Designer License from one of the following: (To obtain your Designer License #, go to the appropriate link below.)
  - [NC Board of Architecture](#)
  - [NC Board of Engineers and Land Surveyors](#)
  - [NC Board of Landscape Architects](#)
4. Fill in the remaining fields
5. Press the **Submit** button

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## B. New Account Instructions for Contractors

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

To register with Vendor Link through the eVP Electronic Vendor Portal, access the following URL and complete the Vendor Registration process:

<https://vendor.ncgov.com/vendor/login> Once you have received notification that your Vendor Link registration has been completed, you may request a logon for InterscopePlus.

Follow these steps for creating a new Contractor user account:

- 1 – Select **Contractor** in the **User Type** field. This will display the entry form.
- 2 – Click on the **Search VendorLink** button. This will display the search page.
- 3 – Enter the first 3 letters of your company name and press **Search**. This will display search results.

- INTERSCOPE NEW USER LOGON REQUEST -

**User Logon Request**

**Organization**

\* User Type: CONTRACTOR

HUB Firm: Search Vendor Portal

Contact:

**Instructions For Contractors**

Contractor Users are those Companies that have engaged the State of North Carolina under contract for building projects. Contractors will only be allowed to access the data available for their company.

**\*\* PLEASE NOTE \*\***

**CONTRACTORS MUST BE REGISTERED WITH THE ELECTRONIC VENDOR PORTAL - eVP**

**IF YOUR FIRM IS ALREADY REGISTERED, PLEASE FOLLOWING THE INSTRUCTIONS BELOW. IF NOT REGISTERED AT THE LINK BELOW.**

**Search IPS VendorLink for your company VendorLink record..**

Name:

HUB Certified? -- Select --

Address:

State:

Phone:  (999-999-9999)

Email:

Contact Person:

City:

Zip:

Search Done Reset

password:  Required password is required

\* Confirm Password:  Required Confirmation Password is Required

Comments:

Submit Cancel

2. Click Search Vendor Portal to identify your eVP registration record.
3. Find and Select your Vendor registration record.
4. Fill in the remaining fields
5. Press Submit

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.

- INTERSCOPE NEW USER LOGON REQUEST -

**User Logon Request**

**Organization**

\* User Type: CONTRACTOR

HUB Firm: Search Vendor Portal

Contact:

**Instructions For Contractors**

Contractor Users are those Companies that have engaged the State of North Carolina under contract for building projects. Contractors will only be allowed to access the data available for their company.

**\*\* PLEASE NOTE \*\***

**Search IPS VendorLink for your company VendorLink record..**

Name:

HUB Certified? -- Select --

Address:

State:

Phone:  (999-999-9999)

Email:

Contact Person:

City:

Zip:

Search Done Reset

	Company	City, State	Voice	Contact	Email	HUB Type
<a href="#">SELECT</a>	2nd Generation Lawn Services	Wake Forest, NC	919-435-7371	Rodman, Carrie	carrie@2ndgenlawn.com	Not a HUB
<a href="#">SELECT</a>	2H Generation Builders LLC	Kernersville, NC	336-414-9276	McIntosh, Stephanie	stephmd@yahoo.com	Not a HUB
<a href="#">SELECT</a>	ACCURATE GENERAL CONTRACTORS	CHICAGO, IL	(773)994-1122	NINO, WILLIAM	ACCURATEGC1@OL.COM	H (Not Certified)
<a href="#">SELECT</a>	Alcoa Power Generation Inc	Badin, NC	704-422-5610	Gill, Lydia	lydia.gill@alcoa.com	Not a HUB
<a href="#">SELECT</a>	Ashley General Contractor Companies LLC	Cary, NC	904-807-5622	Chavez, Maria P	maria@ashleygeneralcontractor.com	Not a HUB
<a href="#">SELECT</a>	AS General Contractors, LLC	Yaffown, NC	336-995-0199	Gilmore, Tibus	associates@as.com	B (Not Certified)
<a href="#">SELECT</a>	Ash General Contractors Inc	Charlotte, NC	(704)770-6389	Gonzalez, Raul	ashgc@gmail.com	H (Not Certified)
<a href="#">SELECT</a>	B&B Lawn Care/General Sub Contractor	Winston Salem, NC	336-529-5017	Fernandez, Rickey	rfernandez@live.com	B (Certified)

11 pages: (1) 2 3 4 5 6 7 8 > Last

Submit Cancel

password:  Required password is required

\* Confirm Password:  Required Confirmation Password is Required

Comments:

Submit Cancel

5. Press Submit

5 – Complete the remaining fields on the form and press **Submit**.

- INTERSCOPE NEW USER LOGON REQUEST -

User Logon Request

Organization

\* User Type:

HUB Firm:   
AR General Contracting, LLC  
3417 hunting creek dr  
pfallown, NC, pfallown, NC 27040  
Contact: Gilmore, Titus  
336-995-0199  
associaterestora@yahoo.com

**IMPORTANT:** Each logon allows access to the projects contracted from one office.  
If your company has multiple locations, please request a separate logon for each location.

Office/Location:

Instructions For Contractors

Contractor Users are those Companies that have engaged the State of North Carolina under contract for building projects.  
Contractors will only be allowed to access the data available for their company.

**\*\* PLEASE NOTE \*\***

**CONTRACTORS MUST BE REGISTERED WITH THE ELECTRONIC VENDOR PORTAL- eVP**

IF YOUR FIRM IS ALREADY REGISTERED, PLEASE FOLLOWING THE INSTRUCTIONS BELOW.  
IF NOT, REGISTER AT THE LINK BELOW.

PLEASE WAIT UNTIL RECEIVING A CONFIRMATION FROM eVP BEFORE REQUESTING AN INTERSCOPE LOGON.

VENDOR REGISTRATION TYPICALLY TAKES 1-2 BUSINESS DAYS.

To register, go to the eVP site and click on "Register Now":  
<https://vendor.nc.gov.com/vendor/login>

To create a Contractor Logon:

1. Select User Type of Contractor
2. Click **Search Vendor Portal** to identify your eVP registration record.
3. Find and **Select** your Vendor registration record.
4. Fill in the remaining fields
5. Press **Submit**

User Profile

\* Username:

\* User Full Name:

\* User Email:

\* User Phone#:

\* Password:

\* Confirm Password:

Comments:

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*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 InterscopePlus for this account will be sent to the email address on file.*

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

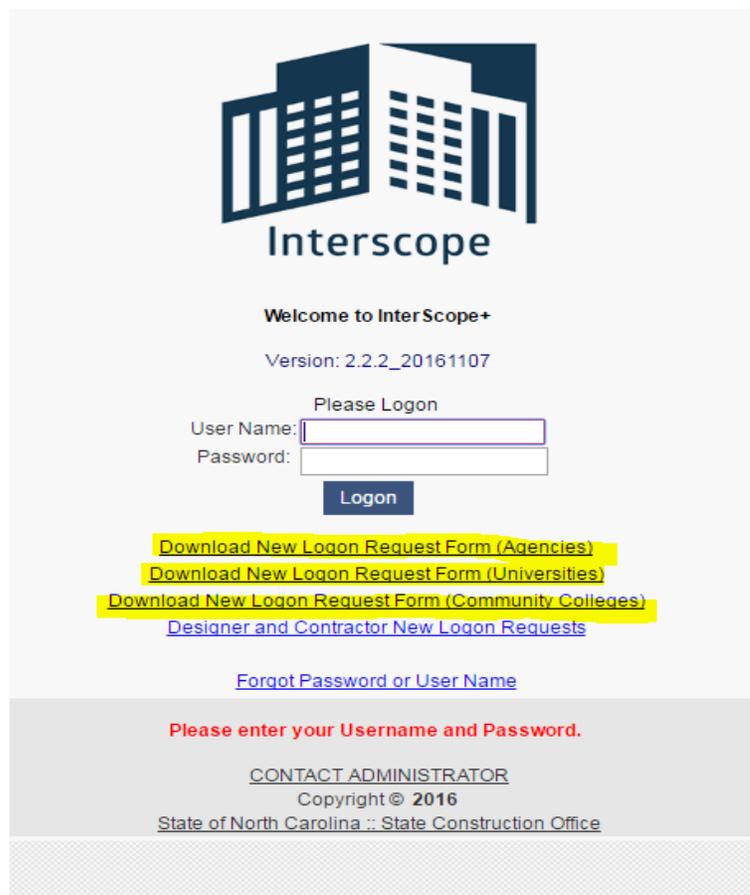


**Note: user account cannot be established for any contractor that does not have prior or current approved and active construction projects setup in InterscopePlus.**

## C. New Account Instructions for Owner Agencies

Follow these steps for creating a new Agency, Community College or University user account:

- 1 – At the logon screen, download the appropriate request form and completely fill it out.
- 2 – Each Agency and/or Department should have one person designated to review and approve the requested roles/permissions.



The screenshot shows the InterscopePlus login interface. At the top is the Interscope logo, which consists of a stylized building icon above the word "Interscope". Below the logo, the text reads "Welcome to InterScope+" and "Version: 2.2.2\_20161107". The login section is titled "Please Logon" and contains two input fields: "User Name:" and "Password:". Below these fields is a blue "Logon" button. Underneath the button are three yellow-highlighted links: "Download New Logon Request Form (Agencies)", "Download New Logon Request Form (Universities)", and "Download New Logon Request Form (Community Colleges)", followed by a blue link "Designer and Contractor New Logon Requests". Below these links is a blue link "Forgot Password or User Name". At the bottom of the form area, there is a red error message: "Please enter your Username and Password." Below the error message is the text "CONTACT ADMINISTRATOR", "Copyright © 2016", and "State of North Carolina :: State Construction Office".

When the InterscopePlus system administrator creates an SCO or Owner-Agency user, the user is assigned one or more roles such as Project Manager, or Capital Project Coordinator (CPC), or Financial Manager. Each role allows the user to access specific information and perform specific actions within the system. The Menu options shown on the page header may vary based on the Role or Roles assigned to the user. As an example, a Project Manager may be able to view information only for projects within their agency or institution.

Permissions are part of roles, and determine whether the Role can add, change, delete, or only view the data on a given screen. The Project Manager role can allow the user to view the funding sources for a project but not be able to change them, but the user can change Milestone dates.

A user can have more than one Role, depending on their job requirements, and Roles can be added or deleted as job requirements change. The System Administrator must make those changes, based on requests from the appropriate management level.

This manual does not attempt to identify role requirements for each type of interaction.

3 – Once the completed form has been approved, submit to the System Administrator at [Interscope@doa.nc.gov](mailto:Interscope@doa.nc.gov).

4 – The administrator will notify the requestor when the user has been set up.

## IV. Navigation

### A. Home

Each user has a home screen and will have tabs for 'System Notices' and 'My Favorites' that will allow them to go directly to a program, project, or contract they want to work on. Depending on your position or role, you may have additional clipboards such as 'My Projects', 'Change Orders in Progress' or 'Funds Transfers'.

### B. Searches

Much of the navigation in InterscopePlus is accomplished using Searches. You can enter as few or as many criteria as you wish. The more criteria that are entered, the more specific the results and so the shorter the list of returned data. It is possible to put in so many criteria that the search will return 0 results. If this happens, try broadening the search criteria by removing some. If changing search criteria, be sure to clear any unneeded items, or . Scroll to the bottom of the results list and on the left side it will show how many pages of results there are. Search results can be exported to Excel using the  button in the lower right hand corner of the screen.

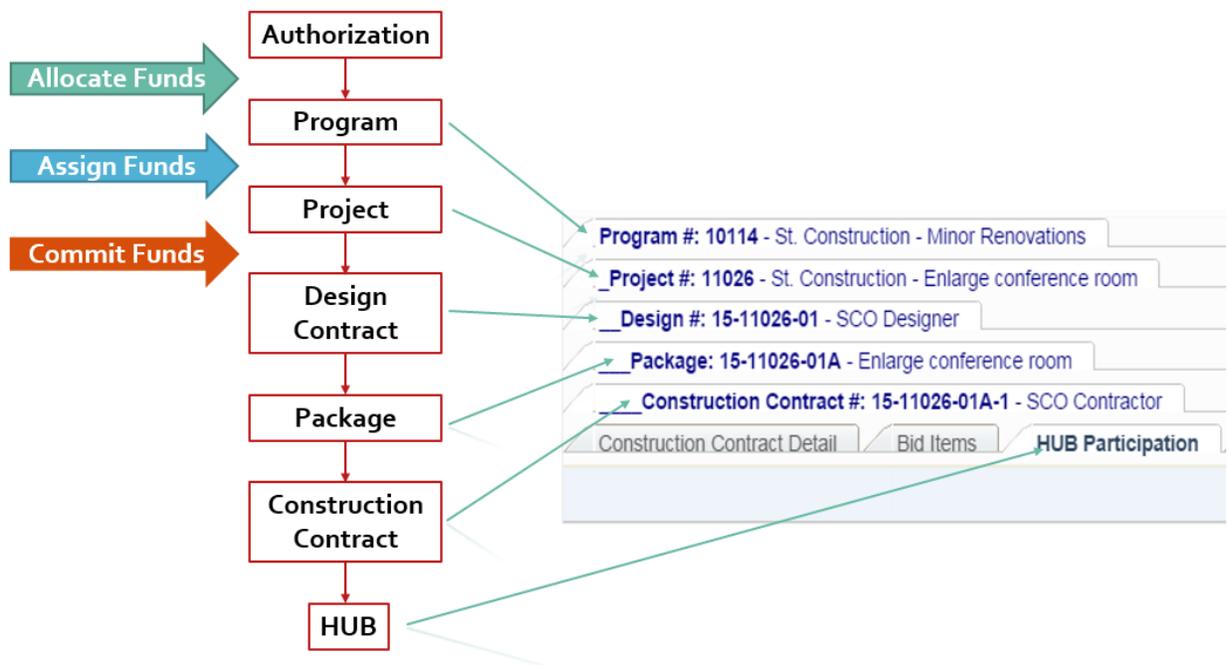
### C. Hyperlinks

Examples shown in this manual are basic navigation. Throughout the software there are alternate ways of navigating, many of which utilize hyperlinks. These are shown in blue and are intended to be short cuts to speed up navigation.

## V. Entering Information

### A. Hierarchy of Data

The data in Interscope follows the typical life cycle of a capital project. It starts with the authorization and funding to do the project. The funding is allocated to a program, and the project is created in the program. The project is designed and then constructed, and HUB is reported on the construction contract. Data must be entered in order, i.e. a project must exist before you can enter a design contract for it, etc.



### B. Authorization

Authorizations will typically be entered by a senior level person within a State Agency/ Department, by the System Office for Community Colleges or by UNC General Administration for Universities. Your user profile, based on your login information, should autofill the Department.

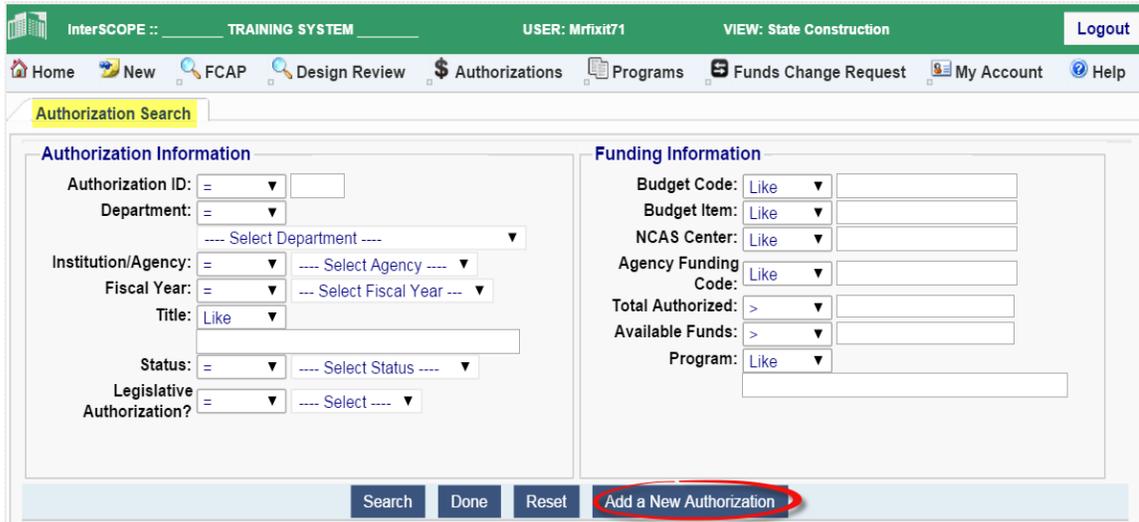
**Note: University:** The General Administration office will create all authorizations and programs. Campuses can then create projects once the authorization and program have been created.

**Community Colleges:** The System Office will create all authorizations, programs and projects.

From the Home screen, select Authorizations>Authorization.



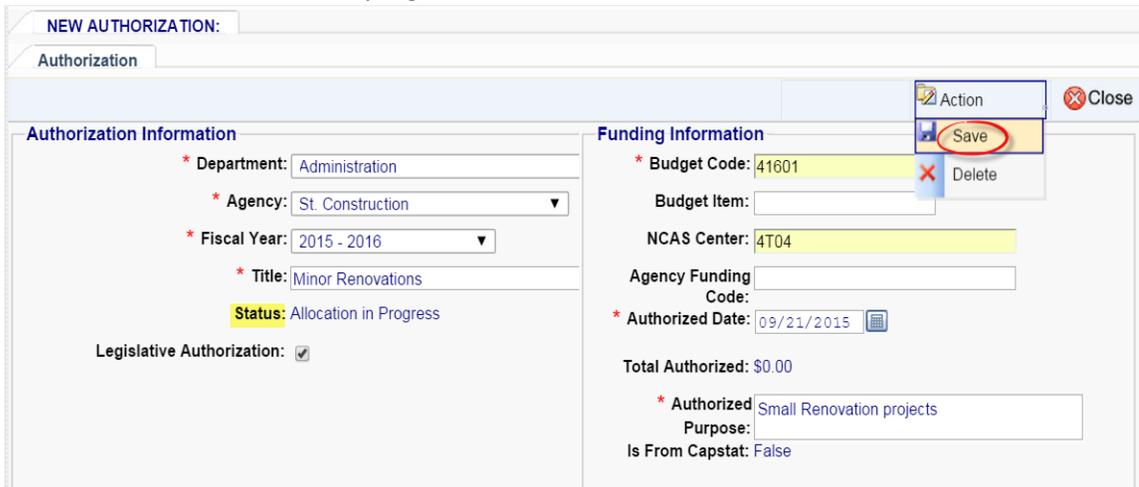
This will bring up the Authorization Search screen. Select the “Add a New Authorization” button.



Fill in the appropriate information. Required fields are marked with asterisks and have a red border. Budget Item **OR** NCAS Center is required, but not both, however all three may be



entered. Click on . Note that the *Status* is “Allocation in Progress”. This will not change until all funds are allocated to programs.



Once saved, the Authorization detail tabs show up on the lower part of the screen. There is also a system assigned Authorization #. Select the ‘Authorization Item Detail’ tab and enter the

amount of the authorization in the proper fund source(s). When all fund sources have been



Authorization # : 1041 - St. Construction - Minor Renovations

Authorization

**Authorization Information**

\* Department: Administration

\* Agency: St. Construction

\* Fiscal Year: 2015 - 2016

\* Title: Minor Renovations

Status: Allocation in Progress

Legislative Authorization:

**Funding Information**

\* Budget Code: 41601

Budget Item:

NCAS Center: 4T04

Agency Funding Code:

\* Authorized Date: 09/21/2015

Total Authorized: \$0.00

\* Authorized Purpose: Small Renovation projects

Is From Capstat: False

Comments

Authorization Item Summary | **Authorization Item Detail** | Program Allocation | Audit Trail - Authorized | Audit Trail - Allocated | Uploads

Source	Orig. C-I-C	Original Authorization Amount	Approved Changes	Pending Changes	Proposed Authorization Amount	Current Allocated Amount	Assigned To Projects	Available To Assign
General Fund	41601-4T04	\$ 750,000.00	\$ 0.00	\$ 0.00	\$ 750,000.00	\$ 0.00	\$ 0.00	\$ 0.00
Non-General Fund	41601-4T04	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Non-State Debt	41601-4T04	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
R&R General Fund	41601-4T04	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
R&R State Debt	41601-4T04	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
State Debt	41601-4T04	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
<b>Totals</b>		<b>\$ 750,000.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 750,000.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>	<b>\$ 0.00</b>

6 Items found Export

**You will need to create a program and allocate funds before the authorization will become "Active" for use.**

### C. Creating a Program

At the top of your home page, select Programs>Program to bring up the Program Search Screen.

InterscopePlus TRAINING SYSTEM USER: Mrfixit71 VIEW: State Construction Logout

Home New FCAP Design Review Authorizations **Programs** Funds Change Request My Account Help

New Projects

System Notices My Favorites Active Design Contracts Active Con

- Cost Estimate
- Program**
- \_Project
- \_Project (legacy funding only)
- \_Design Contract
- \_Package
- \_Construction Contract
- \_Change Order

0 found

9/21/2015 8:23:00 AM InterscopePlus 1.3B\_TRAIN Copyright © 2015 - State of North Carolina

State Construction [Report a Problem](#)

If you are not sure if a Program already exists, perform a search for it by entering any search criteria that might be applicable. If the Program does not exist, click [Add a New Program](#)

Program Search

Department: = ▾  
---- Select Department ---- ▾

Institution/Agency: = ▾ ---- Select Agency ---- ▾

Fiscal Year: = ▾ --- Select Fiscal Year --- ▾

Program ID: Like ▾

Program Name: Like ▾

Available to Transfer: = ▾

Alternate Name: Like ▾

Budget Code: Like ▾

Budget Item: Like ▾

NCAS Center: Like ▾

Status: = ▾ Active ▾

Search Done Reset **Add a New Program**

The New Capital Program screen comes up. Enter the appropriate information. Required fields are marked with asterisks and have a red border. The *Program Name* should be the same as the *Authorization Title*. The *Alternate Name* is not required but it is for the local Agency/Institution

to use if they refer to the Program by a different name. Then



NEW CAPITAL PROGRAM:

Program

Action Close

\* Department: Administration ▾

\* Agency: St. Construction ▾

\* Fiscal Year: 2015 - 2016 ▾

Program ID:

\* Program Name: Minor Renovations

Alternate Name:

Status: Active

Remarks:

Action Save Close

You should now see the Program Screen with the new Program # and tabs below it. The Program # is generated by the system and cannot be changed.

Program added successfully.

Program # 12153 - St. Construction - Minor Renovations

Program Program Funding Projects Assign Amounts to Projects Program Closeout

Action Close

\* Department: Administration ▾

\* Agency: St. Construction ▾

\* Fiscal Year: 2015 - 2016 ▾

Program ID: 12153

\* Program Name: Minor Renovations

Alternate Name:

Status: Active

Remarks:

Action Save Close

## D. Allocating Funds

Funds are allocated from an Authorization to one or more Programs. If there are multiple fund sources for an authorization, make sure that you select the one you want to allocate. You must perform a separate allocation for each fund source to each Program.

**NOTE:** All funds must be allocated to change the Authorization status from 'Allocation in Progress' to 'Active'

Start by selecting Authorizations>Authorization.



This will bring you to the Search screen. Enter appropriate data and  for the authorization.

**Authorization Information**

Authorization ID: [dropdown] [input]  
Department: [dropdown] [input]  
Institution/Agency: [dropdown] Administration  
Fiscal Year: [dropdown] 2015 - 2016  
Title: [dropdown] Like  
Status: [dropdown] ---- Select Status ----  
Legislative Authorization?: [dropdown] ---- Select ----

**Funding Information**

Budget Code: [dropdown] Like [input]  
Budget Item: [dropdown] Like [input]  
NCAS Center: [dropdown] Like [input]  
Agency Funding Code: [dropdown] Like [input]  
Total Authorized: [dropdown] > [input]  
Available Funds: [dropdown] > [input]  
Program: [dropdown] Like [input]

[Search] [Done] [Reset] [Add a New Authorization]

The search will return a list, below, of all Authorizations that meet the criteria. Select the appropriate one by clicking on the 'SELECT', *Auth ID* or *Code-Item-Center* for that Authorization.

**Authorization Search**

**Authorization Information**

Authorization ID: [dropdown] [input]  
Department: [dropdown] [input]  
Institution/Agency: [dropdown] Administration  
Fiscal Year: [dropdown] 2015 - 2016  
Title: [dropdown] Like  
Status: [dropdown] ---- Select Status ----  
Legislative Authorization?: [dropdown] ---- Select ----

**Funding Information**

Budget Code: [dropdown] Like [input]  
Budget Item: [dropdown] Like [input]  
NCAS Center: [dropdown] Like [input]  
Agency Funding Code: [dropdown] Like [input]  
Total Authorized: [dropdown] > [input]  
Available Funds: [dropdown] > [input]  
Program: [dropdown] Like [input]

[Search] [Done] [Reset] [Add a New Authorization]

SL No.	Auth ID	Title	Code-Item-Center	Agency Funding Code	Institution / Agency	Auth Total	Status
1	1041	Minor Renovations	41601-4T04		St. Construction	\$750,000.00	Allocation in Progr

1 Authorization(s) found [Export]

That will bring you to the Authorization Information screen. Select the 'Program Allocation' tab, then the 'Add Allocation'.

Authorization

Action Close

**Authorization Information**

\* Department: Administration  
 \* Agency: St. Construction  
 \* Fiscal Year: 2015 - 2016  
 \* Title: Minor Renovations  
 Status: Allocation in Progress  
 Legislative Authorization:

**Funding Information**

\* Budget Code: 41601  
 Budget Item:  
 NCAS Center: 4T04  
 Agency Funding Code:  
 \* Authorized Date: 09/21/2015  
 Total Authorized: \$750,000.00  
 \* Authorized Purpose: Small Renovation projects  
 Is From Capstat: False

Comments

Authorization Item Summary | Authorization Item Detail | **Program Allocation** | Audit Trail - Authorized | Audit Trail - Allocated | Uploads

Source	Orig. C-I-C	Current Authorization (Orig + Appr Changes)	Pending Changes	Available To Allocate	Allocations
General Fund	41601-4T04	\$ 750,000.00	\$ 0.00	\$ 750,000.00	<a href="#">Add Allocation</a>
Non-General Fund	41601-4T04	\$ 0.00	\$ 0.00	\$ 0.00	
Non-State Debt	41601-4T04	\$ 0.00	\$ 0.00	\$ 0.00	
R&R General Fund	41601-4T04	\$ 0.00	\$ 0.00	\$ 0.00	
R&R State Debt	41601-4T04	\$ 0.00	\$ 0.00	\$ 0.00	
State Debt	41601-4T04	\$ 0.00	\$ 0.00	\$ 0.00	
<b>Totals</b>		<b>\$750,000.00</b>	<b>\$0.00</b>	<b>\$750,000.00</b>	

6 Authorization Items found Add New Program

This will bring up a Program Search. Enter the appropriate information and .

\_Authorization #: 1041 - St. Construction - Minor Renovations

Authorization

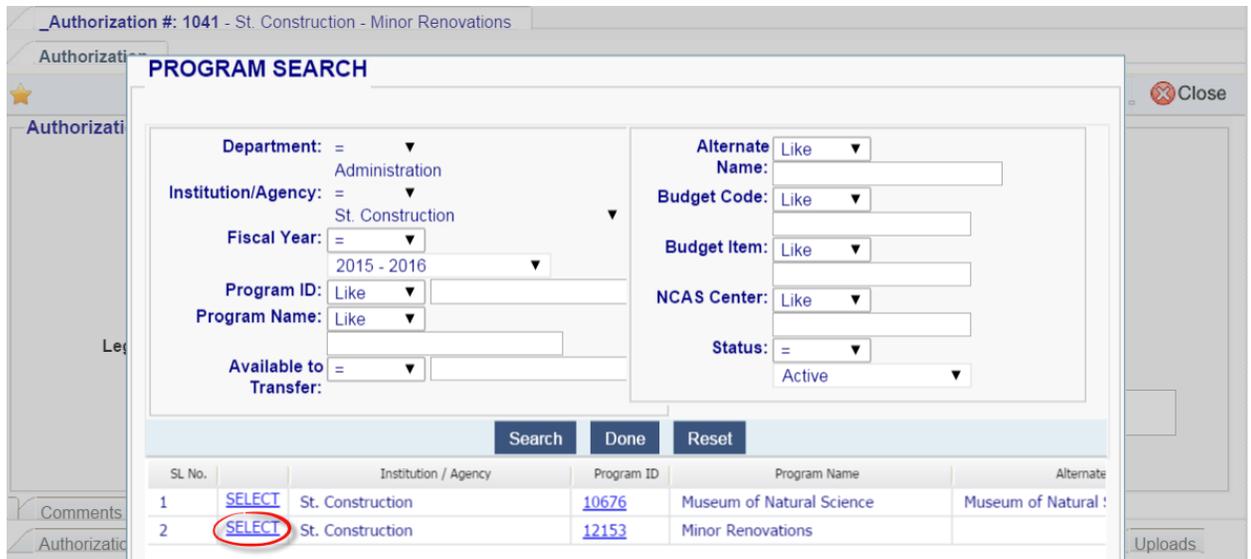
PROGRAM SEARCH

Department: = Administration  
 Institution/Agency: = St. Construction  
 Fiscal Year: = 2015 - 2016  
 Program ID: Like  
 Program Name: Like  
 Available to Transfer: =

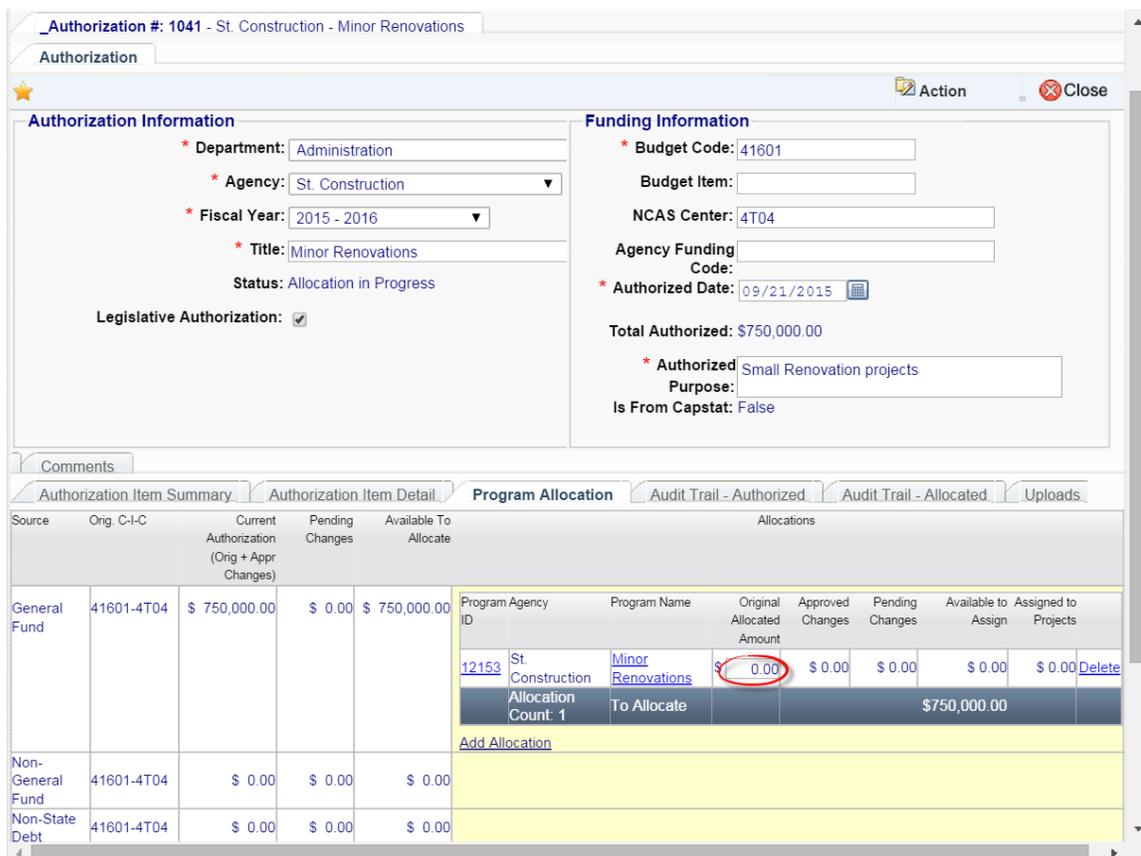
Alternate Name: Like  
 Budget Code: Like  
 Budget Item: Like  
 NCAS Center: Like  
 Status: = Active

Done Reset

From the search results, 'Select' the desired Program.



This returns you to the Authorization Program Allocation screen with the selected program displayed, ready for you to enter the appropriate dollar amount to be allocated.



Enter the amount to allocate to the Program and click on . You will then see that the funds are allocated, they are available to assign, and because all funds are now allocated, that the Authorization Status is "Active".

Authorization update successful.  
Fund Allocations successful.

Authorization # 1041 - St. Construction - Minor Renovations

Authorization

Action Close

**Authorization Information**

\* Department: Administration

\* Agency: St. Construction

\* Fiscal Year: 2015 - 2016

\* Title: Minor Renovations

Status: Active

Legislative Authorization:

**Funding Information**

\* Budget Code: 41601

Budget Item:

NCAS Center: 4T04

Agency Funding Code:

\* Authorized Date: 09/21/2015

Total Authorized: \$750,000.00

\* Authorized Purpose: Small Renovation projects

Is From Capstat: False

Comments

Authorization Item Summary Authorization Item Detail **Program Allocation** Audit Trail - Authorized Audit Trail - Allocated Uploads

Source	Orig. C-I-C	Current Authorization (Orig + Appr Changes)	Pending Changes	Available To Allocate	Allocations						
General Fund	41601-4T04	\$ 750,000.00	\$ 0.00	\$ 750,000.00	Program Agency ID	Program Name	Original Allocated Amount	Approved Changes	Pending Changes	Available to Assign	Assigned to Projects
					12153	St. Construction Minor Renovations	\$ 750,000	\$ 0.00	\$ 0.00	\$ 750,000.00	\$ 0.00
					Allocation Count: 1 To Allocate					\$ 0.00	

Add Allocation

### E. Creating a Project

**NOTE: The Project must be created under the Program that will provide the funding for it.**

Projects will be created by the Agency, Community College or University "Owner." At the top of your home page, select Programs>Program to bring up the Program Search Screen.

IntersCOPE :: TRAINING SYSTEM USER: Mfrfixit71 VIEW: State Construction Logout

Home New FCAP Design Review Authorizations **Programs** Funds Change Request My Account Help

New Projects

System Notices My Favorites Active Design Contracts Active Con

TYPE

0 found

9/21/2015 9:06:36 AM InterscopePlus 1.3B\_TRAIN Copyright © 2015 - State of North Carolina

- Cost Estimate
- Program**
- \_Project
- \_Project (legacy funding only)
- \_\_Design Contract
- \_\_Package
- \_\_Construction Contract
- \_\_Change Order

Report a Problem

Enter the appropriate information and

**Program Search**

Department: =  Administration

Institution/Agency: =  St. Construction

Fiscal Year: =  2015 - 2016

Program ID: Like

Program Name: Like

Available to Transfer: =

Alternate Name: Like

Budget Code: Like

Budget Item: Like

NCAS Center: Like

Status: =  Active

**Search** Done Reset Add a New Program

The search results will show all Programs that meet your criteria. 'Select' the Program you want.

**Program Search**

Department: =  Administration

Institution/Agency: =  St. Construction

Fiscal Year: =  2015 - 2016

Program ID: Like

Program Name: Like

Available to Transfer: =

Alternate Name: Like

Budget Code: Like

Budget Item: Like

NCAS Center: Like

Status: =  Active

**Search** Done Reset Add a New Program

SL No.	Institution / Agency	Program ID	Program Name	Alternate Name	Status
1	St. Construction	<a href="#">10676</a>	Museum of Natural Science	Museum of Natural Science	ACTIVE
2	St. Construction	<a href="#">12153</a>	Minor Renovations		ACTIVE

You will now be in the Program. Select the 'Projects' tab, then the 'Add Project' button.

**Program #:** 12153 - St. Construction - Minor Renovations

Program Program Funding **Projects** Assign Amounts to Projects Program Closeout

SL No.	Project ID	Agency Project Code	Project Title	Status	Estimated Cost	Estimated
Total					\$0.00	

0 Projects found

Now you are on the New Capital Project screen.

Project Information - **Basic**

Program: 12244 - LeaAnne's Test Program

Department: Administration

Agency: State Construction Office

Project ID: (Auto)

Title: LeaAnne's First Test Project

Description:

Agency Project Code:

Status: (Auto)

Project Information - **Advanced**

Project Type:

Standard Project

Performance Contract

Foundation Project

Non-Code-Item Project

Special Project Designation:

Fiscal Year Funded: 2018 - 2019

Financial Controls: On

Bypass Financial Controls?

Estimated Cost

Estimated Project Cost: (Auto)

Total Amount Assigned: (Auto)

Estimated Need: (Auto)

04/20/16 9:29:25 AM InterscopePlus 2.1\_20160824 Copyright © 2016 - State of North Carolina - Department of Administration - State Construction Office Report a Problem

Enter the Project Information – Basic, and Advanced as appropriate. Required fields are marked with asterisks and have a red border. The *Agency Project Code* is optional.

## Determining the Special Project Designation

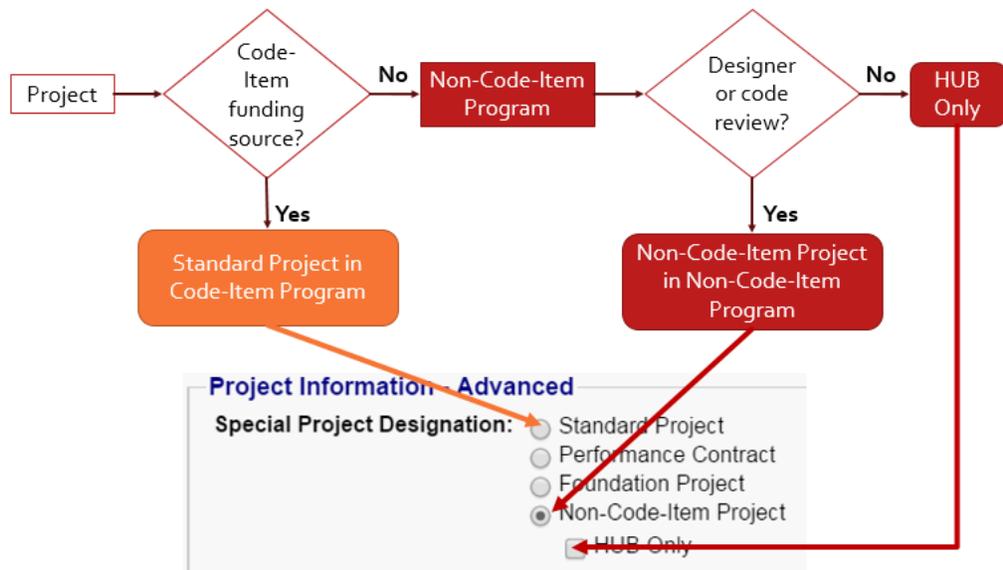
In the Advanced block, select the appropriate type of project under *Special Project Description*.

- **Standard Project:** The default type that will apply to most Capital projects.
- **Performance Contract:** This applies to Guaranteed Energy Savings Performance Contracts
- **Foundation Projects:** This applies primarily to UNC System projects that are designed/constructed by a foundation but must be reviewed by SCO
- **Non-Code-Item Projects:** This is for projects that do not go through the normal State authorization process, such as county funded projects at Community Colleges, or projects completed with operating funds. This will also be used for reporting small project HUB information. An *Estimated Project Completion date*, *Funding Source*, *Estimated Cost* and *Fiscal Year Funded* must be entered. These fields appear for entry only when the Non-Code-Item type is selected.

Disregarding Performance Contracts and Foundation Projects, the proper sequence for determining what the project designation should be is:

- Does it have a capital code-item funding source? If so, it will be a standard project, regardless of cost estimate.
- If it doesn't have a capital code-item funding source, then it belongs in a Non-Code-Item Program.

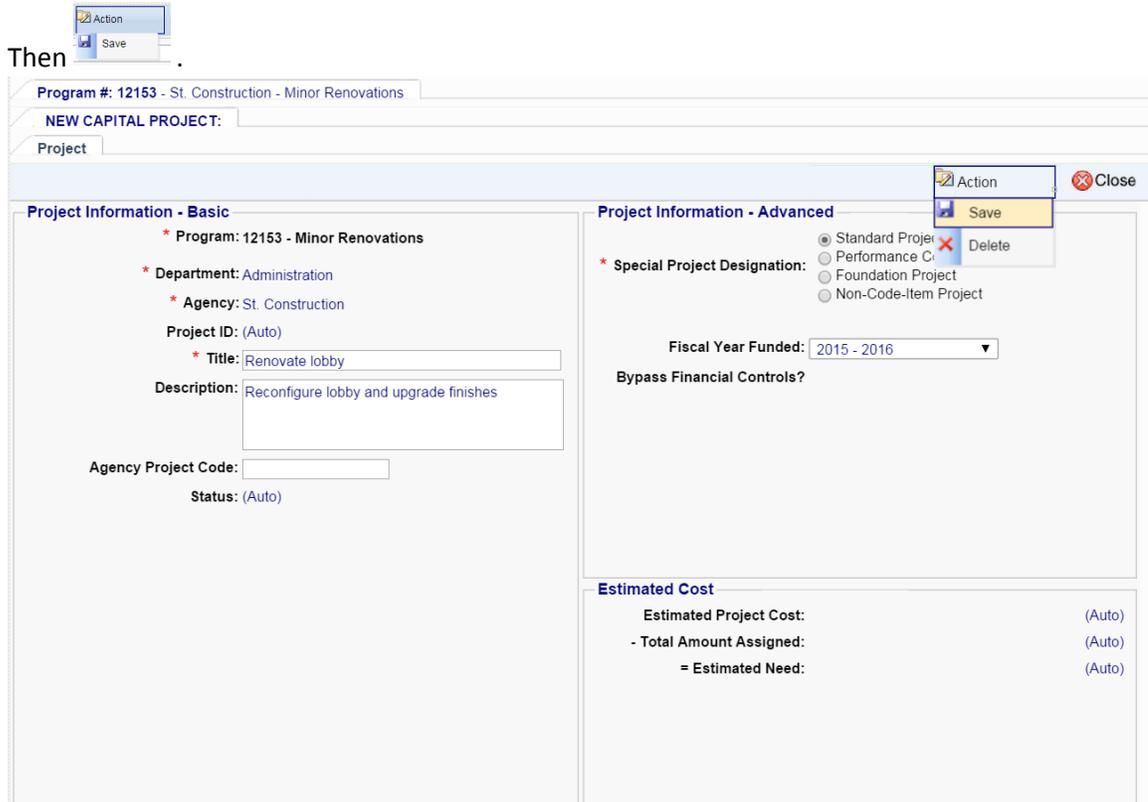
- If it will have a design contract or require any review by SCO (including code only), regardless of cost estimate, it will be a Non-Code-Item project.
- If there will be no SCO review and no design contract, and it is being entered only to meet the requirements for reporting HUB data, it is a HUB only project.



Standard Projects have financial controls, which require funds be assigned to the project and commitments cannot exceed funds assigned. Non-Code-Item Projects do not have financial controls and funds cannot be assigned to them.

**NOTE: Once you have selected the project designation and saved, it cannot be changed. If it is the wrong designation, it will have to be deleted and re-entered with the proper designation.**

Then  .



Program #: 12153 - St. Construction - Minor Renovations

NEW CAPITAL PROJECT:

Project

**Project Information - Basic**

- \* Program: 12153 - Minor Renovations
- \* Department: Administration
- \* Agency: St. Construction
- Project ID: (Auto)
- \* Title: Renovate lobby
- Description: Reconfigure lobby and upgrade finishes
- Agency Project Code:
- Status: (Auto)

**Project Information - Advanced**

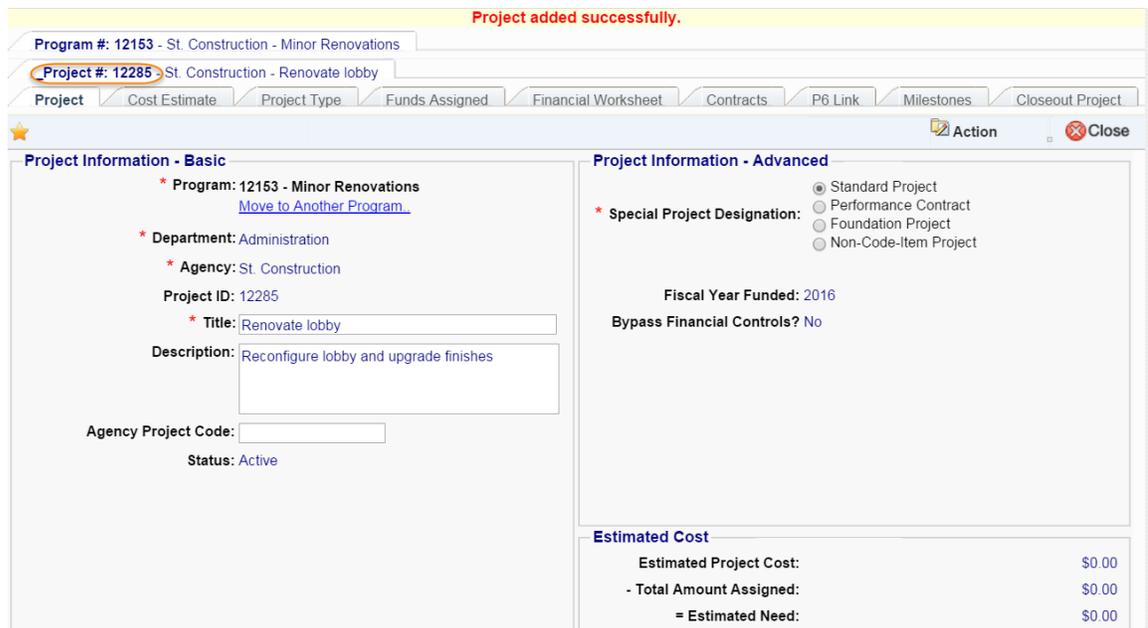
- \* Special Project Designation:
  - Standard Project
  - Performance Contract
  - Foundation Project
  - Non-Code-Item Project
- Fiscal Year Funded: 2015 - 2016
- Bypass Financial Controls?

**Estimated Cost**

- Estimated Project Cost: (Auto)
- Total Amount Assigned: (Auto)
- = Estimated Need: (Auto)

After saving, the system assigns a project number and displays all the respective Project tabs.

Project added successfully.



Program #: 12153 - St. Construction - Minor Renovations

**Project # 12285** - St. Construction - Renovate lobby

Project | Cost Estimate | Project Type | Funds Assigned | Financial Worksheet | Contracts | P6 Link | Milestones | Closeout Project

**Project Information - Basic**

- \* Program: 12153 - Minor Renovations  
[Move to Another Program.](#)
- \* Department: Administration
- \* Agency: St. Construction
- Project ID: 12285
- \* Title: Renovate lobby
- Description: Reconfigure lobby and upgrade finishes
- Agency Project Code:
- Status: Active

**Project Information - Advanced**

- \* Special Project Designation:
  - Standard Project
  - Performance Contract
  - Foundation Project
  - Non-Code-Item Project
- Fiscal Year Funded: 2016
- Bypass Financial Controls? No

**Estimated Cost**

- Estimated Project Cost: \$0.00
- Total Amount Assigned: \$0.00
- = Estimated Need: \$0.00

## F. Entering Cost Estimate

Cost Estimate, in terms of InterscopePlus, refers to the OC-25 for capital projects, or Form 3-1 for Community Colleges. If the OC-25 for the project has been certified by SCO, it will show on the separate tab for the 'Cost Estimate'. If the project name has been changed, the system may not find the OC-25 and the 'Search' feature can be used to find it. If an OC-25 does not exist, there is an option to create one. While an OC-25/Form 3-1 is required for the authorization of particular types of projects, with some exceptions cited elsewhere in this manual, some type of general cost estimate information is necessary to establish a project. General estimate information is entered as part of the process of establishing the project type described in detail in the next section.

Program #: 12153 - St. Construction - Minor Renovations  
\_Project #: 12285 - St. Construction - Renovate lobby

Project Cost Estimate Project Type Funds Assigned Financial Worksheet Contracts P6 Link Milestones Closeout Project

Close

Associate Cost Estimate with this Project

[Search](#)

Cost Estimates associated with this Project

*No Cost Estimates Found*

From the Programs tab, select Cost Estimate

Cost Estimate Search

Biennium End: [v] [ ]  
Department: [v] Educational Institutions (Universities)  
Agency: [v] NC State University  
OCF Sequence#: [v] [ ]  
Title: [v] [ ]  
Description: [v] [ ]  
Status: [v] [v]  
Revision: [v] [v]

Project Sequence#: [v] [ ]  
Submitted By: [v] [ ]  
Approved By: [v] [ ]  
Date Approved: [v] [v] [v] [ ]  
Date Submitted: [v] [v] [v] [ ]  
Package Type: [v] [ ]  
Class: [v] [ ]  
Active?: [v] [v]

Search Done Reset Add Cost Estimate

1/5/2016 4:05:08 PM InterscopePlus 2.1\_A\_20160830 Copyright © 2016 - State of North Carolina - Department of Administration - State Construction Office Report a Problem

Enter your Department and Agency and click the Search button

Cost Estimate Search

Biennium End: [v] [ ]  
Department: [v] Educational Institutions (Universities)  
Agency: [v] NC State University  
OCF Sequence#: [v] [ ]  
Title: [v] [ ]  
Description: [v] [ ]  
Status: [v] [v]  
Revision: [v] [v]

Project Sequence#: [v] [ ]  
Submitted By: [v] [ ]  
Approved By: [v] [ ]  
Date Approved: [v] [v] [v] [ ]  
Date Submitted: [v] [v] [v] [ ]  
Package Type: [v] [ ]  
Class: [v] [ ]  
Active?: [v] [v]

Search Done Reset Add Cost Estimate

1/5/2016 4:05:08 PM InterscopePlus 2.1\_A\_20160830 Copyright © 2016 - State of North Carolina - Department of Administration - State Construction Office Report a Problem

From your search results you can select a Cost Estimate or Add

Cost Estimate Search

Biennium End: [ ]  
 Department: [ Educational Institutions (Universities) ]  
 Agency: [ NC State University ]  
 OCF Sequence: [ ]  
 Title: [ Like ]  
 Description: [ Like ]  
 Status: [ ]  
 Revision: [ ]

Project Sequence: [ ]  
 Submitted By: [ Like ]  
 Approved By: [ Like ]  
 Date Approved: [ > / / ]  
 Date Submitted: [ > / / ]  
 Package Type: [ ]  
 Class: [ ]  
 Active?: [ ]

Search Done Reset Add Cost Estimate

	AGENCY	BIENNIUM	SEQUENCE	TITLE	STATUS	SO#ID#	PACKAGE TYPE	CLASS	ESTIMATED COST
1	NC State University	2007	1	<a href="#">Companion Animal Hospital (Veterinary Medical Ctr)</a>	Approved	0	Hospital	New Facilities	\$34,999,999
2	NC State University	2003	1	<a href="#">Lesage Hall roof replacement</a>	Approved	0	Dormitories	Repairs, Renofing,	\$290,865
3	NC State University	2005	1	<a href="#">Visitors' Center and Advancement Services Building</a>	Approved	0	Visitor Center	New Facilities	\$5,296,596
4	NC State University	2009	1	<a href="#">College of Engineering Facilities - Phase II (Engr. Bldg IV)</a>	Approved	0	Classroom Bldg.	New Facilities	\$90,000,000
5	NC State University	2011	1	<a href="#">JW Eisenhower Tennis Complex Expansion</a>	Approved	0	Tennis Courts/Golf	New Facilities	\$2,225,000
6	NC State University	2013	1	<a href="#">OCUP Chiller Plant Capacity Expansion</a>	Approved	0	General Bldg.	Major Renovations	\$3,508,000
7	NC State University	2017	1	<a href="#">Case Commons Residence Hall</a>	Approved	11649	Residence Hall - New	New Facilities	\$15,000,000
8	NC State University	1987	1	<a href="#">BIOTECHNOLOGY FAC. - RIDGICK HALL</a>	Approved	0	Science/Research Bldg.	Major Renovations	\$973,200
9	NC State University	2015	1	<a href="#">Cox Hall Renovations</a>	Approved	11315	General Bldg.	New Facilities	\$2,237,000
10	NC State University	2015	2	<a href="#">Batherson Hall</a>	Approved	11624	Office Space	Major Renovations	\$2,300,000

3 pages: [ 1 ] [ 2 ] [ 3 ] [ 4 ] [ 5 ] [ 6 ] [ 7 ] [ 8 ] [ > ] [ Last ]

15/2016 4:05:08 PM InterscopePlus 2.1-A\_20160830 Copyright © 2016 - State of North Carolina - Department of Administration - State Construction Office

Add Selected Cost Estimates Export Report a Problem

You can add selected cost estimates as well as export this data.

To add a Cost Estimate, you must complete the fields in red.

ADD COST ESTIMATE

Cost Estimate

Instructions

1. Complete the Cost Estimate Description section
2. Complete the Detailed Estimated Cost Breakdowns section by downloading and completing the OC-25 Worksheet using the link that is provided
3. Attach the completed OC-25 Worksheet using Upload Supporting Documentation button
4. Enter the final TOTAL ESTIMATED PROJECT COSTS from LINE 32 on the OC-25 Worksheet
5. Use Action-- Save to record the Cost Estimate
6. Use Action-- Submit to submit the Cost Estimate for review and approval

Cost Estimate Description

Cost Estimate#: (Auto)

\* Biennium End: 2017

\* Department: [ Select Department ]

\* Agency: [ Select Agency ]

\* Title: [ ]

\* City or Location: [ ]

\* Description: [ Attach additional data as necessary to indicate need, size, function of improvements as well as master plan. Verify if compliance with GS 143-135.35 - 143-135.40, Sustainable, Energy Efficient Buildings, is required. ]

Cost Estimate Class: Code Compliance

\* Construction Type: Undetermined

Status: [ ]

Active:

Submitted By: [ ]

Submitted: [ ]

Approved By: [ ]

Approved: [ ]

Revision: 3

Detailed Estimated Cost Breakdowns

1. Download and complete the Proposed Repair & Renovation Or Capital Improvement Project Worksheet (OC-25)
2. Upload the completed Worksheet and any supporting documentation
3. Enter the Total:

Upload Supporting Documentation

DESCRIPTION	FILE NAME	UPLOADED BY	DATE

Other Estimated Costs

Calculate using:  Percentage  Total

- DESIGN FEE:  % of Estimated Construction Costs 0
- PRECONSTRUCTION COSTS:  % of Estimated Construction Costs [1% for CM@Risk] 0
- COMMISSIONING:  % (0.5% simple; 1.0% moderate; 1.5% complex) 0
- SPECIAL INSPECTION MATERIALS:  % (1.25% estimated) 0
- SUSTAINABILITY:  % (3% LEED Gold, 2% LEED Silver) 0
- ADVANCE PLANNING:  % of Estimated Construction Costs - includes programming, feasibility, analysis) 0
- CONTINGENCIES:  % of Estimated Construction Costs (3% New or 5% RAR) 0

ESTIMATED COSTS: (Estimated Construction Costs + Design Fee + Preconstruction Costs + Commissioning + Special + Sustainability + Advance Planning + Contingencies)

ESCALATION COST INCREASE: (Total of Estimated Construction Costs X Escalation %) (From Est. Date to mid-point of construction) =  months General: 0-5 months- 0.00

Total Estimated Project Cost

TOTAL ESTIMATED PROJECT COSTS [Note: Rounded to the nearest \$1000] - (Estimated Costs + Escalation Cost Increase):

\* Attach basis and justification for estimate, include description, quantities, units, special features, similar cost on recent projects, etc.  
\*\* Include items such as grading, roads, walks, parking, etc.  
\*\*\* Attach explanation of any special building, mechanical, or electrical service requirements with appropriate distance to existing buildings, water, gas, electrical or other utility service.

9/15/2016 4:22:03 PM InterscopePlus 2.1.A\_20160830 Copyright © 2016 - State of North Carolina - Department of Administration - State Construction Office [Report a Problem](#)

Click on this link to open the OC-25

### Detailed Estimated Cost Breakdowns

1. Download and complete the [Proposed Repair & Renovation Or Capital Improvement Project Worksheet \(OC-25\)](#)
2. Upload the completed Worksheet and any supporting documentation
3. Enter the Total:

The screen will open to the OC-25 Template

## Files



[OC-25-Template 9-2016.xlsx](#)

XLS • 17.8 KB

[Download](#)

## Details

This resource is related to:

Forms

State Construction Office

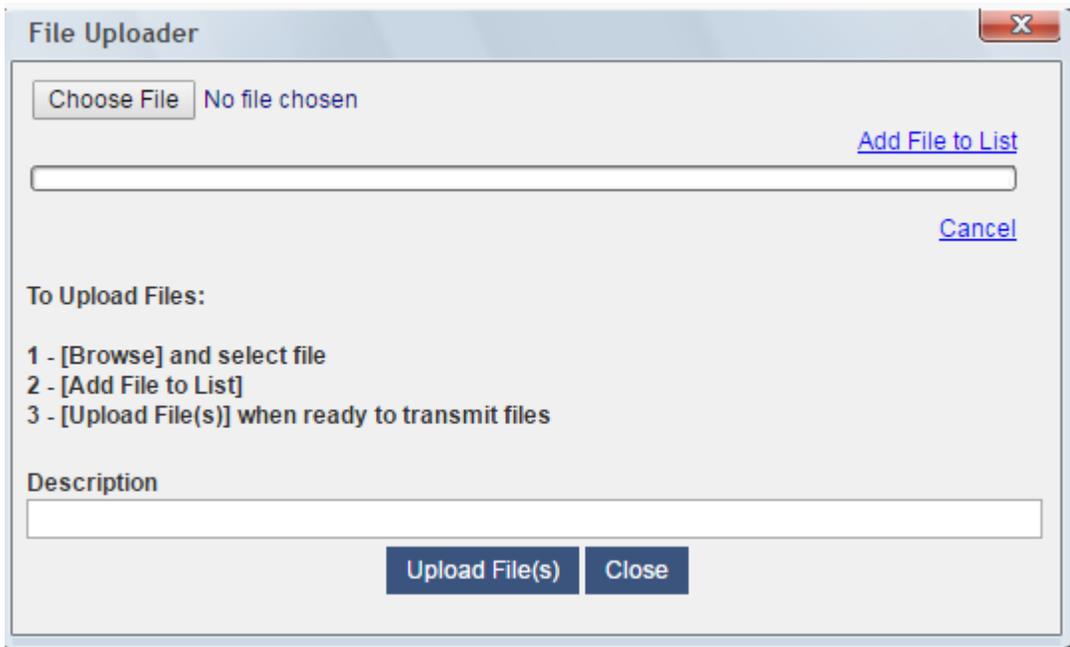
Sample of the OC-25 Worksheet

STATE OF NORTH CAROLINA - DEPARTMENT OF ADMINISTRATION							Form OC-25	
STATE CONSTRUCTION OFFICE							(Rev 09/16)	
PROPOSED REPAIR & RENOVATION OR CAPITAL IMPROVEMENT PROJECT								
BIENNIUM 2015 - 2017								
DEPARTMENT and DIVISION:						DATE:		
PROJECT IDENTIFICATION:								
PROJECT CITY or LOCATION:								
PROJECT DESCRIPTION & JUSTIFICATION: (Attach add'l data as necessary to indicate need, size, function of improvements as well as a master plan.)								
(Definitions/explanations are provided on pg 2 to assist in completion of this form.)								
CURRENT ESTIMATED CONSTRUCTION COST					QTY	UNIT	COST PER UNIT	TOTAL
A.	Land Requirement							\$0
B.	Site Preparation							
	1. Demolition							\$0
	2. Site Work							\$0
C.	Construction							
	1. Utility Services							\$0
	2. Building Construction (new space)							\$0
	3. Building Construction (existing)							\$0
	4. Plumbing (new space)							\$0
	5. HVAC (new space)							\$0
	6. Electrical (Includes TV & Radio Studio)							\$0
	7. Fire Supression and Alarm Systems							\$0
	8. Telephone, Data, Video							\$0
	9. Associated Construction Costs							\$0
	10. Other:							\$0
D.	Equipment							
	1. Fixed							\$0
	2. Moveable							\$0
<b>Total Cost of Work</b>					<b>Enter this total in InterSCOPE on Line 3: "Enter the Total"</b>			<b>\$0</b>

STATE OF NORTH CAROLINA - DEPARTMENT OF ADMINISTRATION		Form OC-25
STATE CONSTRUCTION OFFICE		(Rev 09/16)
PROPOSED REPAIR & RENOVATION OR CAPITAL IMPROVEMENT PROJECT		
BIENNIUM 2015 - 2017		
DEFINITIONS OR EXPLANATIONS		
(Items not listed below are presumed to be self-explanatory. Questions may be directed to the State Construction Office.)		
<b>Item on Form</b>	<b>Definition/Explanation</b>	
CURRENT ESTIMATED CONSTRUCTION COST	Attach basis and justification for estimate. Include description, quantities, units, special	
A. Land Requirement	Includes purchase and acquisition costs (title search, filing fees, other legal fees, etc.)	
B. 1. Demolition	Includes but may not be limited to lead and/or asbestos testing and removal, building or interior space demolition in whole or part.	
B. 2. Site Work	Includes but may not be limited to grading, excavating, poor soils and/or rock removal, utilities relocation, roads, walks, parking, streambank repairs, stormwater management, retaining walls, rainwater harvesting systems, landscaping.	
C. 1. Utility Services	Attach explanation of any special building, mechanical, or electrical service requirements with appropriate distance to existing buildings, water, gas, electrical or other utility service.	
C. 9. Associated Construction Costs	Includes but may not be limited to construction fire alarm testing, utility shut downs, utilities, signage, security, displaced parking, staging, lock cores, keys, State Construction Office charges.	
C. 10. Other	List other significant sources of cost not included elsewhere. Additional lines may be added if needed.	
PRECONSTRUCTION COSTS	Includes but may not be limited to land surveys, lead/asbestos surveys, environmental assessments, copying, postage, costs of print advertising, and destructive testing. For CM at Risk, preconstruction costs are consistent with the requirements of the preconstruction services agreement.	
CONTINGENCIES	Unanticipated or unforeseen conditions including but not limited to design error and omissions, concealed site conditions, utility conflicts, and extended overhead resulting from weather or other delay.	

Back in Interscope, you will find in the middle of page “Upload Supporting Documents”. Here you will upload your OC-25 Excel Spreadsheet

Click on Choose File



You now have a workflow button

COST ESTIMATE - Veterinarian Hospital Renovation

Cost Estimate

Workflow Action Close

**Cost Estimate Description**

Cost Estimate#: 20174800235

\* **Biennium End:** 2017

\* **Department:** Natural and Cultural Resources

\* **Agency:** NC Zoological Park

\* **Title:** Veterinarian Hospital Renovation

\* **City or Location:** Asheboro

\* **Description** (Attach additional data as necessary to indicate need, size, function of improvements as well as master plan. Verify if compliance with GS 143-135.35 - 143-135.40, Sustainable, Energy Efficient Buildings, is required.)  
 The Veterinarian Hospital is over 25 years old and needs general renovation as follows: Painting, Flooring, Cabinets and Improved Lighting. The gross floor area is approximately 13,000 sf.

\* **Cost Estimate Class:** Repairs, Reroofing, Renovations

\* **Construction Type:** Building Renov.

Status: Submitted

Active:

Submitted By: gerryparker

Submitted: 09/16/2016

Approved By: Approved:

Revision: 3

**Workflow Activity**

STEP	ACTION	ACTIVITY	ROLE	FRM/AGENCY	USER COMPLETING STEP	COMPLETED ON	ALERTED ON	RESULT	COMMENTS
1	CREATE	N	OWNER	NC Zoological Park	gerryparker	09/29/2016 08:57		Pending	
2	SUBMIT	N	OWNER	NC Zoological Park	gerryparker	09/16/2016 07:49		Submitted	
3	APPROVE	Y	SCO	St. Construction					

**Detailed Estimated Cost Breakdowns**

- Download and complete the [Proposed Repair & Renovation Or Capital Improvement Project Worksheet \(OC-25\)](#)
- Upload the completed Worksheet and any supporting documentation
- Enter the Total: \$55,000

DESCRIPTION	FILE NAME	UPLOADED BY	DATE
	<a href="#">Ba Vet Hospital Renovations.xls</a>	gerryparker	9/8/2016 8:43:18 AM

G. Determining Project Type

**NOTE: ONCE YOUR PROJECT TYPE IS SELECTED AND SAVED IT CANNOT BE CHANGED. PROJECT TYPE MUST BE COMPLETED PRIOR TO ASSIGNING FUNDS.**

The Project Type is set when a project is added to a Program.

Select the 'Project Type' tab.

**Program #:** 12153 - St. Construction - Minor Renovations  
**Project #:** 12285 - St. Construction - Renovate lobby

Project | Cost Estimate | **Project Type** | Funds Assigned | Financial Worksheet | Contracts | P6 Link | Milestones | Closeout Project

Action Close

**Attributes Determining Project Type:**

Institution and Cost
State Debt
State Land
Special Project Designation
Special Oversight
Oversight Request

**Project Type**

**Project Type:** *Not Known*  
**Override Project Type:** *No Override*

**Requirements of this Project Type:**

**P6 Schedule Requirement:** *Not Known*  
**SCO Role:** *Not Known*  
**Milestones Required:** *Not Known*

**For help see:** [Project Types Table](#)  
[Project Type State Construction Manual](#)

**General Statutes:** [GS 143-129](#) [GS 116-31-11](#) [GS 116-40-6](#)  
[GS 116-37](#) [GS 115D-9](#)

View Summary

Here you will enter information about the project which will be used to determine a Project Type, which in turn determines SCO's oversight role, what type of P6 schedule will be required, if any, and which milestones will be required. Click on the "Institution and Cost" section to start the process.

Program #: 12153 - St. Construction - Minor Renovations  
 Project #: 12285 - St. Construction - Renovate lobby

Project | Cost Estimate | **Project Type** | Funds Assigned | Financial Worksheet | Contracts | P6 Link | Milestones | Closeout Project

Action Close

**Attributes Determining Project Type:**

**Institution and Cost**

Institution / Agency: **St. Construction**

Estimated Project Costs:

**Estimated Cost**

Design Fee \$:	0.00
Construction \$:	0.00
Construction Contingency \$:	0.00
Other \$:	0.00
<b>Total \$:</b>	<b>\$0.00</b>

**Project Type**

Project Type: **Not Known**  
 Override Project Type: **No Override**

Requirements of this Project Type:

P6 Schedule Requirement: *Not Known*  
 SCO Role: *Not Known*  
 Milestones Required: *Not Known*

For help see: [Project Types Table](#)

For State Agencies and Community Colleges, the Estimated Cost must be subdivided into 4 categories: *Design Fee, Construction, Contingency, and Other.*

For UNC Institutions, the Estimated Costs must be subdivided into the 4 categories for projects estimated at more than \$2M and so subject to SCO oversight. For projects estimated at less than \$2M, the estimate may be entered in the 4 categories, or as a lump sum cost by selecting the appropriate radio button.

Program #: 11789 - UNC Pembroke - [45594-301] - Replace Boiler  
 Project #: 12283 - UNC Pembroke - Replace Dial Bldg. boiler

Closeout Project

Project | Cost Estimate | **Project Type** | Funds Assigned | Financial Worksheet | Contracts | P6 Link | Milestones

Action Close

**Attributes Determining Project Type:**

**Institution and Cost**

Institution / Agency: **UNC Pembroke**

Estimated Project Costs:

**Estimated Cost**

Design Fee \$:	\$0.00
Construction \$:	\$0.00
Construction Contingency \$:	\$0.00
Other \$:	\$0.00
<b>Total \$:</b>	<b>0.00</b>

Enter Category Estimates  
 Enter Total Estimates

**Project Type**

Project Type: **Not Known**  
 Override Project Type: **No Override**

Requirements of this Project Type:

P6 Schedule Requirement: *Not Known*  
 SCO Role: *Not Known*  
 Milestones Required: *Not Known*

For help see: [Project Types Table](#)

Enter the cost estimate for the **entire** project, regardless of the amount of funding that is available. For example, you may only have been authorized funding for advanced planning, but you will enter the estimated cost for the entire project here.

Program #: 12153 - St. Construction - Minor Renovations  
 Project #: 12285 - St. Construction - Renovate lobby

Project | Cost Estimate | **Project Type** | Funds Assigned | Financial Worksheet | Contracts | P6 Link | Milestones | Closeout Project

Action Close

**Attributes Determining Project Type:**

Institution and Cost	
Institution / Agency	St. Construction
Estimated Project Costs:	
Estimated Cost	
Design Fee \$:	10,000.00
Construction \$:	100,000.00
Construction Contingency \$:	3,000.00
Other \$:	5,000.00
Total \$:	\$118,000.00

**Project Type**

Project Type: **Not Known**  
 Override Project Type: **No Override**

Requirements of this Project Type:

P6 Schedule Requirement: *Not Known*  
 SCO Role: *Not Known*  
 Milestones Required: *Not Known*

For help see: [Project Types Table](#)

Click on each successive section under 'Attributes Determining Project Type' and complete the required information:

State Debt would only be applicable if the funding was provided through State Debt (Bonds, Certificates Of Participation (COPS), Special Indebtedness, or R&R-Debt).

State Land – This will be applicable to most projects except for Community Colleges and some Foundation projects.

Program #: 12153 - St. Construction - Minor Renovations  
 Project #: 12285 - St. Construction - Renovate lobby

Project | Cost Estimate | **Project Type** | Funds Assigned | Financial Worksheet | Contracts | P6 Link | Milestones | Closeout Project

Action Close

**Attributes Determining Project Type:**

Institution and Cost
State Debt
<b>State Land</b>
<input checked="" type="checkbox"/> This project will affect land owned or leased by the state of North Carolina

**Project Type**

Project Type: **Not Known**  
 Override Project Type: **No Override**

Requirements of this Project Type:

Special Project Designation – you already selected this when you created the project.

Program #: 12153 - NC State University - Toxicology Sea Grant Renovations  
Project #: 12288 - NC State University - Toxicology Renovations for SeaGrantWRI

Project | Cost Estimate | Project Type | Funds Assigned | Financial Worksheet | Contracts | PS Link | Primavera Link | Closeout Project | Evaluations

Action Close

### Attributes Determining Project Type:

Institution and Cost
State Debt
State Land
Special Project Designation
Special Project Designation: Standard Project <b>(This designation cannot be changed after the project is created.)</b>
Special Oversight
Oversight Request

### Project Type

Project Type: **US: UNC Project < \$500K**  
Override Project Type: **No Override**

[SCO Override](#)

Requirements of this Project Type:

PE Schedule Requirement:	Not Required
SCO Role:	R - Review Only
Milestones Required:	SCO Review

For help see: [Project Types Table](#)  
[Project Type State Construction Manual](#)

General Statutes: [GS 143-129](#) [GS 116-31-11](#) [GS 116-40.6](#)  
[GS 116-37](#) [GS 1150.9](#)

[View Summary](#)

Uploads | Comments | Project Managers

Date*	DATE	TYPE	FILE NAME	DESCRIPTION	UPLOADED BY
-------	------	------	-----------	-------------	-------------

Special Oversight – This applies to a very limited number of projects, mainly DOT projects, that have a requirement for concurrent Federal oversight.

Program #: 12153 - St. Construction - Minor Renovations  
 Project #: 12285 - St. Construction - Renovate lobby

Project | Cost Estimate | **Project Type** | Funds Assigned | Financial Worksheet | Contracts | P6 Link | Milestones | Closeout Project

Action Close

**Attributes Determining Project Type:**

Institution and Cost
State Debt
State Land
Special Project Designation
<b>Special Oversight</b>

Special Oversight: N/A

**Project Type**

Project Type: **Not Known**  
 Override Project Type: **No Override**

**Requirements of this Project Type:**

P6 Schedule Requirement: *Not Known*  
 SCO Role: *Not Known*  
 Milestones Required: *Not Known*

Oversight Request – If the project would not require SCO oversight, but the Agency/Institution would prefer SCO to have oversight, it can be requested here. An example is if the estimated cost for a Community College project normally not subject to SCO oversight is \$490,000, they could request SCO treat it as if it were over \$500,000.

Program #: 12153 - St. Construction - Minor Renovations  
 Project #: 12285 - St. Construction - Renovate lobby

Project | Cost Estimate | **Project Type** | Funds Assigned | Financial Worksheet | Contracts | P6 Link | Milestones | Closeout Project

Action Close

**Attributes Determining Project Type:**

Institution and Cost
State Debt
State Land
Special Project Designation
Special Oversight
<b>Oversight Request</b>

**SCO Advisory Oversight Requested**  
 Administer this project as if the estimated cost were: \$

**Project Type**

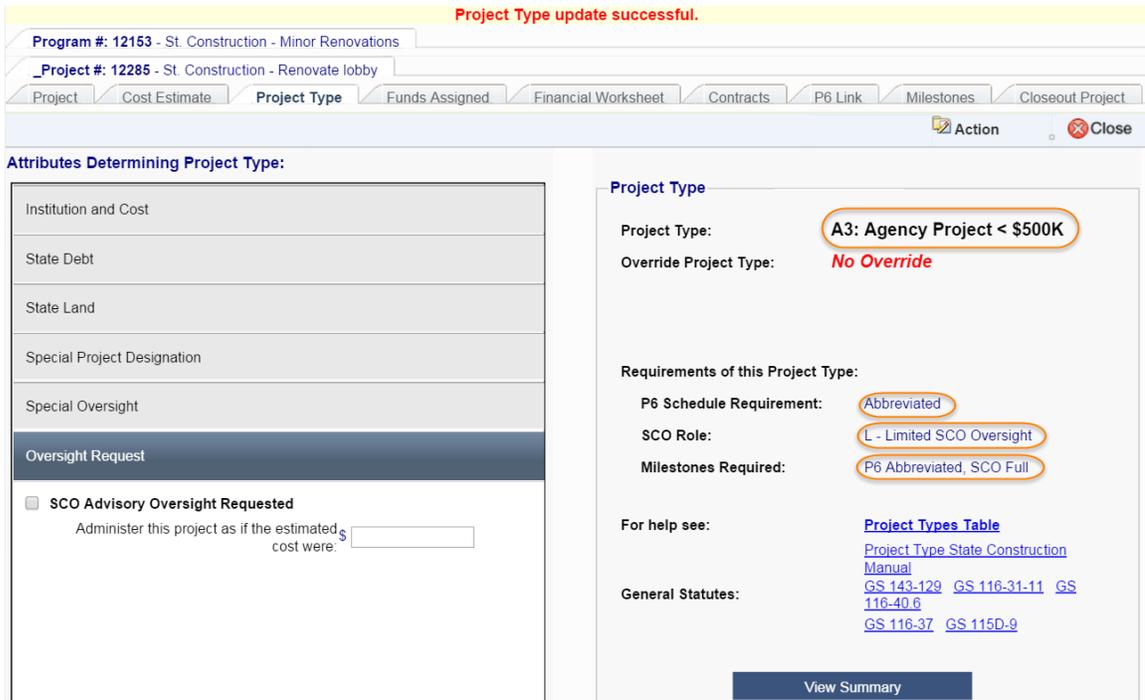
Project Type: **Not Known**  
 Override Project Type: **No Override**

**Requirements of this Project Type:**

P6 Schedule Requirement: *Not Known*  
 SCO Role: *Not Known*  
 Milestones Required: *Not Known*

For help see: [Project Types Table](#)  
[Project Type State Construction](#)

When all the entries have been made, then . The *Project Type* is determined and displayed along with the *P6 Schedule Requirement*, the *SCO Role*, and *Milestones Required*.

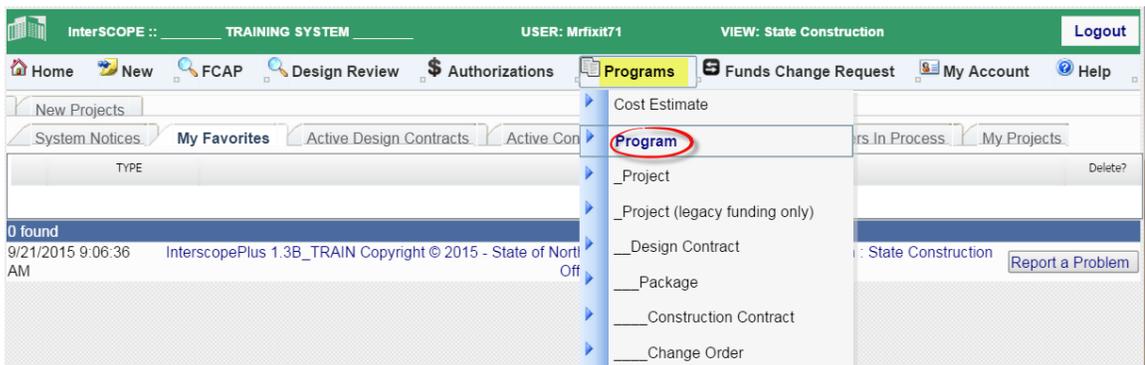


## H. Assigning Funds

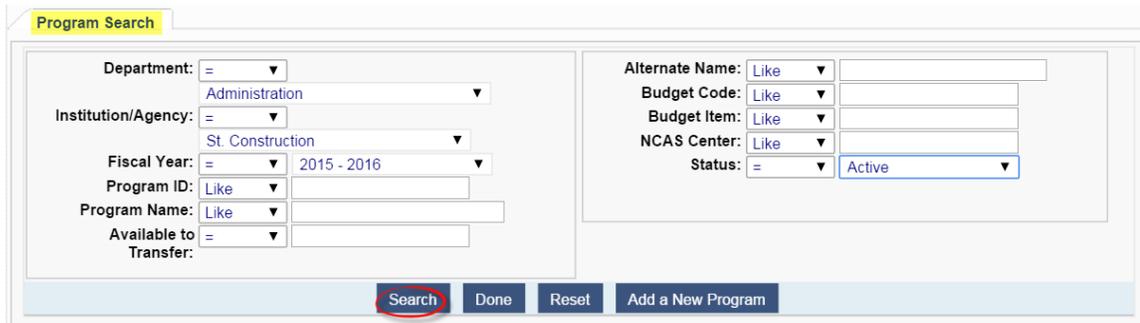
**Note: Before assigning funds to a project, the project type must exist and there must be funds allocated to the program and available for assignment.**

If there are multiple funding sources in a program, funds can be assigned to the project from any available source. If multiple funding sources are to be used in a project, each respective source to be used must be assigned to the project.

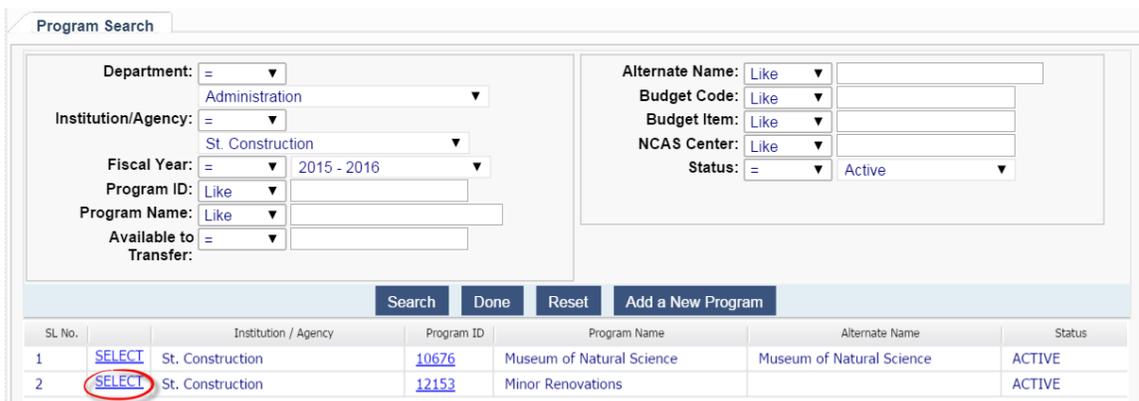
At the top of your home page, click on Programs>Program to bring up the Program Search Screen.



This will bring up a Program Search. Enter the appropriate information and click .

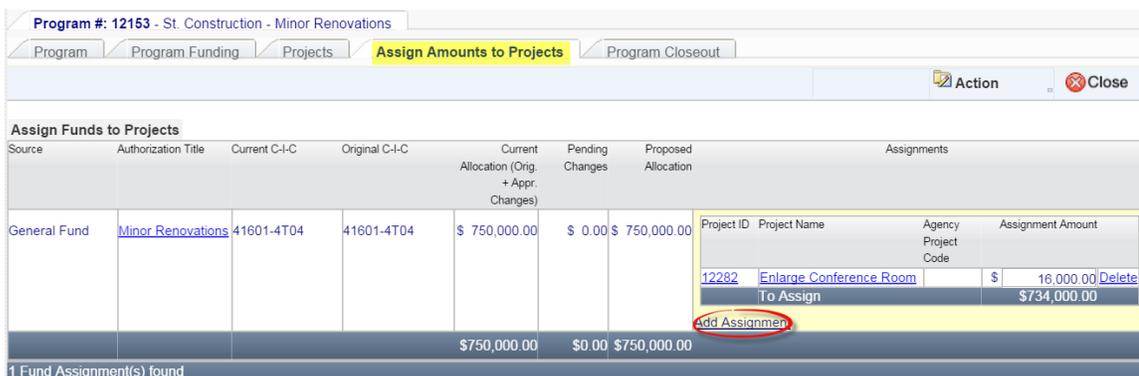


The search results will show all Programs that meet your criteria. 'Select' to choose the Program you want.



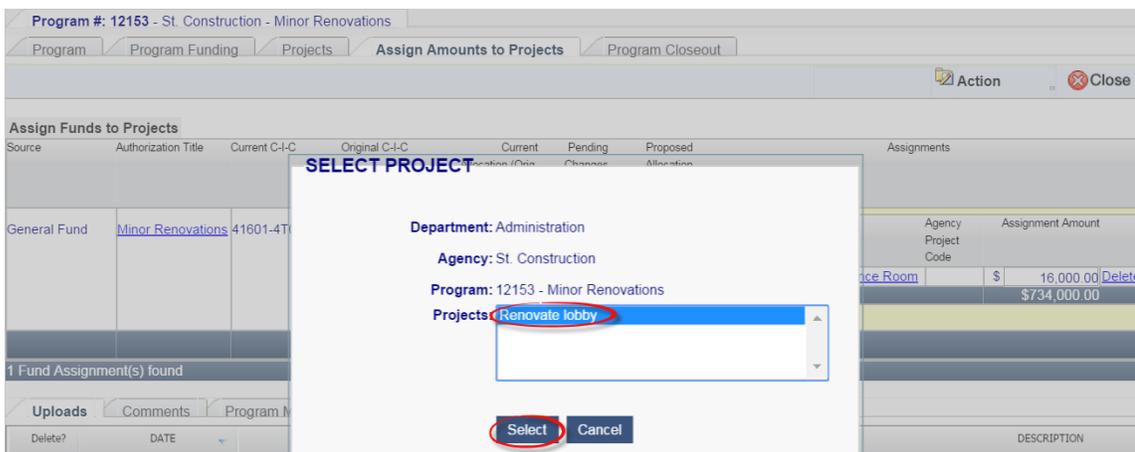
SL No.	Institution / Agency	Program ID	Program Name	Alternate Name	Status
1	St. Construction	10676	Museum of Natural Science	Museum of Natural Science	ACTIVE
2	St. Construction	12153	Minor Renovations		ACTIVE

This will bring you to the Program screen. Select the 'Assign Amounts to Projects' tab and click on 'Add Assignment'.

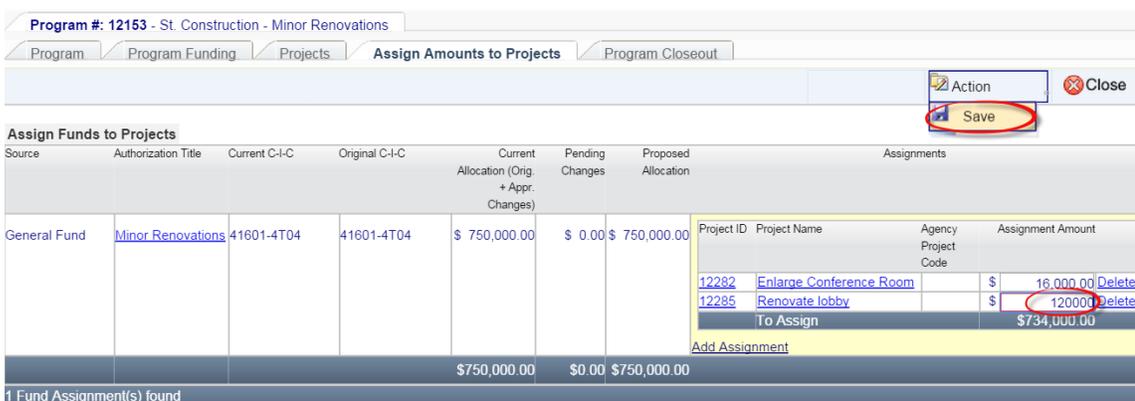
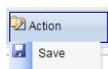


Source	Authorization Title	Current C-I-C	Original C-I-C	Current Allocation (Orig. + Appr. Changes)	Pending Changes	Proposed Allocation	Assignments												
General Fund	Minor Renovations	41601-4T04	41601-4T04	\$ 750,000.00	\$ 0.00	\$ 750,000.00	<table border="1"> <thead> <tr> <th>Project ID</th> <th>Project Name</th> <th>Agency Project Code</th> <th>Assignment Amount</th> </tr> </thead> <tbody> <tr> <td>12282</td> <td>Enlarge Conference Room</td> <td></td> <td>\$ 16,000.00</td> </tr> <tr> <td colspan="3">To Assign</td> <td>\$734,000.00</td> </tr> </tbody> </table>	Project ID	Project Name	Agency Project Code	Assignment Amount	12282	Enlarge Conference Room		\$ 16,000.00	To Assign			\$734,000.00
Project ID	Project Name	Agency Project Code	Assignment Amount																
12282	Enlarge Conference Room		\$ 16,000.00																
To Assign			\$734,000.00																
				\$750,000.00	\$0.00	\$750,000.00													

A new window will appear with a list of Projects in the Program. Click on the desired project and then .



Enter the amount of funds you want to assign and then



To Change an *Assignment Amount*, type in the new desired amount and



To review the outcome of your action, you may click on the Project ID or Project Name and it will take you to the Project. Select the 'Funds Assigned' tab and you can see the funds have been assigned.

Program #: 12153 - St. Construction - Minor Renovations  
 Project #: 12285 - St. Construction - Renovate lobby

Project Cost Estimate Project Type **Funds Assigned** Financial Worksheet Contracts P6 Link Milestones Closeout Project

Close

**Project Funds Assignment Summary** Project #: 12285 - Renovate lobby

**State Debt**

Subtotal - State Debt \$0.00

**Non-State Debt**

Subtotal - Non-State Debt \$0.00

**General Fund**

Authorization	Current C-I-C	Orig. C-I-C
Minor Renovations	41601-4T04	41601-4T04

Subtotal - General Fund **\$120,000.00**

**Non-General Fund**

Subtotal - Non-General Fund \$0.00

**R&R State Debt**

Subtotal - R&R State Debt \$0.00

**R&R General Fund**

Subtotal - R&R General Fund \$0.00

**Total Assigned** \$120,000.00

### I. Financial Worksheet

The financial worksheet provides information on the financial aspects of the project, including such things as funds assigned, contractual commitments to design and construction. To access this information, navigate to the Project, select the 'Financial Worksheet' tab and it will display the 'Estimated vs Committed' tab.

Program #: 12153 - St. Construction - Minor Renovations  
 Project #: 12285 - St. Construction - Renovate lobby

Project Cost Estimate Project Type Funds Assigned **Financial Worksheet** Contracts P6 Link Milestones Closeout Project

**Estimated vs Committed** Contingency Expenditures - Design Expenditures - Construction Expenditures - Other

Close

**Worksheet Summary** Save

Assigned Funds:	<b>\$120,000.00</b>	Assigned Funds:	<b>\$120,000.00</b>
Total Estimated Cost:	<b>\$118,000.00</b>	Total Committed:	<b>\$0.00</b>
Estimated Surplus (Need):	\$2,000.00	Available to Commit:	\$120,000.00

[Assign Funds](#)

**Worksheet Detail**

	Estimated Cost	Committed		Expended
		Original Contracts	Revised Contracts	
Design Fee \$:	\$ 10,000.00	\$ 0.00	\$ 0.00	\$ 0.00
Construction \$:	\$ 100,000.00	\$ 0.00	\$ 0.00	\$ 0.00
Contingency \$:	\$ 3,000.00			
Other \$:	\$ 5,000.00	\$ 0.00	\$ 0.00	\$ 0.00
<b>Total</b>	<b>\$118,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

The *Assigned Funds* are automatically displayed, based on the total amount of funds assigned from the Program, regardless of funding source. Details can be viewed on the 'Funds Assigned' tab.

The *Estimated Cost* data is automatically displayed from the data entered in the 'Project Type' > 'Estimated Costs' tab. These costs can be changed by selecting the appropriate cost category and entering a new number in the field. If the project type has not been established, Estimated Cost information may be entered here.

The screenshot shows the 'Financial Worksheet' for Program # 11531 - NC State University - Reynolds Coliseum Renovations. The 'Estimated vs Committed' tab is active. The 'Worksheet Summary' shows:

- Assigned Funds: \$34,243,560.00
- Total Estimated Cost: \$35,311,060.00
- Estimated Surplus (Need): (\$1,067,500.00)
- Assigned Funds: \$34,243,560.00
- Total Committed: \$33,765,263.55
- Available to Commit: \$478,296.45

The 'Worksheet Detail' table is as follows:

	Estimated Cost	Committed		Expended
		Original Contracts	Revised Contracts	
Design Fee \$:	\$ 3,216,523.00	\$ 2,717,849.00	\$ 3,894,473.00	\$ 0.00
Construction \$:	\$ 23,473,863.00	\$ 23,734,689.00	\$ 27,501,362.00	\$ 0.00
Contingency \$:	\$ 3,500,000.00			
Other \$:	\$ 5,120,674.00	\$ 2,369,428.55	\$ 2,369,428.55	\$ 0.00
<b>Total</b>	<b>\$35,311,060.00</b>	<b>\$28,821,966.55</b>	<b>\$33,765,263.55</b>	<b>\$0.00</b>

The *Total Committed* is the sum of all commitments (design contracts, construction contracts and any Purchase Orders). The amounts of the design contract and construction contract are automatically shown when the respective contract is executed. Changes to those contracts are shown in the *Revised Contracts* column and the total of the *Revised Contracts* will become the total committed.

This screenshot is identical to the one above, but with a red circle highlighting the 'Revised Contracts' column in the 'Total' row, showing a value of \$33,765,263.55.

Refer to sections on [creating design contracts](#), [creating construction contracts](#), and [change orders](#) for details.

The system will allow the *Estimated Cost* to be greater or less than the *Assigned Funds*, but it will not allow *Total Committed* funds to be greater than *Assigned Funds* for Standard Projects. Simply put, you cannot contract for any work without having sufficient funds available.

*Other \$* would be other owner related costs that would appropriately be charged to the project such as advertising, soils exploration, fixed furnishings and equipment (FF&E), etc.

The screenshot displays the 'Financial Worksheet' for Program # 11531 and Project # 9912. The 'Worksheet Summary' shows Assigned Funds of \$34,243,560.00, Total Estimated Cost of \$35,311,060.00, and an Estimated Surplus (Need) of (\$1,067,500.00). The 'Worksheet Detail' table shows the following data:

	Estimated Cost	Original Contracts	Revised Contracts	Expended
Design Fee \$	\$ 3,216,523.00	\$ 2,717,849.00	\$ 3,884,473.00	\$ 0.00
Construction \$	\$ 23,473,863.00	\$ 23,734,689.00	\$ 27,501,362.00	\$ 0.00
Contingency \$	\$ 5,500,000.00			
Other \$	\$ 1,120,674.00	\$ 2,369,428.55	\$ 2,369,428.55	\$ 0.00
<b>Total</b>	<b>\$35,311,060.00</b>	<b>\$29,821,966.55</b>	<b>\$33,765,263.55</b>	<b>\$0.00</b>

Refer to the section on entering [Other Commitments](#) for detailed instructions.

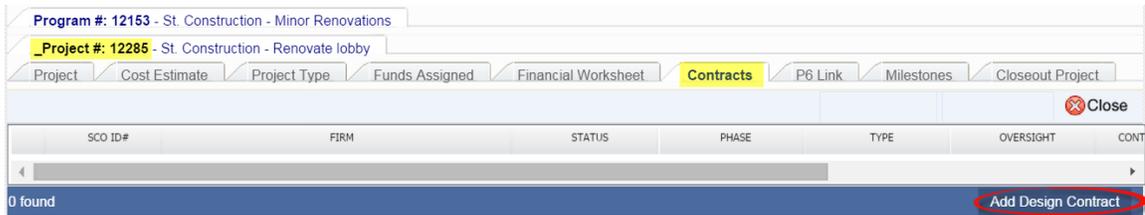
*Contingency \$* are assumed to be the construction contingency. For projects with design contracts under negotiation, the amount listed as the estimated contingency will automatically be shown as construction contingency when the design contract is established. This may be modified in the design contract negotiation process and revised as appropriate.

This screenshot is identical to the one above, showing the 'Financial Worksheet' with the 'Estimated Cost' of \$35,311,060.00 circled in red in the 'Worksheet Detail' table.

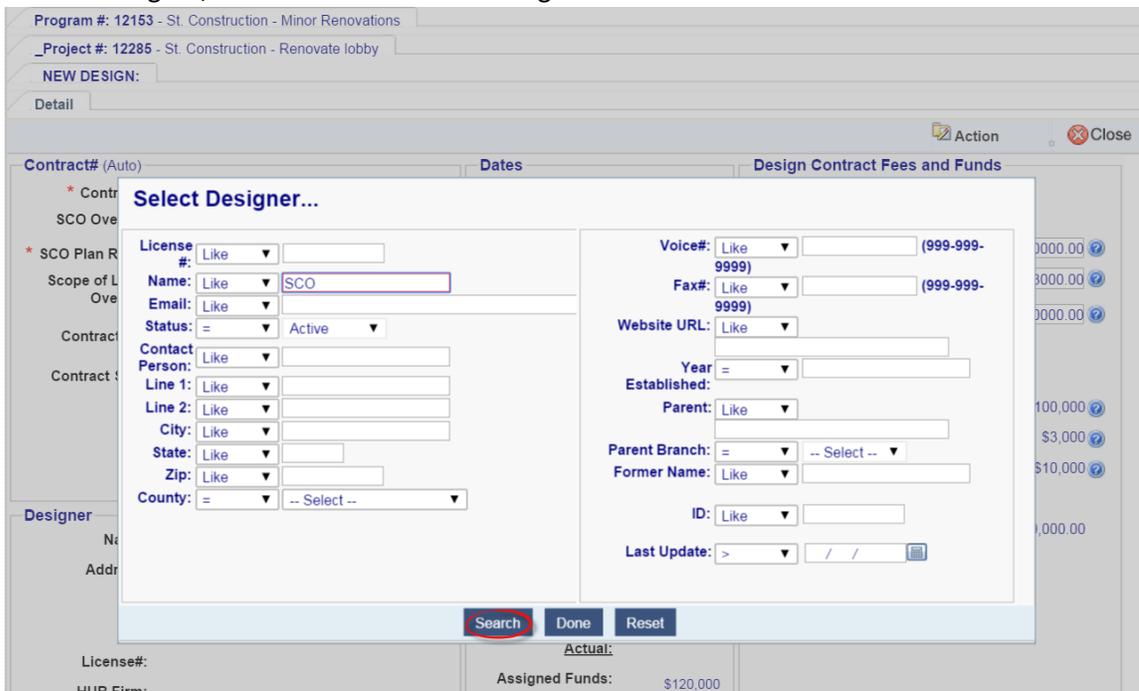
## J. Creating a Design Contract

For projects that have full SCO oversight, SCO will enter the design contract. This section is intended for non-SCO users to enter University “download,” Community College, or any informal project design contracts.

Navigate to the Project for which the contract will be created. Select the ‘Contracts’ tab, then the ‘Add Design Contract.’



This brings up a Select Designer window. Enter the appropriate information to retrieve the desired designer, then . Select the designer.



Program #: 12153 - St. Construction - Minor Renovations

\_Project #: 1

NEW DESIGNER

Detail

Contract# (A)

\* Contr

SCO Ove

\* SCO Plan R

Scope of L

Ove

Contract

Contract

### Select Designer...

License #: Like ▾ [ ]

Name: Like ▾ SCO

Email: Like ▾ [ ]

Status: = ▾ Active ▾

Contact Person: Like ▾ [ ]

Line 1: Like ▾ [ ]

Line 2: Like ▾ [ ]

City: Like ▾ [ ]

State: Like ▾ [ ]

Zip: Like ▾ [ ]

County: = ▾ -- Select -- ▾

Voice#: Like ▾ [ ] (999-999-9999)

Fax#: Like ▾ [ ] (999-999-9999)

Website URL: Like ▾ [ ]

Year: = ▾ [ ]

Established:

Parent: Like ▾ [ ]

Parent Branch: = ▾ -- Select -- ▾

Former Name: Like ▾ [ ]

ID: Like ▾ [ ]

Last Update: > ▾ [ ] / [ ] / [ ]

Search Done Reset

ID	DESIGNER	CITY	COUNTY	STATE	STATUS
10	951952316 <a href="#">HARRISCOST, LLC</a>	EASLEY	OUT OF STATE	SC	Active
11	951952012 <a href="#">Michael B. Wescott</a>	High Point	GUILFORD	NC	Active
12	951951696 <a href="#">NESCO, Inc.</a>	Greenville	PITT	NC	Active
13	951952491 <a href="#">NORESCO</a>	Cary	WAKE	NC	Active
14	951951393 <a href="#">Prescott Environmental Associates</a>	Chapel Hill	ORANGE	NC	Active
15	951952348 <a href="#">SCO - Consulting Services Section</a>		UNKNOWN	NC	Active
16	951952590 <a href="#">SCO Designer</a>	Raleigh	WAKE	NC	Active
17	951952986 <a href="#">Scott R Melrose</a>	Greensboro	GUILFORD	NC	Active
18	951951760 <a href="#">Venturi, Scott Brown and Assoc.</a>	Philadelphia	OUT OF STATE	PA	Active

18 found

worksheets Detail

This will bring up the 'Detail' tab, autofill's the designer information, fills in the Financial Worksheet Summary and the Target Contract amounts from the Project, as shown below.

Program #: 12153 - St. Construction - Minor Renovations  
 Project #: 12285 - St. Construction - Renovate lobby  
 NEW DESIGN:  
 Detail

Action Close

**Contract# (Auto)**  
 \* Contract ID: (Auto)  
 SCO Oversight: L - Limited SCO Oversight  
 \* SCO Plan Review: Limited Oversight  
 Scope of Limited Oversight:  
 Contract Type: Standard Design Contract (Fully Func)  
 Contract Status: Creating

**Dates**  
 Selection: / /  
 RFP Letter: / /  
 Agreement: / /  
 Signed By Designer: / /  
 Signed By Agency: / /  
 SCO: / /  
 Acceptance: / /

**Design Contract Fees and Funds**  
**ORIGINAL DESIGN CONTRACT:**  
 Construction Target \$: 100000.00  
 Contingency Reserve Target \$: 3000.00  
 Original Design Fee \$: 10000.00  
**CURRENT DESIGN CONTRACT:**  
 Construction Target: \$100,000  
 Contingency Reserve Target: \$3,000  
 Design Fee: \$10,000  
 Proposed Commitment Amt \$: \$10,000.00

**Designer**  
 Name: SCO Designer  
 Address: 301 N. Wilmington Street  
 Suite 450  
 Raleigh, NC 27601  
 License#: 123456789  
 HUB Firm: Not a HUB  
 Change Designer

**Financial Worksheet Summary**  
Estimated:  
 Assigned Funds: \$120,000  
 Estimated Cost: \$118,000  
 Estimated Surplus (Need): \$2,000  
Actual:  
 Assigned Funds: \$120,000  
 Total Committed: \$0  
 Available to Commit: \$120,000

For the *SCO Plan Review*, there are two options – Limited Oversight or Code Only. The Limited Oversight option requires that you show the Oversight requirements in the box. If there will only be review of plans, select Code Only.

## Select the appropriate *Contract Type*.

Project #: 7599 - State Construction Office - Mike's Test Project

NEW DESIGN: Detail

Contract# (Auto)

- \* Contract ID: (Auto)
- SCO Oversight: F - Full SCO Oversight
- \* SCO Plan Review: Full Oversight

Contract Type: Standard Design Contract (Fully Funded)

Contract Status: Standard Design Contract (Advance Planning Only)

Designer: Nan

Address: Not Applicable

Owner - Open End

Durham, NC 27707

License#: 50400

HUB Firm: Not a HUB

Dates

Selection: / /

RFP Letter: / /

Agreement: / /

Signed By Designer: / /

Signed By Agency: / /

SCO Acceptance: / /

Financial Worksheet Summary

Estimated:	
Assigned Funds:	\$0
Estimated Cost:	\$7,650,000
Estimated Surplus (Need):	-\$7,650,000
Actual:	
Assigned Funds:	\$0
Total Committed:	\$0
Available to Commit:	\$0

Design Contract Fees and Funds

ORIGINAL DESIGN CONTRACT:

Construction Target \$: 7500000.00

Contingency Reserve Target \$: 0.00

Design Fee: 150000.00

CURRENT DESIGN CONTRACT:

Construction Target: \$7,500,000

Contingency Reserve Target: \$0

Design Fee:

Proposed Commitment Amt \$:

There are several *Contract Types* to choose from and it is important to pick the correct one.

**Standard Design Contract (Fully Funded):** Typical design contract where all funds are available at the time of execution and contract is the full State standard design agreement.

**Standard Design Contract (Advanced Planning Only):** This would apply where the design contract amount is negotiated but only a portion is funded. Examples include funding through DD development or through full design but without construction administration (CA) funding availability. Contract is the full State standard design agreement.

**Letter Agreement (General Use):** A design agreement using the letter agreement format with the work as described in the agreement. Examples include feasibility studies or work under an open-end design arrangement using a letter agreement.

**Letter Agreement (Programming):** Contract for programming using the letter agreement format and as described in the agreement.

**Letter Agreement (Commissioning):** Contract for commissioning using the letter agreement format and as described in the agreement.

**Letter Agreement (Sustainable Energy Programming):** Contract for energy modeling using the letter agreement format and as described in the agreement.

**Not Applicable:** This would apply to projects where there is no design contract or code review, such as HUB Only.

Change the *Construction Target \$*, *Contingency Reserve Target \$*, and/or the *Original Design Fee \$* as necessary. Note that the target construction amount is assumed to be the construction budget estimate. If the design agreement should reflect a different amount, for example if you want to design to 85 or 90% of the construction budget during periods of rapidly escalating prices, change the target amount.

Program #: 13844 - State Construction Office - Test  
 \_Project #: 15996 - State Construction Office - Test  
**NEW DESIGN:**  
 Detail

**Contract# (Auto)**  
 \* Contract ID: (Auto)  
 SCO Oversight: L - Limited SCO Oversight  
 \* SCO Plan Review: Limited Oversight  
 Scope of Limited Oversight:  
 Contract Type: Standard Design Contract (Fully Funded)  
 Contract Status: Standard Design Contract (Advance Planning Only)  
 Standard Design Contract (Fully Funded)  
 Letter Agreement (General Use)  
 Letter Agreement (Programming)  
 Letter Agreement (Commissioning)  
 Letter Agreement (Sustainable Energy Programming)  
 Not Applicable  
 Owner - Open End

**Dates**  
 Selection: / /  
 RFP Letter: / /  
 Agreement: / /  
 Signed By Designer: / /  
 Signed By Agency: / /  
 SCO Acceptance: / /

**Design Contract Fees and Funds**  
**ORIGINAL DESIGN CONTRACT:**  
 Construction Target \$: 1.00  
 Contingency Reserve Target \$: 1.00  
 Design Fee: 1.00  
**CURRENT DESIGN CONTRACT:**  
 Construction Target: \$1  
 Contingency Reserve Target: \$1  
 Design Fee:  
 Proposed Commitment Amt \$:

**Financial Worksheet Summary**  
**Estimated:**  
 Assigned Funds: \$0  
 Estimated Cost: \$4  
 Estimated Surplus (Need): -\$4  
**Actual:**  
 Assigned Funds: \$0  
 Total Committed: \$0  
 Available to Commit: \$0  
[Worksheet Detail](#)

**Designer**  
 Name: SCO Designer  
 Address: 301 N. Wilmington Street  
 Suite 450  
 Raleigh, NC 27601  
 License#: 123456789  
 HUB Firm: Not a HUB  
[Change Designer](#)

9/19/2016 3:45:03 PM InterscopePlus 2.1\_2018024 Copyright © 2016 - State of North Carolina - Department of Administration - State Construction Office [Report a Problem](#)

If the project is funded for Advanced Planning Only and Standard Design Contract (Advanced Planning Only) is selected as the Contract Type, and funds are limited, check the box for *Limit Design Fee Commitment to the following amount* and insert the proper dollar amount.

**NEW DESIGN:**  
 Detail

**Contract# (Auto)**  
 \* Contract ID: (Auto)  
 SCO R - Review Only  
 Oversight:  
 \* SCO Plan Code Only  
 Review:  
 Contract Type: Standard Design Contract (Advance P  
 Contract Status: Creating

**Dates**  
 Selection: / /  
 RFP Letter: / /  
 Agreement: / /  
 Signed By Designer: / /  
 Signed By Agency: / /  
 SCO Acceptance:

**Design Contract Fees and Funds**  
**ORIGINAL DESIGN CONTRACT:**  
 Construction Target \$: 1,542,043  
 Contingency Reserve Target \$: 46,261  
 Original Design Fee \$: 154,204  
**CURRENT DESIGN CONTRACT:**  
 Construction Target: \$1,542,043  
 Contingency Reserve Target: \$46,261  
 Design Fee: \$154,204  
 Limit Design Fee Commitment to the following amount: 110,000.00  
 Proposed Commitment Amt \$: 110,000

**Financial Worksheet Summary**  
**Estimated:**  
 Assigned Funds: \$150,000  
 Estimated Cost: \$1,790,000  
 Estimated Surplus (Need): -\$1,640,000  
**Actual:**  
 Assigned Funds: \$150,000  
 Total Committed: \$0  
 Available to Commit: \$150,000  
[Worksheet Detail](#)

**Designer**  
 Name: SCO Designer  
 Address: 301 N. Wilmington Street  
 Suite 450  
 Raleigh, NC 27601  
 License#: 123456789  
 HUB Firm: Not a HUB  
[Change Designer](#)

The financial controls will not allow a commitment greater than the funds *Available to Commit*.

You can  at any time.

Enter the *Selection Date*, *RFP Letter Date* if applicable, *Agreement* date if agreement has been

reached and . This will automatically update the *Contract Status* to “Created – Not Signed” and show the proposed commitment.

**Contract Status changed to Created - Not Signed**  
Click: ACTION->SAVE to save this change.

Program #: 12153 - St. Construction - Minor Renovations  
 \_Project #: 12285 - St. Construction - Renovate lobby  
 NEW DESIGN:

Detail Action Close

<p><b>Contract# (Auto)</b></p> <p>* Contract ID: (Auto)</p> <p>SCO Oversight: L - Limited SCO Oversight</p> <p>* SCO Plan Review: Limited Oversight</p> <p>Scope of Limited Oversight: Design Review Only</p> <p>Contract Type: Standard Design Contract (Fully Func)</p> <p>Contract Status: Created - Not Signed</p>	<p><b>Dates</b></p> <p>Selection: 01/13/2015</p> <p>RFP Letter: 01/20/2015</p> <p>Agreement: 01/29/2015</p> <p>Signed By Designer: / /</p> <p>Signed By Agency: / /</p> <p>SCO: / /</p> <p>Acceptance:</p>	<p><b>Design Contract Fees and Funds</b></p> <p><b>ORIGINAL DESIGN CONTRACT:</b></p> <p>Construction Target \$: 100000.00</p> <p>Contingency Reserve Target \$: 3000.00</p> <p>Original Design Fee \$: 10000.00</p> <p><b>CURRENT DESIGN CONTRACT:</b></p> <p>Construction Target: \$100,000</p> <p>Contingency Reserve Target: \$3,000</p> <p>Design Fee: \$10,000</p> <p>Proposed Commitment Amt \$: <b>\$10,000.00</b></p>																
<p><b>Designer</b></p> <p>Name: SCO Designer</p> <p>Address: 301 N. Wilmington Street Suite 450 Raleigh, NC 27601</p> <p>License#: 123456789 HUB Firm: Not a HUB</p>																		
<p><b>Financial Worksheet Summary</b></p> <table border="1"> <thead> <tr> <th colspan="2">Estimated:</th> </tr> </thead> <tbody> <tr> <td>Assigned Funds:</td> <td>\$120,000</td> </tr> <tr> <td>Estimated Cost:</td> <td>\$118,000</td> </tr> <tr> <td>Estimated Surplus (Need):</td> <td>\$2,000</td> </tr> <tr> <th colspan="2">Actual:</th> </tr> <tr> <td>Assigned Funds:</td> <td>\$120,000</td> </tr> <tr> <td>Total Committed:</td> <td>\$0</td> </tr> <tr> <td>Available to Commit:</td> <td>\$120,000</td> </tr> </tbody> </table>			Estimated:		Assigned Funds:	\$120,000	Estimated Cost:	\$118,000	Estimated Surplus (Need):	\$2,000	Actual:		Assigned Funds:	\$120,000	Total Committed:	\$0	Available to Commit:	\$120,000
Estimated:																		
Assigned Funds:	\$120,000																	
Estimated Cost:	\$118,000																	
Estimated Surplus (Need):	\$2,000																	
Actual:																		
Assigned Funds:	\$120,000																	
Total Committed:	\$0																	
Available to Commit:	\$120,000																	

When the *Signed by Designer* and *Signed by Agency* dates are entered and saved, the *Contract Status* will be changed to “Active.” Once the *Contract Status* is “Active”, the screen will show the CURRENT DESIGN CONTRACT information and the updated commitment in the Financial

Worksheet Summary. 

DesignContract added successfully.

Program #: 12153 - St. Construction - Minor Renovations  
 \_Project #: 12285 - St. Construction - Renovate lobby  
 \_Design #: 16-12285-01 - SCO Designer

Detail | Contract Scope and Fees | Breakdowns | Amendments | Consultants | Packages

★ Action Close

**Contract# 1**

\* Contract ID: 16-12285-01

SCO Oversight: L - Limited SCO Oversight

\* SCO Plan Review: Limited Oversight

Scope of Limited Oversight: Design Review Only

Contract Type: Standard Design Contract (Fully Func)

Contract Status: Active

**Dates**

Selection: 2015-01-13

RFP Letter: 2015-01-20

Agreement: 2015-01-29

Signed By: 2015-02-10

Designer: 2015-02-12

Agency: 2015-02-13

SCO Acceptance: 2015-02-13

**Design Contract Fees and Funds**

**ORIGINAL DESIGN CONTRACT:**

Construction Target \$: 100,000

Contingency Reserve Target \$: 3,000

Original Design Fee \$: 10,000

**CURRENT DESIGN CONTRACT:**

Construction Target: \$100,000

Contingency Reserve Target: \$3,000

Design Fee: \$10,000

Actual Commitment Amt \$: \$10,000.00

**Designer**

Name: SCO Designer

Address: 301 N. Wilmington Street  
 Suite 450  
 Raleigh, NC 27601

License#: 123456789

HUB Firm: Not a HUB

**Financial Worksheet Summary**

Estimated:

Assigned Funds: \$120,000

Estimated Cost: \$118,000

Estimated Surplus (Need): \$2,000

Actual:

Assigned Funds: \$120,000

Total Committed: \$10,000

Available to Commit: \$110,000

Corrections or edits may be made, but require that the contract status be changed to “Creating” in order to open fields for editing, then changed back to “Active” and .

If this is an in-house design, a design contract is still required. Select ‘In-House Design by’ for your agency from the Designer selection list.

Program #: 13844 - State Construction Office - Test  
 \_Project #: 15996 - State Construction Office - Test  
 NEW DESIGN

Detail

Contract# (Auto) | Dates | Design Contract Fees and Funds

\* Contract ID: (Auto) | Selection: / / | ORIGINAL DESIGN CONTRACT:

SCO Oversight: L - Limited SCO Oversight | RFP Letter: / /

**Select Designer...**

License #: Like

Name: Like

Email: Like

Status:

Contact Person: Like

Line 1: Like

Line 2: Like

City: Like

State: Like

Zip: Like

County:

Voice#: Like

Fax#: Like

Website URL: Like

Year Established:

Parent: Like

Parent Branch:

Former Name: Like

ID: Like

Last Update:

Search Done Reset

Change Designer Available to Commit: 50 Worksheet Detail

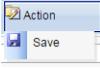
Create a contract with \$0 and fill in the appropriate dates.

## K. Entering Design Amendment

For projects that have full SCO oversight, SCO will enter the design amendments. This section is intended for non-SCO users to enter University “download,” Community College, or any informal project design contract amendments.

Navigate to the design contract, select the ‘Amendments’ tab, and click on ‘Add Amendment’.

It shows the Current contract amount, the Financial Worksheet Summary, Amendment Fees and Funds and Amendment Dates. **Enter only the changes to the Fees and Target Funds necessary for this amendment.** These changes will be added to the existing contract. A description of the

amendment is required. Enter the appropriate dates and 

Amendment added successfully.

Program #: 12153 - St. Construction - Minor Renovations  
 Project #: 12285 - St. Construction - Renovate lobby  
 Design #: 16-12285-01 - SCO Designer  
 Amendment #1  
 Amendment

Action Close

Current Design Contract	Financial Worksheet Summary	Amendment Fees and Funds
Construction Target: \$100,000 Contingency Target: \$3,000 Current Design Fee: \$10,500	<b>Estimated:</b> Assigned Funds: \$120,000 Estimated Cost: \$118,000 Estimated Surplus (Need): \$2,000  <b>Actual:</b> Assigned Funds: \$120,000 Total Committed: \$10,500 Available to Commit: \$109,500  <a href="#">Worksheet Detail</a>	Change to Construction Targets: 0 Change to Contingency Targets: 0 Change to Design Fee \$: 500

Amendment Dates	Description
Amendment Date: 03/09/2015 Signed By Designer: 03/09/2015 Signed By Agency: 03/10/2015 SCO Receipt: 03/11/2015  Generate Amendment (MS Word)	Add 3D rendering of new lobby

and it takes you back to the 'Contract Amendments' tab and shows you the results of the amendment.

Program #: 12153 - St. Construction - Minor Renovations  
 Project #: 12285 - St. Construction - Renovate lobby  
 Design #: 16-12285-01 - SCO Designer

Detail Contract Scope and Fees Breakdowns **Amendments** Consultants Packages

Close

#	DESCRIPTION	\$DESIGN FEE	\$CONSTRUCTION	\$CONTINGENCY	AMENDMENT DATE	SI
1	Add 3D rendering of new lobby	500.00	0.00	0.00	2015-03-09	

1 found Add Amendment Export

On the 'Detail' tab, it shows the updated Current Design Contract *Design Fee* and updated *Total Committed*.

**Contract# 1**

\* Contract ID: **16-12285-01**  
 SCO Oversight: L - Limited SCO Oversight  
 \* SCO Plan Review: Limited Oversight  
 Scope of Limited Oversight: Design Review Only  
 Contract Type: Standard Design Contract (Fully Func)  
 Contract Status: Active

**Dates**  
 Selection: 2015-01-13  
 RFP Letter: 2015-01-20  
 Agreement: 2015-01-29  
 Signed By: 2015-02-10  
 Designer:  
 Signed By: 2015-02-12  
 Agency:  
 SCO Acceptance: 2015-02-13

**Designer**  
 Name: SCO Designer  
 Address: 301 N. Wilmington Street  
 Suite 450  
 Raleigh, NC 27601  
 License#: 123456789  
 HUB Firm: Not a HUB

**Financial Worksheet Summary**

Estimated:	
Assigned Funds:	\$120,000
Estimated Cost:	\$118,000
Estimated Surplus (Need):	\$2,000
Actual:	
Assigned Funds:	\$120,000
<b>Total Committed:</b>	<b>\$10,500</b>
Available to Commit:	\$109,500

**Design Contract Fees and Funds**

**ORIGINAL DESIGN CONTRACT:**  
 Construction Target \$: 100,000  
 Contingency Reserve Target \$: 3,000  
 Original Design Fee \$: 10,000

**CURRENT DESIGN CONTRACT:**  
 Construction Target: \$100,000  
 Contingency Reserve Target: \$3,000  
**Design Fee: \$10,500**  
 Actual Commitment Amt \$: \$10,500.00

And on the 'Project Financial Worksheet' it shows the *Revised Contracts* amount.

**Worksheet Summary**

Assigned Funds:	\$120,000.00	Assigned Funds:	\$120,000.00
Total Estimated Cost:	\$118,000.00	Total Committed:	\$10,500.00
Estimated Surplus (Need):	\$2,000.00	Available to Commit:	\$109,500.00

**Worksheet Detail**

	Estimated Cost	Committed		Expended
		Original Contracts	Revised Contracts	
Design Fee \$:	\$ 10,000.00	\$ 10,000.00	<b>\$ 10,500.00</b>	\$ 0.00
Construction \$:	\$ 100,000.00	\$ 0.00	\$ 0.00	\$ 0.00
Contingency \$:	\$ 3,000.00			
Other \$:	\$ 5,000.00	\$ 0.00	\$ 0.00	\$ 0.00
<b>Total</b>	<b>\$118,000.00</b>	<b>\$10,000.00</b>	<b>\$10,500.00</b>	<b>\$0.00</b>

L. Creating a Construction Contract

For projects that have full SCO oversight, SCO will enter the construction contract. This section is intended for non-SCO users to enter University “download,” Community College, or any informal project construction contracts.

Within the InterscopePlus system, design contracts typically yield documents that require reviews at different stages of design. At the end of the design process, there is a construction contract, and therefore the construction contract is linked to a design contract. The item that connects the design contract and the construction contract is called a Package, and it is primarily how SCO tracks the design review process.

To create a construction contract, navigate to the appropriate design contract, select the ‘Packages’ tab and select the correct package. Normally there is only one package.

SCO ID#	PACKAGE_TITLE	STATUS	PROJECT MONITOR	% COMPLETE	TOTAL CONTRACT\$	PLAN LOCATION
16-12285-01A	Renovate lobby	Under Design	Unassigned			

You will need to update the Bidding/Construction Contracts information on the ‘Detail’ tab by indicating whether it is a formal contract and the construction procurement type of contract (Single Prime, Construction Manager at Risk, etc.) from the drop-down lists. Entering other

information or updating status is optional. Then

**Package A**

Oversight: L - Limited SCO Oversight

\* Title: Renovate lobby

\* Type: Undetermined

\* Status: Under Design

Status Reason:   
 Square: 0   
 Footage:   
 Plan Location:   
 \* County: UNKNOWN   
 Renovate lobby

Description:   
 Designer Rep:   
 Description

**Bidding/Construction Contracts**

Approved for Bid:   
 Formal Contracts?: N   
 Approved for Award:   
 \* Award Type: Single Prime

**Construction Administration**

\* Project Monitor: Unassigned   
 Monthly Conference:   
 Percent Complete: 0%   
 Final Punchlist: Active

**Fees / Funds**

Liquidated Damages (day): 0.00   
 CD Cost Estimate: 0.00   
 Plan Deposit: 0.00   
 Total Change Orders: \$0.00   
 Total Construction Contract: \$0.00

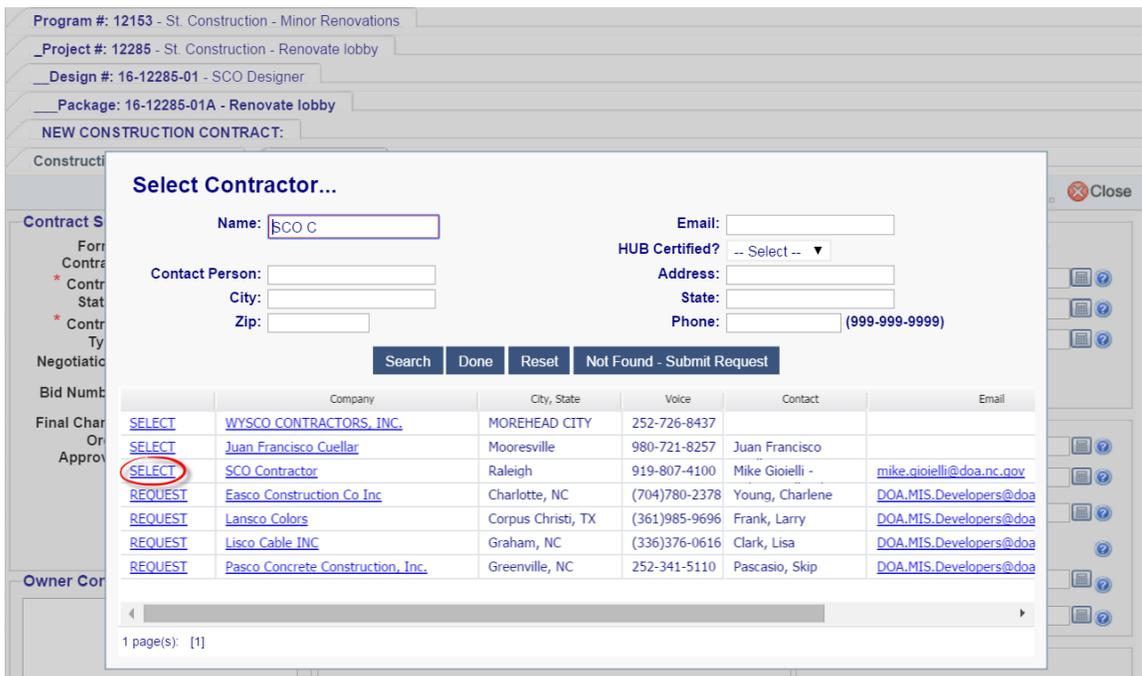
**Archive Information**

Archive Date:   
 Archive Box#:   
 Micro Film#:   
 Archive

Select the 'Construction Contracts' tab and then 'New Construction Contract'.



The Select Contractor window will appear. Enter criteria needed to find the correct contractor, and select the contractor from the search results.



The contractor information is automatically entered, based on your selection, in the 'Construction Contract Detail' tab. The *Contract Status* is set to "Creating" and the default *Contract Type* is "General Contract." Select an appropriate contract type if other than "General." Enter appropriate *Award Details*, *Contract Dates*, and *Contract Amounts*. Required fields are marked with asterisks and have a red border. Entering *Owner Contact*, *Safety Officer*, *Surety*, *Sheets* and *Contractor Contact* is optional.

If this is a Standard Project, the system will not allow commitments greater than the assigned funds. To avoid losing data, you can  as long as the status is "Creating." When sufficient funds are available to award the contract, change the status to "Valid Contract" and .

**Program #:** 12153 - St. Construction - Minor Renovations  
**Project #:** 12285 - St. Construction - Renovate lobby  
**Design #:** 16-12285-01 - SCO Designer  
**Package:** 16-12285-01A - Renovate lobby  
**Construction Contract #:** 16-12285-01A-1 - SCO Contractor

[Construction Contract Detail](#) | [Bid Items](#) | [HUB Good-Faith Efforts](#) | [HUB Participation](#) | [Change Orders](#)

★ Action Close

**Contract Summary**

Formal N

Contract:

Status:

Type:

Negotiation?

Bid Number: SCO-16-12285-01A

Final Change Order: State Construction

Approval:

**Contractor**

Name: SCO Contractor

Address: 301 N. Wilmington Street  
Suite 450  
Raleigh, NC 27601

License#:

Contact:

**Award Details**

Award Type: Single Prime

Approved For Bid: 2015-06-09

Actual Bid: 2015-07-02

Awarded: 2015-07-07

**Owner Contact**

**Contract Dates**

Contract Date: 2015-07-13

Contracts Approved by Agency: 2015-07-14

Contracts Approved by Atty Genl:

Projected Completion: 2015-09-18

Construction Start (NTP): 07/20/2015

**Safety Officer**

**Surety**

Name:

Address:

Agent:

Address:

**Sheets**

**Contract Amounts**

**Project Financial Worksheet Summary:**

Assigned Funds:	\$120,000
Total Committed:	\$109,000
Available to Commit:	\$11,000
This Contract:	\$98,500
Available to Commit After Contract Approval:	\$11,000

[Worksheet Detail](#)

**Contract Amounts:**

	Amount	Days
Original:	\$98,500.00	60
Change Order:	\$0.00	0
<b>Current:</b>	<b>\$98,500.00</b>	<b>60</b>

Select the 'Project #:' tab in the hierarchy, then the 'Financial Worksheet' tab. The construction contract now shows up as a commitment.

Program #: 12153 - St. Construction - Minor Renovations

Project #: 12285 - St. Construction - Renovate lobby

Project | Cost Estimate | Project Type | Funds Assigned | **Financial Worksheet** | Contracts | P6 Link | Milestones | Closeout Project

**Estimated vs Committed** | Contingency | Expenditures - Design | Expenditures - Construction | Expenditures - Other

Close

---

**Worksheet Summary** **Save**

<b>Assigned Funds:</b>	\$120,000.00	<b>Assigned Funds:</b>	\$120,000.00
<b>Total Estimated Cost:</b>	\$118,000.00	<b>Total Committed:</b>	\$109,000.00
<b>Estimated Surplus (Need):</b>	\$2,000.00	<b>Available to Commit:</b>	\$11,000.00

[Assign Funds](#)

---

**Worksheet Detail**

	Estimated Cost	Committed		Expended
		Original Contracts	Revised Contracts	
Design Fee \$:	\$ 10,000.00	\$ 10,000.00	\$ 10,500.00	\$ 0.00
Construction \$:	\$ 100,000.00	\$ 98,500.00	\$ 98,500.00	\$ 0.00
Contingency \$:	\$ 3,000.00			
Other \$:	\$ 5,000.00	\$ 0.00	\$ 0.00	\$ 0.00
<b>Total</b>	<b>\$118,000.00</b>	<b>\$108,500.00</b>	<b>\$109,000.00</b>	<b>\$0.00</b>

M. Construction Contract Change Orders

Project Types and Approval Levels

PROJECT TYPE	PROJECT DESCRIPTION	OBJECT	OBJECT SUBTYPE
A1	Agency Project > \$500K	CHANGE ORDER	CHANGE ORDER SCO
A2	Agency Project < \$500K (State Debt)	CHANGE ORDER	CHANGE ORDER AGENCY
A3	Agency Project < \$500K (No State Debt)	CHANGE ORDER	CHANGE ORDER NO WORKFLOW
C1	CC Project < \$500K	CHANGE ORDER	CHANGE ORDER AGENCY (*)
C2	CC Project > \$500K	CHANGE ORDER	CHANGE ORDER SCO
C3	CC Project > \$500K <= \$4M	CHANGE ORDER	CHANGE ORDER AGENCY
C4	CC Project > 4M (State Debt)	CHANGE ORDER	CHANGE ORDER SCO
C5	CC Project > 4M (No State Debt)	CHANGE ORDER	CHANGE ORDER AGENCY
F1	Foundation Project/Other	CHANGE ORDER	CHANGE ORDER NO WORKFLOW
F2	Foundation Project/Other	CHANGE ORDER	CHANGE ORDER NO WORKFLOW
G	Federal Oversight Project	CHANGE ORDER	CHANGE ORDER NO WORKFLOW
H1	Hospital Project > \$500K	CHANGE ORDER	CHANGE ORDER SCO
H2	Hospital Project < \$500K	CHANGE ORDER	CHANGE ORDER AGENCY (*)
P1	Performance Contracts	CHANGE ORDER	CHANGE ORDER NO WORKFLOW
P2	Performance Contracts	CHANGE ORDER	CHANGE ORDER NO WORKFLOW
U1	UNC Project > \$2M	CHANGE ORDER	CHANGE ORDER SCO
U2	UNC Project > \$500K < \$2M	CHANGE ORDER	CHANGE ORDER AGENCY
U3	UNC Project > \$500K < \$1M	CHANGE ORDER	CHANGE ORDER AGENCY
U4	UNC Project < \$500K	CHANGE ORDER	CHANGE ORDER NO WORKFLOW
U5	UNC Project < \$500K	CHANGE ORDER	CHANGE ORDER NO WORKFLOW

1. For Formal Projects

The construction change order process provides an electronic process for submitting and approving changes to projects with construction costs over \$500,000 and is controlled by a work flow that requires the sequential execution of the steps by the respective parties. Change orders for smaller projects are not processed electronically, but use a simple spreadsheet shown at the end of this section, to record change order information.

Only Designers (or InterscopePlus users given the appropriate permission) are allowed to create and submit change orders for review, processing and approval. The electronic change order process is used for all formal projects, both those subject to SCO oversight and University “download” projects. University change orders follow a slightly different approval process, with the final approval being at the University level rather than at SCO,

a) *Creating the Change Order*

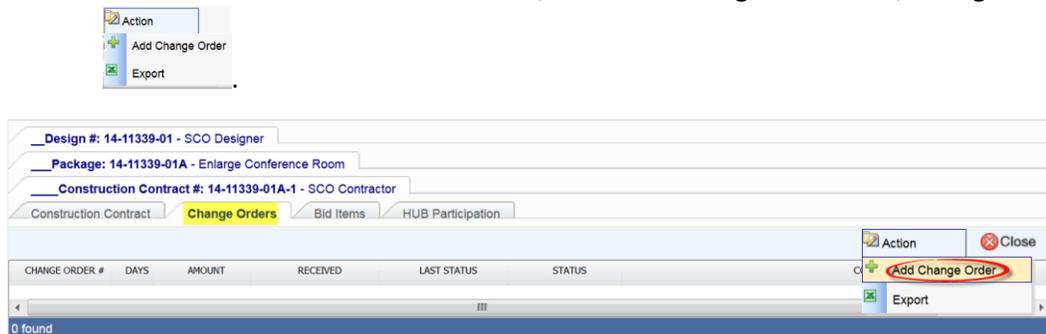
**NOTE: Each Proposed Change Order (PCO) requires supporting documentation to be uploaded for review and acceptance. A PCO cannot be added without supporting documentation. It is recommended that all supporting documentation be gathered prior to change order entry.**

After logging in, the designer selects the Active Construction Contracts tab on his/her Home screen, then selects the contract for which the Change Order (CO) will be entered and clicks on it.

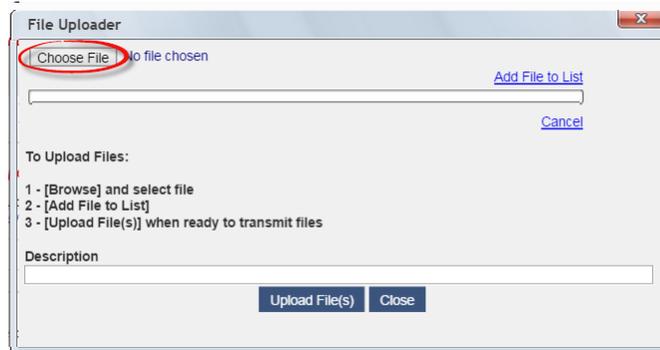


**Tip:** Use the *SCO File#* to identify the correct Construction Contract.

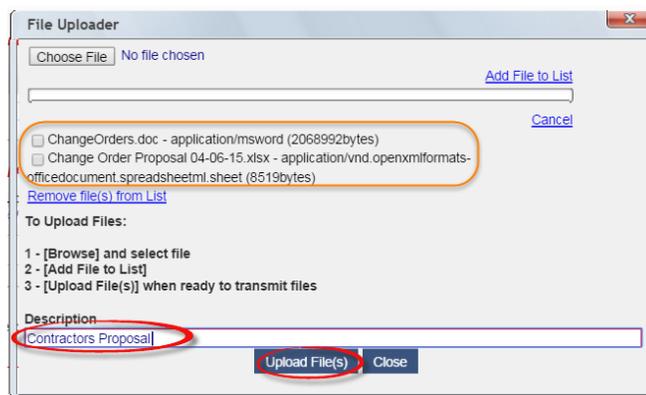
On the Construction Contract Screen, select the Change Orders tab, then go to



Enter the appropriate information. To upload files, select **Upload Files** at the bottom of the screen. In the File Uploader window, select Choose File to browse for the file to upload.



When the file is selected, it will be uploaded to the window. Upload as many files as necessary. Add a description and **Upload Files**



After it is saved, it will show as Change Order # with the next sequential number, show the Status and the Work Flow Activity and the  icon appears.

Change Order added successfully

Design #: 15-11026-01 - SCO Designer  
 Package: 15-11026-01A - Enlarge conference room  
 Construction Contract #: 15-11026-01A-1 - SCO Contractor  
 Change Order #: 1

Status: Under Construction  
 Status Date: Valid Contract

Status: Created  
 Status Date: 4/21/2015 2:50:00 PM

Date Received:  
 Last Update: 4/21/2015 2:50:00 PM

Total Days: 0  
 Total Amount: \$1,000

STEP	ACTION	ACTIVE?	ROLE	FIRM/AGENCY	USER COMPLETING STEP	COMPLETED ON	ALERTED ON	RESULT	COMMENTS
1	CREATE	N	DESIGNER	SCO Designer	scodesigner	04/21/2015 14:50		Created	
2	SUBMIT	Y	DESIGNER	SCO Designer					
3	APPROVE	N	CONTRACTOR	SCO Contractor					
4	APPROVE	N	DESIGNER	SCO Designer					
5	APPROVE	N	OWNER	St. Construction					
6	APPROVE	N	SCO	St. Construction					

**Designer Summary**

- Schedule Items affected by this change:
- Can Contractor mitigate the change without requiring a contract time extension:
- Select the Contractors that will need a contract time extension due to this change:
- 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="0"/>	<input type="text" value="0"/>
6. Estimated time extension field cost (\$), if any:	<input type="text" value="0.00"/>	<input type="text" value="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)
Construction Days	30	+	0	=	30	(+/-)	0	=	30
Cost (\$)	\$135,000	+	\$0	=	\$135,000	(+/-)	\$1,000	=	\$136,000.00

**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)
04/03/2015	+	30	=	05/03/2015	+	0	=	05/03/2015	+	0	=	05/03/2015

**PCO Breakdowns**

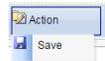
PCO1

DESCRIPTION OF PCO	REASON(S) FOR CHANGE(S)	PCO COST	# DAYS
Add data connection for projector	Original design was for all wireless internet. Projector requires hard wired connection	<input type="text" value="1,000"/>	<input type="text" value="0"/>

DESCRIPTION	FILE NAME	UPLOADED BY	DATE
Contractors Proposal	<a href="#">Change Order Proposal 04-06-15.xlsx</a>	scodesigner	4/21/2015 2:49:48 PM <a href="#">Delete</a>

[Upload Files](#)

The Designer may continue to make changes to the Change Order using the



up until the time that the Change Order is submitted.

**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	30	+	0	=	30	0	=	30
Cost (\$)	\$135,000	+	\$0	=	\$135,000	\$1,000	=	\$136,000.00

**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)
04/03/2015	+	30	=	05/03/2015	+	0	=	05/03/2015	+	0	=	05/03/2015

**PCO Breakdowns**

PCO1

DESCRIPTION OF PCO (Provide adequate detail to enable SCO to properly assign the cause (Provide adequate detail to properly justify cause codes))	REASON(S) FOR CHANGE(S)	PCO COST	# DAYS
Add data connection for projector	Original design was for all wireless internet. Projector requires hard wired connection	1,000	0

DESCRIPTION	FILE NAME	UPLOADED BY	DATE
Contractors Proposal	<a href="#">Change Order Proposal 04-06-15.xlsx</a>	scodesigner	4/21/2015 2:49:48 PM <a href="#">Delete</a>

[Upload Files](#)

The Designer may choose to abandon or delete the Change Order using the



. However, once it is submitted, no changes or deletions are allowed.

## b) Submitting the Change Order for Review

To complete this workflow step, the Designer must submit the Change Order to initiate its 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**. A Confirmation window will appear to confirm this action. Select **Yes** to continue or **No** to return.

The Change Order workflow is updated 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.

1 alerts created for users: scocontract  
Change order has been submitted by scodesigner

Design #: 15-11026-01 - SCO Designer  
 Package: 15-11026-01A - Enlarge conference room  
 Construction Contract #: 15-11026-01A-1 - SCO Contractor  
 Change Order #: 1

Detail

Workflow Action Close

**Status**

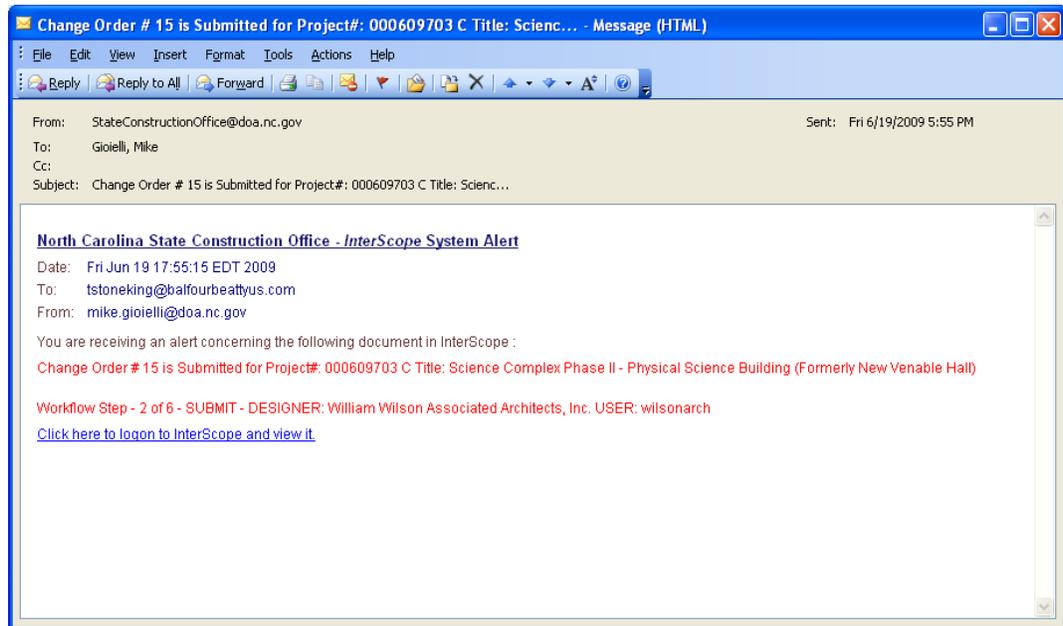
Package Status: Under Construction      Status: Submitted      Date Received: 4/21/2015 2:50:00 PM      Total Days: 0  
 Contract Status: Valid Contract      Status Date: 4/21/2015 2:50:00 PM      Last Update: 4/21/2015 2:50:00 PM      Total Amount: \$1,000

**Workflow Activity**

STEP	ACTION	ACTIVE?	ROLE	FIRM/AGENCY	USER COMPLETING STEP	COMPLETED ON	ALERTED ON	RESULT	COMMENTS
1	CREATE	N	DESIGNER	SCO Designer	scodesigner	04/21/2015 14:50		Created	
2	SUBMIT	N	DESIGNER	SCO Designer	scodesigner	04/21/2015 15:41		Submitted	
3	APPROVE	Y	CONTRACTOR	SCO Contractor					
4	APPROVE	N	DESIGNER	SCO Designer					
5	APPROVE	N	OWNER	St. Construction					
6	APPROVE	N	SCO	St. Construction					

c) *Receiving and responding to the Alert*

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



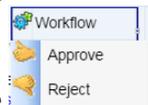
To access the Change Order, simply click on the link at the bottom of the Alert Email.

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

d) *Reviewing and Approving Change Orders*

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

When the Contractor logs on to InterscopePlus, he/she sees a “Change Orders In Progress” clipboard on his/her Home screen. By selecting a Change Order, he/she can view the Work Flow Activity of that Change Order. Change Orders that are awaiting their action are highlighted in yellow. At this workflow step there are only 2 options that can be performed – **Approve** or **Reject**. They are



available from the

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.

**Construction Contract #: 15-11026-01A-1 - SCO Contractor**  
**Change Order #: 1**

Detail

Workflow Activity

STEP	ACTION	ACTIVE?	ROLE	FIRM/AGENCY	USER COMPLETING STEP	COMPLETED ON	ALERTED ON	RESULT	COMMENTS
1	CREATE	N	DESIGNER	SCO Designer	scodesigner	04/21/2015 14:50		Created	
2	SUBMIT	N	DESIGNER	SCO Designer	scodesigner	04/21/2015 15:41		Submitted	
3	APPROVE	Y	CONTRACTOR	SCO Contractor					
4	APPROVE	N	DESIGNER	SCO Designer					
5	APPROVE	N	OWNER	St. Construction					
6	APPROVE	N	SCO	St. Construction					

The owner must certify that sufficient funds are available for the change order before approving. Sufficient funding must be reflected in the InterscopePlus system before the change will be approved by SCO.

**Project Financial Worksheet Summary**

Assigned Funds	\$150,000	
Total Committed:	\$145,000	
<hr/>		
Available to Commit:	\$5,000	The owner certifies that the project's Assigned Funds are adequate to support this change order: <input checked="" type="radio"/> Yes
This Change:	\$1,000	
Available to Commit After this Change:	\$4,000	

[Worksheet Detail](#)

e) *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.

## 2. Informal Project Change Orders

The change order process for informal projects involves making entries to identify the nature of the change, cost, and impact on contract days into a spreadsheet format on the 'Change Order' tab on the construction contract.

	CONTRACT START	+	CHANGE ORDERS (CURRENT)	=	CONTRACT (CURRENT)	(+/-)	CHANGE ORDERS (NEW)	=	CONTRACT (NEW)
Construction Days	45	+	0	=	45	(+/-)	0	=	45
Cost (\$)	\$450,000.00	+	\$0.00	=	\$450,000.00	(+/-)	\$0.00	=	\$450,000.00

CHANGE ORDER #	DESCRIPTION	DAYS	AMOUNT
			X

Click in the *Description* block and enter the description of the change. Tab to fill in any additional days and tab to enter amount of change. Change orders are automatically numbered in the order entered. You may enter as many change orders as necessary,

then . The changes are reflected in the Change Orders Summary.

	CONTRACT START	+	CHANGE ORDERS (CURRENT)	=	CONTRACT (CURRENT)	(+/-)	CHANGE ORDERS (NEW)	=	CONTRACT (NEW)
Construction Days	45	+	0	=	45	(+/-)	3	=	48
Cost (\$)	\$450,000.00	+	\$0.00	=	\$450,000.00	(+/-)	\$2,500.00	=	\$452,500.00

CHANGE ORDER #	DESCRIPTION	DAYS	AMOUNT
	Add additional curb cut	3	2,500.00 X

On the 'Construction Contract Detail' tab, the total of all change order amounts are also shown.

**Contract Amounts**

**Project Financial Worksheet Summary:**

Assigned Funds:	\$498,000
Total Committed:	\$493,606
Available to Commit:	\$4,394
This Contract:	\$452,500
Available to Commit After Contract Approval	\$4,394

[Worksheet Detail](#)

**Contract Amounts:**

	Amount	Days
Original:	\$450,000.00	45
Change Order:	\$2,500.00	3
Current:	\$452,500.00	48

## N. Contingency Funds

Within the context of InterscopePlus, contingency funds are the construction contingency funds that are shown as a line item in the design contract. The amount entered in the estimated cost field for contingency is automatically carried into the design contract, but can be modified before contract commitment. Some Agencies/Institutions choose to use the contingency line as a total project contingency, which is acceptable. For projects with SCO Full Oversight, the amount of construction contingency must be clearly communicated to SCO at the time of design negotiations.

The financial controls look at the assigned funds and the total commitments, and will only allow commitments up to the amount of assigned funds. There is no requirement to update estimated costs to be in agreement with commitments, however the user may do so. There is no mechanism for committing or expending funds from the contingency line. The simplest way to move contingency funds is in the 'Financial Worksheet' > 'Estimated vs Committed' tab. Here the amount in the Estimated Cost can be changed by entering the new amount and Save. A transaction of this type is shown in the example below.

If a more detailed audit trail is desired, the entries may be made directly on the Contingency tab.

Program #: 9882 - UNC School Of The Arts - 2016 R&R  
 Project #: 10876 - UNC School Of The Arts - Replace roof - Workplace

Project | Cost Estimate | Project Type | Funds Assigned | **Financial Worksheet** | Contracts | Milestones | Closeout Project

Estimated vs Committed | **Contingency** | Expenditures - Design | Expenditures - Construction | Expenditures - Other

Close

**Track Contingency Amounts** Save

Automatically draw down contingency amounts to fund change orders

Contingency Amount						
Current Total	Change	New Total	Reason for Change	Transfer To	Recorded On	Recorded By
\$10,000.00	\$ -500.00	\$ 9,500.00	Increase to 'Other' funds	Other	5/8/2015	trainer

History of Changes

Current Total	Change	New Total	Reason	Transfer To	Recorded On	Recorded By
\$0.00	\$10,000.00	\$10,000.00	Initial Amount from Estimate	N/A	05/08/2015	Rich Cox

Enter the amount of change, or the new total, the reason for the change and where the funds are going. Then **Save**.

Contingency Data saved successfully.

Program #: 9882 - UNC School Of The Arts - 2016 R&R  
 Project #: 10876 - UNC School Of The Arts - Replace roof - Workplace

Project | Cost Estimate | Project Type | Funds Assigned | **Financial Worksheet** | Contracts | Milestones | Closeout Project

Estimated vs Committed | **Contingency** | Expenditures - Design | Expenditures - Construction | Expenditures - Other

Close

**Track Contingency Amounts** Save

Automatically draw down contingency amounts to fund change orders

Contingency Amount						
Current Total	Change	New Total	Reason for Change	Transfer To	Recorded On	Recorded By
\$9,500.00	\$ 0.00	\$ 0.00		N/A	5/8/2015	trainer

History of Changes

Current Total	Change	New Total	Reason	Transfer To	Recorded On	Recorded By
\$10,000.00	(\$500.00)	\$9,500.00	Increase to 'Other' funds	OTHER	05/08/2015	Rich Cox
\$0.00	\$10,000.00	\$10,000.00	Initial Amount from Estimate	N/A	05/08/2015	Rich Cox

The “History of Changes” tracks all changes in Contingency regardless of the method of change.

## O. Entering Other Commitments

Other Commitments are those owner expenses related to the project that do not involve design or construction contracts, typically things like advertising, surveys, permit fees, etc.

**NOTE: Commissioning, Special Inspections, and similar services that are selected using the design contract procedures must be recorded as design contracts, not Other Commitments.**

Navigate to the Project ‘Financial Worksheet’> ‘Estimated vs Committed’ tab.

Program #: 9882 - UNC School Of The Arts - 2016 R&R  
 Project #: 10876 - UNC School Of The Arts - Replace roof - Workplace

Project | Cost Estimate | Project Type | Funds Assigned | **Financial Worksheet** | Contracts | P6 Link | Milestones

Estimated vs Committed | Contingency | Expenditures - Design | Expenditures - Construction | Expenditures - Other

**Worksheet Summary** Save

Assigned Funds:	\$100,000.00	Assigned Funds:	\$100,000.00
Total Estimated Cost:	\$350,000.00	Total Committed:	\$98,000.00
Estimated Surplus (Need):	(\$250,000.00)	Available to Commit:	\$2,000.00

[Assign Funds](#)

**Worksheet Detail**

Enter Category Estimates  
 Enter Total Estimates

	Estimated Cost	Committed		Expended
		Original Contracts	Revised Contracts	
Design Fee \$:	\$ 25,000.00	\$ 25,000.00	\$ 26,000.00	\$ 0.00
Construction \$:	\$ 300,000.00	\$ 72,000.00	\$ 72,000.00	\$ 0.00
Contingency \$:	\$ 10,000.00			
Other \$:	\$ 15,000.00	\$ 0.00	\$ 0.00	\$ 0.00
<b>Total</b>	<b>\$350,000.00</b>	<b>\$97,000.00</b>	<b>\$98,000.00</b>	<b>\$0.00</b>

The Estimated Cost *Other* \$ shows \$15,000 but the amount of funds *Available to Commit* is only \$2000, and the system will not allow committing more funds than are available. This financial constraint does not apply to Special Project Designations (Performance Contract, Foundation Project, Non-Code-Item Project).

Select the 'Expenditures – Other' tab

Program #: 9882 - UNC School Of The Arts - 2016 R&R  
 Project #: 10876 - UNC School Of The Arts - Replace roof - Workplace

Project | Cost Estimate | Project Type | Funds Assigned | **Financial Worksheet** | Contracts | P6 Link | Milestones

Estimated vs Committed | Contingency | Expenditures - Design | Expenditures - Construction | **Expenditures - Other**

**Expenditure Details** Save

Cost Category: **Other**

Add  line(s) +

Enter the number of lines you want to add, 1 line for each PO or other commitment and click the + sign.

Program #: 9882 - UNC School Of The Arts - 2016 R&R  
 Project #: 10876 - UNC School Of The Arts - Replace roof - Workplace

Project | Cost Estimate | Project Type | Funds Assigned | **Financial Worksheet** | Contracts | P6 Link | Milestones

Estimated vs Committed | Contingency | Expenditures - Design | Expenditures - Construction | **Expenditures - Other**

**Expenditure Details** Save

Cost Category: **Other**

Add  line(s) +

HUB? Commitment #	Purpose	Vendor	Commitment Amt	Open Amt	Invoice	
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text" value="0.00"/>	\$0.00		<a href="#">Add Invoice</a>
<b>Total</b>			\$0.00	\$0.00		<a href="#">Delete Commitment</a>

If the vendor is a HUB, check the box at the left. Assign a commitment #, which can be a PO number or anything you want, a purpose or description of what is being purchased, the vendor, and the commitment amount, then **Save**. HUB Vendors must be selected from the vendor search because their certification status is validated as part of the data entry process, but other vendors can be entered by typing the name.

**Commitment(s) and Expenditures Saved successfully**

Program #: 9882 - UNC School Of The Arts - 2016 R&R  
 Project #: 10876 - UNC School Of The Arts - Replace roof - Workplace

Project | Cost Estimate | Project Type | Funds Assigned | **Financial Worksheet** | Contracts | P6 Link | Milestones

Estimated vs Committed | Contingency | Expenditures - Design | Expenditures - Construction | **Expenditures - Other**

**Close**

**Expenditure Details** **Save**

Cost Category: **Other**

Add  line(s) **+**

HUB? Commitment #	Purpose	Vendor	Commitment Amt	Open Amt	Invoice
<input checked="" type="checkbox"/> 1	Survey	Regional Land Surveyors, Inc	\$ 1,500.00 <a href="#">Search</a>	\$1,500.00 <a href="#">Add Invoice</a>	
<b>Total</b>			<b>\$1,500.00</b>	<b>\$1,500.00</b>	<b>\$0.00</b>

**Delete Commitment**

Unlike design or construction contracts, there is no formal process for changing these commitments. If there is an increase or decrease to the commitment amount, simply enter the new correct amount in the *Commitment Amt.* and **Save**. Entering expenditures (payments/invoices) is optional. If there are invoices entered, the commitment amount cannot be reduced below the expenditures and the commitment cannot be deleted.

All the information from this tab rolls up automatically to the 'Estimated vs Committed' tab, as shown below.

Program #: 9882 - UNC School Of The Arts - 2016 R&R  
 Project #: 10876 - UNC School Of The Arts - Replace roof - Workplace

Project | Cost Estimate | Project Type | Funds Assigned | **Financial Worksheet** | Contracts | P6 Link | Milestones

**Estimated vs Committed** | Contingency | Expenditures - Design | Expenditures - Construction | Expenditures - Other

**Close**

**Worksheet Summary** **Save**

<b>Assigned Funds:</b>	\$100,000.00	<b>Assigned Funds:</b>	\$100,000.00
<b>Total Estimated Cost:</b>	\$350,000.00	<b>Total Committed:</b>	\$99,500.00
<b>Estimated Surplus (Need):</b>	(\$250,000.00)	<b>Available to Commit:</b>	\$500.00

[Assign Funds](#)

**Worksheet Detail**

Enter Category Estimates  
 Enter Total Estimates

	Estimated Cost	Committed		Expended
		Original Contracts	Revised Contracts	
Design Fee \$:	\$ 25,000.00	\$ 25,000.00	\$ 26,000.00	\$ 0.00
Construction \$:	\$ 300,000.00	\$ 72,000.00	\$ 72,000.00	\$ 0.00
Contingency \$:	\$ 10,000.00			
Other \$:	\$ 15,000.00	\$ 1,500.00	\$ 1,500.00	\$ 0.00
<b>Total</b>	<b>\$350,000.00</b>	<b>\$98,500.00</b>	<b>\$99,500.00</b>	<b>\$0.00</b>

P. Entering Expenditures

Entering expenditures is optional in this system since it is not designed to be an accounting system, but the opportunity for these entries was provided to assist users in tracking payments to designers, contractors, and other vendors.

1. Designer Expenditures

Navigate to the 'Financial Worksheet' > 'Expenditures – Design' tab, and click on 'Add New Row.'

The screenshot shows the 'Expenditures - Design' tab. At the top, there are navigation tabs: Project, Cost Estimate, Project Type, Funds Assigned, Financial Worksheet (selected), Contracts, P6 Link, and Milestones. Below these are sub-tabs: Estimated vs Committed, Contingency, Expenditures - Design (selected), Expenditures - Construction, and Expenditures - Other. The main area shows 'Expenditure Details' with 'Cost Category: Design'. Below that, a table shows 'Commitment: #1 - SCO Designer' with a total of \$3,500,000.00. A red circle highlights the 'Add New Row' button.

Commitment: #1 - SCO Designer			
Total: Design Contracts	\$3,500,000.00	\$0.00	\$3,500,000.00

Enter the invoice number, date, and amount. If you are tracking multiple funding sources, insert the proper funding code from which the funds were taken for the invoice. Then [Save](#).

The screenshot shows the 'Expenditures - Design' tab after adding a new row. The table now includes a row for 'SCO Designer' with an invoice number of 1, a date of 03/17/2015, and an amount of \$60,000.00. The total design contracts amount is now \$3,440,000.00.

Vendor	Committed	Invoice	Date	Amount	Agency Funding Code	Open
SCO Designer	\$3,500,000.00	1	03/17/2015	\$ 60,000.00		\$3,440,000.00
Total: Design Contracts	\$3,500,000.00			\$60,000.00		\$3,440,000.00

The amount expended and remaining balance are shown on the *Total Design Contracts* line. Note that if you now go to the 'Estimated vs Committed' tab, the expenditure also

appears.

**Program #:** 9920 - St. Construction - New Office Complex  
**Project #:** 10929 - St. Construction - Construct Building

Project | Cost Estimate | Project Type | Funds Assigned | **Financial Worksheet** | Contracts | Milestones

Estimated vs Committed | Contingency | Expenditures - Design | Expenditures - Construction | Expenditures - Other

**Worksheet Summary**

<b>Assigned Funds:</b>	\$25,000,000.00	<b>Assigned Funds:</b>	\$25,000,000.00
<b>Total Estimated Cost:</b>	\$50,000,000.00	<b>Total Committed:</b>	\$22,000,000.00
<b>Estimated Surplus (Need):</b>	(\$25,000,000.00)	<b>Available to Commit:</b>	\$3,000,000.00

[Assign Funds](#)

**Worksheet Detail**

	Estimated Cost	Committed		Expended
		Original Contracts	Revised Contracts	
Design Fee \$:	\$ 5,000,000.00	\$ 3,500,000.00	\$ 3,500,000.00	\$ 60,000.00
Construction \$:	\$ 40,100,000.00	\$ 18,500,000.00	\$ 18,500,000.00	\$ 0.00
Contingency \$:	\$ 900,000.00			
Other \$:	\$ 4,000,000.00	\$ 0.00	\$ 0.00	\$ 0.00
<b>Total</b>	<b>\$50,000,000.00</b>	<b>\$22,000,000.00</b>	<b>\$22,000,000.00</b>	<b>\$60,000.00</b>

## 2. Construction Expenditures

Construction expenditures are recorded similarly to Designer expenditures. Navigate to the 'Financial Worksheet' > 'Expenditures – Construction' tab, and click on 'Add New Row.'

**Program #:** 9920 - St. Construction - New Office Complex  
**Project #:** 10929 - St. Construction - Construct Building

Project | Cost Estimate | Project Type | Funds Assigned | **Financial Worksheet** | Contracts | P6 Link | Milestones

Estimated vs Committed | Contingency | Expenditures - Design | **Expenditures - Construction** | Expenditures - Other

**Expenditure Details**

Cost Category: **Construction**

Commitment: #1 - SCO Contractor

Total: Construction Contracts	\$18,500,000.00	\$0.00	\$18,500,000.00
-------------------------------	-----------------	--------	-----------------

[Add New Row](#)

Enter the invoice number, date, and amount. If you are tracking multiple funding sources, insert the proper funding code from which the funds were taken for the invoice. Then [Save](#).

**Expenditures Saved successfully**

**Program #:** 9920 - St. Construction - New Office Complex  
**Project #:** 10929 - St. Construction - Construct Building

Project | Cost Estimate | Project Type | Funds Assigned | **Financial Worksheet** | Contracts | P6 Link | Milestones

Estimated vs Committed | Contingency | Expenditures - Design | **Expenditures - Construction** | Expenditures - Other

**Expenditure Details**

Cost Category: **Construction**

Commitment: #1 - SCO Contractor

Vendor	Committed	Invoice	Date	Amount	Agency Funding Code	Open
SCO Contractor		1	04/09/2015	\$ 50,000.00		<a href="#">Delete</a>
Total: Construction Contracts	\$18,500,000.00			\$50,000.00		\$18,450,000.00

The amount expended and remaining balance are shown on the *Total Construction Contracts* line. Again, if you now go to the ‘Estimated vs Committed’ tab, the expenditure also appears.

Expenditures Saved successfully

Program #: 9920 - St. Construction - New Office Complex  
 Project #: 10929 - St. Construction - Construct Building

Project / Cost Estimate / Project Type / Funds Assigned / **Financial Worksheet** / Contracts / P6 Link / Milestones

Estimated vs Committed / Contingency / Expenditures - Design / Expenditures - Construction / Expenditures - Other

Close

---

**Worksheet Summary** Save

Assigned Funds:	\$25,000,000.00	Assigned Funds:	\$25,000,000.00
Total Estimated Cost:	\$50,000,000.00	Total Committed:	\$22,000,000.00
Estimated Surplus (Need):	(\$25,000,000.00)	Available to Commit:	\$3,000,000.00

[Assign Funds](#)

**Worksheet Detail**

	Estimated Cost	Committed		Expended
		Original Contracts	Revised Contracts	
Design Fee \$:	\$ 5,000,000.00	\$ 3,500,000.00	\$ 3,500,000.00	\$ 60,000.00
Construction \$:	\$ 40,100,000.00	\$ 18,500,000.00	\$ 18,500,000.00	\$ 50,000.00
Contingency \$:	\$ 900,000.00			
Other \$:	\$ 4,000,000.00	\$ 0.00	\$ 0.00	\$ 0.00
<b>Total</b>	<b>\$50,000,000.00</b>	<b>\$22,000,000.00</b>	<b>\$22,000,000.00</b>	<b>\$110,000.00</b>

### 3. Other Expenditures

To enter Other expenditures, a commitment needs to exist first. See [Entering Other Commitments](#). Navigate to the ‘Financial Worksheet’ > ‘Expenditures – Other’ tab and click “Add Invoice.”

Program #: 9920 - St. Construction - New Office Complex  
 Project #: 10929 - St. Construction - Construct Building

Project / Cost Estimate / Project Type / Funds Assigned / **Financial Worksheet** / Contracts / P6 Link / Milestones

Estimated vs Committed / Contingency / Expenditures - Design / Expenditures - Construction / **Expenditures - Other**

Close

---

**Expenditure Details** Save

Cost Category: **Other**

Add  line(s) +

HUB? Commitment #	Purpose	Vendor	Commitment Amt	Open Amt	Invoice	
<input type="checkbox"/> 1	Survey	Survey Master	\$ 12,000.00	\$12,000.00	<a href="#">Add Invoice</a>	<a href="#">Delete Commitment</a>
<b>Total</b>			<b>\$12,000.00</b>	<b>\$12,000.00</b>		<b>\$0.00</b>

As with Design and Construction Expenditures, enter the invoice number, date, and amount. If you are tracking multiple funding sources, insert the proper funding code from which the funds were taken for the invoice. Then Save.

Commitment(s) and Expenditures Saved successfully

Program #: 9920 - St. Construction - New Office Complex  
 Project #: 10929 - St. Construction - Construct Building

Project | Cost Estimate | Project Type | Funds Assigned | **Financial Worksheet** | Contracts | P6 Link | Milestones

Estimated vs Committed | Contingency | Expenditures - Design | Expenditures - Construction | **Expenditures - Other**

Close

**Expenditure Details** Save

Cost Category: **Other**

Add  line(s) +

HUB? Commitment #	Purpose	Vendor	Commitment Amt	Open Amt	Invoice								
<input type="checkbox"/> 1	Survey	Survey Master	\$ 12,000.00	\$6,000.00	<table border="1"> <thead> <tr> <th>Invoice #</th> <th>Invoice Date</th> <th>Invoice Amt</th> <th>Agency Funding Code</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>04/09/2015</td> <td>\$ 6,000.00</td> <td></td> </tr> </tbody> </table>	Invoice #	Invoice Date	Invoice Amt	Agency Funding Code	1	04/09/2015	\$ 6,000.00	
Invoice #	Invoice Date	Invoice Amt	Agency Funding Code										
1	04/09/2015	\$ 6,000.00											
<b>Total</b>			\$12,000.00	\$6,000.00	\$6,000.00								

Delete Commitment

The amount expended and remaining balance are shown to the *Total* line and the expenditure appears on the 'Estimated vs Committed' tab.

Program #: 9920 - St. Construction - New Office Complex  
 Project #: 10929 - St. Construction - Construct Building

Project | Cost Estimate | Project Type | Funds Assigned | **Financial Worksheet** | Contracts | P6 Link | Milestones

Estimated vs Committed | Contingency | Expenditures - Design | Expenditures - Construction | Expenditures - Other

Close

**Worksheet Summary** Save

<b>Assigned Funds:</b>	\$25,000,000.00	<b>Assigned Funds:</b>	\$25,000,000.00
<b>Total Estimated Cost:</b>	\$50,000,000.00	<b>Total Committed:</b>	\$22,012,000.00
<b>Estimated Surplus (Need):</b>	(\$25,000,000.00)	<b>Available to Commit:</b>	\$2,988,000.00

[Assign Funds](#)

**Worksheet Detail**

	Estimated Cost	Committed		Expended
		Original Contracts	Revised Contracts	
Design Fee \$:	\$ 5,000,000.00	\$ 3,500,000.00	\$ 3,500,000.00	\$ 60,000.00
Construction \$:	\$ 40,100,000.00	\$ 18,500,000.00	\$ 18,500,000.00	\$ 50,000.00
Contingency \$:	\$ 900,000.00			
Other \$:	\$ 4,000,000.00	\$ 12,000.00	\$ 12,000.00	\$ 6,000.00
<b>Total</b>	\$50,000,000.00	\$22,012,000.00	\$22,012,000.00	\$116,000.00

**Q. Entering HUB Data**

HUB data must be entered as part of a construction contract.

For Standard Projects with designers or SCO code review, HUB data should be entered at the time of contract award, and the data is saved as "At award." The Good Faith Effort must be entered. For formal contracts awarded by SCO, data "At award" will be entered by them. HUB data should be updated as it changes through the life of the contract and verified before the project is closed. Updating/finalizing HUB data will be the responsibility of the owner agency, university, or community college. A beneficial occupancy date must be entered before HUB data can be finalized.

Non-Code-Item Projects that are construction only (no designer or SCO code review) can be entered as "HUB Only," which will allow direct creation of a construction contract. The project must be created as a Non-Code-Item Project AND the HUB Only check box must be checked in order to utilize the abbreviated data entry method.

**NOTE: If a project exists in InterscopePlus because of design or code review, the construction contract and HUB data must be entered under that project, regardless of dollar amount of project.**

## 1. Good Faith Efforts

Navigate to the desired 'Project' > 'Contracts' tab, and select the construction contract.

	SCO ID#	FIRM	STATUS	PHASE	TYPE	OVERSIGHT	
1	16-12285-01	SCO Designer	Active	Design	Standard Design	Limited Oversight	
2	16-12285-01A-1	SCO Contractor	Valid Contract	Construction	General Contract		

Click on the 'HUB Good Faith Efforts' tab. The Good Faith Efforts must be documented to determine if the contractor is responsive. Select the 'HUB Good-Faith Efforts' tab,

enter the appropriate information, and



**Construction Contractor's Good-Faith Effort Affidavit**

- 1 - (10 pts) Contacted minority businesses.
- 2 - (10 pts) Made the construction plans, specifications and requirements available.
- 3 - (15 pts) Broken down or combined elements of work.
- 4 - (10 pts) Worked with minority trade, community or contractor organizations.
- 5 - (10 pts) Attended prebid meetings scheduled by the public owner
- 6 - (20 pts) Provided assistance in getting required bonding or insurance
- 7 - (15 pts) Negotiated in good faith with interested minority businesses.
- 8 - (25 pts) Provided assistance to an otherwise qualified minority business.
- 9 - (20 pts) Negotiated joint venture and partnership arrangements.
- 10 - (20 pts) Provided quick pay agreements and policies.

**Affidavit Execution**

\* Company Submitting Affidavit:

\* Date:

**GFE Assessment (50 points required to be considered responsive)**

Points Achieved: 0

✗ Not Responsive

Once saved, the system will calculate the number of points and determine if the contractor is responsive.

**Affidavit and Good Faith Efforts updated successfully.**

Program #: 12153 - St. Construction - Minor Renovations  
Project #: 12285 - St. Construction - Renovate lobby  
Design #: 16-12285-01 - SCO Designer  
Package: 16-12285-01A - Renovate lobby  
Construction Contract #: 16-12285-01A-1 - SCO Contractor

Construction Contract Detail | Bid Items | **HUB Good-Faith Efforts** | HUB Participation | Change Orders

Action Close

### Construction Contractor's Good-Faith Effort Affidavit

- 1 - (10 pts) Contacted minority businesses.
- 2 - (10 pts) Made the construction plans, specifications and requirements available.
- 3 - (15 pts) Broken down or combined elements of work.
- 4 - (10 pts) Worked with minority trade, community or contractor organizations.
- 5 - (10 pts) Attended prebid meetings scheduled by the public owner
- 6 - (20 pts) Provided assistance in getting required bonding or insurance
- 7 - (15 pts) Negotiated in good faith with interested minority businesses.
- 8 - (25 pts) Provided assistance to an otherwise qualified minority business.
- 9 - (20 pts) Negotiated joint venture and partnership arrangements.
- 10 - (20 pts) Provided quick pay agreements and policies.

[State Construction Manual: Good-Faith Efforts](#)

### Affidavit Execution

\* Company Submitting Affidavit:

\* Date:

### GFE Assessment (50 points required to be considered responsive)

Points Achieved: **75**

**Responsive**

2. HUB Entry as part of a Standard Project – Single Prime

Navigate to the desired Project Contracts tab, and select the construction contract.

Click on the ‘HUB Participation’ tab.

This provides information on the HUB status of the Prime Contractor, and the current HUB participation.

If the contractor has submitted an Affidavit C, on the ‘HUB Participation’ tab click on the

**Add Subcontractor**

Program #: 12153 - St. Construction - Minor Renovations  
 Project #: 12285 - St. Construction - Renovate lobby  
 Design #: 16-12285-01 - SCO Designer  
 Package: 16-12285-01A - Renovate lobby  
 Construction Contract #: 16-12285-01A-1 - SCO Contractor

Construction Contract Detail | Bid Items | HUB Good-Faith Efforts | **HUB Participation** | Change Orders

Action Close

**Construction Contract HUB Participation**

General Contractor: **SCO Contractor**  
 GC HUB Type: **Unknown**

HUB Data is FINAL as of: / /

Show HUB Details/Status as of: Award

Source of Information:  
 Affidavit B  
 Affidavit (GFEs req'd)  
 C (GFEs req'd)  
 Affidavit (GFEs req'd)  
 D

**HUB Participation Summary (Certified Only)**

	Awarded	Current
Construction Contract Amount:	\$98,500.00	\$98,500.00
Total HUB Participation:	\$0.00	\$0.00
HUB %:	0.00 %	0.00 %

Contractor	HUB Type	HUB Certified?	CSI Division	Work	Awarded	Current Contract	Payments To Date	Final Payment?
0 found								

**Add Subcontractor**

This will bring up the “Add Subcontractor” search box. Enter information about the desired subcontractor and **Search**.

**Add Subcontractor...**

Name: Paint  
 HUB Certified? Y

City:   
 Zip:   
 Email:   
 Contact Person:   
 Address:   
 State:   
 Phone: (999-999-9999)

Search Done Reset Not Found - Submit Request

	Company	City, State	Voice	Contact	Email
<a href="#">LINK TO IPS</a>	<a href="#">Martinez's Painting Co.</a>	Wilmington, NC	(910)231-7515	Martinez, Joseph	<a href="#">DOA.MIS.Developers@</a>
<a href="#">LINK TO IPS</a>	<a href="#">MECKLENBURG PAINT CO INC</a>	Charlotte, NC	(704)588-3113	ETHEREDGE, LIZ	<a href="#">DOA.MIS.Developers@</a>
<a href="#">LINK TO IPS</a>	<a href="#">Meticulous painting and drywall</a>	Knighdale, NC	(919)638-0332	Withrow, Leroy	<a href="#">DOA.MIS.Developers@</a>
<a href="#">LINK TO IPS</a>	<a href="#">Morrison ElectroStatic Painting, Inc.</a>	Terrell, NC	828-851-4779	Crowder, Susan	<a href="#">DOA.MIS.Developers@</a>
SELECT	<a href="#">Paint Master</a>	Sanford, NC	(919)776-9251	Harris, Larrry	<a href="#">DOA.MIS.Developers@</a>
<a href="#">LINK TO IPS</a>	<a href="#">Painting the Carolinas, LLC</a>	Mount Holly, NC	(704)827-0210	Goolsby, Charleen	<a href="#">DOA.MIS.Developers@</a>
<a href="#">LINK TO IPS</a>	<a href="#">Painting the Carolinas, LLC</a>	Mount Holly, NC	(704)827-0210	Goolsby, Charleen	<a href="#">DOA.MIS.Developers@</a>
SELECT	<a href="#">Paintmaster LLC</a>	Wendell, NC	(919)365-3201	Eberhardt, Debra	<a href="#">DOA.MIS.Developers@</a>

5 page(s): 1 2 [3] 4 5

Select the desired contractor from the pick list. “Link TO IPS” or “SELECT” options are displayed. The difference between these two options is a system parameter involving where address information is stored. Any company that can be “SELECT”ed, is in the InterscopePlus database and can be used for Contractors. Companies that can be “LINK TO IPS” are in IPS database but not in InterscopePlus. If the desired company is not listed, click on the additional box for **Not Found - Submit Request** to request the addition. This will open a screen for entry of contractor information including name, address, and telephone which will be routed to the system administrator for approval/entry.

Request Contractor: Profile

Close

Fill out the form below as completely as possible and click "Request Contractor." An Administrator will review your request, and you will be notified once a decision has been made.

Request Contractor

\* Name: Required \*

Status: Pending

\* Email: Required \*

\* Contact Person: Required \*

\* Line 1: Required \*

Line 2:

\* City: Required \*

\* State: ▾

\* Zip: Required \*

County: UNKNOWN ▾

Voice#: - - - -

Fax#: - - - -

Website URL: \_\_\_\_\_

Parent: \_\_\_\_\_

Former Name: \_\_\_\_\_

Firm ID#: (Auto)

Last Update: \_\_\_\_\_

IPS Vendor:

Address:

Contact:

Email:

IPS Location:

IPS Sequence:

HUB participation information for this company or a “LINK TO IPS” company may not be entered until the contractor is approved and loaded into the system by the System Administrator. An automatic e-mail will be generated back to the requester when this has been done so that HUB entries may be completed.

### Add SubContractor...

Name:  Email:

HUB Certified?  Contact Person:

Address:  City:

State:  Zip:

Phone:  (999-999-9999)

	Int	IPS	Company	City, State	Voice	Contact
<a href="#">REQUEST</a>		×	<a href="#">Maze Custom Painting, LLC</a>	Charlotte, NC	(704)778-6288	Felisbret, Jason
<a href="#">REQUEST</a>		×	<a href="#">MECKLENBURG PAINT CO INC</a>	Charlotte, NC	(704)588-3113	ETHEREDGE, LIZ
<a href="#">REQUEST</a>		×	<a href="#">Meticulous painting and drywall</a>	Knighdale, NC	(919)638-0332	Withrow, Leroy
<b>SELECT</b>	×	×	<a href="#">Paint Master</a>	Sanford, NC	(919)776-9251	Harris, Larry
<a href="#">REQUEST</a>		×	<a href="#">Painting &amp; Drywall By Villanueva Inc</a>	Raleigh, NC	(919)349-0204	Villanueva, Patrick
<a href="#">REQUEST</a>		×	<a href="#">Painting the Carolinas, LLC</a>	Mount Holly, NC	(704)827-0210	Goolsby, Charleen
<a href="#">REQUEST</a>		×	<a href="#">Painting the Carolinas, LLC</a>	Mount Holly, NC	(704)827-0210	Goolsby, Charleen
<a href="#">REQUEST</a>		×	<a href="#">Paintmaster LLC</a>	Wendell, NC	(919)365-3201	Eberhardt, Debra

6 page(s): [1](#) [2](#) [3](#) [4](#) [5](#) [6](#)

The selected subcontractor is displayed on the contractor list, as shown below. Now complete entering the *CSI Division, Work, and Awarded* amount, check if this is a final payment, and .

HUB Participation data saved.

Program #: 10114 - St. Construction - Minor Renovations  
 \_Project #: 11026 - St. Construction - Enlarge conference room  
 \_\_Design #: 15-11026-01 - SCO Designer  
 \_\_\_Package: 15-11026-01A - Enlarge conference room  
 \_\_\_\_Construction Contract #: 15-11026-01A-1 - SCO Contractor

Construction Contract Detail | Bid Items | **HUB Participation** | HUB Good-Faith Efforts | Change Orders

#### Construction Contract HUB Participation

General Contractor: **SCO Contractor**  
 GC HUB Type: **Not a HUB**

HUB Data is FINAL

Show HUB Details/Status as of  Source of Information:  Affidavit B  Affidavit C  Affidavit D (MUST first enter [Good-Faith Efforts](#))

	Awarded	Current
Construction Contract Amount:	\$135,000.00	\$135,000.00
Total HUB Participation:	<b>\$15,000.00</b>	\$0.00
HUB %:	<b>11.11 %</b>	0.00 %

Contractor	HUB Type	HUB Certified?	CSI Division	Work	Awarded	Current Contract	Payments To Date	Final Payment?
<a href="#">Paint Master</a>	B	Y	09700 - Wall F	Vinyl Wall Covering	\$ 15,000.00	\$ 0.00	\$ 0.00	<input type="checkbox"/>

1 found

The HUB participation is automatically calculated and displayed for Certified HUB contractors. Uncertified HUB firms may be listed, but will not be reflected in the displayed calculations. Continue adding subcontractors as necessary.

NOTE: Contractors/subcontractors will need to be linked to IPS through eVP to capture HUB data.

### 3. HUB Entry as part of a Standard Project – CM at Risk

HUB Entry for CM at Risk differs from Single Prime in that participation must be reported for each 1<sup>st</sup> tier subcontractor. Therefore, there is a Trade/Sub Package for each 1<sup>st</sup> tier subcontractor or Package Prime Contractor, and the HUB subcontractors under each Trade/Sub Package are recorded.

If the construction contract was created as a CMAR, the appropriate HUB Participation (CMAR) tab will show up under the contract.

Program #: 9920 - St. Construction - New Office Complex  
 Project #: 10929 - St. Construction - Construct Building  
 Design #: 16-10929-02 - SCO Designer  
 Package: 16-10929-02A - Construct Building  
 Construction Contract #: 16-10929-02A-1 - SCO Contractor

Construction Contract Detail | Bid Items | **HUB Participation (CMAR)** | HUB Good-Faith Efforts | Change Orders

Action | Close

**Construction Contract HUB Participation - CMAR Contract**

Construction Manager: SCO Contractor  
 CMAR HUB Type: Not a HUB  
 Hub Data is FINAL

**HUB Participation Summary (Certified Only)**

	Awarded	Current
Construction Contract Amount:	\$18,500,000	\$18,500,000
Total HUB Participation:	\$0	\$0
HUB %:	0.0%	0.0%

Trade / Sub Packages Show HUB Details/Status as of: Award

Add Trade / Sub Package

Pkg # 2 For Sitework **Select Package Prime Contractor**

For each Trade/Sub Package, enter the *Pkg#* and type of work, then ‘Select Package Prime Contractor’. The *Pkg #* is user-defined and may be whatever is customary for the organization making the entries. Similarly, the type of work under *For* is a user-defined entry, but should be generally descriptive of the nature of the work.

Search for the desired contractor and select them.

### Add SubContractor...

Name:

HUB Certified? -- Select --

Address:

State:

Phone:  (999-999-9999)

Email:

Contact Person:

City:

Zip:

Search
Done
Reset

	Company	City, State	Voice	Cont
<a href="#">REQUEST</a>	<a href="#">Hine Sitework, Inc.</a>	Goldsboro, NC	(919)736-8990	Hine, Ann

1 page(s): [1]

Enter the *Pkg Amount at Award*. If there are HUB subcontractors for the Package Prime, they should be added by clicking 'Add Subcontractor.'

**Program #:** 9920 - St. Construction - New Office Complex

**\_Project #:** 10929 - St. Construction - Construct Building

**\_Design #:** 16-10929-02 - SCO Designer

**\_Package:** 16-10929-02A - Construct Building

**\_Construction Contract #:** 16-10929-02A-1 - SCO Contractor

Construction Contract Detail | Bid Items | **HUB Participation (CMAR)** | HUB Good-Faith Efforts | Change Orders

Action Close

**Construction Contract HUB Participation - CMAR Contract**

Construction Manager: SCO Contractor

CMAR HUB Type: Not a HUB

Hub Data is FINAL

**HUB Participation Summary (Certified Only)**

	Awarded	Current
<b>Construction Contract Amount:</b>	\$18,500,000	\$18,500,000
<b>Total HUB Participation:</b>	\$0	\$0
<b>HUB %:</b>	0.0%	0.0%

**Trade / Sub Packages** Show HUB Details/Status as of: Award

Pkg # 2 For Sitework

Pkg Prime: Hine Sitework, Inc. [Change](#) Hub Type: F (Certified) Pkg Amount at Award: \$ 1,500,000.00 Current: \$

Contractor	HUB Type	HUB Certified?	CSI Division	Work	Awarded	Current Contract	Payments To Date	Final Payment?
<a href="#">Add Subcontractor</a>								

**Add Trade / Sub Package**

Pkg # 2 For Sitework [Select Package Prime Contractor...](#)

It is recommended that you  after each contractor, as the Hub Participation Summary will be updated when you save.

HUB Participation data saved.

Program #: 9920 - St. Construction - New Office Complex  
 \_Project #: 10929 - St. Construction - Construct Building  
 \_Design #: 16-10929-02 - SCO Designer  
 \_Package: 16-10929-02A - Construct Building  
 \_Construction Contract #: 16-10929-02A-1 - SCO Contractor

Construction Contract Detail | Bid Items | **HUB Participation (CMAR)** | HUB Good-Faith Efforts | Change Orders

Action | Close

---

**Construction Contract HUB Participation - CMAR Contract**

Construction Manager: SCO Contractor  
 CMAR HUB Type: Not a HUB  
 Hub Data is FINAL

**HUB Participation Summary (Certified Only)**

	Awarded	Current
<b>Construction Contract Amount:</b>	\$18,500,000	\$18,500,000
<b>Total HUB Participation:</b>	\$1,500,000	\$0
<b>HUB %:</b>	8.1%	0.0%

Trade / Sub Packages      Show HUB Details/Status as of: Award

Pkg # 2      For Sitework

Pkg Prime: Hine Sitework, Inc. [Change](#)      Hub Type: F (Certified)      Pkg Amount at Award: \$ 1,500,000.00      Current: \$ 0.00

Contractor	HUB Type	HUB Certified?	CSI Division	Work	Awarded	Current Contract	Payments To Date	Final Payment?
<a href="#">Add Subcontractor...</a>								

**Add Trade / Sub Package**

Pkg # 3      For Concrete      [Select Package Prime Contractor...](#)

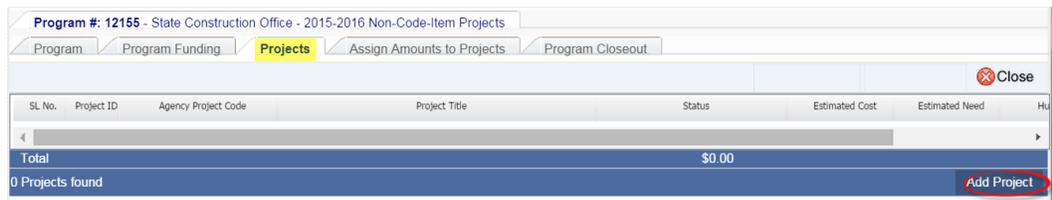
Continue entering Trade/Sub Packages and Subcontractors until all HUB data is complete.

#### 4. HUB Only data entry/Non-code-item-center entry

Small projects that are NOT part of a code-item-center capital project or, by their nature have no design or code review such as painting, road patching, etc., need to be entered for reporting capital activity as well as recording HUB data. All construction projects whose construction cost is in excess of \$30,000 must be reported for HUB participation according to statute. There is an abbreviated method for these entries.

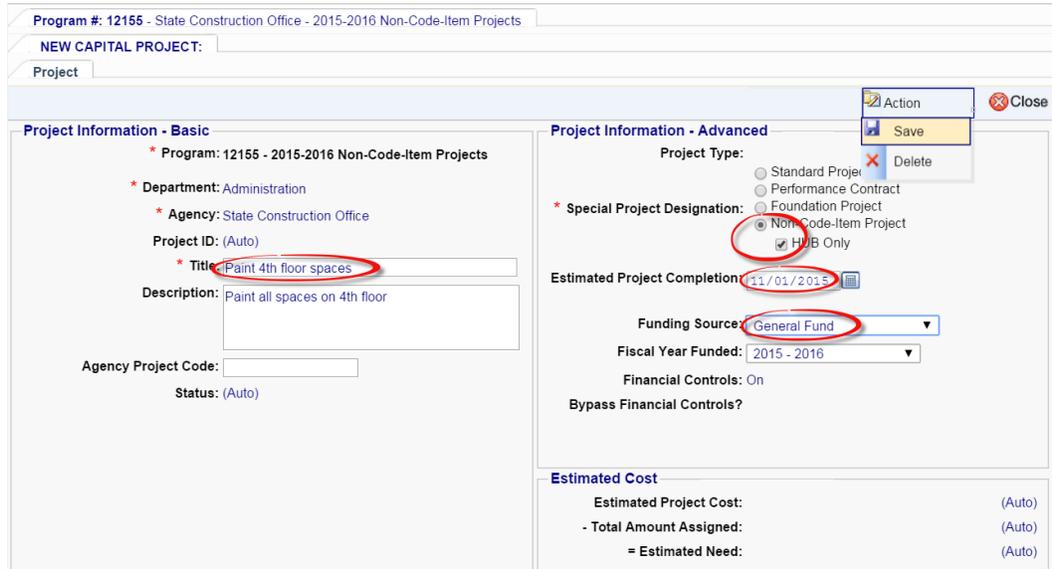
**NOTE: If a project exists in InterscopePlus because of design or code review, the construction contract and HUB data must be entered under that project, regardless of the dollar amount of the project. If the Project is funded from a Capital Project Code-Item-Center, including R&R, it must NOT be entered as a Non-Code-Item Project/HUB Only.**

At the Program, navigate to the 'Projects' tab and click 'Add Project'.

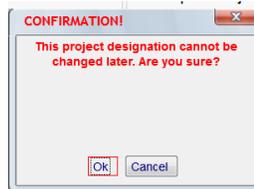


Enter the *Title* and *Description*, then select the Special Project Designation “Non-Code-Item.” Refer to [Determining the Special Project Designation](#). The HUB Only checkbox will appear and must be clicked to enter the checkmark. Enter an *Estimated Project*

*Completion, Funding Source, and Fiscal Year Funded*, then

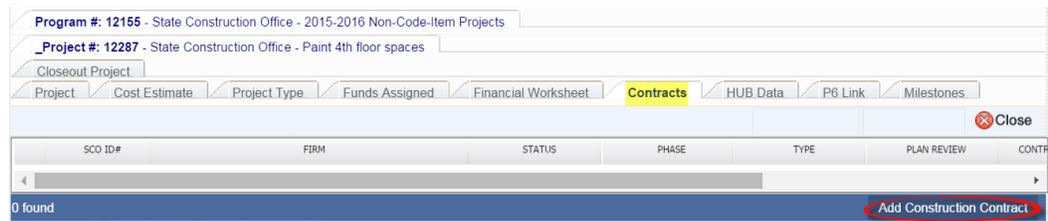


You will be asked to confirm that this is the project designation you want, as it cannot be changed at a later time.

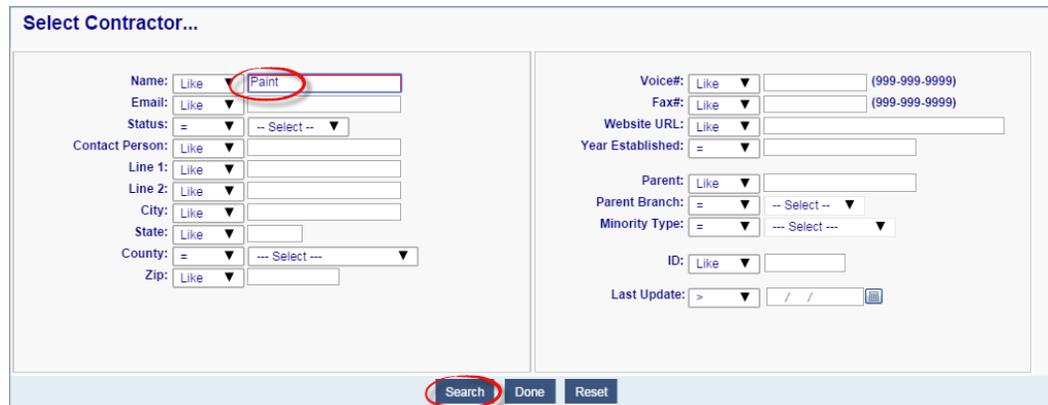


Because there is no Capital Code-Item-Center, and no designer/SCO design reviews, the system assigns the Project Type of <\$500K automatically.

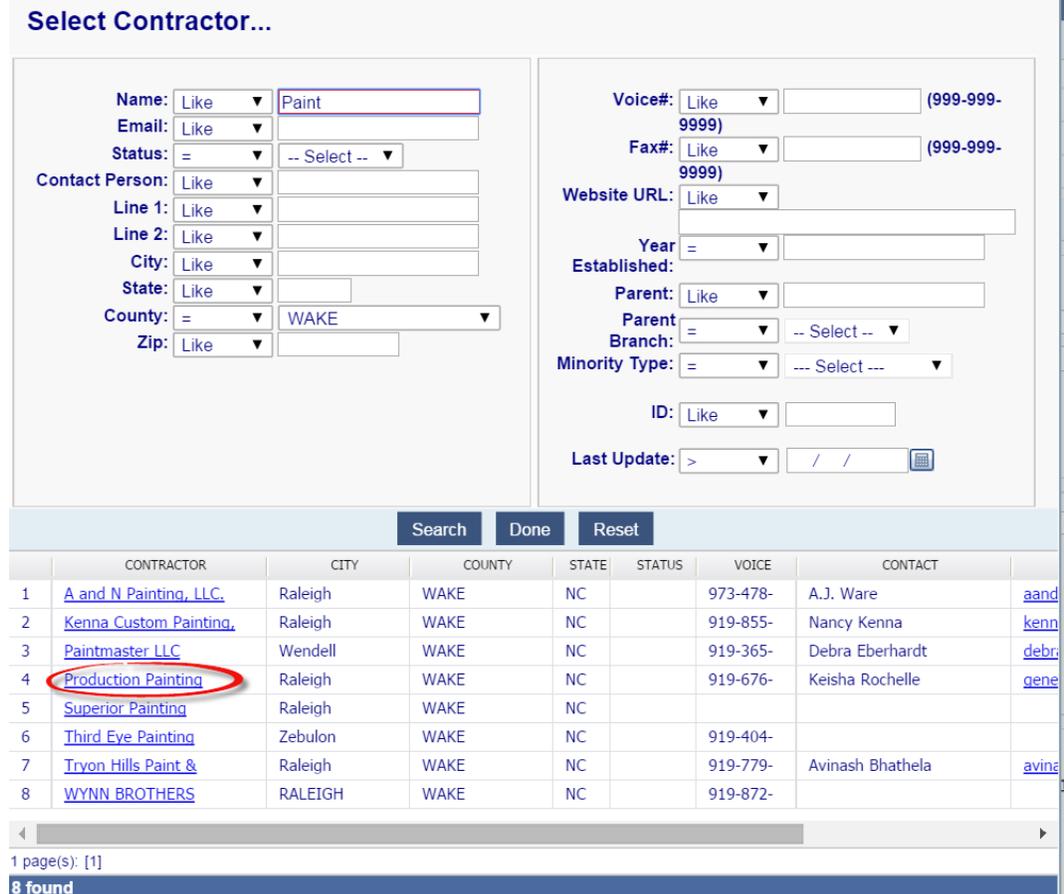
Go to the 'Contracts' tab and select "Add Construction Contract."



At the Select Contractor search window, enter selection criteria and .

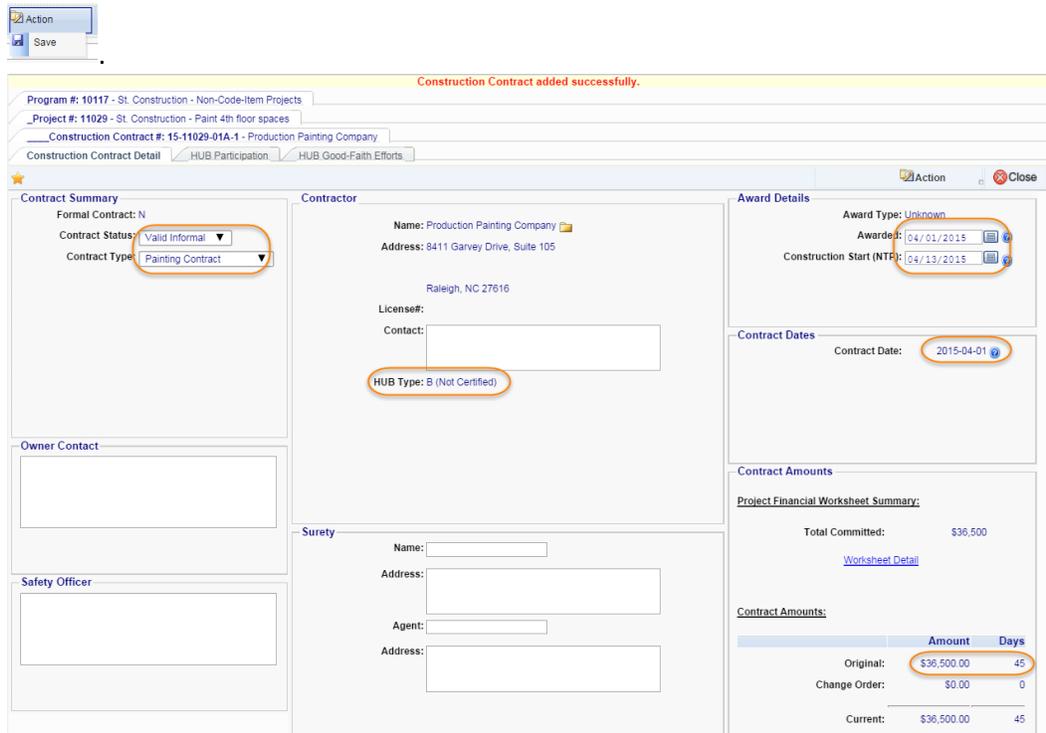


Click on the desired contractor from the list.



The contractor information is displayed in the ‘Construction Contract Detail’ tab, including *HUB Type* and *Contract status*. The *Contract Status* is set to “Creating” and the default *Contract Type* is “General Contract.” Select an appropriate contract type if other than “General.” Entering *Owner Contact*, *Safety Officer*, *Surety*, *Sheets* and *Contractor Contact* is optional. Enter appropriate *Award Details*, *Contract Date*, and *Contract*

*Amounts*. To avoid losing data, you can  as long as the status is “Creating.” When all data is complete, change *Contract Status* to the appropriate “Valid” contract type and



**Construction Contract added successfully.**

Program #: 10117 - St. Construction - Non-Code-Item Projects  
 Project #: 11029 - St. Construction - Paint 4th floor spaces  
 Construction Contract #: 15-11029-01A-1 - Production Painting Company

Construction Contract Detail | HUB Participation | HUB Good-Faith Efforts

**Contract Summary**  
 Formal Contract: N  
 Contract Status: Valid Informal  
 Contract Type: Painting Contract

**Contractor**  
 Name: Production Painting Company  
 Address: 8411 Garvey Drive, Suite 105  
 Raleigh, NC 27616  
 License#: \_\_\_\_\_  
 Contact: \_\_\_\_\_  
 HUB Type: B (Not Certified)

**Award Details**  
 Award Type: Unknown  
 Awarded: 04/01/2015  
 Construction Start (NTR): 04/13/2015

**Contract Dates**  
 Contract Date: 2015-04-01

**Contract Amounts**  
**Project Financial Worksheet Summary:**  
 Total Committed: \$36,500  
[Worksheet Detail](#)

**Contract Amounts:**

	Amount	Days
Original:	\$36,500.00	45
Change Order:	\$0.00	0
Current:	\$36,500.00	45

**Owner Contact**  
 \_\_\_\_\_

**Safety Officer**  
 \_\_\_\_\_

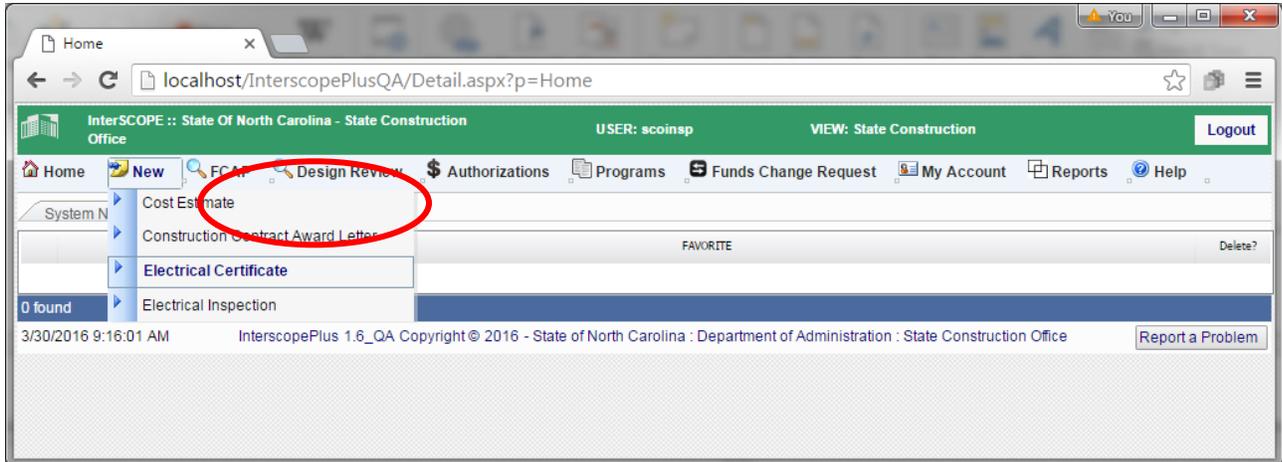
**Surety**  
 Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Agent: \_\_\_\_\_  
 Address: \_\_\_\_\_

Enter [Good Faith Efforts](#) and additional [HUB Participation](#) as appropriate.

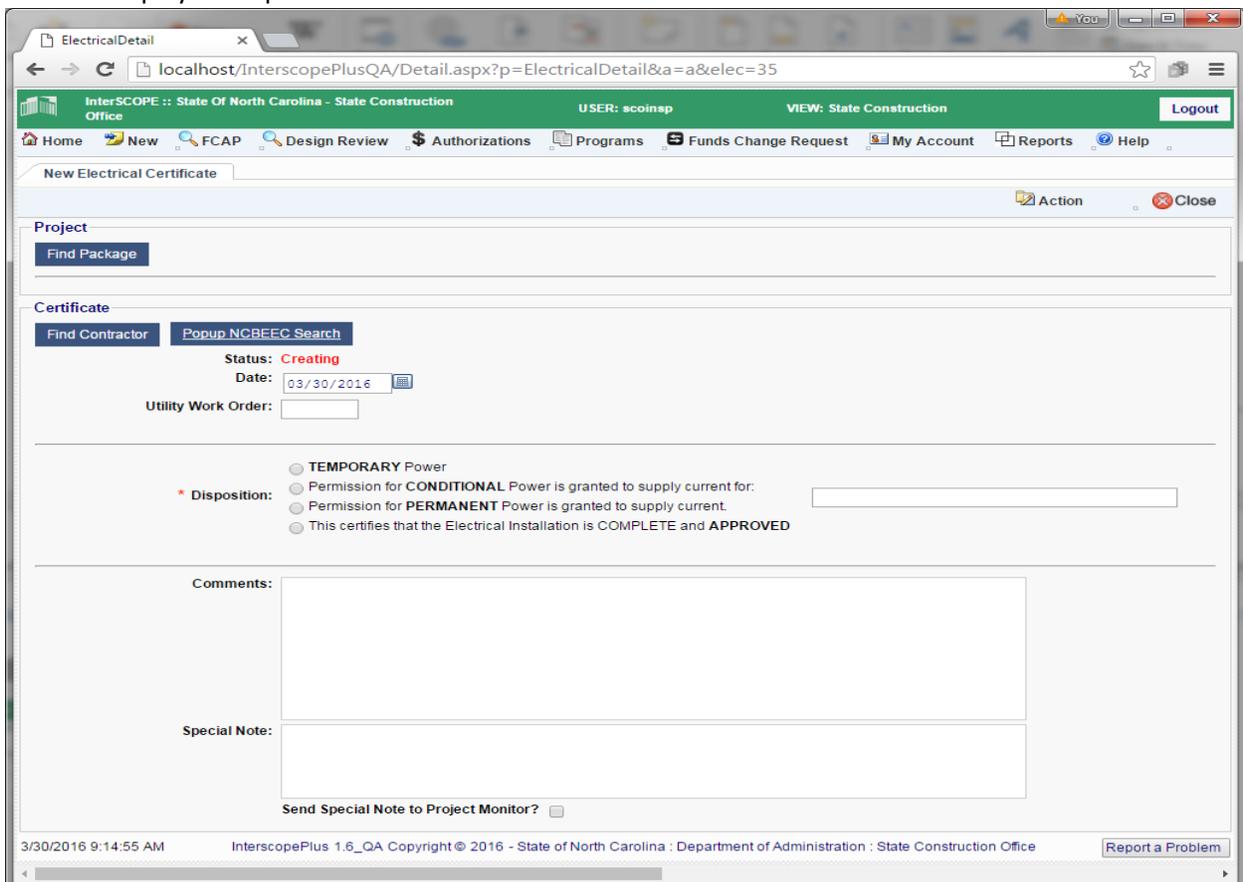
## R. Electrical Certificate or Inspection

### 1. Step 1 - Select the Package

Step 1 – Select the Package To initiate the process of creating an electrical certificate, click on the desired option under “**New**” on the main menu:

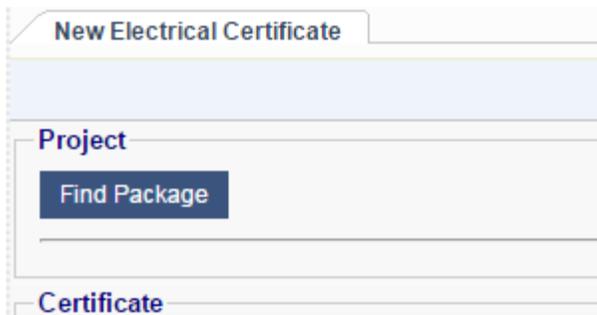


This will display the input form:

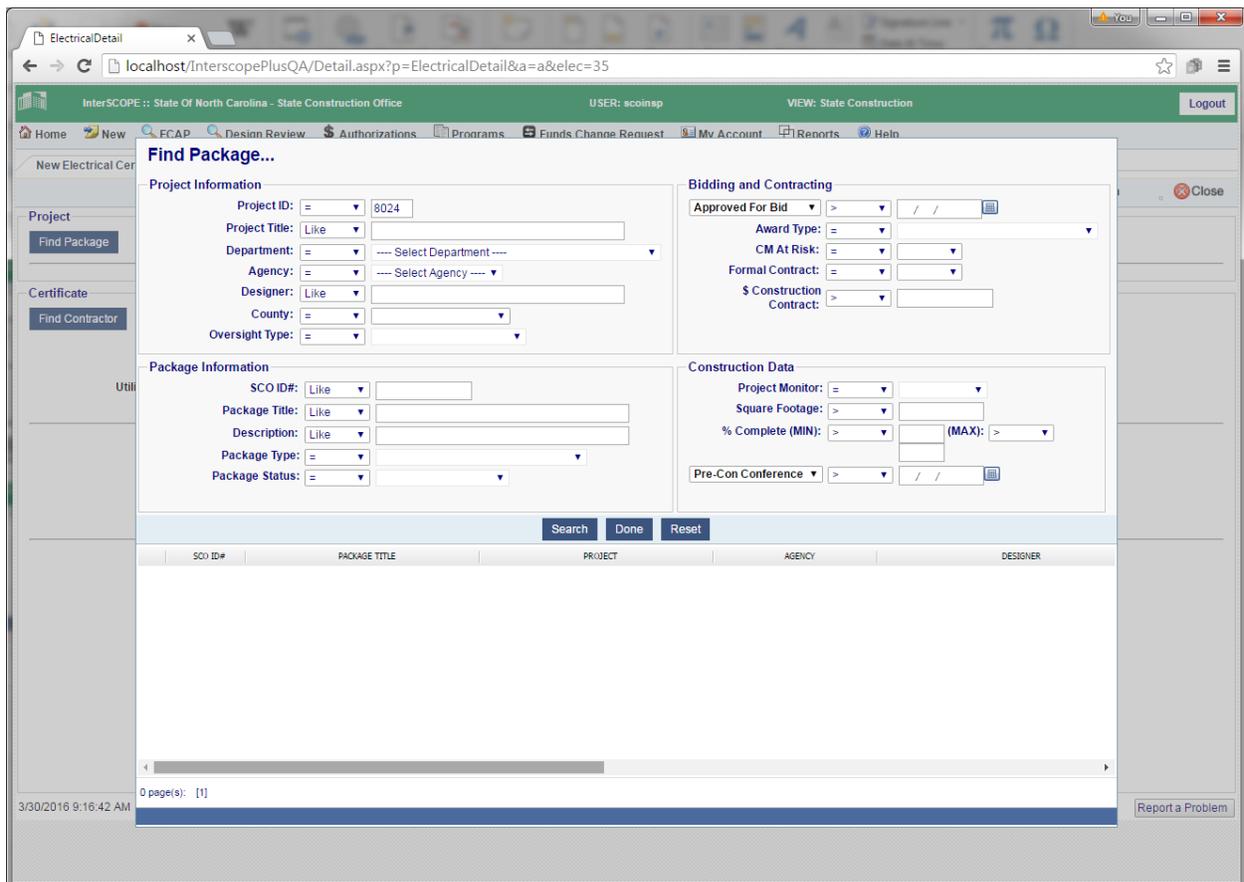


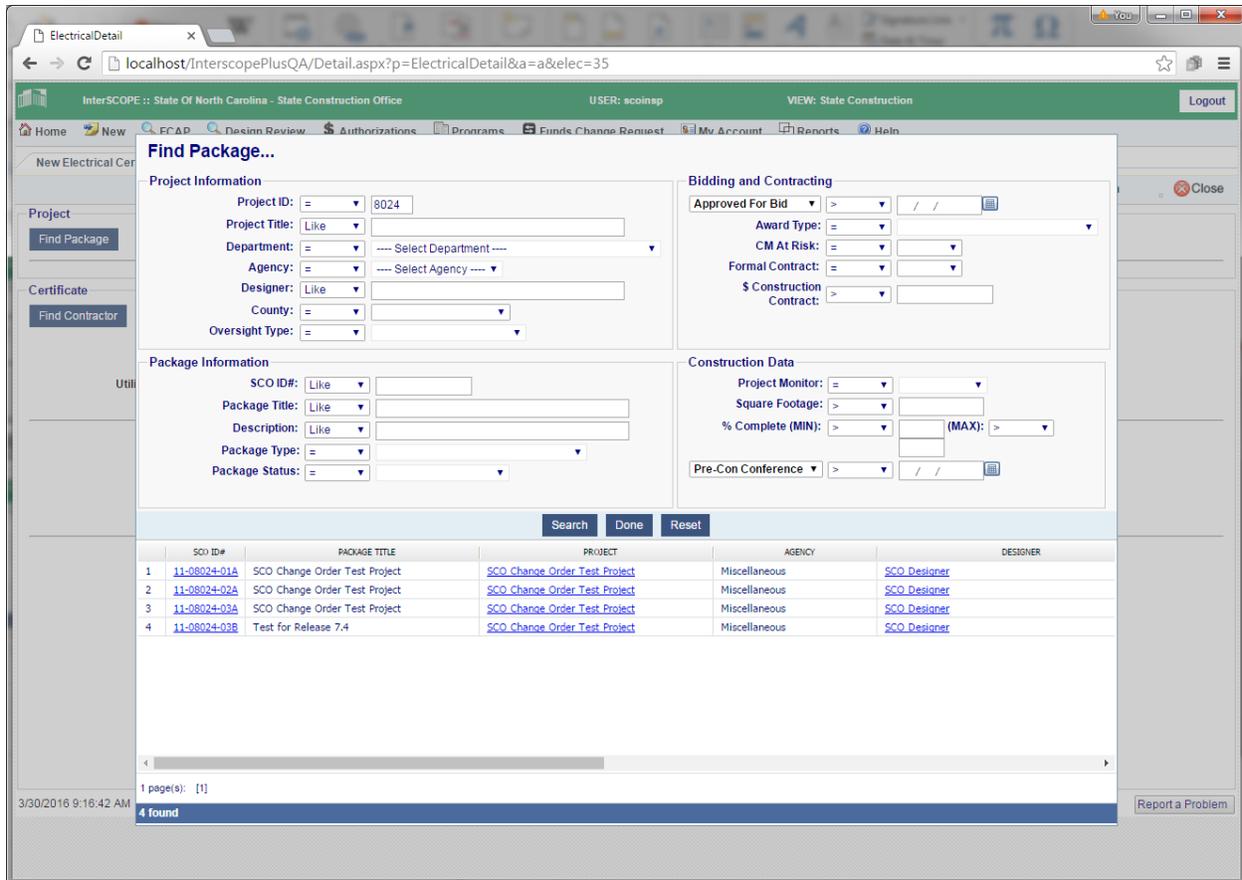
The first step in creating a record is to locate the Package for which this certificate or inspection applies.

Use the “**Find Package**” button to display the Package Search page for locating and selecting the package.



Enter any search criteria that is useful in locating the package. The following example uses the Project ID # to locate a list of packages for selection:





Click on the **SCO ID#** field to select the target package. The search screen will close showing the selected package on the input screen.

To change the package, simply click on the **“Find Package”** button and repeat the search and selection steps above.



## 2. Step 2 - Selection the Electrical Contractor

The next step is to select the Electrical Contractor.

Use the **“Find Contractor”** button to display the Electrical Contractor Search page for locating and selecting the contractor.

**Certificate**

[Find Contractor](#) [Popup NCBEEC Search](#)

Status: **Creating**

Date:

Utility Work Order:

Enter any search criteria that is useful in locating the contractor in the Interscope database. The following example uses the contractor **Name** to locate a list of contractors for selection:

The screenshot displays the InterscopePlus web application interface. A popup window titled "Find Electrical Contractor..." is open, allowing users to search for contractors. The popup includes the following search criteria:

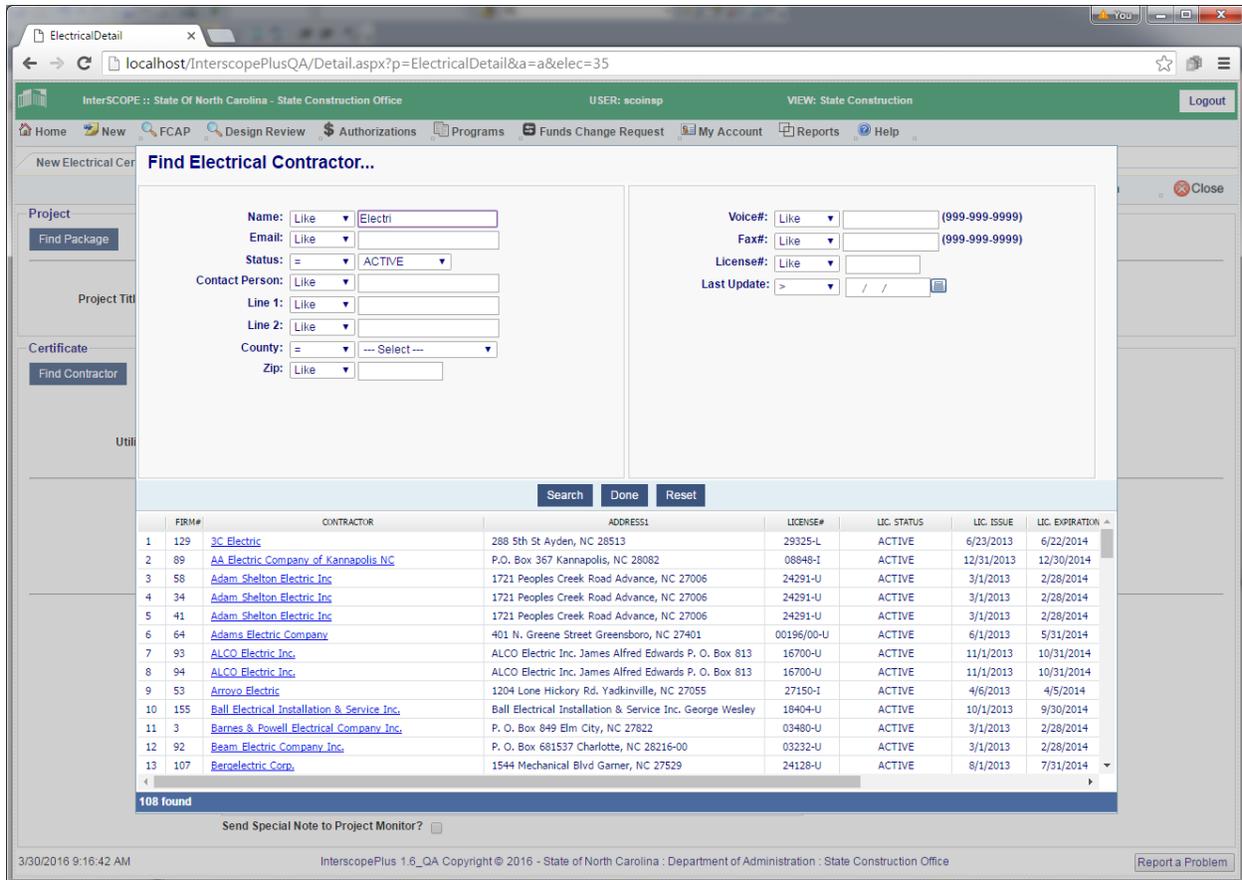
- Name:  (with a "Like" dropdown)
- Email:  (with a "Like" dropdown)
- Status:  (with a dropdown menu showing "ACTIVE")
- Contact Person:  (with a "Like" dropdown)
- Line 1:  (with a "Like" dropdown)
- Line 2:  (with a "Like" dropdown)
- County:  (with a dropdown menu showing "-- Select --")
- Zip:  (with a "Like" dropdown)
- Voice#:  (with a "Like" dropdown and a default value of "(999-999-9999)")
- Fax#:  (with a "Like" dropdown and a default value of "(999-999-9999)")
- License#:  (with a "Like" dropdown)
- Last Update:  (with a dropdown menu showing ">" and a date format "/ /")

Buttons at the bottom of the popup include "Search", "Done", and "Reset".

The background shows the "New Electrical Certificate" form with the following sections:

- Project:** Find Package button, SCO ID#: 11-08024-03B, Project Title field.
- Certificate:** Find Contractor button.
- Utility:** Utility field.
- Special Note:** Special Note text area, Send Special Note to Project Monitor? checkbox.

Footer information: 3/30/2016 9:16:42 AM, InterscopePlus 1.6\_QA Copyright © 2016 - State of North Carolina : Department of Administration : State Construction Office, Report a Problem button.

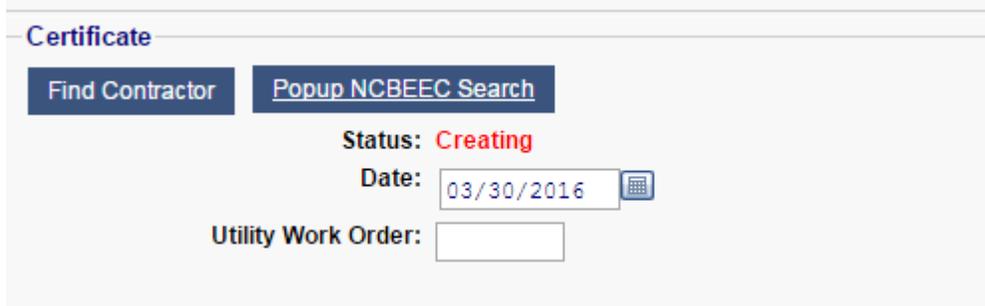


Click on the **CONTRACTOR** field to select the contractor for this record. The search screen will close showing the selected contractor information on the input screen.

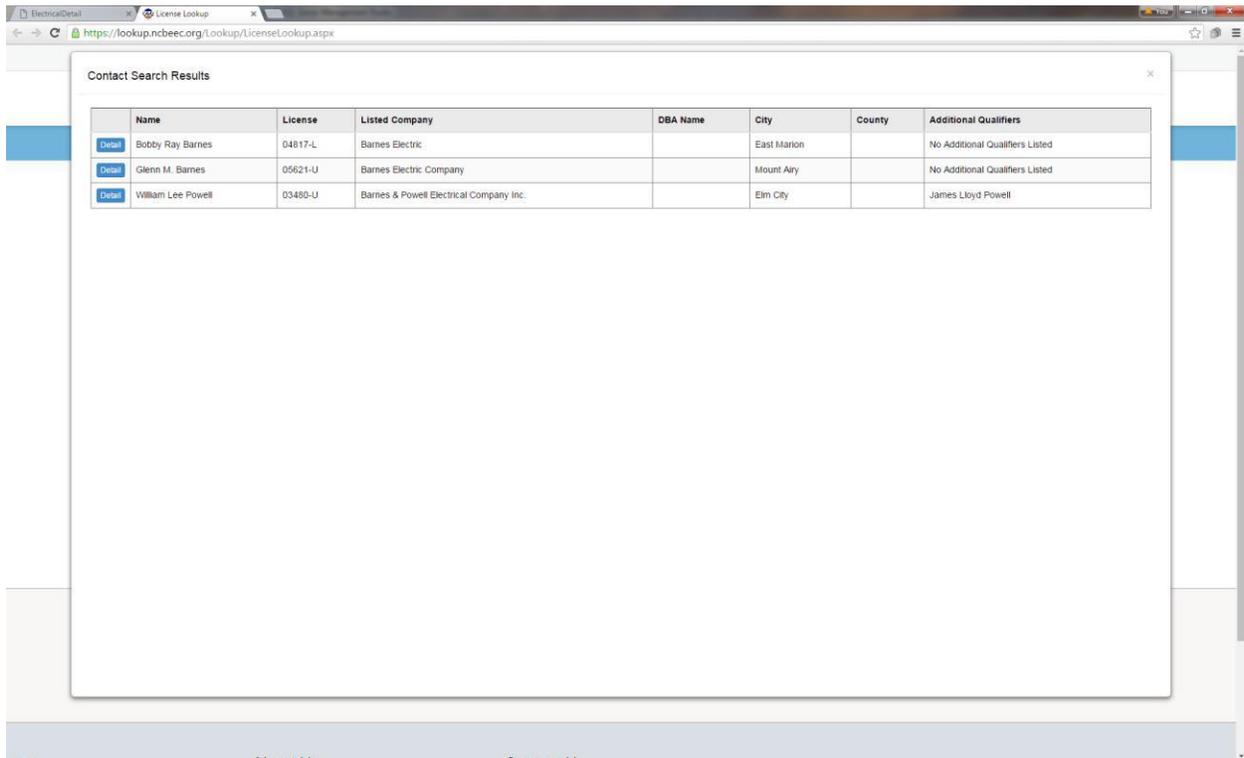


### 3. Step 3 – Verify the contractor’s license status

To check the current status of the selected contractor’s license, click on the “**Popup NCBEEC Search**” button to display a browser tab containing the search page at the NC State Board of Examiners of Electrical Contractors (www.ncbeec.org).



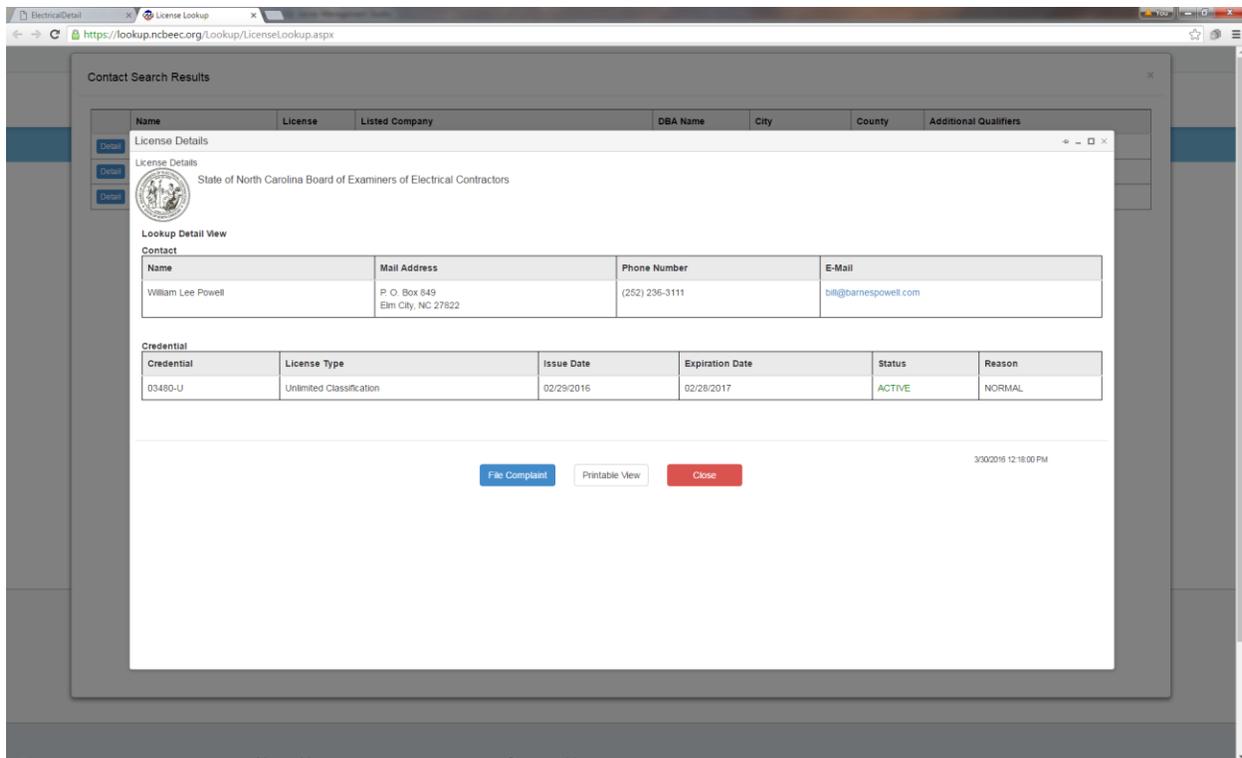
Enter any search criteria that is useful in locating the contractor in the NCBEEC database. The following example uses the contractor **Name** to locate a list of contractors:



Click on the “Detail” button to display the contractor’s license status.

Verify that the license status is “**ACTIVE**” or “**ACTIVE IN RENEWAL**”.

To return to Interscope, click on the browser tab “**Electrical Detail**”. The “License Lookup” tab may remain active for subsequent searches.



#### 4. Step 4 – Complete the data entry

Finish entering the following fields on the form:

**Date** – this field is prepopulated with the current date

**Utility Work Order** – this field is optional

**Disposition** – this field is required

**Comments** – this field is required if Disposition = “Approved w/Notes”

**Alert Email** – this field is pre-populated with the email that is on file for the contractor. If the alert should be sent to a different email, enter this email in the Alert Email field.

**Special Note** – enter any note to be communicated to the monitor assigned to the package. Then check “**Send Special Note to Project Monitor?**” to notify the monitor.

Figure 1 – Completed Certificate ready to be created.

The screenshot displays the 'New Electrical Certificate' form in the InterscopePlus web application. The browser address bar shows the URL: localhost/InterscopePlusQA/Detail.aspx?p=ElectricalDetail&a=a&elec=35. The application header includes the user 'scoinsp' and the view 'State Construction'. The navigation menu contains links for Home, New, FCAP, Design Review, Authorizations, Programs, Funds Change Request, My Account, Reports, and Help. The form is titled 'New Electrical Certificate' and includes an 'Action' button and a 'Close' button.

**Project**

Find Package

SCO ID#: 11-08024-03B  
Project Title and Location: SCO Change Order Test Project  
Package Title: Test for Release 7.4  
Owning Agency or University: Miscellaneous  
Project Monitor: Unassigned

**Certificate**

Find Contractor    **Popup NCBEEC Search**

Electrical Contractor (EC): Barnes & Powell Electrical Company Inc.  
EC Phone Number: (252) 236-3111  
EC Physical Address: P. O. Box 849 Elm City, NC 27822  
EC License#: 03480-U

EC Representative: William Lee Powell  
EC Email (On File): james@barnespowell.com  
Alert Email: james@barnespowell.com  
(Alerts are sent to this email address)

Status: **Creating**  
Date: 03/30/2016  
Utility Work Order: 001

\* Disposition:

- TEMPORARY Power
- Permission for **CONDITIONAL** Power is granted to supply current for: \_\_\_\_\_
- Permission for **PERMANENT** Power is granted to supply current.
- This certifies that the Electrical Installation is **COMPLETE** and **APPROVED**

Comments: This Certificate is for temporary power

Special Note:

Send Special Note to Project Monitor?

3/30/2016 9:16:42 AM    InterscopePlus 1.6\_QA Copyright © 2016 - State of North Carolina : Department of Administration : State Construction Office    Report a Problem

Figure 2 – Completed Inspection ready to be created

The screenshot displays the 'New Electrical Inspection' form in the InterscopePlus application. The form is organized into several sections:

- Project Section:** Includes a 'Find Package' button. Fields include SCO ID#: 11-08024-03B, Project Title and Location: SCO Change Order Test Project, Package Title: Test for Release 7.4, Owing Agency or University: Miscellaneous, and Project Monitor: Unassigned.
- Inspection Section:** Includes 'Find Contractor' and 'Popup NCBEEC Search' buttons. Fields include Electrical Contractor (EC): Barnes & Powell Electrical Company Inc., EC Phone Number: (252) 236-3111, EC Physical Address: P. O. Box 849 Elm City, NC 27822, EC License#: 03480-U, EC Representative: William Lee Powell, EC Email (On File): james@barnespowell.com, and Alert Email: james@barnespowell.com (Alerts are sent to this email address).
- Status and Date:** Status is 'Creating' (in red). Date is 03/30/2016 with a calendar icon. Utility Work Order is 001.
- Disposition and Inspection Type:** Disposition is 'APPROVED' (selected). Other options include APPROVED w/Notes, DISAPPROVED, ROUGH-IN, TRENCH, SLAB, WALLS, CEILING, RE-INSPECTION, FINAL, and OTHER.
- Comments and Special Note:** Comments field contains 'Approved'. Special Note field is empty.
- Footer:** Includes a 'Send Special Note to Project Monitor?' checkbox, a timestamp of 3/30/2016 9:53:47 AM, copyright information for InterscopePlus 1.6\_QA, and a 'Report a Problem' button.

## 5. Step 5 – Save the record

Click on the “**Save**” option under the **Action** menu to create the new record:

The screenshot shows the 'New Electrical Certificate' form in the InterscopePlus application. The form is titled 'New Electrical Certificate' and contains the following information:

- Project:** SCO ID#: 11-08024-03B, Project Title and Location: SCO Change Order Test Project, Package Title: Test for Release 7.4, Owning Agency or University: Miscellaneous, Project Monitor: Unassigned.
- Certificate:** Electrical Contractor (EC): Barnes & Powell Electrical Company Inc., EC Phone Number: (252) 236-3111, EC Physical Address: P. O. Box 849 Elm City, NC 27822, EC License#: 03480-U, EC Representative: William Lee Powell, EC Email (On File): james@barnespowell.com, Alert Email: james@barnespowell.com (Alerts are sent to this email address).
- Status:** Creating, Date: 03/30/2016, Utility Work Order: 001.
- Disposition:**  TEMPORARY Power,  Permission for CONDITIONAL Power is granted to supply current for: [text box],  Permission for PERMANENT Power is granted to supply current,  This certifies that the Electrical Installation is COMPLETE and APPROVED.
- Comments:** This Certificate is for temporary power.
- Special Note:** [text box]

The 'Save' button is highlighted in the Action menu.

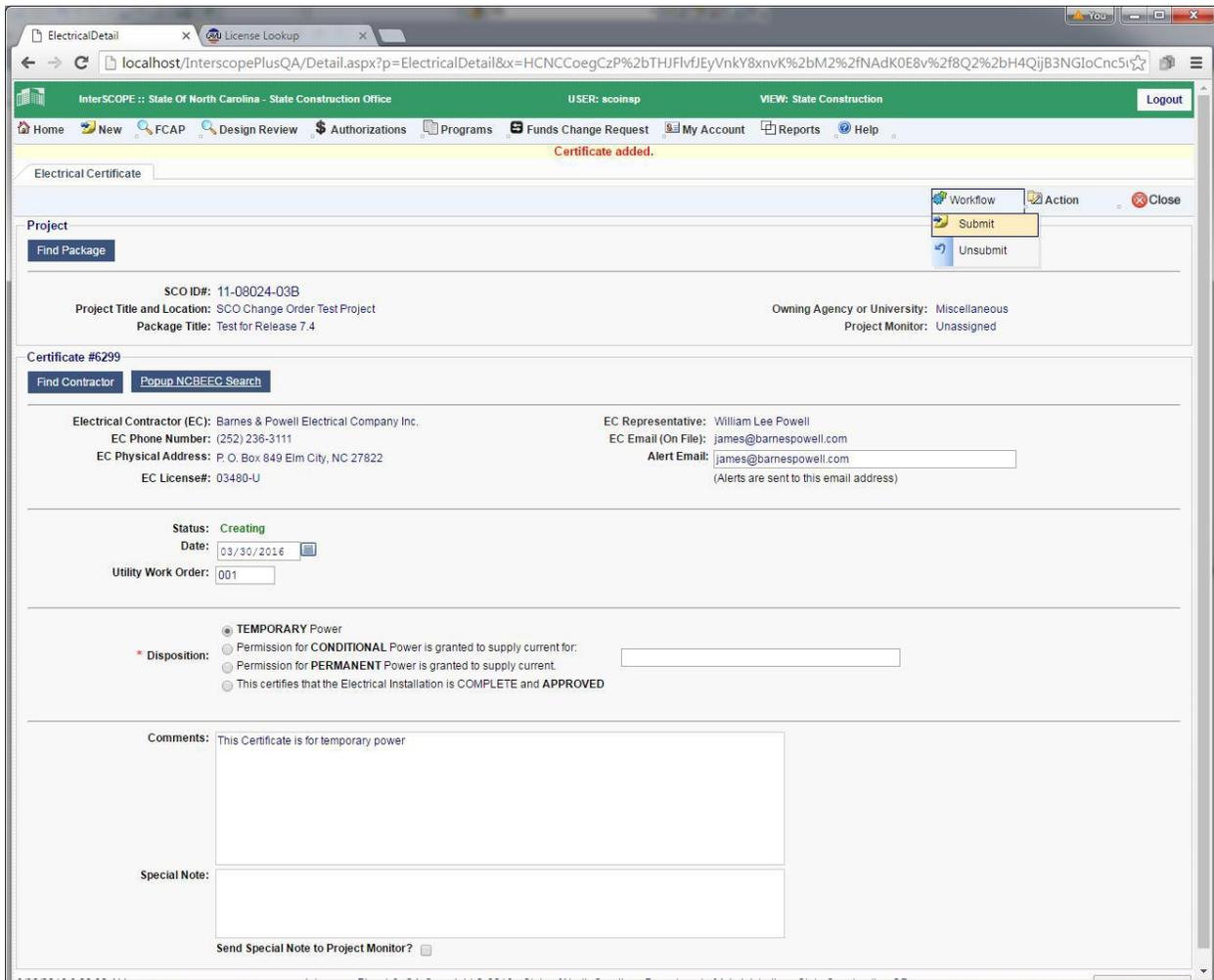
An “... added” message will be displayed:

The screenshot shows the 'New Electrical Certificate' form in the InterscopePlus application after successful submission. A yellow banner at the top displays the message "Certificate added." The form content is identical to the previous screenshot.

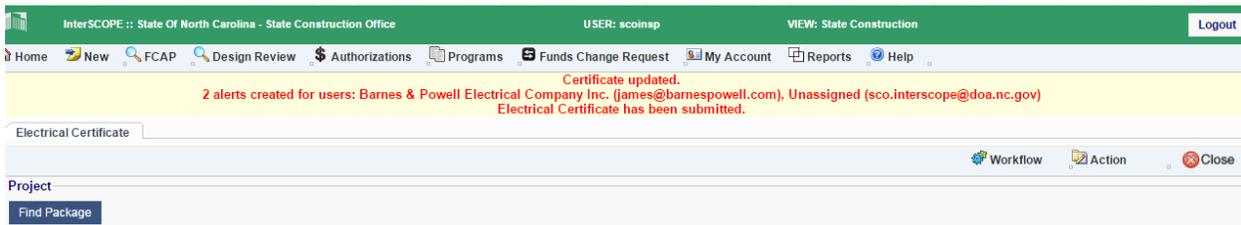
## 6. Step 6 – Submit the Certificate or Inspection

To complete the processing of the certificate or inspection, click on the **“Submit”** option under the **Workflow** menu.

This action will finalize the data entry and notify the contractor, designer and project monitor via email alerts of the completed document.



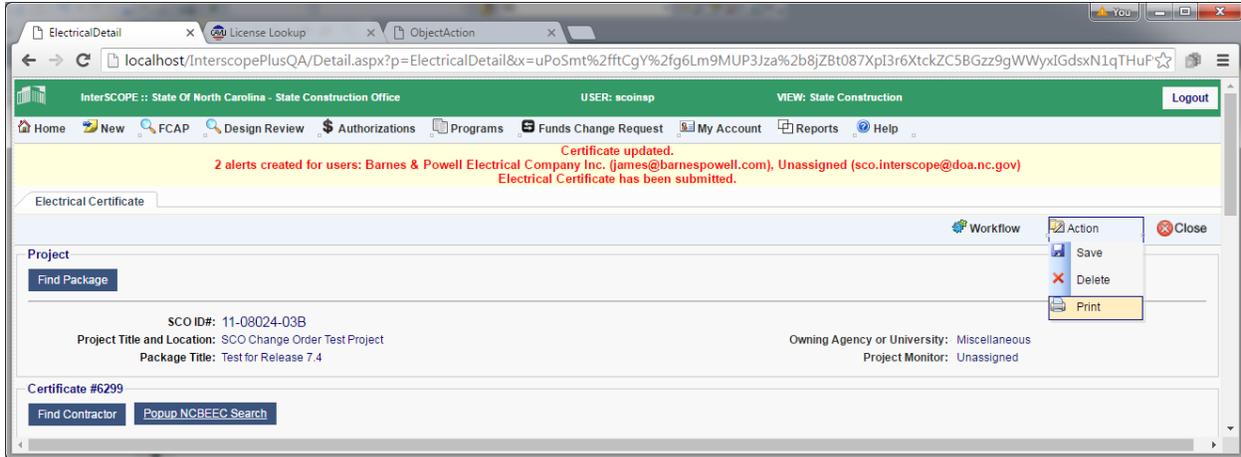
A message will be displayed listing the users alerted:



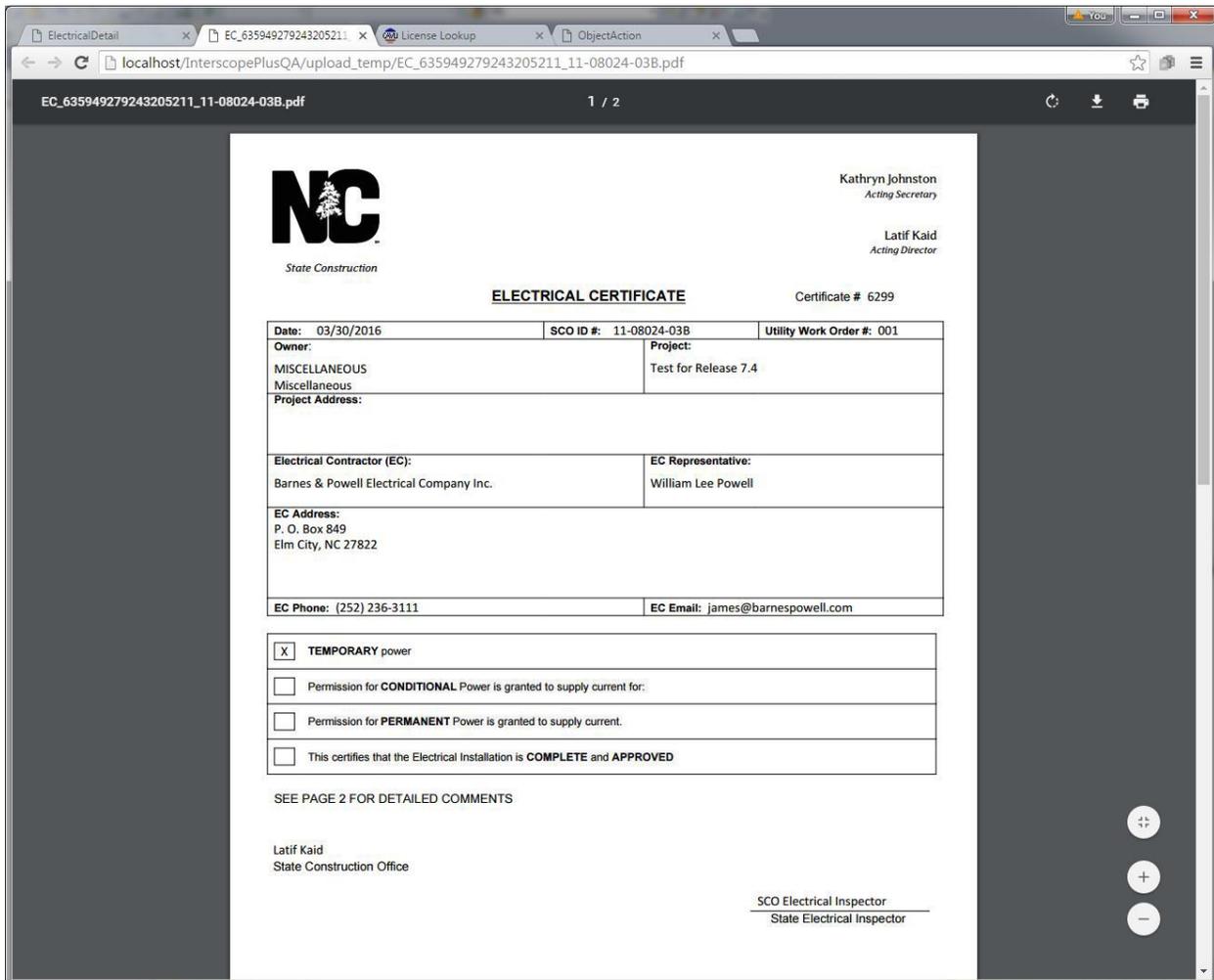
## 7. Step 7 – Print the document

To print a PDF copy of the completed document, click on the **“Print”** option under the **Action** menu.

# InterscopePlus User Manual



A PDF copy will appear in a new browser tab.  
To return to Interscope, click on the “Electrical Detail” tab



ElectricalDetail
EL\_635949288113104261\_

localhost/InterscopePlusQA/upload\_temp/EL\_635949288113104261\_11-08024-03B.pdf

EL\_635949288113104261\_11-08024-03B.pdf
1 / 2



**NC**  
State Construction

Kathryn Johnston  
*Acting Secretary*

Latif Kaid  
*Acting Director*

**ELECTRICAL INSPECTION**      Inspection # 6300

Date: 03/30/2016	SCO ID #: 11-08024-03B	Utility Work Order #: 001
Owner: MISCELLANEOUS Miscellaneous	Project: Test for Release 7.4	
Project Address:		
Electrical Contractor (EC): Barnes & Powell Electrical Company Inc.	EC Representative: William Lee Powell	
EC Address: P. O. Box 849 Elm City, NC 27822		
EC Phone: (252) 236-3111	EC Email: james@barnespowell.com	

<input checked="" type="checkbox"/> ROUGH-IN	<input checked="" type="checkbox"/> SLAB	<input type="checkbox"/> CEILING	<input type="checkbox"/> FINAL
<input type="checkbox"/> TRENCH	<input checked="" type="checkbox"/> WALLS	<input type="checkbox"/> RE-INSPECTION	<input type="checkbox"/> OTHER

<input type="checkbox"/> APPROVED w/Notes	<input checked="" type="checkbox"/> APPROVED	<input type="checkbox"/> DISAPPROVED
---	--	--------------------------------------

SEE PAGE 2 FOR DETAILED COMMENTS

Latif Kaid  
State Construction Office

SCO Electrical Inspector  
State Electrical Inspector



Nothing Compares  
State of North Carolina | State Construction  
301 N. Wilmington St, Suite 450 | Raleigh, NC 27601  
1307 Mail Service Center | Raleigh, NC 27699-1307  
919 807 4100 T

8. Maintaining Electrical Contractor Profiles

InterSCOPE :: State Of North Carolina - State Construction Office    USER: scoinsp    VIEW: State Construction    Logout

Home Companies New FCAP Design Review Authorizations Programs Funds Change Request My Account Reports Help

Electrica
 

- Designers
- Contractors
- Electrical Contractors**
- Consultants
- Evaluations

Contact Person: Like [ ]  
 Line 1: Like [ ]  
 Line 2: Like [ ]  
 County: = [ ]  
 Zip: Like [ ]

Voice#: Like [ ] (999-999-9999)  
 Fax#: Like [ ] (999-999-9999)  
 License#: Like [ ]  
 Last Update: > [ ] / [ ] / [ ]

Search Done Reset Add Contractor

3/30/2016 10:07:49 AM    InterscopePlus 1.6\_QA Copyright © 2016 - State of North Carolina : Department of Administration : State Construction Office    Report a Problem

InterSCOPE :: State Of North Carolina - State Construction Office    USER: scoinsp    VIEW: State Construction    Logout

Home Companies New FCAP Design Review Authorizations Programs Funds Change Request My Account Reports Help

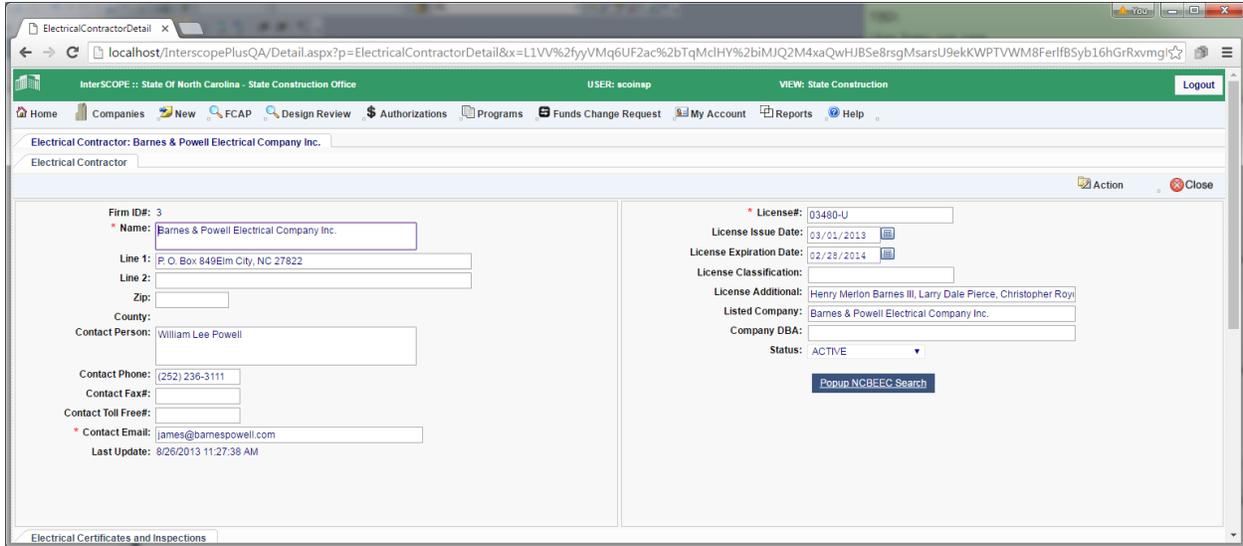
Electrical Contractor Search

Name: Like [ ] Barnes  
 Email: Like [ ]  
 Status: = [ ] -- Select --  
 Contact Person: Like [ ] Barnes & Powell Electrical Company, Inc.  
 Line 1: Like [ ]  
 Line 2: Like [ ]  
 County: = [ ]  
 Zip: Like [ ]

Voice#: Like [ ] (999-999-9999)  
 Fax#: Like [ ] (999-999-9999)  
 License#: Like [ ]  
 Last Update: > [ ] / [ ] / [ ]

Search Done Reset Add Contractor

FIRM#	CONTRACTOR	ADDRESS1	LICENSE#	LIC STATUS	LIC ISSUE	LIC EXPIRATION	LAST UPDATE	CONTACT	VOICE	EMAIL
1 3	Barnes & Powell Electrical Company, Inc.	P. O. Box 849 Elm City, NC 27822	03480-U	ACTIVE	3/1/2013	2/28/2014	8/26/2013	William Lee Powell	(252) 236-3111	james@barnespowell.com
2 197	Barnes & Powell Electrical Company, Inc.	P. O. Box 849 Elm City, NC 27822	03480-U	ACTIVE IN RENEWAL	3/1/2013	2/28/2014	4/22/2014	William Lee Powell	(252) 236-3111	>carmen
3 410	Barnes & Powell Electrical Company, Inc.		03480-U				1/8/2016	William Lee Powell		>Kenneth.Lee



Search for a License

**Search Criteria**

Note: Hover over the field text to display any help  
 \*\* Indicates a value is required.

License Number:

Business Name/DBA:

First Name:

Last Name:

Address:

City:

State:

Zip:

County:

Search   Clear Form

Current Filters

**Business Name/DBA:** Barnes

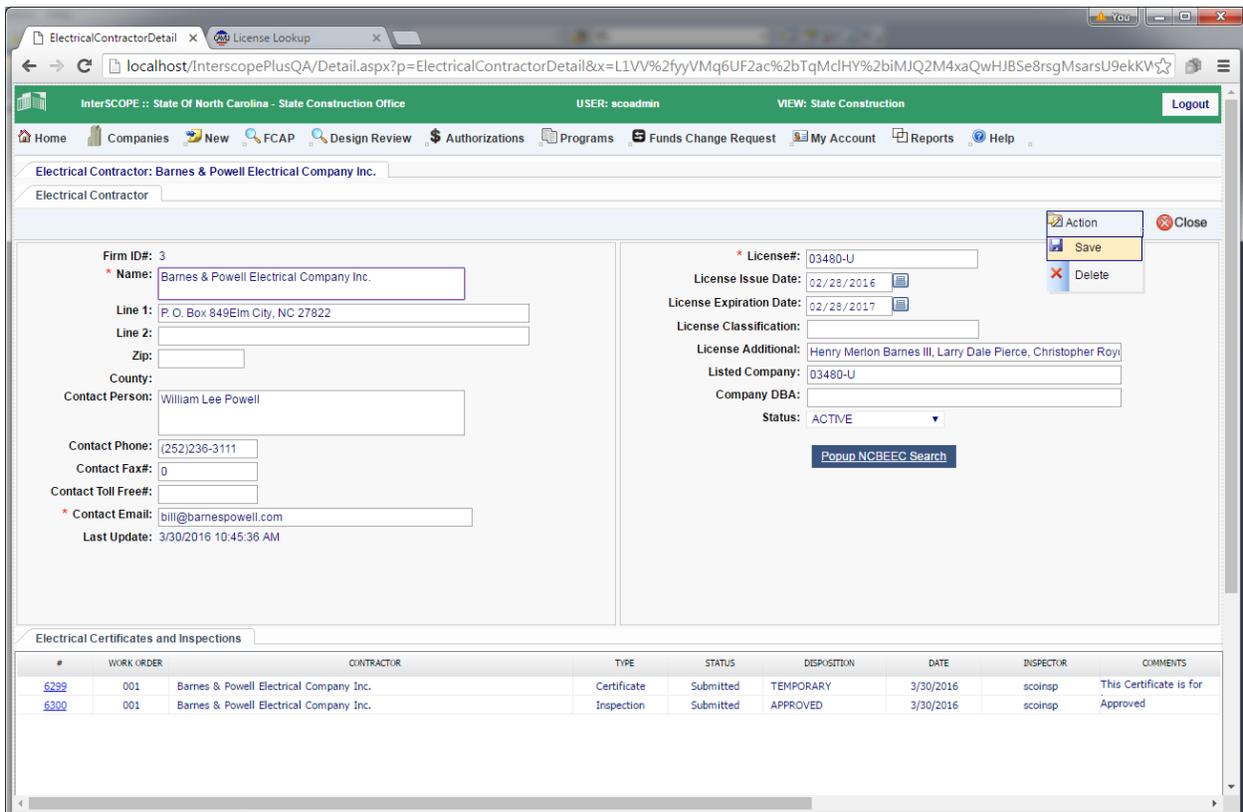
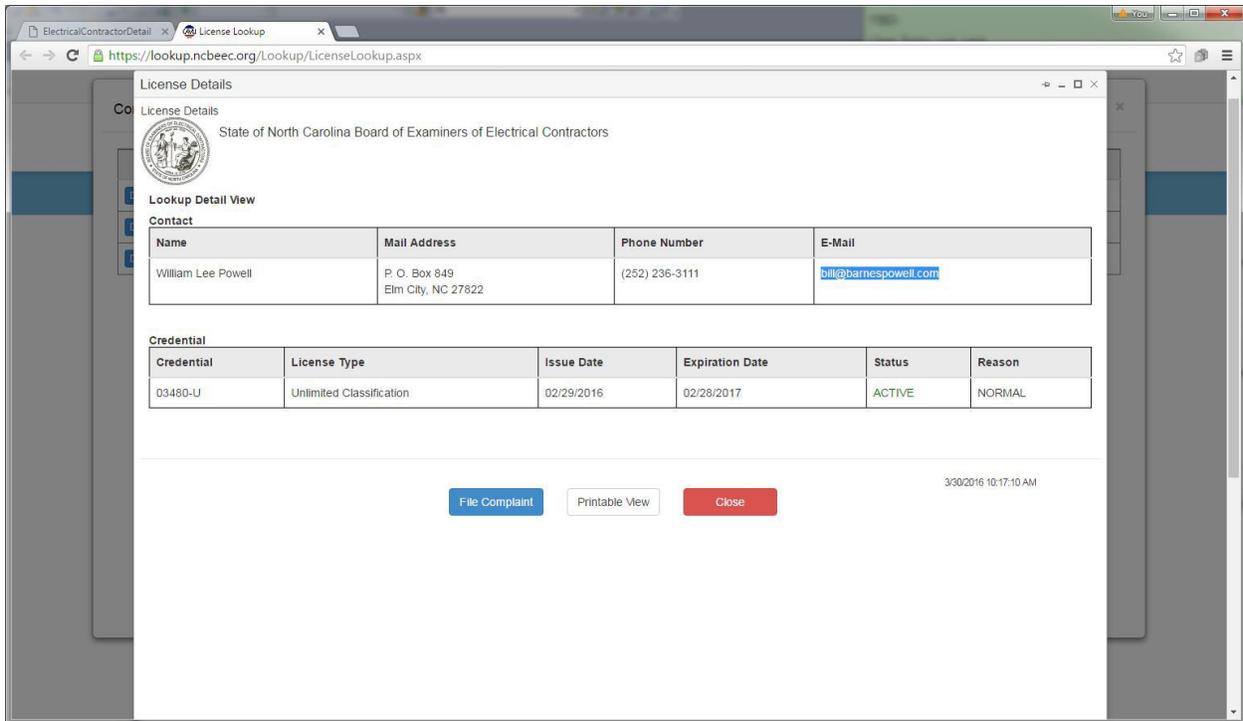
Contact Search Results

	Name	License	Listed Company	DBA Name	City	County	Additional Qualifiers
<a href="#">Detail</a>	Bobby Ray Barnes	04817-L	Barnes Electric		East Marion		No Additional Qualifiers Listed
<a href="#">Detail</a>	Glenn M. Barnes	05621-U	Barnes Electric Company		Mount Airy		No Additional Qualifiers Listed
<a href="#">Detail</a>	William Lee Powell	03480-U	Barnes & Powell Electrical Company Inc.		Elm City		James Lloyd Powell

Search   Clear Form

Current Filters

**Business Name/DBA:** Barnes



## S. Electronic Change Order Processing

### 1. Formal Projects

The construction change order process provides an electronic process for submitting and approving changes to projects with construction costs over \$500,000 and is controlled by a work flow that requires the sequential execution of the steps by the respective parties. Change orders for smaller projects are not processed electronically, but use a simple spreadsheet shown at the end of this section, to record change order information.

Only Designers (or InterscopePlus users given the appropriate permission) are allowed to create and submit change orders for review, processing and approval. The electronic change order process is used for all formal projects, both those subject to SCO oversight and University “download” projects. University change orders follow a slightly different approval process, with the final approval being at the University level rather than at SCO.

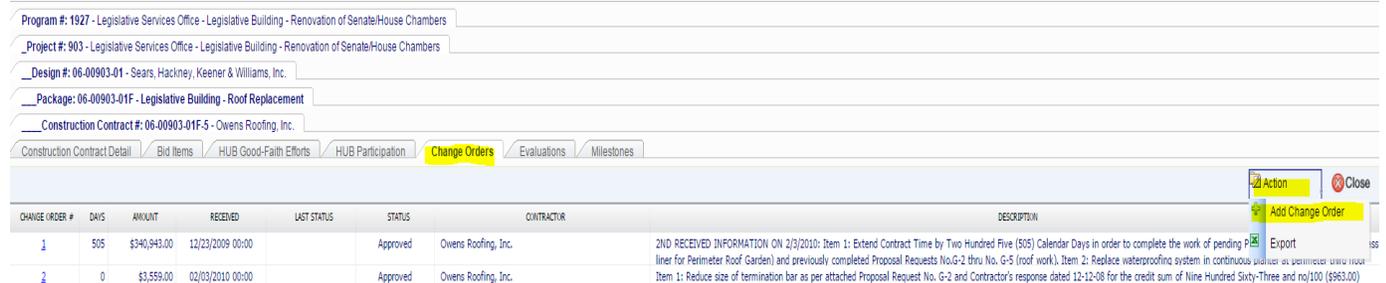
**NOTE: Each Proposed Change Order (PCO) requires supporting documentation to be uploaded for review and acceptance. A PCO cannot be added without supporting documentation. It is recommended that all supporting documentation be gathered prior to change order entry.**

#### a) Creating the Change Order

After logging in, the **designer** selects the Active Construction Contracts tab on his/her Home screen, then selects the contract for which the Change Order (CO) will be entered and clicks on it.



On the Construction Contract Screen, select the Change Orders tab, then go to Action and select Add Change Order



**Tip: Use the SCO File# to identify the correct Construction Contract.**

Fields in **Red** are required

HINT: To add more PCOs, use 'Action' Save' to create the change order first.

Program #: 1927 - Legislative Services Office - Legislative Building - Renovation of SenateHouse Chambers  
 Project #: 903 - Legislative Services Office - Legislative Building - Renovation of SenateHouse Chambers  
 Design #: 06-00903.01 - Sears, Hacthney, Keener & Williams, Inc.  
 Package: 06-00903-01F - Legislative Building - Roof Replacement  
 Construction Contract #: 06-00903-01F-5 - Owens Roofing, Inc.  
 NEW CHANGE ORDER:  
 Detail

Action Close

Status Package Status: Under Construction Status: Creating Date Received: Total Days: 0  
 Contract Status: Under Construction Status Date: Last Update: Total Amount:

**Designer Summary**

1. Schedule items affected by this change: [dropdown]  
 2. Can Contractor mitigate the change without requiring a contract time extension: [dropdown]  
 3. List contractors needing 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): [dropdown]

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

**Project Financial Worksheet Summary**

Assigned Funds	\$0
Total Committed:	\$8,656,043.07
Available to Commit:	-\$8,656,043.07
This Change:	
Available to Commit After this Change:	-\$8,656,043.07

[Worksheet Detail](#)

**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	60	+	0	=	60	(+/-)	0	=	60
Cost (\$)	\$377,404	+		=	\$377,404	(+/-)		=	\$1,786,952.07

**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)
10/13/2008	+	60	=	12/12/2008	+	0	=	12/12/2008	+	0	=	12/12/2008

**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 CAUSE (For SCO Use Only)

Unassigned

To upload files, click

[Upload Files](#)

2/2/2016 2:45:09 PM InterscopePlus 2.1\_20160824 Copyright © 2016 - State of North Carolina | Department of Administration | State Construction Office [Report a Problem](#)

In the File Uploader window, select Choose File to browse for the file to upload.

**File Uploader**

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

[Cancel](#)

**To Upload Files:**

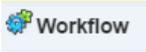
- 1 - [Browse] and select file
- 2 - [Add File to List]
- 3 - [Upload File(s)] when ready to transmit files

**Description**

[Upload File\(s\)](#) [Close](#)

# InterscopePlus User Manual

When the file is selected, it will be uploaded to the window. Upload as many files as necessary. Add a description and 

After it is saved, it will show as Change Order # with the next sequential number, show the Status and the Work Flow Activity and the  icon appears.

Change Order added successfully

Design #: 15-11026-01 - SCO Designer  
Package: 15-11026-01A - Enlarge conference room  
Construction Contract #: 15-11026-01A-1 - SCO Contractor  
Change Order #: 1

Detail

**Status**  
Package Status: Under Construction      Status: Created      Date Received:      Total Days: 0  
Contract Status: Valid Contract      Status Date: 4/21/2015 2:50:00 PM      Last Update: 4/21/2015 2:50:00 PM      Total Amount: \$1,000

**Workflow Activity**

STEP	ACTION	ACTIVE?	ROLE	FIRM/AGENCY	USER COMPLETING STEP	COMPLETED ON	ALERTED ON	RESULT	COMMENTS
1	CREATE	N	DESIGNER	SCO Designer	sodesigner	04/21/2015 14:50		Created	
2	SUBMIT	Y	DESIGNER	SCO Designer					
3	APPROVE	N	CONTRACTOR	SCO Contractor					
4	APPROVE	N	DESIGNER	SCO Designer					
5	APPROVE	N	OWNER	St. Construction					
6	APPROVE	N	SCO	St. Construction					

**Designer Summary**

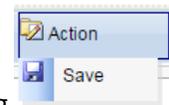
1. Schedule Items affected by this change:

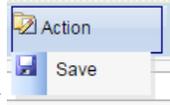
2. Can Contractor mitigate the change without requiring a contract time extension:

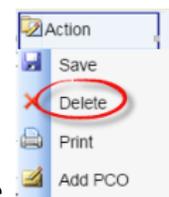
3. Select the Contractors that will need a contract time extension due to this change:

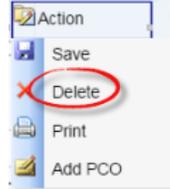
4. Are additional costs incurred by reason of the time extension? (if so, include in items 5&6 below):

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



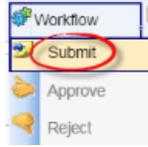
The Designer may continue to make changes to the Change Order using  up until the time that the Change Order is submitted.



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

## 2. Submitting the Change Order for Review

To complete this workflow step, the Designer must submit the Change Order to initiate its 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**. A Confirmation window will appear to confirm this action. Select **Yes** to continue or **No** to return.

The Change Order workflow is updated 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.

1 alerts created for users: scocontract  
Change order has been submitted by scodesigner

Design #: 15-11026-01 - SCO Designer  
 Package: 15-11026-01A - Enlarge conference room  
 Construction Contract #: 15-11026-01A-1 - SCO Contractor  
 Change Order #: 1  
 Detail

Workflow Action Close

**Status** Package Status: Under Construction      Status: Submitted      Date Received:      Total Days: 0  
 Contract Status: Valid Contract      Status Date: 4/21/2015 2:50:00 PM      Last Update: 4/21/2015 2:50:00 PM      Total Amount: \$1,000

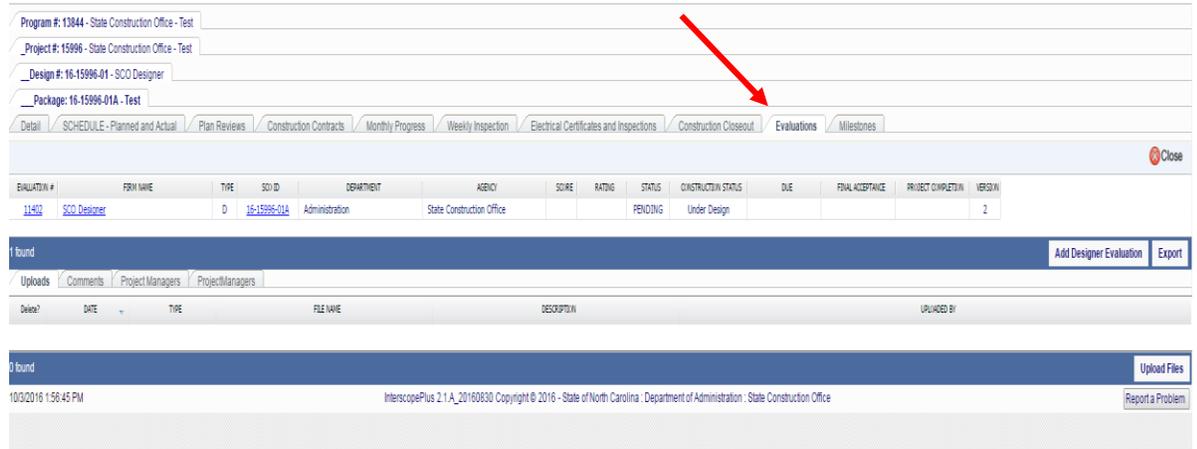
STEP	ACTION	ACTIVE?	ROLE	FIRM/AGENCY	USER COMPLETING STEP	COMPLETED ON	ALERTED ON	RESULT	COMMENTS
1	CREATE	N	DESIGNER	SCO Designer	scodesigner	04/21/2015 14:50		Created	
2	SUBMIT	N	DESIGNER	SCO Designer	scodesigner	04/21/2015 15:41		Submitted	
3	APPROVE	Y	CONTRACTOR	SCO Contractor					
4	APPROVE	N	DESIGNER	SCO Designer					
5	APPROVE	N	OWNER	BT Construction					
6	APPROVE	N	SCO	BT Construction					

T. Closing a Project

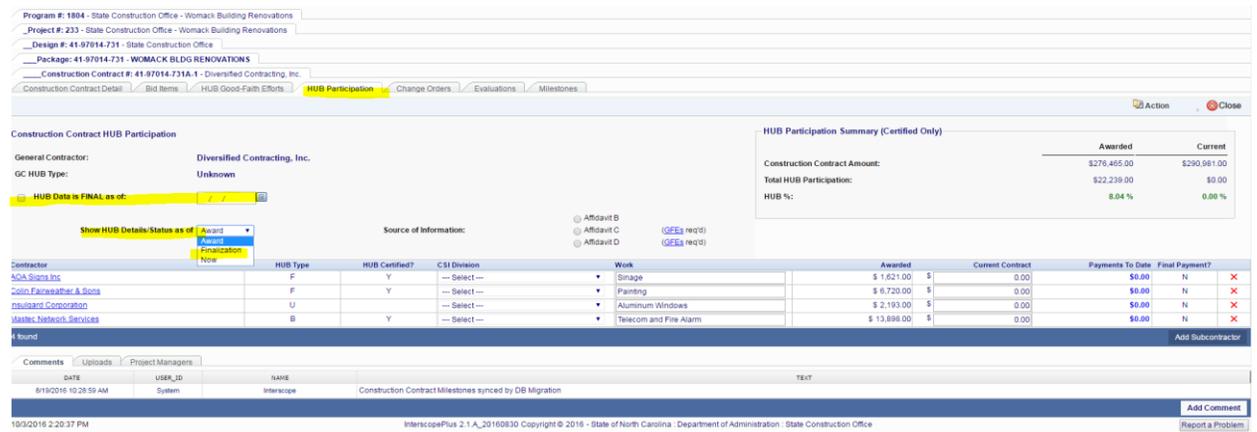
Closing a project will allow it to be placed in an “Inactive” status, and by limiting searches to “Active” projects, minimize the number of projects returned in searches. It is also beneficial to close projects while all information and people involved are available and current.

1. Construction Closeout

Project closeout begins with the construction contract. Once work is completed and the contract documentation is being finalized, a contractor evaluation is required. That is completed on the ‘Construction Contract’> ‘Evaluation’ tab. Please refer to the Evaluations section for additional information.



Review and update HUB data on the ‘HUB Participation’ tab. Change HUB status to “Finalization,” check the *HUB Data is FINAL* box and  Save.



Remember that current HUB certification is checked and reported as of the data finalization so you will want to review data carefully before finalizing. A beneficial occupancy date and Final Acceptance Date must be entered before HUB data can be finalized.

# InterscopePlus User Manual

Program #: 14293 - Administration General - Test-Training 6/22/2017  
 Project #: 17128 - Administration General - Training - Guenther  
 Design #: 17-17128-01 - DudaPaine Architects, PA  
 Package: 17-17128-01A - Training - Guenther

Detail | Plan Reviews | Construction Contracts | Monthly Progress | Weekly Inspection | Electrical Certificates and Inspections | Construction Closeout | Evaluations | **Milestones**

**Milestones For: Package#: 17-17128-01A - Training - Guenther** Primavera Project: N/A  
**Package Status: Under Construction** Last P6 Synchronization:

PHASE	MLESTONE NAME	PLANNED	ACTUAL
DESIGN REVIEW	Advanced Planning submittal to SCO	/ / [ ]	
	Advanced Planning approval by SCO	/ / [ ]	
	Schematic Design Submitted to SCO (FIRST submittal)	/ / [ ]	
	Schematic Design Approved by SCO (Final Approval)	/ / [ ]	
	Design Development Submitted to SCO (FIRST submittal)	/ / [ ]	
	Design Development Approved by SCO (Final Approval)	/ / [ ]	
	Construction Documents Submitted to SCO (FIRST submittal)	/ / [ ]	
	Construction Documents Approved by SCO (Final Approval)	/ / [ ]	
BIDDING AND CONTRACTS	Final Documents Approved by SCO (Final Approval)	/ / [ ]	
	Approved for Bid	/ / [ ]	06/19/2017 [ ]
	Advertise for Bid	/ / [ ]	
	Projected Bid Date	/ / [ ]	/ / [ ]
	Award Letter	/ / [ ]	06/21/2017 [ ]
CONSTRUCTION	Contracts Approved by Owner	/ / [ ]	/ / [ ]
	Contracts Approved by Atty Genl	/ / [ ]	/ / [ ]
	Pre-Construction Conference	/ / [ ]	/ / [ ]
	Construction Start (Notice to Proceed)	/ / [ ]	06/22/2017 [ ]
	Estimated Completion (Contract Completion)	/ / [ ]	/ / [ ]
CLOSEOUT	Beneficial Occupancy	/ / [ ]	/ / [ ]
	Final Inspection	/ / [ ]	/ / [ ]
	Final Acceptance	/ / [ ]	06/19/2017 [ ]
	Final Report Submitted to SCO / Received by SCO	/ / [ ]	/ / [ ]
	Final Report Approved by SCO	/ / [ ]	/ / [ ]
	Final Approval - Last step of Closeout process	/ / [ ]	/ / [ ]
	Archive Date	/ / [ ]	/ / [ ]

*Note: Highlighted row indicates a milestone required for P6 Integration.*

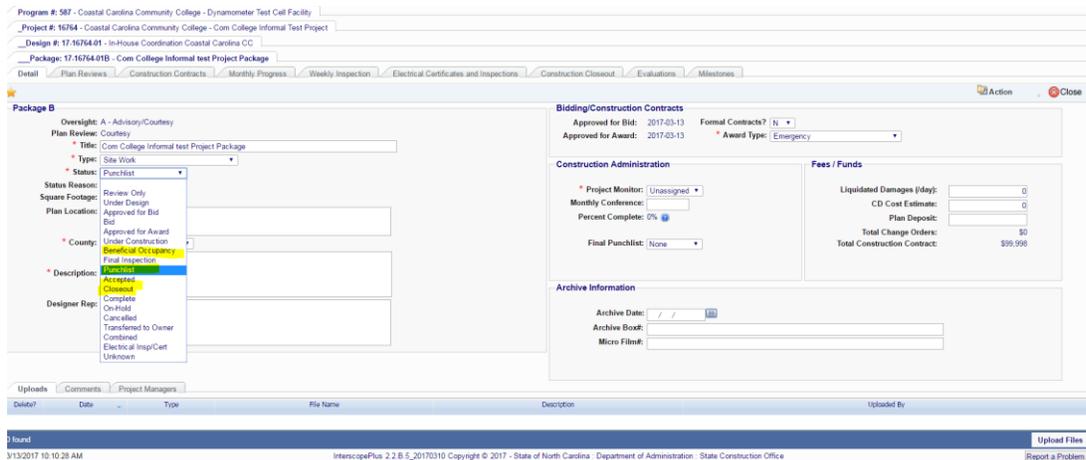
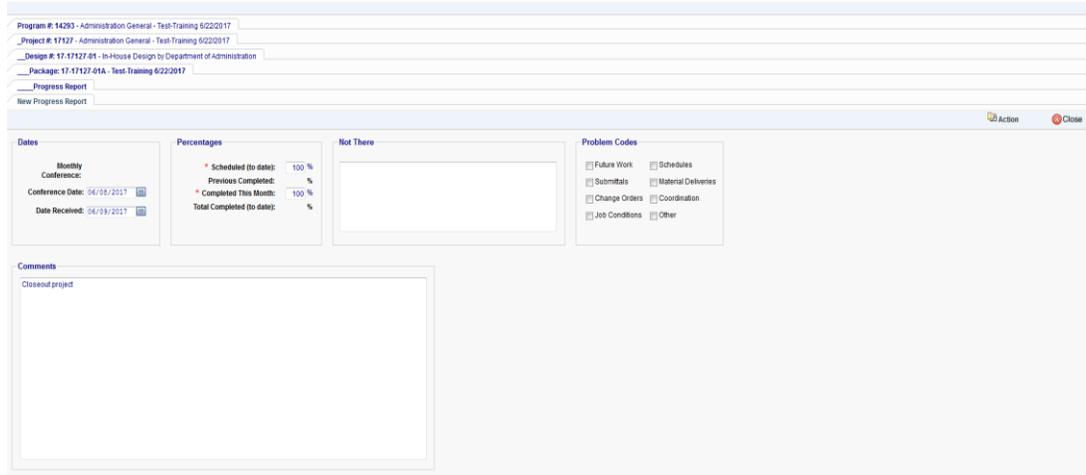
Export All Milestones

Once construction goes from “Under Construction” to “Beneficial Occupancy”, “Punchlist”, “Accepted” or “Closeout” status will appear on the Construction Closeout tab to “Start Construction Closeout”.

Go to the ‘Package Detail’ tab, change the *Contract Status* to one of the above status



**NOTE: THE AWARD TYPE MUST BE SET AND WORK BE 100% COMPLETE UNDER MONTHLY PROGRESS.**



Click on the “Go to Construction Closeout Details” tab.

Program #: 587 - Coastal Carolina Community College - Dynamometer Test Cell Facility  
Project #: 16764 - Coastal Carolina Community College - Com College Informal Test Project  
Design #: 17.16764.01 - In-House Coordination Coastal Carolina CC  
Package: 17.16764.01B - Com College Informal test Project Package

Detail | Plan Reviews | Construction Contracts | Monthly Progress | Weekly Inspection | Electrical Certificates and Inspections | **Construction Closeout** | Evaluations | Milestones

**Closeout Summary** Close

Package Status: Punchlist  
Final Acceptance:  
**Closeout Due:** Construction closeout is due 60 days after Final Acceptance Date  
Closeout Status: Created  
Closeout Submitted:  
Closeout Approved:  
Last Update: 03/13/2017

[Go to Construction Closeout Details](#)

Uploads | Comments | Project Managers

Delete?	Date	Type	File Name	Description	Uploaded By
0 found					

3/13/2017 10:10:28 AM InterscopePlus 2.2.B.5\_20170310 Copyright © 2017 - State of North Carolina - Department of Administration - State Construction Office

[Upload Files](#)  
[Report a Problem](#)

Here you will see a workflow and five (5) tabs for document upload.

The screenshot displays the InterscopePlus interface for a project. At the top, there are navigation tabs for Program, Project, Design, and Package. Below this is a 'Project Summary' section with fields for SCO ID, Department, Agency, Designer, Project Monitor, Percent Complete, Final Inspection Date, Final Acceptance Date, Last Update, Project, Description, Package, and Package Status. A 'Workflow Activity' table follows, with columns for Step, Action, Active?, Role, Firm/Agency, User Completing Step, Completed On, Alerted On, Result, and Comments. The 'Documents' section at the bottom contains instructions for document upload, including a list of required documents and a note to upload scanned copies.

STEP	ACTION	ACTIVE?	ROLE	FIRM/AGENCY	USER COMPLETING STEP	COMPLETED ON	ALERTED ON	RESULT	COMMENTS
1	UPDATE	N	DESIGNER	In-House Coordination Coastal Carolina CC	lthahnl	03/13/2017 10:10		Created	
2	SUBMIT	Y	DESIGNER	In-House Coordination Coastal Carolina CC					
3	APPROVE	N	SCD	SC Construction					

The workflow consists of and update, submittal and approval. The update and submittal are completed by the Designer and the approval by State Construction Office.

The Document tabs consist of the following:

1. Inspection
  - a. Designer's Verification of Punchlist Completion (if applicable)
  - b. Final Inspection for Owner Occupancy
  - c. Partial Utilization for Beneficial Occupancy (if applicable)
2. Claim Verification
  - a. Refer to Section 506-Construction Claims in the [State Construction Manual](#)
  - b. Answer a yes or no question regarding claims
3. Construction Closeout
  - a. Final Pay Application
  - b. Consent of Surety of Final Payment
  - c. Contractor's Affidavit of Release of Liens
  - d. Contractor's Affidavit of Payment of Debts and Claims
  - e. Appendix E-MBE Documentation for Contract Payments
4. Designer Certificate
  - a. Answer a yes or No question regarding Flood Plain Permit
  - b. Certificate of Compliance
  - c. Certificate of Completion
  - d. Flood Plain Certificate of Compliance
  - e. Floor Plain Elevation Certificate
5. Record of Drawings
  - a. Instructions
  - b. Disk Label
  - c. Transmission

d. Enter dates drawings were sent

Once all documents have been uploaded and submitted by the designer, alerts will be sent to the Owner and the State Construction Office.

5 alerts created for users: N/A (interscope@doa.nc.gov) | bhahnel-submitter (esaanne.bahnel@doa.nc.gov) | wvahby\_o (Fady.Wahby@doa.nc.gov) | kjackson\_o (kent.jackson@doa.nc.gov) | rralley\_o (Robert.Talley@doa.nc.gov)  
Construction Closeout has been submitted by bhahnel-des

Design #: 17-17127-01 Agency: Administration General  
Package: 17-17127-01A - Test-Training 6/22/2017  
Construction Closeout

**Project Summary**

SCO DIR: 17-17127-01A  
Department: Administration  
Agency: Administration General  
Designer: In-House Design by Department of Administration  
Project Monitor: N/A  
Percent Complete: 100%  
Final Inspection Date: 06/09/2017  
Final Acceptance Date: 06/12/2017  
Last Update: 6/12/2017 4:16:00 PM

Project: Test-Training 6/22/2017  
Description: Test-Training 6/22/2017  
Package: Test-Training 6/22/2017  
Package Status: Closeout  
Closeout Due: 8/11/2017  
Closeout Submitted Date: 06/12/2017  
Closeout Approved Date:  
Close Out Status: Submitted

**Workflow Activity**

STEP	ACTION	ACTIVE?	ROLE	FIRM/AGENCY	USER COMPLETING STEP	COMPLETED ON	ALERTED ON	RESULT	COMMENTS
1	UPDATE	N	DESIGNER	In-House Design by Department of Administration	bahnel	06/12/2017 11:07		Created	
2	SUBMIT	N	DESIGNER	In-House Design by Department of Administration	bahnel-des	06/12/2017 16:15		Submitted	
3	APPROVE	Y	SCO	St. Construction					

**Documents**

1 INSPECTION | 2 CLAIM VERIFICATION | 3 CONSTRUCTION CLOSEOUT | 4 DESIGNER CERTIFICATE | 5 RECORD DRAWINGS

**Instructions**

1. Complete the following documents according to the instructions in Section 602 Final Report of the State Construction Manual. If applicable, a link is provided to download a blank form.

- Designer's Verification of Punchlist Completion (If Applicable)
- Final Inspection for Owner Occupancy
- Partial Utilization for Beneficial Occupancy (If Applicable)
- Other

2. Upload a scanned copy of each document using the section below

## 2. Package Completion

Once the workflow for the closeout is completed, the Package Status automatically changes to "Complete."

Program #: 9809 - St. Construction - SCO office Building  
Project #: 10963 - St. Construction - SCO Office Project  
Design #: 15-10963-01 - SCO Designer  
Package: 15-10963-01A - SCO Office Project

Detail | SCHEDULE - Planned and Actual | Plan Reviews | Construction Contracts | Monthly Progress | Weekly Inspection | Electrical Certificates

**Package A**

Oversight: Full Oversight  
Title: SCO Office Project  
Type: Undetermined  
Status: Complete  
Status Reason:  
Square Footage: 0  
Plan Location:  
County: UNKNOWN  
Description: SCO Office Project  
Designer Rep:

**Bidding/Construction Contracts**

Approved for Bid:  
Approved for Award: 2015-02-05  
Formal Contracts? Y  
Award Type: Sing

**Construction Administration**

Project Monitor: Unassigned  
Monthly Conference:  
Percent Complete: 0%  
Final Punchlist: Y

**Fees / Funds**

Liquidated Damages (/day): \$0  
CD Cost Estimate: \$0  
Plan Deposit: \$0.00  
Total Change Orders: \$0  
Total Construction Contract: \$0

**Archive Information**

Archive Date: / /  
Archive Box#:

## 3. Design Contract

Select the 'Design' > 'Evaluation' tab, and complete designer evaluation.

Select the 'Design' > 'Detail' tab, change *Contract Status* to "Complete," and

Note: All packages must be complete or closed out for Design status to be changed to "Complete."

#### 4. Contract Closeout

Select the 'Project' > 'Closeout Project' tab. If the Steps 1 and 2 above were completed correctly, all the check boxes for "1 Contracts" should be checked.

Contract	CounterParty	Contract For	Status	Contract Closed Out?	Ratings Present?	HUB Data Finalized?	Ready for Project Closeout
17-17127-01	In-House Design by Department of Administration	Design	No SCO Design Contract	<input checked="" type="checkbox"/>	N/A	N/A	<input checked="" type="checkbox"/>
17-17127-01A-1	Bolton Construction and Service, LLC	Construction	Complete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Project Financial Worksheet Summary	
Assigned Funds:	\$325,000.00
Total Committed:	\$275,000.00
Available to Commit:	\$49,000.00

The check boxes report completed activities and cannot be manually checked. If they are not checked, something was not completed in Steps 1, 2 or 3 above.

For “2 Milestones” check the box. Milestones include various key dates such as date of award and notice to proceed that are entered throughout the system during the life of a project. The Milestones tab summarizes key information. After completing the above,

**Close out Design / Construction**

Program #: 14293 - Administration General - Test-Training 6/22/2017  
 Project #: 17127 - Administration General - Test-Training 6/22/2017

Project Cost Estimate Project Type Funds Assigned Financial Worksheet Contracts Primavera Link Milestones Closeout Project Evaluations

**Close out Design / Construction**

1 **Contracts:**

Contract	CounterParty	Contract For	Status	Contract Closed Out?	Ratings Present?	HUB Data Finalized?	Ready for Project Closeout
17-17127-01	In-House Design by Department of Administration	Design	No SCO Design Contract	✓	✓	N/A	✓
17-17127-01A-1	Bolton Construction and Service, LLC	Construction	Complete	✓	✓	✓	✓

Bypass Ratings?

2 **Milestones:**  
 I certify that project milestone data is entered and complete.

3 **Close Design / Construction for this project:**

**Financial Closeout**

1 Design / Construction closeout must be complete.

2 All funds assigned to this project must be committed or released:

**Project Financial Worksheet Summary:**

Assigned Funds:	\$325,000.00
Total Committed:	\$275,000.00
Available to Commit:	\$49,000.00

[Worksheet Detail](#)

Certify Milestones and click “Close out Design/Construction”

## 5. Financial Closeout

### a) Standard, Performance and Foundation Closeout

After the Design and Construction contracts have been closed, the next step is Financial Closeout.

Program #: 9809 - St. Construction - SCO office Building  
 Project #: 10963 - St. Construction - SCO Office Project

Project Cost Estimate Project Type Funds Assigned Financial Worksheet Contracts Milestones Closeout Project

**Close out Design / Construction**

1 **Contracts:**

Contract	CounterParty	Contract For	Status	Contract Closed Out?	Ratings Present?	HUB Data Finalized?	Ready for Project Closeout
1S-10963-01	SCO Designer	Design	Complete	✓	✓	N/A	✓
1S-10963-01A-1	SCO Contractor	Construction	Complete	✓	✓	✓	✓

2 **Milestones:**  
 I certify that project milestone data is entered and complete. Certified by Interscope Administrator on 6/10/2015

3 **Close Design / Construction for this project:**  
 Closed out by Interscope Administrator on 6/10/2015

**Financial Closeout**

1 Design / Construction closeout must be complete.

2 All funds assigned to this project must be committed or released:

**Project Financial Worksheet Summary:**

Assigned Funds:	\$10,000,000.00
Total Committed:	\$9,600,000.00
Available to Commit:	\$400,000.00

[Worksheet Detail](#)

In the Financial Closeout section is a summary of assigned funds, committed funds and any available funds. To close out the project, the *Available to Commit* must be \$0.

There are 2 options. The first option is to select the **Release Uncommitted Funds** and let the system “Un-assign” the funds, releasing them back to the Program. This is recommended if there is only one fund source assigned to the project.

But, if there are multiple fund sources, navigate to the ‘Program’>‘Assign Funds to Projects’ tab and change the assignment amount to equal the committed amount, then



This example illustrates multiple funding sources.

Source	Authorization Title	Current C-I-C	Original C-I-C	Current Allocation	Pending Changes (Orig. + Appr. Changes)	Proposed Allocation	Assignments																								
General Fund	<a href="#">Performing Arts Building</a>	41531-301	41631-302	\$ 600,000.00	\$ -100,000.00	\$ 500,000.00	<table border="1"> <thead> <tr> <th>Project ID</th> <th>Project Name</th> <th>Agency Project Code</th> <th>Assignment Amount</th> </tr> </thead> <tbody> <tr> <td>10921</td> <td><a href="#">Parking lot</a></td> <td></td> <td>\$ 350,000.00</td> </tr> <tr> <td colspan="3"></td> <td>\$150,000.00</td> </tr> </tbody> </table>	Project ID	Project Name	Agency Project Code	Assignment Amount	10921	<a href="#">Parking lot</a>		\$ 350,000.00				\$150,000.00												
Project ID	Project Name	Agency Project Code	Assignment Amount																												
10921	<a href="#">Parking lot</a>		\$ 350,000.00																												
			\$150,000.00																												
State Debt	<a href="#">Performing Arts Building</a>	41531-301	41531-301	30,000,000.00	\$ 0.00	30,000,000.00	<table border="1"> <thead> <tr> <th>Project ID</th> <th>Project Name</th> <th>Agency Project Code</th> <th>Assignment Amount</th> </tr> </thead> <tbody> <tr> <td>10912</td> <td><a href="#">Purchase Land</a></td> <td></td> <td>\$ 1,750,000.00</td> </tr> <tr> <td>10913</td> <td><a href="#">Construct new Performing Arts building</a></td> <td></td> <td>\$ 25,000,000.00</td> </tr> <tr> <td>10921</td> <td><a href="#">Parking lot</a></td> <td></td> <td>\$ 50,000.00</td> </tr> <tr> <td>10922</td> <td><a href="#">Extend campus utilities</a></td> <td></td> <td>\$ 1,750,000.00</td> </tr> <tr> <td colspan="3"></td> <td>\$1,450,000.00</td> </tr> </tbody> </table>	Project ID	Project Name	Agency Project Code	Assignment Amount	10912	<a href="#">Purchase Land</a>		\$ 1,750,000.00	10913	<a href="#">Construct new Performing Arts building</a>		\$ 25,000,000.00	10921	<a href="#">Parking lot</a>		\$ 50,000.00	10922	<a href="#">Extend campus utilities</a>		\$ 1,750,000.00				\$1,450,000.00
Project ID	Project Name	Agency Project Code	Assignment Amount																												
10912	<a href="#">Purchase Land</a>		\$ 1,750,000.00																												
10913	<a href="#">Construct new Performing Arts building</a>		\$ 25,000,000.00																												
10921	<a href="#">Parking lot</a>		\$ 50,000.00																												
10922	<a href="#">Extend campus utilities</a>		\$ 1,750,000.00																												
			\$1,450,000.00																												
				\$30,600,000.00	(\$100,000.00)	\$30,500,000.00																									

Return to the ‘Project’>‘Closeout Project’ tab and the *Available to Commit* should equal \$0.

**Close out Design / Construction**

1 Contracts:

Contract	CounterParty	Contract For	Status	Contract Closed Out?	Range Present?	HUB Data Finalized?	Ready for Project Closeout
<a href="#">15-10963-01</a>	SCO Designer	Design	Complete	✓	✓	N/A	✓
<a href="#">15-10963-01A-1</a>	SCO Contractor	Construction	Complete	✓	✓	✓	✓

2 Milestones:  
 I certify that project milestone data is entered and complete. Certified by *InterScope Administrator* on 6/10/2015

3 Close Design / Construction for this project:  
 Closed out by *InterScope Administrator* on 6/10/2015

**Financial Closeout**

1 Design / Construction closeout must be complete.

2 All funds assigned to this project must be committed or released:

**Project Financial Worksheet Summary:**

Assigned Funds:	\$9,600,000.00
Total Committed:	\$9,600,000.00
Available to Commit:	\$0.00

[Worksheet Detail](#)

Select **Close out Project Financials**. After executing this, the project is closed.

Financial closeout successful.

Program #: 9809 - St. Construction - SCO office Building  
 Project #: 10963 - St. Construction - SCO Office Project

Project | Cost Estimate | Project Type | Funds Assigned | Financial Worksheet | Contracts | Milestones | Closeout Project

Close

**Close out Design / Construction**

1 **Contracts:**

Contract	CounterParty	Contract For	Status	Contract Closed Out?	Ratings Present?	HUB Data Finalized?	Ready for Project Closeout
<a href="#">15-10963-01</a>	SCO Designer	Design	Complete	✓	✓	N/A	✓
<a href="#">15-10963-01A-1</a>	SCO Contractor	Construction	Complete	✓	✓	✓	✓

2 **Milestones:**

I certify that project milestone data is entered and complete. Certified by *InterScope Administrator* on 6/10/2015

3 **Close Design / Construction for this project:**

[Reopen Design / Construction](#) Closed out by *InterScope Administrator* on 6/10/2015

**Financial Closeout**

1 **Design / Construction closeout must be complete.**

2 **All funds assigned to this project must be committed or released:**

Project Financial Worksheet Summary:

Assigned Funds:	\$9,600,000.00
Total Committed:	\$9,600,000.00
Available to Commit:	\$0.00

[Worksheet Detail](#)

[Reopen Project Financials](#) Closed out by *InterScope Administrator* on 6/10/2015

## b) *Non-Code-Item Financial Closeout*

This type of project will not have a financial close out as shown below.

**Close out Design / Construction**

1 **Contracts:**

Contract	CounterParty	Contract For	Status	Contract Closed Out?	Ratings Present?	HUB Data Finalized?	Ready for Project Closeout
<a href="#">16-15534-01</a>	Dewberry Engineers Inc.	Design	Complete	✓	N/A	N/A	✓
<a href="#">16-15534-01A-1</a>	MV Momentum Construction, LLC	Construction	Complete	✓	N/A	■	■

Bypass Ratings?

2 **Milestones:**

I certify that project milestone data is entered and complete.

3 **Close Design / Construction for this project:**

[Force Design / Construction Close](#) [Close out Design / Construction](#)

**Financial Closeout**

1 **Design / Construction closeout must be complete.**

2 **All funds assigned to this project must be committed or released:**

Project Financial Worksheet Summary:

Assigned Funds:	\$0.00
Total Committed:	\$92,768.77
Available to Commit:	(\$92,768.77)

[Worksheet Detail](#)

Non-code-item Projects *do not* have a financial close out button

## U. Closing a Program

Closing a Program is similar to closing Projects. To close a program, all projects must be closed, there can be no pending transfers, and there cannot be any unassigned funds. Funds cannot be assigned to closed projects, so any funds remaining in the program must be transferred to other Programs or the allocation from the Authorization must be reduced. Community Colleges and Universities should utilize the Funds Transfer function to request movement of funds or increase/decrease in authority. Permission to close programs will be established at the same levels as they were created. For the universities and community colleges programs will be closed by UNC GA or NCCCS System Office.

Program #: 9809 - St. Construction - SCO office Building

Program / Program Funding / Projects / Assign Amounts to Projects / Program Closeout

Close

**Close out Projects**

1. Projects:

Project ID	Title	Project Status	Ready for Program Closeout
10963	SCO Office Project	Financials Closed Out	<input checked="" type="checkbox"/>

**Close out Financials**

2. There may not be any pending Funds Transfer or Increase / Decrease Authorization requests that affect this program.

3. All funds allocated to this program must be assigned, transferred or released.

Source	Current C-I-C	Original C-I-C	Original Allocated Amt	Pending Changes	Current Allocated Amt	Assigned To Projects	Available To Assign
State Debt	41501-4T01	41501-4T01	\$9,600,000.00	\$0.00	\$9,600,000.00	\$9,600,000.00	\$0.00

Close out Program

Once the *Available to Assign* funds is \$0, click the **Close out Program**.

Program closeout successful. The status of the program has been changed to Complete.

Program #: 9809 - St. Construction - SCO office Building

Program / Program Funding / Projects / Assign Amounts to Projects / Program Closeout

Close

**Close out Projects**

1. Projects:

Project ID	Title	Project Status	Ready for Program Closeout
10963	SCO Office Project	Financials Closed Out	<input checked="" type="checkbox"/>

**Close out Financials**

2. There may not be any pending Funds Transfer or Increase / Decrease Authorization requests that affect this program.

3. All funds allocated to this program must be assigned, transferred or released.

Source	Current C-I-C	Original C-I-C	Original Allocated Amt	Pending Changes	Current Allocated Amt	Assigned To Projects	Available To Assign
State Debt	41501-4T01	41501-4T01	\$9,600,000.00	\$0.00	\$9,600,000.00	\$9,600,000.00	\$0.00

Reopen Program

Closed out by InterScope Administrator on 6/10/2015

## VI. Advanced Functions

### A. Funds Change Request

Funds change requests allow moving funds from an Authorization/Program to another Authorization/ Program. It begins with entering a request, and continues with a sequential multi-step approval process.

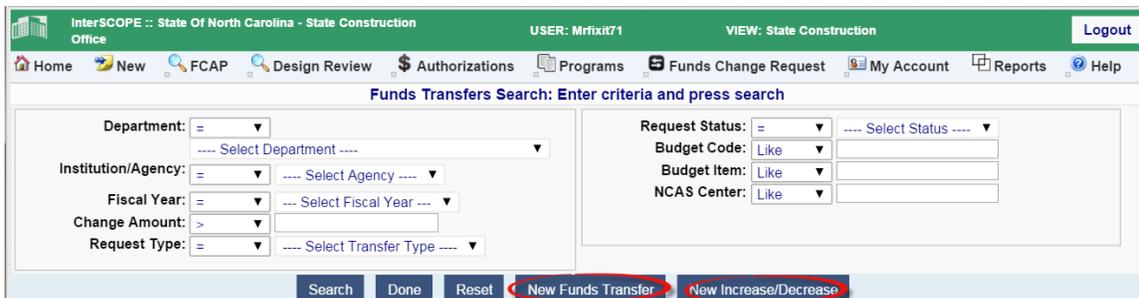
A separate request must be created for each source of funds to be transferred.

The Program that the funds will be transferred from must have unassigned funds equal to or greater than the amount to be transferred within the source of funds to be transferred, i.e. the program must have \$15,000 unassigned Non-General Fund (NGF) funds in order to be able to transfer \$15,000 NGF. Excess funds in projects may be unassigned to increase the amount of unassigned funds available within a program.

At the top of your home page, select Funds Change Request>Funds Change Request to bring up the Funds Transfer Search Screen.



On the search screen, you can search for a previous request that has been made to check the status or create a new request. A new request may be either a transfer of existing funds from one program to another or an increase/decrease in authority. Increase/decrease in authority applies generally to Non-General Fund or Non-State Debt funding sources where the agency/institution is providing the funds, or releasing unneeded funds. Both follow a similar approval process.



#### 1. Funds Transfer

Select the New Funds Transfer button. Search for the Program that you want to transfer the funds from and select the desired program. Enter the amount you wish to transfer. If there are multiple fund sources in the program, be sure to select the desired fund

source. Then, search for and select the Program to which you will transfer the funds. Enter appropriate remarks as to why you are transferring the funds. Then Continue.

This brings up the summary of the request, above. Select Save and you will see the workflow with the current status as shown on page 74 following submission. This also creates a "Pending Change" for the Authorization and Program financials shown below.

Source	Orig. C-I-C	Original Authorized Amount	Approved Changes	Pending Changes	Proposed Authorization Amount	Current Allocated Amount	Assigned To Projects	Available To Assign
1 General Fund	41531-301	\$0.00	\$600,000.00	\$-100,000.00	\$500,000.00	\$600,000.00	\$350,000.00	\$150,000.00
2 Non-General Fund	41531-301	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3 Non-State Debt	41531-301	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4 R&R General Fund	41531-301	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5 R&R State Debt	41531-301	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6 State Debt	41531-301	\$30,000,000.00	\$0.00	\$0.00	\$30,000,000.00	\$30,000,000.00	\$30,000,000.00	\$0.00
Totals		\$30,000,000.00	\$600,000.00	(\$100,000.00)	\$30,500,000.00	\$30,600,000.00	\$30,350,000.00	\$150,000.00

Source	Orig. C-I-C	Current Authorization (Orig + Appr Changes)	Pending Changes	Available To Allocate
General Fund	41531-301	\$ 0.00	\$ 0.00	\$ 0.00
	41631-302	\$ 600,000.00	\$ -100,000.00	\$ 500,000.00
Non-General Fund	41531-301	\$ 0.00	\$ 0.00	\$ 0.00
Non-State Debt	41531-301	\$ 0.00	\$ 0.00	\$ 0.00
R&R General Fund	41531-301	\$ 0.00	\$ 0.00	\$ 0.00
R&R State Debt	41531-301	\$ 0.00	\$ 0.00	\$ 0.00
State Debt	41531-301	\$ 30,000,000.00	\$ 0.00	\$ 30,000,000.00
Totals		\$30,600,000.00	(\$100,000.00)	\$30,500,000.00

Program ID	Agency	Program Name	Original Allocated Amount	Approved Changes	Pending Changes	Available to Assign	Assigned to Projects
9903	UNC Pembroke	Performing Arts School	\$ 0.00	\$ 600,000.00	\$ -100,000.00	\$ 500,000.00	\$ 350,000.00
Allocation Count: 1 To Allocate							

Select Submit to send the request forward for approval.

**Funds Transfer Summary** / Funds Transfer

**Institution / Agency:** UNC Pembroke  
**Amount:** \$100,000.00  
**Effect on Source Authorization:** [41531-301 Performing Arts Building](#)  
**Authorized Funds**

**Transaction:** Transfer Funds  
**Remarks:** Move utility work to this project.  
**Effect on Destination Authorization:** [41531-302 Agricultural Center](#)  
**Authorized Funds**

**Effect on Source Program:** 9903 - Performing Arts School  
**Funds Allocated to Program**

**Effect on Destination Program:** 9904 - Agricultural Center  
**Funds Allocated To Program**

**Workflow**

STEP	ACTION	ACTIVE?	ROLE	ORGANIZATION	APPROVER	COMPLETED ON	ALERTED ON	DISPOSITION	COMMENTS
1	CREATE	N	AGENCY	UNC Pembroke		4/13/2015		Created	rc0x
2	SUBMIT	Y	AGENCY	UNC Pembroke					
3	APPROVE	N	AGENCY	UNC Pembroke					
4	APPROVE	N	DEPARTMENT	Educational Institutions (Universities)					
5	APPROVE	N	OSBM	State Budget And Management					

**Comments**

Normally, the requester will not be approving the request for the Agency/Institution, but an email will be sent to the Approver, notifying him/her that there is a request for his/her action.

**Funds Transfer Summary** / Funds Transfer

**Institution / Agency:** UNC Pembroke  
**Amount:** \$100,000.00  
**Effect on Source Authorization:** [2017 - 41531-302 - Agricultural Center](#)  
**Authorized Funds**

**Transaction:** Transfer Funds  
**Remarks:** Shift utility work to this project.  
**Effect on Destination Authorization:** [41531-301 Performing Arts Building](#)  
**Authorized Funds**

**Effect on Source Program:** 9904 - Agricultural Center  
**Funds Allocated to Program**

**Effect on Destination Program:** 9903 - Performing Arts School  
**Funds Allocated To Program**

**Workflow**

STEP	ACTION	ACTIVE?	ROLE	ORGANIZATION	APPROVER	COMPLETED ON	ALERTED ON	DISPOSITION	COMMENTS
1	CREATE	N	AGENCY	UNC Pembroke		4/13/2015		Created	rc0x
2	SUBMIT	N	AGENCY	UNC Pembroke		4/13/2015		Pending	rc0x
3	APPROVE	Y	AGENCY	UNC Pembroke					
4	APPROVE	N	DEPARTMENT	Educational Institutions (Universities)					
5	APPROVE	N	OSBM	State Budget And Management					

**Comments**

The person who is the next level up in the approval process will open the transaction and make a decision to accept or reject the request, by selecting the appropriate



button under Workflow. They may make comments in the space provided at the bottom of the workflow, and an explanation in the comments is mandatory if they Reject the request.

If that person disapproves the request, the original requester is notified and the process is complete. If that person approves the request, the system notifies the next higher level approver.

The 3<sup>rd</sup> level person must log in and navigate to the pending request.

**Funds Transfer Summary** / Funds Transfer

**Institution / Agency:** UNC Pembroke  
**Amount:** \$100,000.00  
**Effect on Source Authorization:** [41531-302 Agricultural Center](#)  
**Authorized Funds**

**Transaction:** Transfer Funds  
**Remarks:** Shift utility work to this project.  
**Effect on Destination Authorization:** [41531-301 Performing Arts Building](#)  
**Authorized Funds**

**Effect on Source Program:** 9904 - Agricultural Center  
**Funds Allocated to Program**

**Effect on Destination Program:** 9903 - Performing Arts School  
**Funds Allocated To Program**

**Workflow**

STEP	ACTION	ACTIVE?	ROLE	ORGANIZATION	APPROVER	COMPLETED ON	ALERTED ON	DISPOSITION	COMMENTS
1	CREATE	N	AGENCY	UNC Pembroke		4/13/2015		Created	rc0x
2	SUBMIT	N	AGENCY	UNC Pembroke		4/13/2015		Pending	rc0x
3	APPROVE	N	AGENCY	UNC Pembroke		4/13/2015		Pending	rc0x
4	APPROVE	Y	DEPARTMENT	Educational Institutions (Universities)					
5	APPROVE	N	OSBM	State Budget And Management					

**Comments**



They have the option of approving or disapproving the request using the , and making comments. If they disapprove, the requester and Agency approver are notified and the process is complete. If they approve, the request goes forward to the next level.

STEP	ACTION	ACTIVE?	ROLE	ORGANIZATION	APPROVER	COMPLETED ON	ALERTED ON	DISPOSITION	COMMENTS
1	CREATE	N	AGENCY	UNC Pembroke		4/13/2015		Created	rcox
2	SUBMIT	N	AGENCY	UNC Pembroke		4/13/2015		Pending	rcox
3	APPROVE	N	AGENCY	UNC Pembroke		4/13/2015		Pending	rcox
4	APPROVE	N	DEPARTMENT	Educational Institutions (Universities)		4/13/2015		Pending	uncga
5	APPROVE	Y	OSBM	State Budget And Management		4/13/2015		Pending	uncga

The status for the request remains in “Pending” until disapproved, or until the top level of the approval process approves it.

STEP	ACTION	ACTIVE?	ROLE	ORGANIZATION	APPROVER	COMPLETED ON	ALERTED ON	DISPOSITION	COMMENTS
1	CREATE	N	AGENCY	UNC Pembroke		4/13/2015		Created	rcox
2	SUBMIT	N	AGENCY	UNC Pembroke		4/13/2015		Pending	rcox
3	APPROVE	N	AGENCY	UNC Pembroke		4/13/2015		Pending	rcox
4	APPROVE	N	DEPARTMENT	Educational Institutions (Universities)		4/13/2015		Pending	uncga
5	APPROVE	N	OSBM	State Budget And Management		4/13/2015		Approved	osbm

Once it receives final approval, the funds records will be updated and there will no longer be funds in a pending status. While funds are in a pending status, they may not be assigned, committed, or otherwise affected.

## 2. Increase/Decrease

To request an increase or decrease in funds, select the New Increase/Decrease button.

The screenshot shows the InterscopePlus interface with the following elements:

- Header: Interscope :: State Of North Carolina - State Construction Office. USER: rcox. VIEW: Educational Institutions (Universities). Logout
- Navigation: Home, Companies, New, Authorizations, Programs, Funds Transfer, My Account, Help
- Search Section: Funds Transfers Search: Enter criteria and press search
- Search Criteria:
  - Department: Educational Institutions (Universities)
  - Institution/Agency: Select Agency
  - Fiscal Year: Select Fiscal Year
  - Change Amount: >
  - Request Type: Select Transfer Type
  - Request Status: Select Status
  - Budget Code: Like
  - Budget Item: Like
  - NCAS Center: Like
- Buttons: Search, Done, Reset, New Funds Transfer, **New Increase/Decrease** (highlighted in red)

**NOTE: You may only increase or decrease existing authority.**

Search for and select the authorization you wish to increase. Enter amount and remarks, then .

The screenshot shows the 'Authorization Change' form. At the top, there is a search bar for 'Existing Authorization:' and a 'Search' button. Below this is a table with columns: Original C2-C, Current C2-C, Source, Original Auth Amt, Approved Changes, Pending Changes, Current Auth Amt, Proposed Change, and Proposed Total. The table contains several rows, with the row for 'NGF' highlighted in blue. Below the table, there is a section 'Allocate To Program' with a dropdown menu for 'Program:' set to 'Agricultural Center (9904)' and a text area for 'Remarks:' containing 'Supplement for increased cost.' A 'Continue' button is at the bottom right.

This brings up the summary of the request. Select  and you will see the workflow with the current status. Select  to send the request forward for approval.

The screenshot shows the summary page of the 'Authorization Change' form. It includes fields for 'Institution / Agency:' (UNC Pembroke), 'Amount:' (\$10,000.00), 'Effect on Authorization:' (2017 - 41631-313 - Ag Center NGF), 'Transaction:' (Increase/Decrease), 'Remarks:' (Supplement for increased cost), and 'Effect on Program:' (9904 - Agricultural Center). A 'Workflow' button is circled in red. Below this is a 'Workflow' section with a table of steps:

STEP	ACTION	ACTIVE?	ROLE	ORGANIZATION	APPROVER	COMPLETED ON	ALERTED ON	DISPOSITION	COMMENTS
1	CREATE	N	AGENCY	UNC Pembroke		4/13/2015		Created	rcox
2	SUBMIT	Y	AGENCY	UNC Pembroke					
3	APPROVE	N	AGENCY	UNC Pembroke					
4	APPROVE	N	DEPARTMENT	Educational Institutions (Universities)					
5	APPROVE	N	OSBM	State Budget And Management					

The workflow continues the same as a funds transfer request until it is approved or rejected.

## B. Primavera (P6) Linking to Interscope

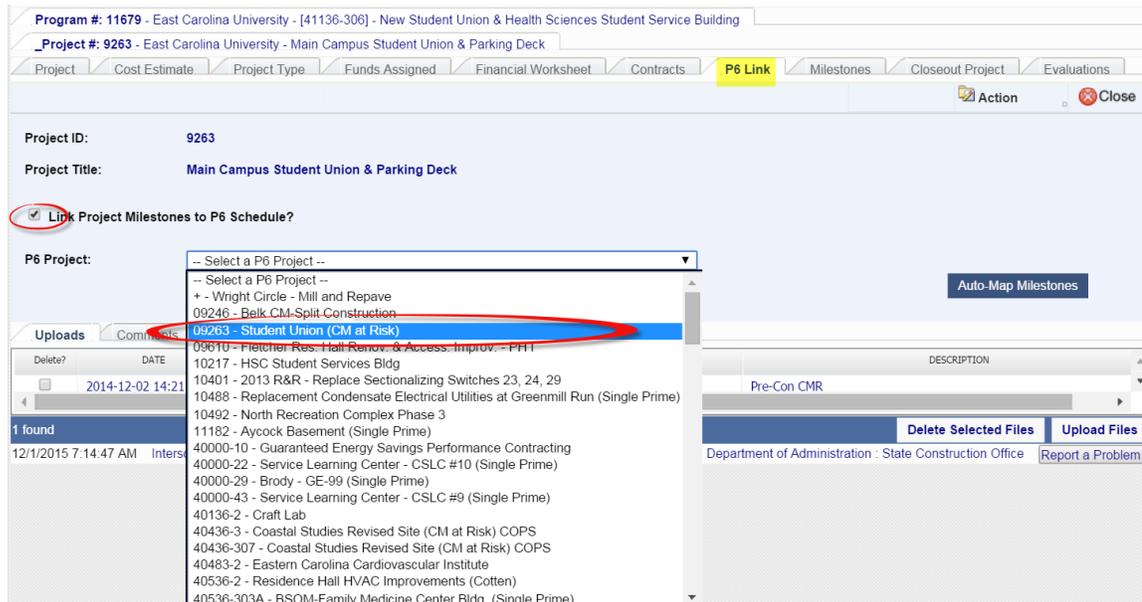
Primavera schedules are required for Standard Projects over \$500K and are optional for smaller projects. Projects <\$500K that are funded by R&R State Debt may be required to have schedules if OSBM or the State Treasurer require cash flow forecasting.

The P6 schedule is a planning tool for managing the project schedule and forecasting when milestones will occur. In general, milestone dates from P6 will be uploaded into Interscope as "Planned" dates and "Actual" dates will be entered in Interscope and automatically be downloaded into P6.

A schedule must exist in P6 to be able to link it to Interscope. It is recommended that the Project ID in P6 be the same as the Project ID in Interscope for ease of linking.

## 1. Establishing the Link

Select the Project>P6 Link tab, select the box that says “Link Project Milestones to P6 Schedule,” and select the project from the dropdown project list.



2. Select the Auto-Map Milestones to have the program match as many milestones as possible without user intervention.



Then . Mapping individual Milestones.

As with other data fields in Interscope, milestone dates are related to the various parts of the project i.e. the designer contract milestone date is found in the design contract section, the construction contract milestone date is found in the construction contract section, etc. There are Milestone tabs at the project level, design contract level, package level and construction contract level. Where there are multiple contracts, ensure that the milestone is linked to the proper contract i.e. the commissioning authority contract milestone must be linked to the design contract for the commissioning authority, and the pre-con contract milestone to the pre-con contract.

Select the Project>Milestones tab

Program #: 11679 - East Carolina University - [41136-306] - New Student Union & Health Sciences Student Service Building  
 Project #: 9263 - East Carolina University - Main Campus Student Union & Parking Deck

Project | Cost Estimate | Project Type | Funds Assigned | Financial Worksheet | Contracts | P6 Link | **Milestones** | Closeout Project | Evaluations

Milestones For: Project #: 9263 - East Carolina University - Main Campus Student Union & Parking Deck  
 P6 Project: 09263 - Student Union (CM at Risk)

Note: Red border indicates a required milestone

Project Milestones

Code	P6 Code	Name	P6 Activity	P6 Activity Name	Change P6 Activity	Planned	Actual
DESADVPRJ	DESADVPRJ	Date of FIRST advertisement for designer			<a href="#">change</a> <a href="#">unlink</a>	/ /	
CXADVPRJ	CXADVPRJ	Date of advertisement for commissioning authority	A2930	Advertise for Commissioning Agent	<a href="#">change</a> <a href="#">unlink</a>	3/9/2015	/ /
CXCONPRJ	CXCONPRJ	Execute Commissioning Contract	A3000	Cx Contract Milestone	<a href="#">change</a> <a href="#">unlink</a>	7/1/2014	/ /
CLOSEPRJ	CLOSEPRJ	Project Closeout	A2530	Construction Closeout Milestone	<a href="#">change</a> <a href="#">unlink</a>	7/5/2018	/ /
CMADVPRJ	CMADVPRJ	Advertise for CM at Risk	A2850	Advertise for CMAR Milestone	<a href="#">change</a> <a href="#">unlink</a>	3/5/2015	/ /

In this case, the Designer Advertisement milestone did not map. Select 'change' for that activity

and pick the activity from the dropdown list, then

Action | Save

Program #: 11679 - East Carolina University - [41136-306] - New Student Union & Health Sciences Student Service Building  
 Project #: 9263 - East Carolina University - Main Campus Student Union & Parking Deck

P6 Activity

Milestone Name: Date of FIRST advertisement for designer  
 Code: DESADVPRJ  
 P6 Project: 09263 - Student Union (CM at Risk)  
 P6 Code: DESADVPRJ

Select	Activity ID	Activity Description	Mstn Code	Planned	Actual
<b>SELECT</b>	A1000	Advertise for Designer Milestone	DESADVPRJ	11/17/2011	11/17/2011
SELECT	A1040	Designer Selected Milestone	DESSELDC	2/27/2012	2/27/2012
SELECT	A1090	Design Contract Milestone	DESCONDC	9/4/2012	9/4/2012
SELECT	A1120	Programming submittal to SCO	APSSCOPKG	8/31/2015	5/30/2013
SELECT	A1130	Programming submittal approval by SCO	APASCOPKG	8/31/2015	6/18/2013

6 page(s) [1] 2 3 4 5 6

Close

It is now linked and shows the planned advertisement date.

Program #: 11679 - East Carolina University - [41136-306] - New Student Union & Health Sciences Student Service Building  
 Project #: 9263 - East Carolina University - Main Campus Student Union & Parking Deck

Project | Cost Estimate | Project Type | Funds Assigned | Financial Worksheet | Contracts | P6 Link | **Milestones** | Closeout Project | Evaluations

Milestones For: Project #: 9263 - East Carolina University - Main Campus Student Union & Parking Deck  
 P6 Project: 09263 - Student Union (CM at Risk)

Note: Red border indicates a required milestone

Project Milestones

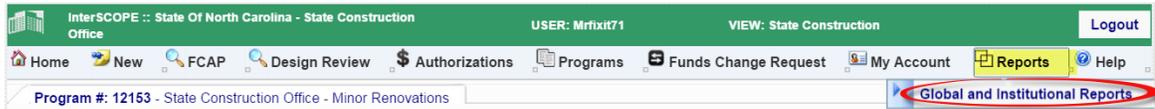
Code	P6 Code	Name	P6 Activity	P6 Activity Name	Change P6 Activity	Planned	Actual
DESADVPRJ	DESADVPRJ	Date of FIRST advertisement for designer	A1000	Advertise for Designer Milestone	<a href="#">change</a> <a href="#">unlink</a>	11/17/2011	/ /
CXADVPRJ	CXADVPRJ	Date of advertisement for commissioning authority	A2930	Advertise for Commissioning Agent	<a href="#">change</a> <a href="#">unlink</a>	3/9/2015	/ /
CXCONPRJ	CXCONPRJ	Execute Commissioning Contract	A3000	Cx Contract Milestone	<a href="#">change</a> <a href="#">unlink</a>	7/1/2014	/ /
CLOSEPRJ	CLOSEPRJ	Project Closeout	A2530	Construction Closeout Milestone	<a href="#">change</a> <a href="#">unlink</a>	7/5/2018	/ /
CMADVPRJ	CMADVPRJ	Advertise for CM at Risk	A2850	Advertise for CMAR Milestone	<a href="#">change</a> <a href="#">unlink</a>	3/5/2015	/ /

The linking process should be continued until all applicable milestones are linked. Not all Interscope milestones are in the P6 schedule. Not all P6 milestones apply to every project, as not every project has commissioning, or utilizes CM delivery. The milestones highlighted in gray should be in all P6 schedules. The required milestones must be linked and cannot be unlinked.

As the project progresses, actual dates are entered in Interscope, either by SCO for full oversight projects, or by agency/institution for other projects. Those actual dates are then downloaded into the P6 linked activity.

## VII. Reporting

From the Home screen, select Reports> Global and Institutional Reports.



This will bring up a new screen with two tabs – Global Reports and Institutional Reports. In general, Global reports are available to owners (state employees) and contain information that would be of interest to users across all departments and agencies. Institutional Reports are available to owners but the data that can be retrieved with the report is limited to their respective agency/institution.



**NOTE:** You must disable pop-up blockers for this sight in order to see the reports.

Select the desired report and it will appear in a new tab on your browser using the default criteria. The report may be filtered by selecting parameters from the sidebar. After selecting any parameters, click on “View Report” to see the new report. The selection parameters are shown in the report heading.

Export to PDF   Export to Excel   Export to Word Document   Export to HTML Document   Export to Image

Page 1/74

Department: Administration  
Agency: ALL  
Project Status: ALL

**Designer Selections**

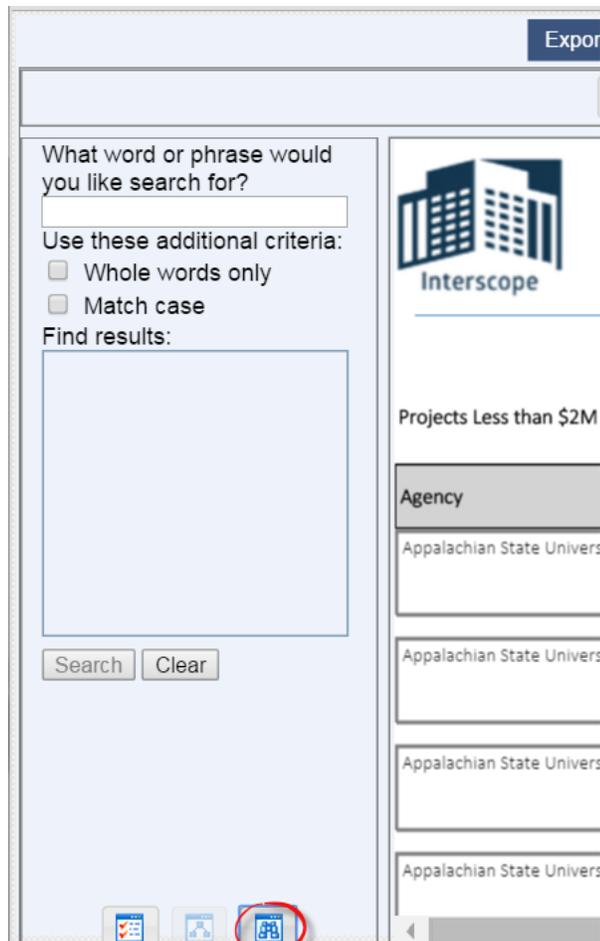
Projects Less than \$2M

Agency	Program Name	Project ID	Project Title	Estimated Total Cost	Designer Name	Design Fee	Designer Selected
Administration General	Revenue Building Elevator Installation	4277	Revenue Building Elevator Installation	50	RND Architects, P.A.	50	06/02/2000
Administration General	Watson House Accessibility Modifications	4431	Watson House Accessibility Modifications	50	H. S. Annis, Architect, AIA	50	10/23/2000
Administration General	Cooper Building Elevator Upgrades	4448	Cooper Building Elevator Upgrades	50	The Wooten Company	563,625	11/15/2000
Administration General	New Juvenile Youth Development Centers (YDC)	5644	New Juvenile Youth Development Centers (YDC)	50	O'Brien / Atkins Associates, P.A.	5997,966	04/16/2003
					O'Brien / Atkins Associates, P.A.	55,171,038	09/23/2004
Administration General	Garner Rd Complex --- Facility & Utility Upgrades	6825	Garner Rd Complex --- Facility & Utility Upgrades	50	United Engineering Group, Inc. (Inactive)	50	11/19/2008

Designer Selections      Report Generated: 9/28/2015 1:28:16 PM      Page 1 of 101

The report may be exported to a pdf document, Excel, a word (.rtf) document, an HTML document, or to an image (.tiff).

If you want to search for a particular word or phrase, select binoculars  at the bottom of the sidebar and it will bring up the search information.

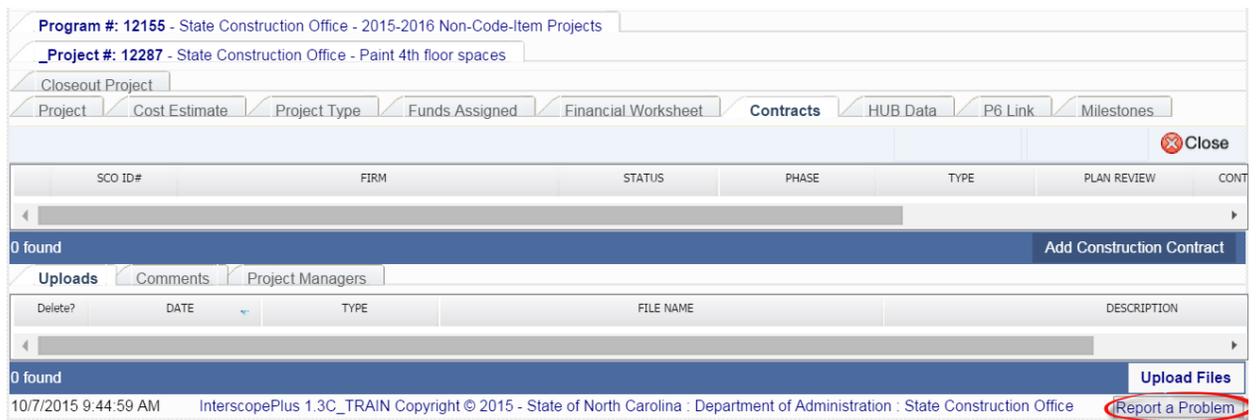


To return to the parameters, click on the  at the bottom of the sidebar.

## VIII. Problem Reporting/ User Feedback/Help

### A. Problem Reporting

The system has a tool for reporting problems that can be found at the bottom of each screen



When a problem is encountered, click the button and the system will automatically capture a screen shot. Enter the requested information and

A screenshot of a web application window titled 'ADD PROBLEM REPORT:'. The window has a tab labeled 'Problem Report'. The main content area contains the following text: 'Problem Report#: (auto)', 'Component: ProgramDetail', and 'User: scoadmin'. Below this is a red text block: 'The system has recorded a screen capture of the problem. Please enter a detailed description of the problem including the steps needed to reproduce it. Include any additional contact information and use the Action menu to Save your report. The Interscope Administrator will be alerted and follow up for resolution.' At the bottom left, there is a label 'Description:' followed by a large empty text input area. The top right of the window has 'Action' and 'Close' buttons.

## B. Contact

The system administrator may be contacted by clicking on the “CONTACT ADMINISTRATOR” link on the logon page.

### IX. Evaluations

This addendum to the User Manual covers the entry, update and submission of Designer and Contractor evaluations as required under the guidelines and policies established by the State Building Commission outlined in Subchapters 30E and 30F of the North Carolina Administrative Code.

Relevant sections of this Code are listed below:

Designer Evaluations:

<http://reports.oah.state.nc.us/searchRules.asp?title=&chapter=&searchCriteria=30E&returnType=Rule>

Contractor Evaluations:

<http://reports.oah.state.nc.us/searchRules.asp?title=&chapter=&searchCriteria=30F&returnType=Rule>

#### Evaluations Overview

InterscopePlus automatically creates an evaluation record whenever a design and construction contract is created. However, designer evaluations are not created for In-house design contracts.

##### A. Evaluation Status

The system automatically maintains the active status of each evaluation on a daily basis.

For designer evaluations, the *Package Final Approval* date is used to determine the Due Date. Evaluations are “Due” within 60 days of the *Final Approval date*. (Note: On the Evaluation Search page, the Final Approval date has been labelled the “Project Completion” date).

For contractor evaluations, the *Package Final Acceptance* date is used to determine the Due Date. Evaluations are “Due” within 60 days of the *Final Acceptance* date

These dates can be found on the Package “*Milestones*” tab.

Interscope allows a grace period of 60 days past the Due Date at which time, the system marks the evaluation as “Past Due”.

Evaluations remain in a “Pending” status until Final Approval or Final Acceptance dates entered at which time the due date is calculated.

##### B. Evaluation Rating

Evaluations are automatically assigned one of the following ratings when the system processes the raw score from the uploaded evaluation form:

- UNRATED
- UNACCEPTABLE
- POOR
- ACCEPTABLE
- EXCELLENT
- 

The rating determination details can be found in the detail evaluation forms that are generated and downloaded from the system:

Evaluation	Raw Score	Rating
<b>Designer</b>	0	Unrated
	0 < 3.5	Unacceptable
	3.5 < 5.0	Acceptable
	5.0	Excellent
<b>Contractor</b>	0	Unrated
	0 < 151	Unacceptable
	150 < 191	Poor
	190 < 276	Acceptable
	>275	Excellent

## C. Accessing Evaluations

Evaluation information can be found in InterscopePlus in the Home page or any level of the Project data structure: Project, Design Contract, Package or Construction Contract.

### 1. Home Page – “Active Evaluations” tab:

A special “clipboard” tab has been added to the Home page to aid in the identification of “active” evaluations. An “active” evaluation is one that has not yet been completed having a status of “Pending”, “Due” or “Overdue”.

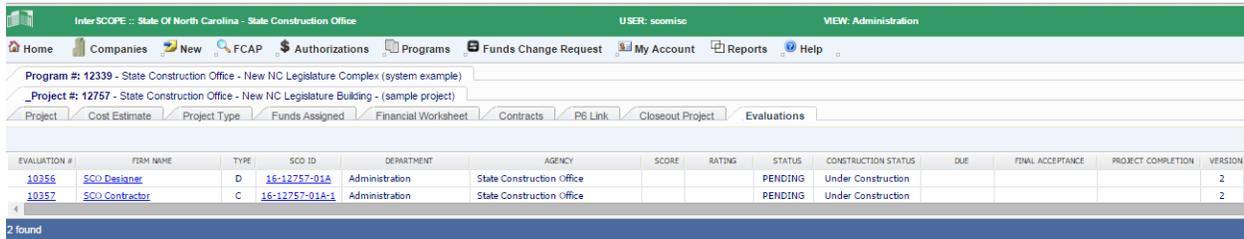
Note - “Completed” evaluations will not be listed under the “Active Evaluations” tab.

It is intended that this tab be used as a working queue of evaluations that need to be completed for owner projects. Therefore, when an evaluation is marked “Complete”, it will no longer appear under this tab. The Evaluation Search page can be used to locate completed evaluations.

InterSCOPE :: State Of North Carolina - State Construction Office														USER: sconnau		VIEW: NC State University	
<a href="#">Home</a> <a href="#">Companies</a> <a href="#">New</a> <a href="#">FCAP</a> <a href="#">Authorizations</a> <a href="#">Programs</a> <a href="#">Funds Change Request</a> <a href="#">My Account</a> <a href="#">Reports</a> <a href="#">Help</a>																	
<a href="#">System Notices</a> <a href="#">My Favorites</a> <a href="#">Active Design Contracts</a> <a href="#">Active Construction Contracts</a> <a href="#">All Change Orders In Process</a> <a href="#">My Projects</a> <a href="#">Evaluations (Active)</a>																	
EVALUATION #	FIRM NAME	TYPE	SOI ID	DEPARTMENT	AGENCY	SCORE	RATING	STATUS	CONSTRUCTION STATUS	DUE	FINAL ACCEPTANCE	PROJECT COMPLETE?	VERSION				
5695	Parkins + Will North Carolina, Inc.	D	06-06705-01C	Educational Institutions (Universities)	NC State University	0		PENDING	Review Only				2				
10097	Thompson-Gordon-Shook Engineers, Inc. d/b/a/	D	16-11655-01A	Educational Institutions (Universities)	NC State University	0		PENDING	Under Design				2				
2367	Engineered Designs, Inc. (EDI)	D	07-07214-01F	Educational Institutions (Universities)	NC State University	0	UNRATED	PENDING	Combined				2				
8817	LeChase Construction Services, LLC	C	14-11135-01A-1	Educational Institutions (Universities)	NC State University	0	UNRATED	PENDING	Under Construction				2				
2368	Engineered Designs, Inc. (EDI)	D	07-07214-01F	Educational Institutions (Universities)	NC State University	0	UNRATED	PENDING	Combined				2				
10208	GMK OF NORTH CAROLINA, P.C.	D	16-12194-01A	Educational Institutions (Universities)	NC State University	0		PENDING	Under Design				2				
1541	Sebesta Blomberg & Associates, Inc. (Inactive)	D	07-07299-02A	Educational Institutions (Universities)	NC State University	0	UNRATED	PENDING	Cancelled				2				
10159	RND Architects, P.A.	D	14-12111-01A	Educational Institutions (Universities)	NC State University	0		PENDING	Under Construction				2				
2483	Duda/Paine Architects, LLP	D	08-07847-03A	Educational Institutions (Universities)	NC State University	0	UNRATED	PENDING	Beneficial Occupancy				2				
9544	Jacobs Engineering Group, Inc.	D	15-12942-01A	Educational Institutions (Universities)	NC State University	0		PENDING	Approved for Bid				2				
8794	BoomersRussell DaveyCo	M	08-07847-03A-2	Educational Institutions (Universities)	NC State University	0	UNRATED	PENDING	Beneficial Occupancy				2				
9583	Walsner Architecture, PLLC	D	14-11226-01A	Educational Institutions (Universities)	NC State University	0		PENDING	Approved for Bid				2				
2585	Duda/Paine Architects, LLP	D	08-07847-03B	Educational Institutions (Universities)	NC State University	0	UNRATED	PENDING	Approved for Bid				2				
10034	FPM Engineering, Inc. (Inactive)	D	14-11372-01A	Educational Institutions (Universities)	NC State University	0		PENDING	Approved for Bid				2				
8295	BoomersRussell DaveyCo	M	08-07847-03B-3	Educational Institutions (Universities)	NC State University	0	UNRATED	PENDING	Approved for Bid				2				
9555	Barnes & Powell Electrical Co., Inc.	C	15-11454-01A-1	Educational Institutions (Universities)	NC State University	0		PENDING	Review Only				2				
2253	Duda/Paine Architects, LLP	D	08-07847-03D	Educational Institutions (Universities)	NC State University	0	UNRATED	PENDING	Beneficial Occupancy				2				

## 2. Project Detail – “Evaluations” tab

All designer and contractor evaluations for all contracts under the project are listed under this tab.



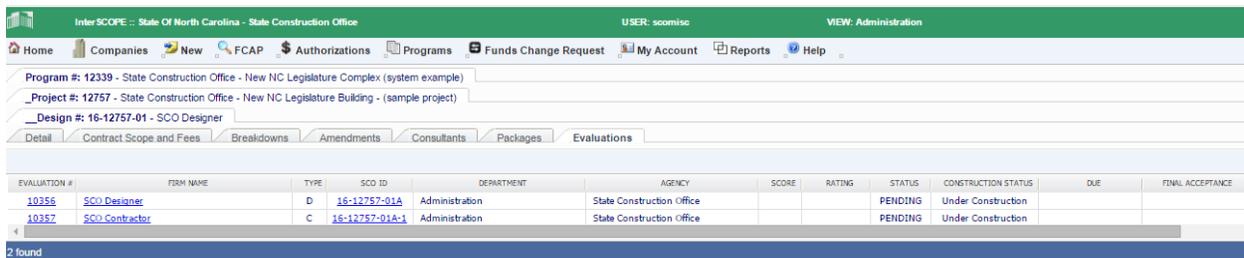
The screenshot shows the 'Evaluations' tab for a project. The breadcrumb trail is: Program # 12339 - State Construction Office - New NC Legislature Complex (system example) > Project # 12757 - State Construction Office - New NC Legislature Building - (sample project) > Evaluations. The table below lists two evaluations:

EVALUATION #	FIRM NAME	TYPE	SCO ID	DEPARTMENT	AGENCY	SCORE	RATING	STATUS	CONSTRUCTION STATUS	DUE	FINAL ACCEPTANCE	PROJECT COMPLETION	VERSION
10356	SCO Designer	D	16-12757-01A	Administration	State Construction Office			PENDING	Under Construction				2
10357	SCO Contractor	C	16-12757-01A-1	Administration	State Construction Office			PENDING	Under Construction				2

## 3. Design Contract Detail – “Evaluations” tab

The designer evaluation and all evaluations for contractors under all packages under this design contract are listed under this tab.

The designer evaluation can be added from this tab.



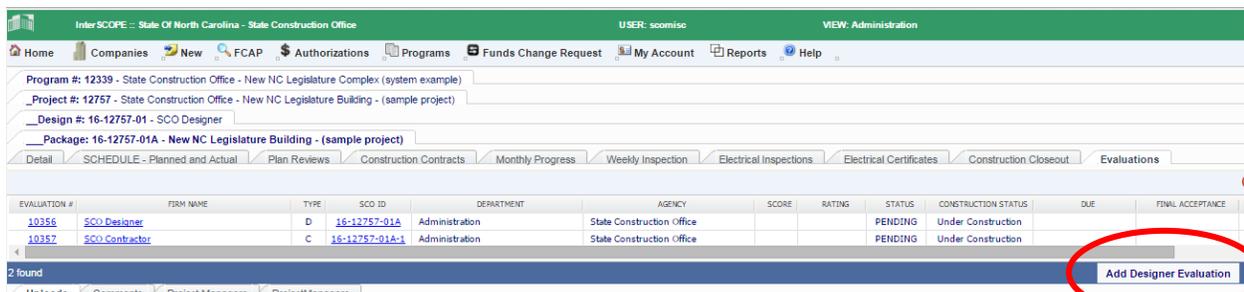
The screenshot shows the 'Evaluations' tab for a design contract. The breadcrumb trail is: Program # 12339 - State Construction Office - New NC Legislature Complex (system example) > Project # 12757 - State Construction Office - New NC Legislature Building - (sample project) > Design # 16-12757-01 - SCO Designer > Evaluations. The table below lists two evaluations:

EVALUATION #	FIRM NAME	TYPE	SCO ID	DEPARTMENT	AGENCY	SCORE	RATING	STATUS	CONSTRUCTION STATUS	DUE	FINAL ACCEPTANCE
10356	SCO Designer	D	16-12757-01A	Administration	State Construction Office			PENDING	Under Construction		
10357	SCO Contractor	C	16-12757-01A-1	Administration	State Construction Office			PENDING	Under Construction		

## 4. Package Detail – “Evaluations” tab

The designer evaluation and all evaluations for contractors for this package under this design contract are listed under this tab.

The designer evaluation can be added from this tab.



The screenshot shows the 'Evaluations' tab for a package. The breadcrumb trail is: Program # 12339 - State Construction Office - New NC Legislature Complex (system example) > Project # 12757 - State Construction Office - New NC Legislature Building - (sample project) > Design # 16-12757-01 - SCO Designer > Package: 16-12757-01A - New NC Legislature Building - (sample project) > Evaluations. The table below lists two evaluations:

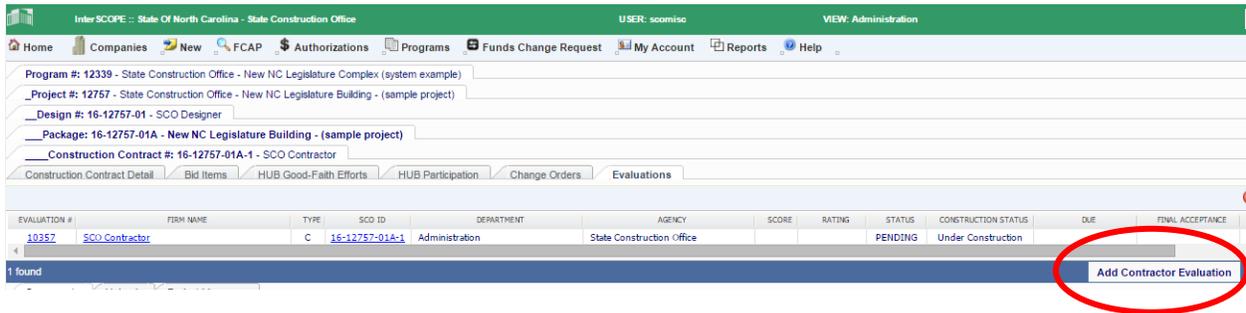
EVALUATION #	FIRM NAME	TYPE	SCO ID	DEPARTMENT	AGENCY	SCORE	RATING	STATUS	CONSTRUCTION STATUS	DUE	FINAL ACCEPTANCE
10356	SCO Designer	D	16-12757-01A	Administration	State Construction Office			PENDING	Under Construction		
10357	SCO Contractor	C	16-12757-01A-1	Administration	State Construction Office			PENDING	Under Construction		

An 'Add Designer Evaluation' button is circled in red at the bottom right of the table area.

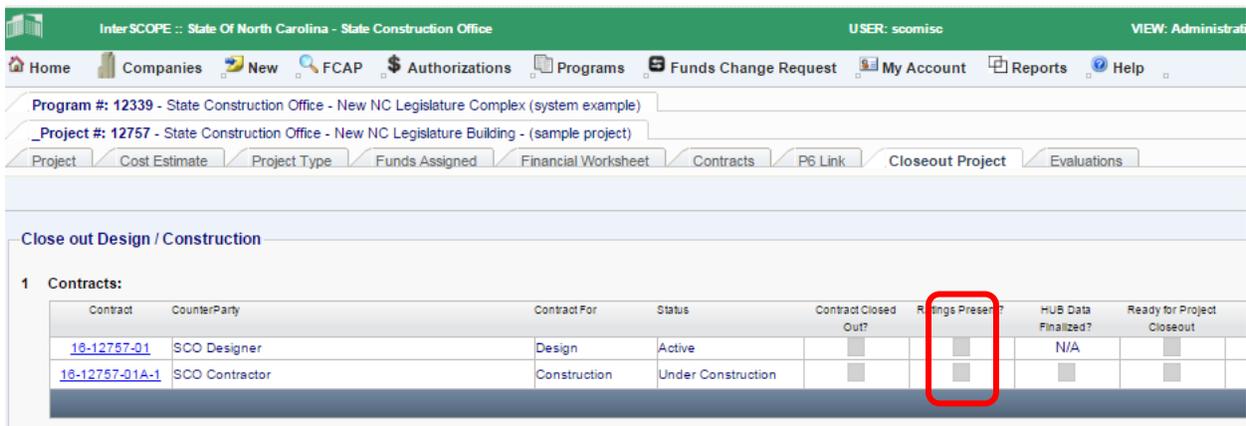
## 5. Construction Contract Detail – “Evaluations” tab

The evaluation for the contractor on this contract is listed under this tab.

The contractor evaluation can be added from this tab.

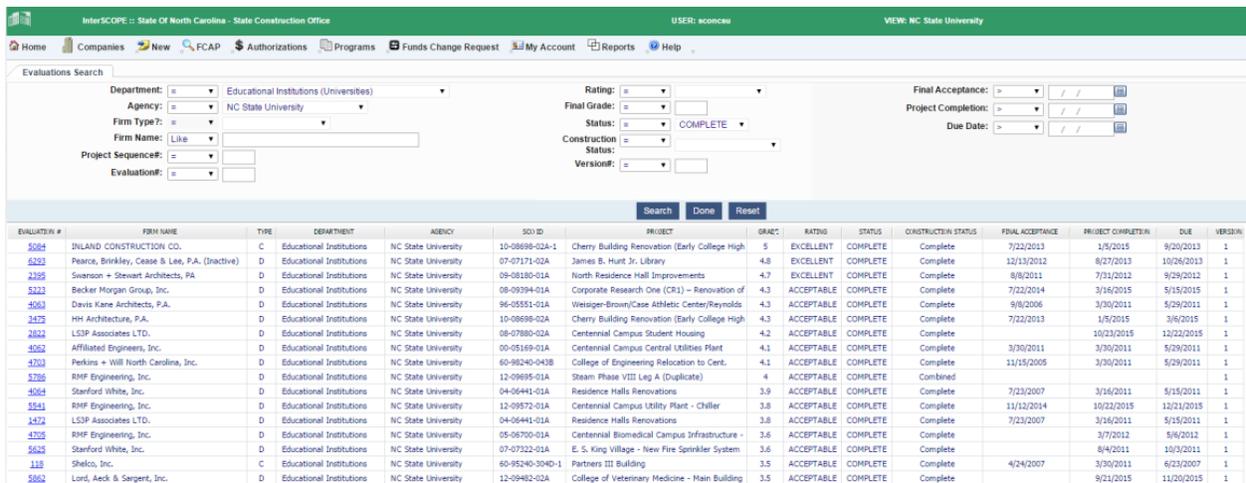


## 6. Project Design and Construction Closeout



## 7. Evaluation Search Page

The evaluation search page can be used to perform more complex queries of evaluation information.



## D. Maintaining Evaluations

To update evaluations, locate the evaluations using one of the methods described in “Accessing Evaluations”.

Click on the Evaluation# to open the evaluation for review and/or update:

EVALUATION #	FIRM NAME	TYPE	SCO ID	DEPARTMENT	
<a href="#">10356</a>	<a href="#">SCO Designer</a>	D	<a href="#">16-12757-01A</a>	Administration	State Const
<a href="#">10357</a>	<a href="#">SCO Contractor</a>	C	<a href="#">16-12757-01A-1</a>	Administration	State Const

2 found

Follow the instructions listed at the top of the Evaluation detail page. You may also visit the relevant Administrative Code Subchapters for detailed instructions and guidelines for completing your evaluation. These links are listed in the Instructions section.

**Instructions**

1. Instructions for completion of this form are outlined in the [State Building Commission Designer and Contractor Evaluation Procedures, T](#)
2. [Generate and Download the Evaluation Form \(MS Excel\) for this project](#)
3. Open the downloaded worksheet in Microsoft Excel and complete the evaluation.
4. [Upload the Completed Evaluation Form \(MS Excel\)](#)
  - o Interscope will automatically load the form.
  - o The Package SCO ID# is validated against the SCO ID# found on the form.
  - o TOTAL SCORE on the form must be greater than 0.
  - o The TOTAL SCORE is recorded in the Report section and the overall Rating is calculated and shown in the Summary section.
  - o The uploaded form is then converted from Excel to PDF format, stored and available in the Report section.
  - o The evaluation is recalculated each time a form is uploaded.
  - o NOTE: The upload button is not available if the evaluation has been completed.
5. Complete the "Report" Section
6. Use **Action-> Save** to record the evaluation
7. Include any additional comments or Supporting documentation below as appropriate

## E. Generating the Evaluation Form

The first step is to generate a downloadable evaluation form to be completed and uploaded.

Clicking on the “Generate and Download...” button will cause Interscope to create a pre-filled evaluation Excel file specific to this firm and project.

The screenshot shows the Interscope web application interface. The header includes the logo and text "InterSCOPE :: State Of North Carolina - State Construction Office" and "USER:". Below the header is a navigation bar with icons and labels for "Home", "Companies", "New", "FCAP", "Authorizations", "Programs", "Funds Change Request", and "My Account". The main content area is titled "Evaluation" and contains a section labeled "Instructions". The instructions are numbered 1 through 7. Step 2, "Generate and Download the Evaluation Form (MS Excel) for this project", is highlighted with a red rectangular box. Other steps include opening the downloaded worksheet in Microsoft Excel, uploading the completed form, and completing the report section.

The generated evaluation Excel file will appear at the bottom of your screen depending upon the browser that is used:

Google Chrome download:



Internet Explorer download:



Open the file for editing.

## F. Completing the Evaluation Form

### 1. Designer Evaluations

# InterscopePlus User Manual

The evaluation form is an Excel spreadsheet containing the detail sections to be completed for the evaluation. You will notice that Interscope has pre-filled the header portion of the spreadsheet with project and firm information. This area of the spreadsheet is locked and cannot be changed. Upon upload, Interscope checks the SCO ID # on the form to verify that the correct evaluation form is being uploaded.

The only cells open for update are highlighted as shown below. All other cells are locked and cannot be changed.

As each raw score is entered, the spreadsheet calculates the TOTAL SCORE for the evaluation and assigns the final RATING according to the scoring details described in the Overview section of this guide.

For designer evaluations, a raw score from 0 – 5 can be entered. Sections that are not applicable can be skipped and will not influence the TOTAL SCORE.

The screenshot shows an Excel spreadsheet titled "16-12757-01A\_DesignerEvaluation.xlsx - Excel". The ribbon includes FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, DEVELOPER, LOAD TEST, and TEAM. The spreadsheet content is as follows:

**STATE OF NORTH CAROLINA - DEPARTMENT OF ADMINISTRATION**  
**STATE CONSTRUCTION OFFICE**  
**DESIGNER EVALUATION MATRIX**

DATE: 1/10/2016 2:38:00 PM  
DEPARTMENT: Administration  
AGENCY: State Construction Office  
SCO ID#: 16-12757-01A  
DESIGNER: SCO Designer

**INSTRUCTIONS:**

It is the policy of the State Building Commission to evaluate designers for capital improvement projects as defined in G.S. 143-135.27 based on criteria contained herein. To be timely and useful, designer evaluation data will be accumulated within 30 days of submission of the final report. Prior to completion of the final designer evaluation, the capital projects coordinator shall submit the proposed evaluation to the designer for comment. Comments received from designers shall be considered by the capital projects coordinator. At this stage, the capital projects coordinator shall prepare the final designer evaluation and provide a copy to the designer. This form approved by the State Building Commission shall be used for this purpose. It is imperative that the final designer evaluation be completed and presented to the State Construction Office for all capital projects within 60 days of the final report.

TOTAL SCORE			4.0
Category	Item	Score	
1. Programming & Advance Planning	Category Summary	4.0	
	1. The Designer assisted the Owner in defining a preliminary Project Budget Schedule that identified milestone design and construction delivery dates	4.0	
	2. The Designer provided a detailed space program that identified primary users and spaces, including Facilities Condition Assessment Recommendations	4	
	3. The Designer included any special requirements relating to regulatory restraints, physical characteristics, historic or environmental issues, site constraints, etc...		Please enter a score between 0.0 and 5.0
	4. The Designer includes any special requirements from the Owner's guidelines for energy conservation, sustainable design and construction, life cycle cost evaluations, hazardous materials, etc...	0.0	

## 2. Contractor Evaluations

Contractor evaluations are handled in the same manner. The SCO ID # is recorded on the generated form.

The only cells open for update are highlighted as shown below. All other cells are locked and cannot be changed.

As each raw score is entered, the spreadsheet calculates the TOTAL SCORE for the evaluation and assigns the final RATING according to the scoring details described in the Overview section of this guide. Comments for each section may be added as appropriate in the section at the right.

For contractor evaluations, a raw score from 0 – 3 can be entered. All sections must be completed as they influence the TOTAL SCORE.

STATE OF NORTH CAROLINA - DEPARTMENT OF ADMINISTRATION  
STATE CONSTRUCTION OFFICE  
CONTRACTOR EVALUATION MATRIX

DATE: 1/10/2016 2:38:00 PM  
DEPARTMENT: Administration  
AGENCY: State Construction Office  
SCO ID: 16-12757-01A-1  
CONTRACTOR: SCO Contractor

**INSTRUCTIONS:**

- COMPLETE ALL SECTIONS HIGHLIGHTED IN YELLOW
- ENTER the TOTAL SCORE on LINE 11 on the INTERSCOPE EVALUATION FORM
- RATE EACH CATEGORY USING THE EVALUATION CRITERIA FOUND IN 01 NCAC 30E

**USE THE FOLLOWING NUMERICAL SCALE:**

- 3 = EXCELLENT PERFORMANCE
- 2 = SATISFACTORY PERFORMANCE
- 1 = POOR PERFORMANCE
- 0 = NON PERFORMANCE

3. UPLOAD THIS COMPLETED FORM FOR REVIEW

Question	Evaluation Category	Relative Importance	RATING	SCORE	Administrative Code Requirement	Construction Contract Reference	Comments
1	Did the contractor submit the documentation required by the contract in order to award and execute the construction contract for the project in a timely and complete manner in accordance with GS 143-129.b?	5	3	15	"Documents required for award, including Minority Business Enterprise (MBE) data, bonds, insurance documentation, and the executed contract documents."	Instructions to Bidders, Section 7 General Statute 143-129.b	My Comments here
2	Did the contractor manage the submittal process for all submittals required by the project specifications in a timely and effective manner?	5	3	15	"Shop drawing processing."	Instructions to Bidders, Section 12. General Conditions, Articles 5, 31c, 14	

**USE THE FOLLOWING NUMERICAL SCALE:**

- 3 = EXCELLENT PERFORMANCE
- 2 = SATISFACTORY PERFORMANCE
- 1 = POOR PERFORMANCE
- 0 = NON PERFORMANCE

3. UPLOAD THIS COMPLETED FORM FOR REVIEW

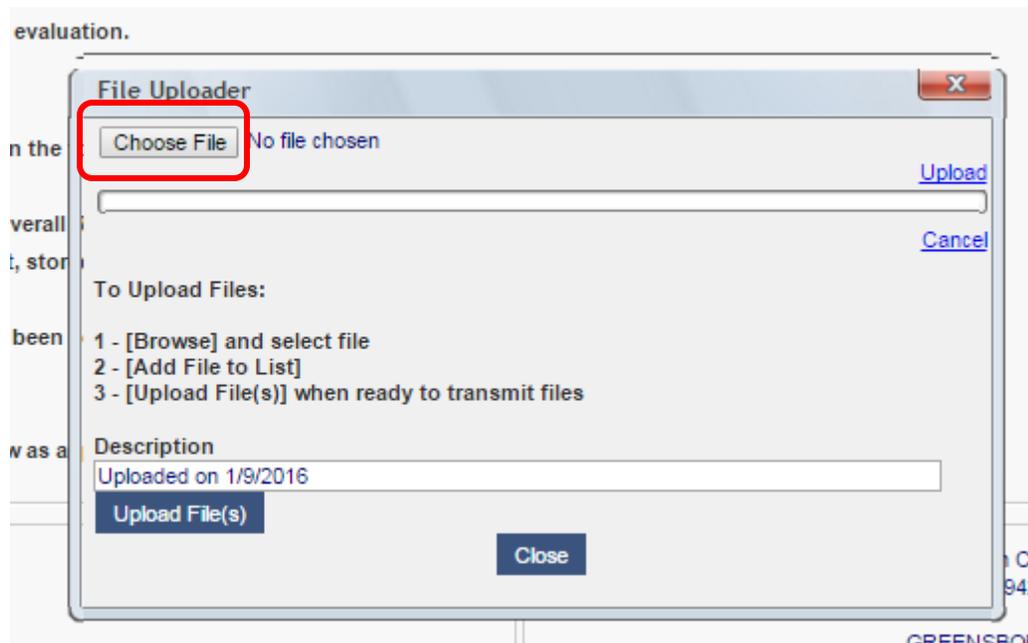
Question	Evaluation Category	Relative Importance	RATING	SCORE	Administrative Code Requirement	Construction Contract Reference	Comments
1	Did the contractor submit the documentation required by the contract in order to award and execute the construction contract for the project in a timely and complete manner in accordance with GS 143-129.b?	5	3	15	"Documents required for award, including Minority Business Enterprise (MBE) data, bonds, insurance documentation, and the executed contract documents."	Instructions to Bidders, Section 7 General Statute 143-129.b	My Comments here
2	Did the contractor manage the submittal process for all submittals required by the project specifications in a timely and effective manner?	5	3	15	"Shop drawing processing."	Instructions to Bidders, Section 12. General Conditions, Articles 5, 31c, 14	

## 3. Uploading the Evaluation Form

Review, save and exit Excel to complete the data entry of the evaluation.

Return to Interscope, and click on **Upload the Completed Evaluation Form (MS Excel)** the button to begin the upload process.

The file uploader pop-up window will then appear.

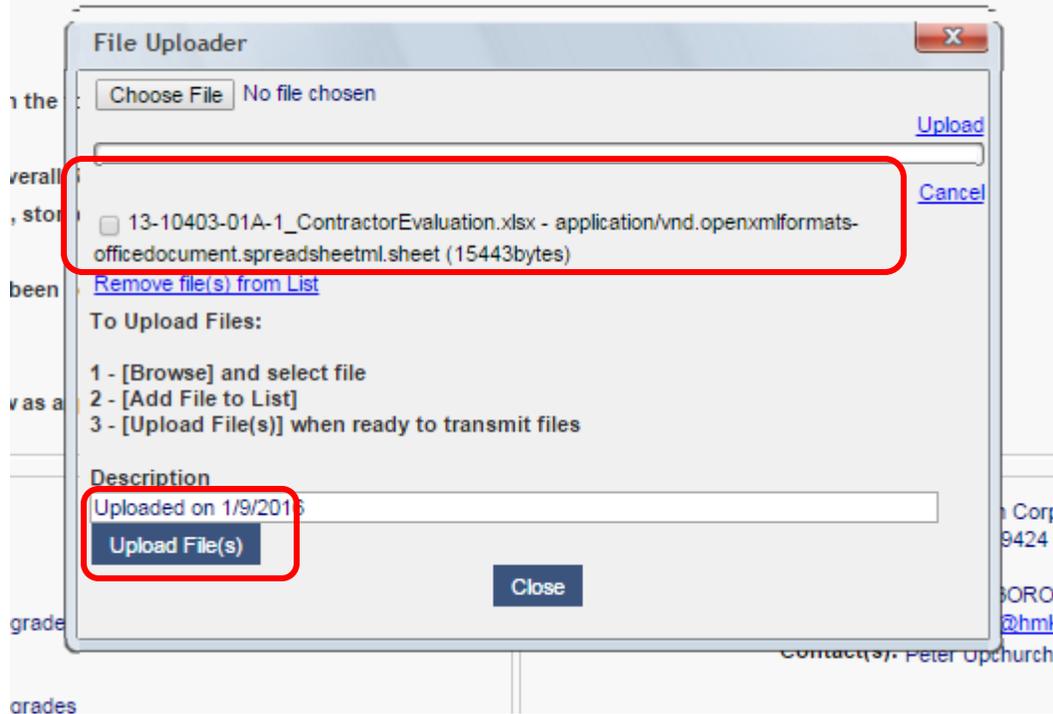


Click on the "Choose File" button to browse, find and select your completed evaluation spreadsheet file.



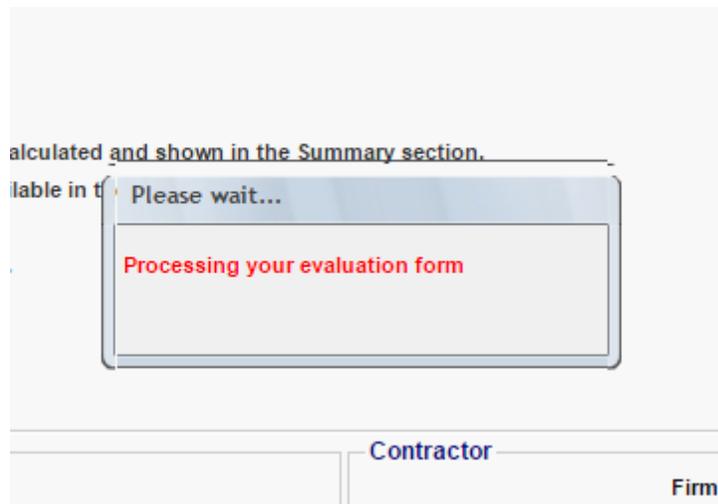
Click on the "Upload File(s)" button to begin the uploading process.

evaluation.

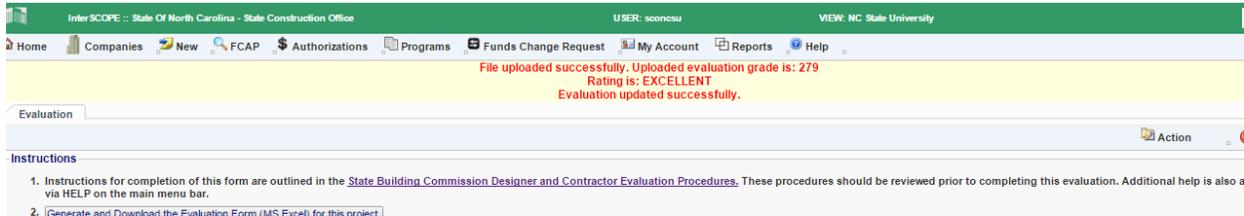


Interscope will then upload, validate and process the evaluation information, verifying the correct SCO ID # and recording the Total Score and Rating from the form.

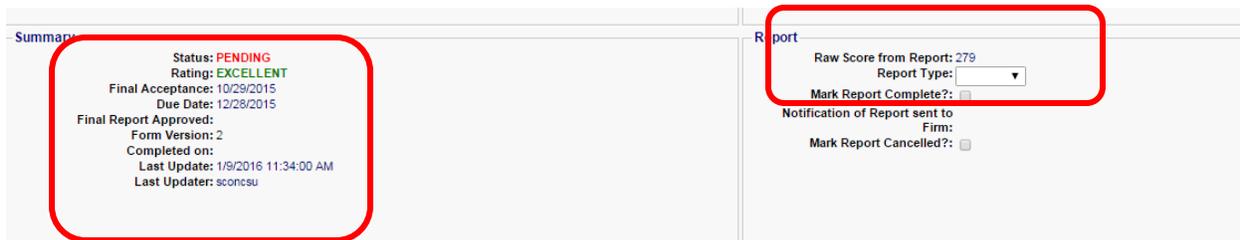
In addition, a PDF version of the Excel file will be created and stored with the evaluation and available for printing and download from the “Print” option under the “Action” menu.



Once the form is successfully processed, a message is displayed detailing the results of the upload.



The Summary and Report sections of the evaluation will display the Rating and Raw Score from the uploaded evaluation.



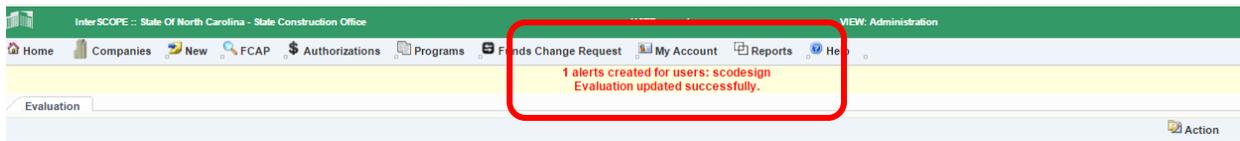
## 4. Finalizing the Evaluation

To complete the evaluation, select the Report Type (Interim or Final) from the drop down and check the "Mark Report Complete?" box. Then save these updates from the Action menu.

The evaluation is now complete allowing Design and Construction Closeout to proceed.

## 5. Alert Notifications

Designer and Contractor users that are registered in Interscope are notified via the Interscope alerting system that their evaluation has been completed.



They receive an email with an alert which contains a link to the evaluation. Clicking on this link will bring them to the Logon screen and after logon, to the evaluation record for their review and comments.

## North Carolina State Construction Office - *InterScope* System Alert

Date: 1/10/2016

To: [mike.gioielli@doa.nc.gov](mailto:mike.gioielli@doa.nc.gov)  
SCO TEST DESIGNER  
SCO Designer

From: North Carolina State Construction Office  
310 N. Willmington St., Suite 450  
Raleigh, North Carolina 27601  
Telephone: (919) 807-4100 Fax: (919) 807-4110 Web: [www.nc-sco.com](http://www.nc-sco.com)

You are receiving an alert concerning the following document in InterScope :

### DESIGNER EVALUATION:

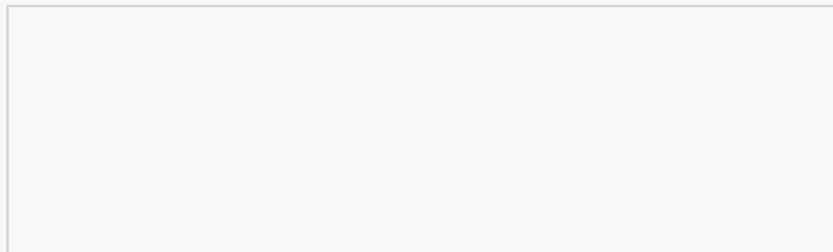
Department: Administration  
Agency: State Construction Office  
Package Title: New NC Legislature Building - (sample project)  
User: scomisc

[Click here to logon to InterScope and view it.](#)

---

Firms can record their responses to the evaluation in the Firm Comments section of the evaluation.

### Firm Comments



## G. Project Design and Construction Closeout

The completed evaluation now appears with a check in the “Ratings Present?” section of the Project – Closeout Project tab.

All evaluations for a given project must be completed to allow the project to proceed to Design and Construction Closeout.

InterSCOPE :: State Of North Carolina - State Construction Office      USER: soomisc      VIEW: Administ

Home Companies New FCAP Authorizations Programs Funds Change Request My Account Reports Help

Program #: 12339 - State Construction Office - New NC Legislature Complex (system example)  
\_Project #: 12757 - State Construction Office - New NC Legislature Building - (sample project)

Project Cost Estimate Project Type Funds Assigned Financial Worksheet Contracts P6 Link Closeout Project Evaluations

Close out Design / Construction

1 Contracts:

Contract	CounterParty	Contract For	Status	Contract Closed Out?	Ratings Present?	HUB Data Finalized?	Ready for Project Closeout
<a href="#">16-12757-01</a>	SCO Designer	Design	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>	N/A	<input type="checkbox"/>
<a href="#">18-12757-01A-1</a>	SCO Contractor	Construction	Under Construction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## H. Certificate of Merit Recommendations

If a firm receives and Excellent rating, recommendation for a Certificate of Merit award can be made by checking the “Recommend Firm for Certificate of Merit Award?” checkbox.

Saving this change will initiate an alert via email to the State Construction Office for Merit Award consideration.

Merit Nomination

- If the firm's performance rating on this project is EXCELLENT, an award nomination can be made to the State Building Commission.
- Certificate of Merit nominations are reviewed by the State Construction Office and the State Building Commission and presented at the annual Construction Conference.
- You must attach a nomination letter to this evaluation under the Supporting Documentations tab.
- NOTE: The checkbox will only appear if there is an EXCELLENT rating.

Recommend Firm for Certificate of Merit Award?

InterSCOPE :: State Of North Carolina - State Construction Office      USER: scoadmin      VIEW: NC State University

Home Companies New FCAP Authorizations Programs Funds Change Request My Account Reports Help

1 alerts created for users: scoadmin  
Evaluation updated successfully.

Evaluation

## North Carolina State Construction Office - InterScope System Alert

Date: 1/10/2016

To: [interscope@doa.nc.gov](mailto:interscope@doa.nc.gov)  
 InterScope Administrator  
 Administration/State Construction Office

From: North Carolina State Construction Office  
 310 N. Willmington St, Suite 450  
 Raleigh, North Carolina 27601  
 Telephone: (919) 807-4100 Fax: (919) 807-4110 Web: [www.nc-sco.com](http://www.nc-sco.com)

You are receiving an alert concerning the following document in Inter Scope :

### DESIGNER EVALUATION:

Department: Administration  
 Agency: State Construction Office  
 Package Title: New NC Legislature Building - (sample project)  
 User: scomisc

[Click here to logon to InterScope and view it.](#)

## X. Creating Owner Contracts on Full Oversight projects

### 1. Step 1 – Select the Project and access the “Contracts” tab:

The screenshot displays the InterScope web application interface. The top navigation bar includes the application name, user information, and a Logout button. Below the navigation bar, there are several tabs for project management, with 'Contracts' selected. The main content area is divided into two panels: 'Project Information - Basic' and 'Project Information - Advanced'.

**Project Information - Basic:**

- Program: 11535 - [41224-320] - 2012 Repairs and Renovations
- Department: Educational Institutions (Universities)
- Agency: NC State University
- Project ID: 10317
- Title: Centennial Campus Substation Expansion
- Description: [Empty text box]
- Agency Project Code: 201320005
- Status: Active

**Project Information - Advanced:**

- Project Type: U1 - UNC Project > \$2M
  - Standard Project
  - Performance Contract
  - Foundation Project
  - Non-Code-Item Project
- Special Project Designation: [None selected]
- Fiscal Year Funded: 2011 - 2012
- Financial Controls: Off
- Bypass Financial Controls?: Off

**Estimated Cost:**

Estimated Project Cost:	\$4,167,861.60
- Total Amount Assigned:	\$4,167,862.00
= Estimated Need:	(\$0.40)

2. Step 2 – Click on the “Add Owner Contract” button to add an owner contract:

The screenshot shows the InterscopePlus web application interface. At the top, it displays the user's name (sconcsu) and the view (NC State University). Below the navigation menu, there are tabs for Program # 11535 and Project # 10317. The main area contains a table of contracts with columns for SCO ID#, FIRM, STATUS, PHASE, TYPE, PLAN REVIEW, CONTRACT DATE, and various contract amounts. The 'Add Owner Contract' button is circled in red.

SCO ID#	FIRM	STATUS	PHASE	TYPE	PLAN REVIEW	CONTRACT DATE	SCUR CONTRACT	SCUR CONTRACT	SCUR COMMIT
12-10317-01	Jacobs Engineering Group, Inc.	Active	Design	Standard Design Contract (Fully Funded)	Full Oversight	2014-01-09	\$348,800.00	\$400,150.00	\$400,150.00
12-10317-01A-2	PowerSecure, Inc.	Approved for Award	Construction	Electrical Contract			\$3,247,645.00	\$3,247,645.00	\$0.00
12-10317-01B-1	HD Supply Power Solutions, Limited Partnership	Approved for Award	Construction	Electrical Contract			\$1,460,550.00	\$1,460,550.00	\$0.00

3. Step 3 – Select the Designer for the contract:

The screenshot shows the 'Select Designer...' form. It contains two columns of input fields. The left column includes License #, Name, Email, Status (set to Active), Contact Person, Line 1, Line 2, City, State, Zip, and County. The right column includes Voice#, Fax#, Website URL, Year Established, Parent, Parent Branch (set to -- Select --), Former Name, ID, and Last Update. At the bottom, there are 'Search', 'Done', and 'Reset' buttons.

# InterscopePlus User Manual

- Step 4 – Once the designer is selected, the New screen will be displayed. Complete data entry selecting the desired contract type and entering data for the remaining fields.

Program #: 11535 - NC State University - [41224-320] - 2012 Repairs and Renovations  
Project #: 10317 - NC State University - Centennial Campus Substation Expansion  
NEW DESIGN:  
Detail

Contract# (Auto)  
\* Contract ID: (Auto)  
SCO Oversight: F - Full SCO Oversight  
\* SCO Plan Review: Not Applicable  
Owner Contract Type: Owner - Commissioning  
Contract Status: Owner - Commissioning

Contract Firm  
Name: SCO Designer  
Address: 301 N. Wilmington Street  
Suite 450  
Raleigh, NC 27601  
License#: 123456789  
HUB Firm: Not a HUB  
Change Designer

Dates  
Selection: / /  
RFP Letter: / /  
Agreement: 10/06/2015  
Signed By Designer: 10/12/2015  
Signed By Agency: 10/13/2015

Financial Worksheet Summary  
Estimated:  
Assigned Funds: \$4,167,862  
Estimated Cost: \$4,167,862  
Estimated Surplus (Need): \$0  
Actual:  
Assigned Funds: \$4,167,862  
Total Committed: \$832,211  
Available to Commit: \$3,335,651  
Worksheet Detail

Contract Fees and Funds  
ORIGINAL OWNER CONTRACT:  
Contract Fee: 10,000  
CURRENT OWNER CONTRACT:  
Contract Fee: \$0  
Proposed Commitment Amt \$: \$0

11/2/2015 11:47:00 AM InterscopePlus Integration Copyright © 2015 - State of North Carolina : Department of Administration : State Construction Office Report a Problem

- Step 5 – Use Action->Save to create the contract. Notice that only a subset of the tabs are displayed for owner contracts.

Program #: 11535 - NC State University - [41224-320] - 2012 Repairs and Renovations  
Project #: 10317 - NC State University - Centennial Campus Substation Expansion  
Design #: 12-10317-02 - SCO Designer  
Detail Amendments Consultants

Contract# 2  
\* Contract ID: 12-10317-02  
SCO Oversight: F - Full SCO Oversight  
\* SCO Plan Review: Not Applicable  
Owner Contract Type: Owner - Commissioning  
Contract Status: Active

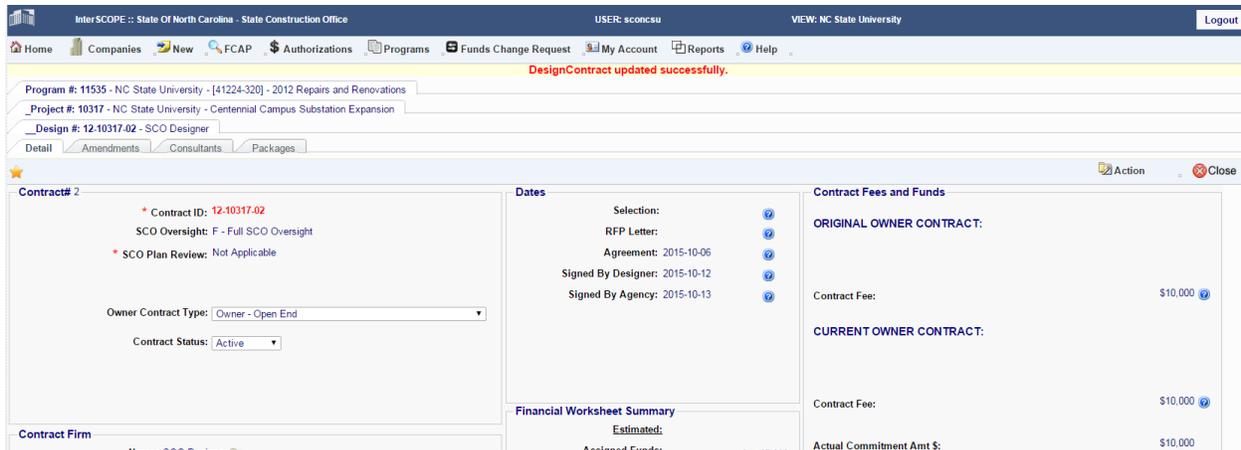
Dates  
Selection:  
RFP Letter:  
Agreement: 2015-10-06  
Signed By Designer: 2015-10-12  
Signed By Agency: 2015-10-13

Financial Worksheet Summary  
Estimated:  
Assigned Funds: \$4,167,862  
Estimated Cost: \$4,167,862  
Estimated Surplus (Need): \$0  
Actual:  
Assigned Funds: \$4,167,862  
Total Committed: \$832,211  
Available to Commit: \$3,335,651  
Worksheet Detail

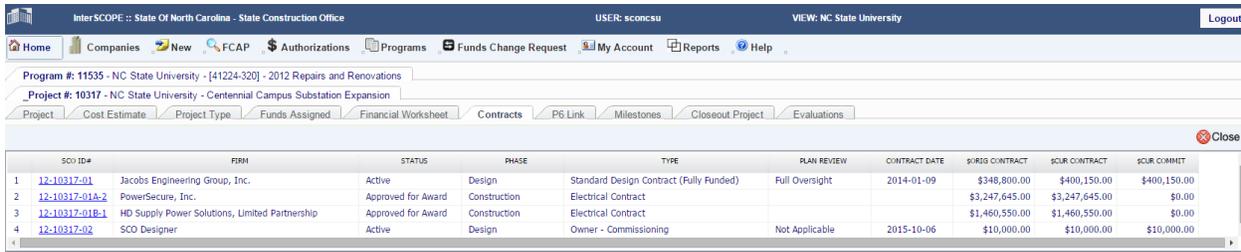
Contract Fees and Funds  
ORIGINAL OWNER CONTRACT:  
Contract Fee: \$10,000  
CURRENT OWNER CONTRACT:  
Contract Fee: \$10,000

11/2/2015 11:47:00 AM InterscopePlus Integration Copyright © 2015 - State of North Carolina : Department of Administration : State Construction Office Report a Problem

NOTE: For Open End Design Contracts, the “Packages” tab is also displayed to allow users to add construction contracts under the associated package.



## 6. Step 6 -The contract will now appear under the Project’s “Contracts” tab.



## XI. Primavera (P6) Linking to Interscope

### A. Overview

Oracle’s Primavera P6 Enterprise Project Portfolio Management is a

powerful, robust and easy-to-use solution for prioritizing, planning, managing and evaluating projects, programs and portfolios. It is a cloud based “Software as a Service” (SaaS) solution providing a 100% web-based solution for managing projects of any size, adapts to varying levels of complexity across projects and intelligently scales to meet the needs of all roles, functions, or skill levels in an organization.<sup>1</sup>

This addendum to the User Manual covers the linking, update and synchronization of schedule milestones between the State Construction Office Interscope System and the University of North Carolina General Administration’s cloud-based Primavera P6 system. Specifically, it addresses the following features:

1. Linking an unlinking Interscope projects and Primavera schedules
2. Mapping milestones between the systems
3. Updating and synchronizing Primavera milestone planned dates
4. Updating and synchronizing Interscope milestone actual dates
5. The capture of Primavera cost information
6. Background batch updating

The intended user base for these features are the project managers responsible for project schedules who are involved with Interscope capital improvement projects.

### B. Getting Started

Interscope Version 2 now includes features for linking to schedules that exist in a Primavera P6 Project scheduling system. The integration works in the following manner:

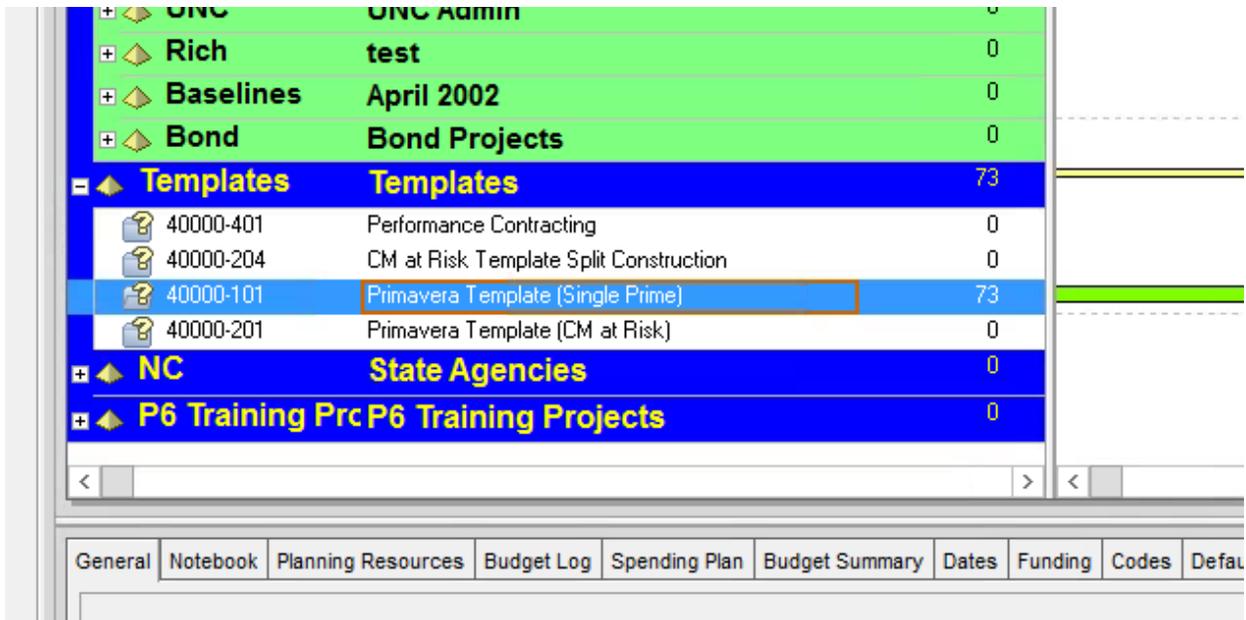
- Milestone Planned dates flow from Primavera to Interscope
- Milestone Actual dates flow from Interscope to Primavera
- Interscope “pushes” actual dates to Primavera schedule milestone activities as they occur
- Interscope “pulls” Primavera milestone activity planned dates based upon user actions. (Additionally, an Interscope batch job runs periodically to keep Interscope projects and Primavera schedules synchronized with up-to-date information.)

Prerequisites for establishing the linkage between an Interscope project and its associated Primavera schedule include the following:

1 – The Primavera P6 schedule must reside in the Primavera P6 Enterprise system hosted by the University of North Carolina General Administration. This is the only Primavera P6 system that Interscope currently supports.

(To obtain information about licensing and user accounts for this system, please contact Lindsay Noth at [lmnoth@northcarolina.edu](mailto:lmnoth@northcarolina.edu).)

2 – The Primavera P6 project schedule must be created using the custom UNC GA templates. These reside in the “Templates” section in UNC GA Primavera P6 system:



The templates contain the custom columns that enable the integration of the two systems:

At Completion Total Cost	Latest iPlus Update	UNC Milestones
\$0		
\$0		
\$0		
\$0		DESADVPRJ
\$0		
\$0		
\$0		
\$0		DESSELDC
\$0		

### UNC Milestone

- the common milestone code for the P6 activity and Interscope date which is used to link and update planned and actual dates between the systems.
- date of the last update/synchronization from Interscope. This date is updated for each activity when an update is triggered from Interscope.

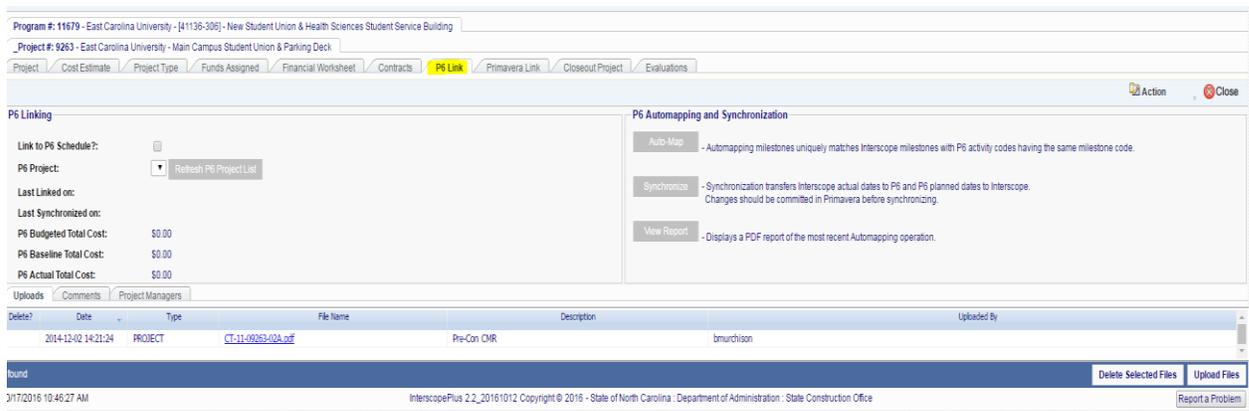
3 – The P6 schedule must be “Active”. Interscope will ignore all schedules that have been closed. These will not be visible in the Interscope P6 project listing displayed for linking.

## C. The Integration Process

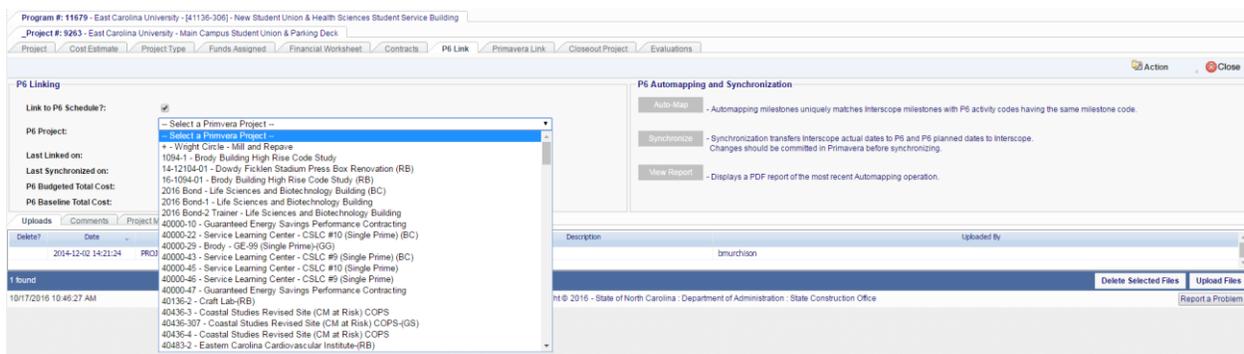
Primavera schedules are required for Standard Projects over \$500K and are optional for smaller projects. Projects <\$500K that are funded by R&R State Debt may be required to have schedules if OSBM or the State Treasurer require cash flow forecasting.

The P6 schedule is a planning tool for managing the project schedule and forecasting when milestones will occur. In general, milestone dates from P6 will be uploaded into Interscope as “Planned” dates and “Actual” dates will be entered in Interscope and automatically be downloaded into P6.

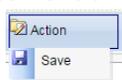
A schedule must exist in P6 to be able to link it to Interscope. It is recommended that the Project ID in P6 be the same as the Project ID in Interscope for ease of linking.

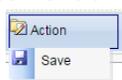


1. Select the Project>P6 Link tab, select the box that says “Link Project Milestones to P6 Schedule,” and select the project from the dropdown project list.



Select the Auto-Map Milestones to have the program match as many milestones as possible without user intervention.



Then . Mapping individual Milestones.

Program #: 11679 - East Carolina University - [41136-306] - New Student Union & Health Sciences Student Service Building  
 Project #: 9263 - East Carolina University - Main Campus Student Union & Parking Deck

Project | Cost Estimate | Project Type | Funds Assigned | Financial Worksheet | Contracts | P6 Link | Primavera Link | Closeout Project | Evaluations

**P6 Linking**

Link to P6 Schedule?:

P6 Project: 14-12104-01 - Dowdy Ficklen Stadium Press Box Renovation (RB)

Last Linked on: 10/17/2016 11:02:00 AM

Last Synchronized on:

P6 Budgeted Total Cost: \$0.00

P6 Baseline Total Cost: \$0.00

**P6 Automapping and Synchronization**

**Auto-Map** - Automapping milestones uniquely matches Interscope milestones with P6 activity codes having the same milestone code.

**Synchronize** - Synchronization transfers Interscope actual dates to P6 and P6 planned dates to Interscope. Changes should be committed in Primavera before synchronizing.

**View Report** - Displays a PDF report of the most recent Automapping operation.

Delete?	Date	Type	File Name	Description	Uploaded By
	2014-12-02 14:21:24	PROJECT	CT-11-09263-02A.pdf	Pre-Con CMR	bmurichson

1 found

10/17/2016 11:02:53 AM InterscopePlus 2.2\_20161012 Copyright © 2016 - State of North Carolina - Department of Administration - State Construction Office

As with other data fields in Interscope, milestone dates are related to the various parts of the project i.e. the designer contract milestone date is found in the design contract section, the construction contract milestone date is found in the construction contract section, etc. There are Milestone tabs at the project level, design contract level, package level and construction contract level. Where there are multiple contracts, ensure that the milestone is linked to the proper contract i.e. the commissioning authority contract milestone must be linked to the design contract for the commissioning authority, and the pre-con contract milestone to the pre-con contract.

Automap finished  
 6 milestones were previously mapped.  
 0 new milestones were mapped.  
 23 P6 activities with milestones were not mapped.  
 Automap report has been generated.  
 Click on 'View Report' for details.

Program #: 11679 - East Carolina University - [41136-306] - New Student Union & Health Sciences Student Service Building  
 Project #: 9263 - East Carolina University - Main Campus Student Union & Parking Deck

Project | Cost Estimate | Project Type | Funds Assigned | Financial Worksheet | Contracts | P6 Link | Primavera Link | Closeout Project | Evaluations

**P6 Linking**

Link to P6 Schedule?:

P6 Project: 14-12104-01 - Dowdy Ficklen Stadium Press Box Renovation (RB)

Last Linked on: 10/17/2016 11:02:00 AM

Last Synchronized on:

P6 Budgeted Total Cost: \$0.00

P6 Baseline Total Cost: \$0.00

**P6 Automapping and Synchronization**

**Auto-Map** - Automapping milestones uniquely matches Interscope milestones with P6 activity codes having the same milestone code.

**Synchronize** - Synchronization transfers Interscope actual dates to P6 and P6 planned dates to Interscope. Changes should be committed in Primavera before synchronizing.

**View Report** - Displays a PDF report of the most recent Automapping operation.

Delete?	Date	Type	File Name	Description	Uploaded By
	2014-12-02 14:21:24	PROJECT	CT-11-09263-02A.pdf	Pre-Con CMR	bmurichson

found

10/17/2016 11:02:53 AM InterscopePlus 2.2\_20161012 Copyright © 2016 - State of North Carolina - Department of Administration - State Construction Office

This is a project after linking to P6

Program #: 11446 - UNC Chapel Hill - [41223-315] - Hill Hall Renovations & Addition  
 Project #: 10105 - UNC Chapel Hill - Hill Hall Renovation

Project | Cost Estimate | Project Type | Funds Assigned | Financial Worksheet | Contracts | Primavera Link | Milestones | Closeout Project | Evaluations

Milestones For: Project#: 10105 - UNC Chapel Hill - Hill Hall Renovation  
 Project Status: Active

Primavera Project: 10105 - Hill Hall Renovation CIP 502  
 Last P6 Synchronization: 10/17/2016 12:45:00 PM

Show Primavera Details:

PHASE	MILESTONE NAME	PLANNED	ACTUAL
ADVERTISEMENT	Date of FIRST advertisement for designer	5/02/2013	/ / [!]
	Date of advertisement for commissioning authority	4/18/2016	/ / [!]
	Execute Commissioning Contract	4/20/2016	/ / [!]
	Advertise for CM at Risk	4/18/2016	/ / [!]
PROJECT CLOSEOUT	Project Closeout	3/7/2017	

Note: Highlighted row indicates a milestone required for P6 integration.

Synchronize Dates with Primavera | Export All Milestones

Delete?	DATE	TYPE	FILE NAME	DESCRIPTION	UPLOADED BY
	2016-06-16 13:05:36	PROJECT	Proj2017JanP6Link_14.16.xlsx	Project Reconciliation	bmurichson

1 found

10/17/2016 12:45:59 PM InterscopePlus 2.1\_A\_20160830 Copyright © 2016 - State of North Carolina - Department of Administration - State Construction Office

As the project progresses, actual dates are entered in Interscope, either by SCO for full oversight projects, or by agency/institution for other projects. Those actual dates are then downloaded into the P6 linked activity.

## XII. In-House Designers and Project Coordinators

### A. Creating In-House designer profiles

Access the Designer search page from the **Companies** option on the Main Menu.

Click on the **Add Designer** button.

The screenshot shows the 'Designer Search' page in the InterscopePlus application. The page has a green header with the user's name 'USER: scoodman' and the view 'VIEW: State Construction'. Below the header is a navigation menu with options like Home, System, Users, Companies, New, FCAP, Design Review, Authorizations, Programs, Funds Change Request, My Account, Reports, Forms, and Help. The main content area is titled 'Designer Search' and contains a form with the following fields: License # (dropdown), Name (text), Email (text), Status (dropdown), Contact Person (text), Line 1 (text), Line 2 (text), City (text), State (text), Zip (text), County (dropdown), Voice# (text), Fax# (text), Website URL (text), Year Established (text), Parent (text), Parent Branch (dropdown), Former Name (text), ID (text), and Last Update (text). The 'Add Designer' button is circled in red.

Complete the New Designer input form. Required fields are flagged with a **red asterisk**.

For **Name**, **Email**, **Address** and **Contact**, enter information for the agency employee who will be performing the work.

For In-House Designer profiles, prefix the name with *“In-House Design by”*, before the agency name.

Examples:

ID	DESIGNER
1	<a href="#">In-House Design by Appalachian State University</a>
2	<a href="#">In-House Design by DENR - Forest Resources (INACTIVE)</a>
3	<a href="#">In-House Design by DENR - Museum of Natural Sciences</a>
4	<a href="#">In-House Design by Department of Administration</a>
5	<a href="#">In-House Design by Department of Administration - Facility</a>
6	<a href="#">In-House Design by Department of Agriculture &amp; Consumer Services</a>
7	<a href="#">In-House Design by Department of Boards &amp; Commissions</a>
8	<a href="#">In-House Design by Department of Commerce</a>
9	<a href="#">In-House Design by Department of E &amp; NR</a>
10	<a href="#">In-House Design by Department of E&amp;NR - Marine Fisheries</a>

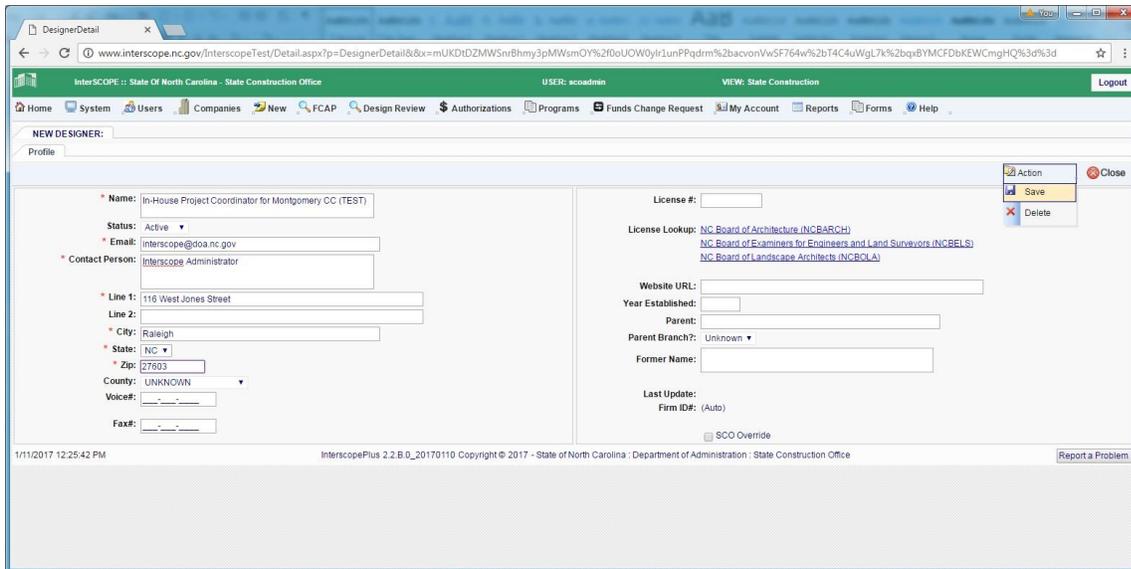
# InterscopePlus User Manual

For In-House Project Coordinator profiles, prefix the name with “*In-House Project Coordination by*” before the agency name.

Examples:

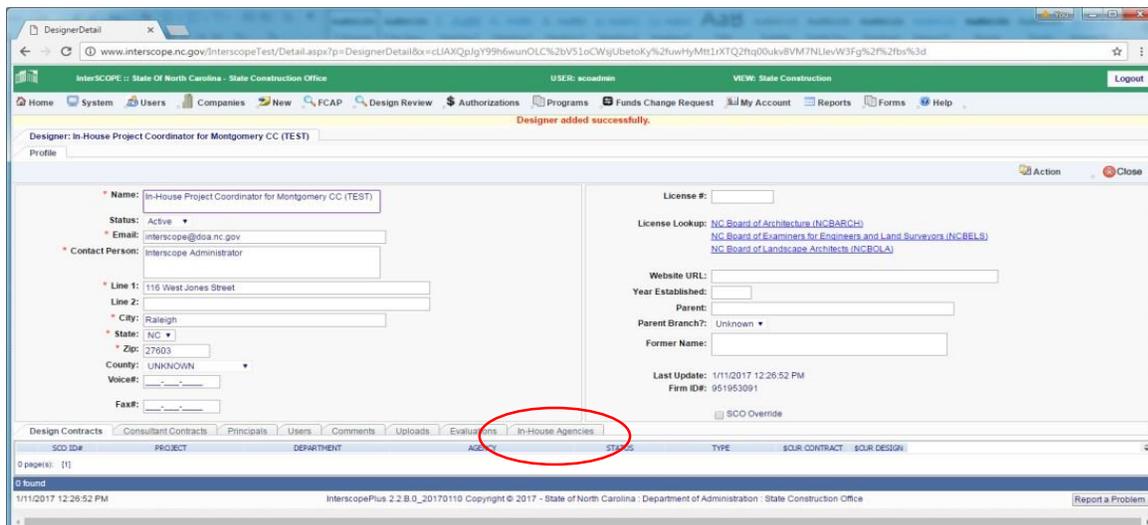
	ID	DESIGNER
1	951953091	<a href="#">In-House Project Coordination by Montgomery CC (TEST)</a>
2	951953090	<a href="#">In-House Project Coordination by Randolph CC</a>

Select the **Save** option on the **Action** menu to complete the new designer profile record.

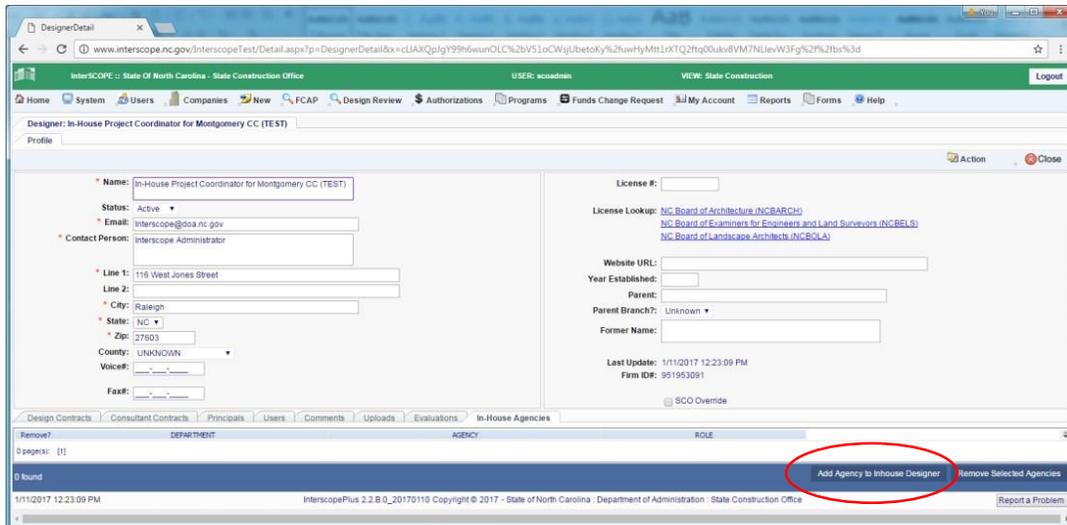


## B. Assigning Profiles to Agencies

Click on the “**In-House Agencies**” tab



Click on the “**Add Agency to InHouse Designer**” button to display a pick list of Agencies.

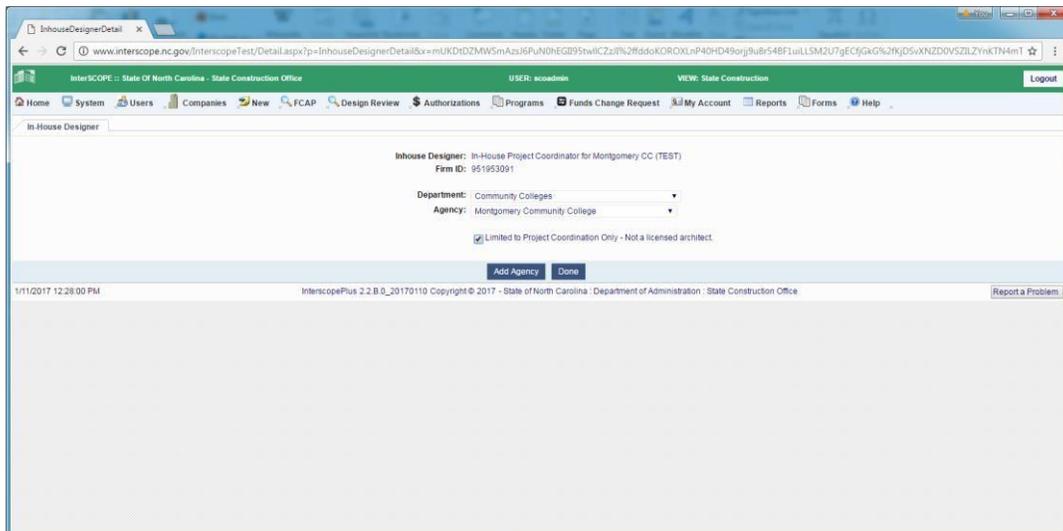


Select the desired agency for this in-house designer profile assignment.

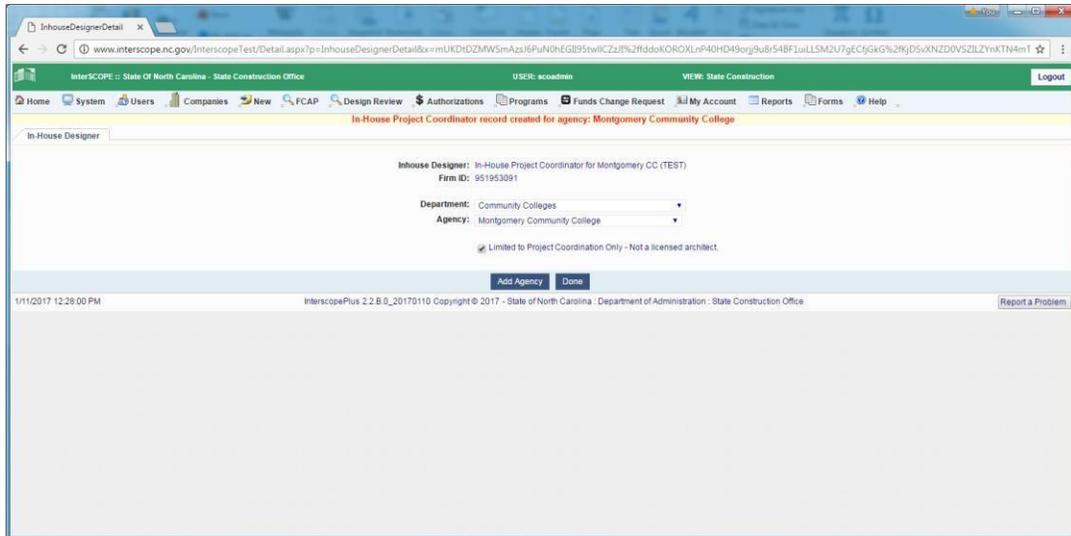
To create a project coordination profile, check the **“Limited to Project Coordination Only – Not a licensed architect”** flag.

To create a licensed in-house architect profile, leave this checkbox unchecked.

Click on the **“Add Agency”** to assign the in-house profile to the agency.



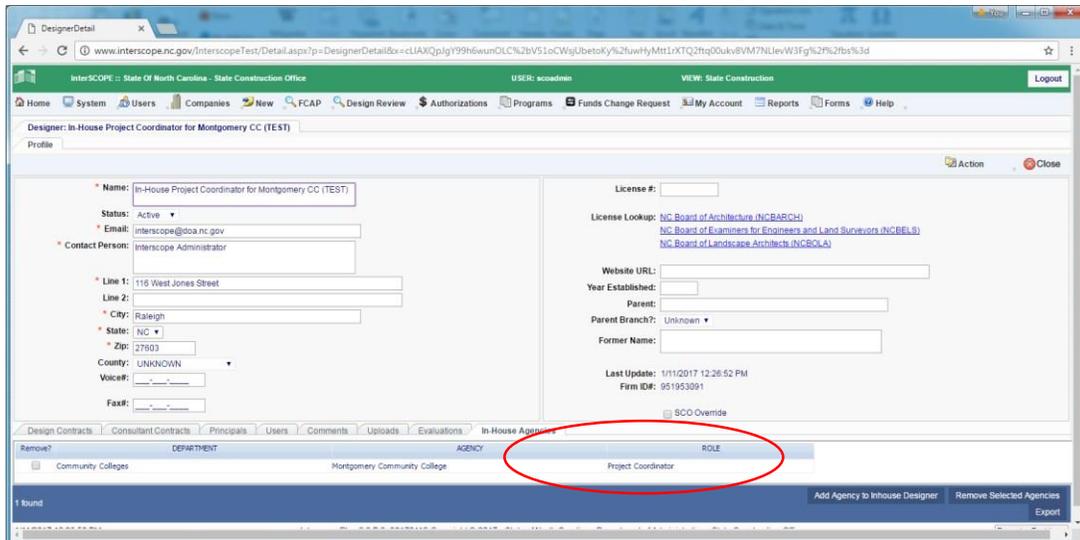
A message will be displayed indicating successful assignment of the profile to the agency.



The assignment cannot be updated after it is created. It must be removed using the “**In-House Agencies**” tab and re-added.

Click “**Done**” to return to the “In-House Agencies” tab.

Confirm that the correct Role has been assigned for the agency for this profile.



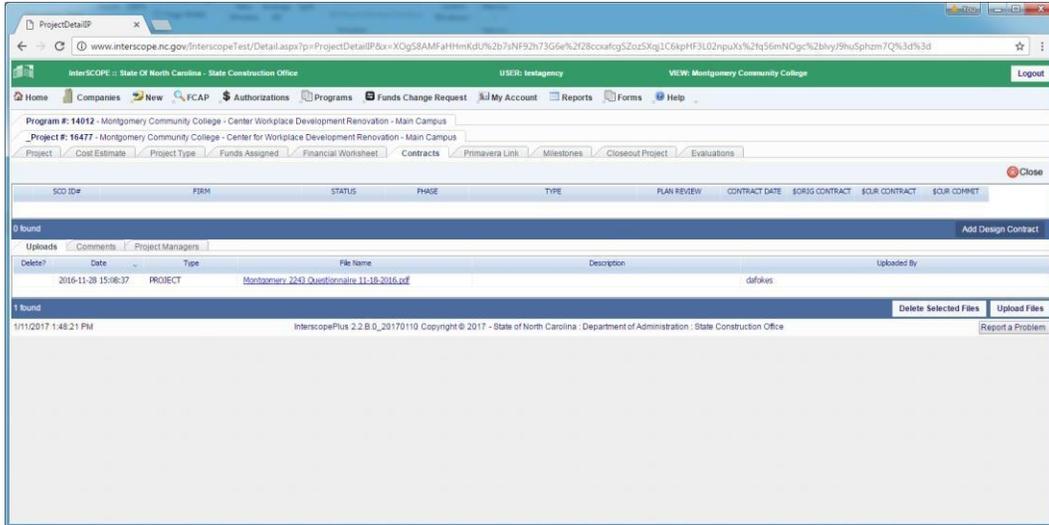
## C. Creating Contracts using in-house designer profiles

Design contracts can be created using In-House designer profiles under 2 scenarios:

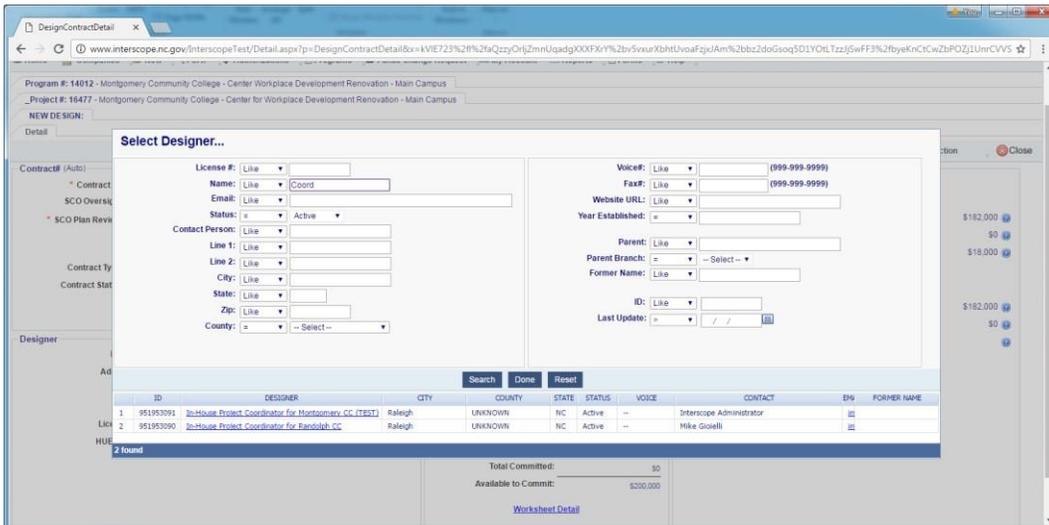
- 1 – Design contracts where a licensed architect is required by [General Statute 133.1.1 Subsection \(a\)](#) and there is a licensed architect in-house for the agency.

2 – Design contracts where a licensed architect is not required by General Statute 133.1.1 Subsections (c) and (d) and there is a project coordinator in-house for the agency.

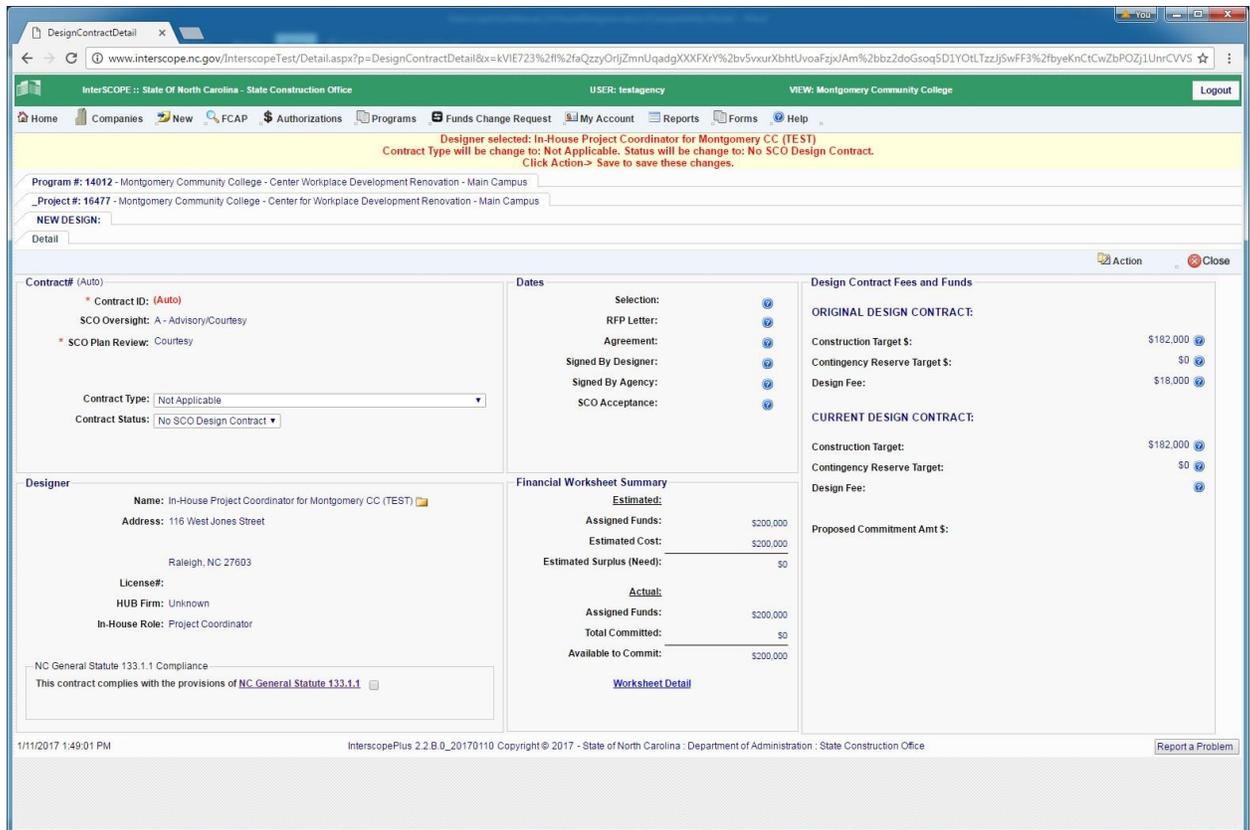
Access the **Contracts** tab on the **Project Detail** page and click on the **“Add Design Contract”** button.



Search for and select the desired in-house designer profile.



Since the in-house designer profile has been associated with the owning agency, Interscope will create an in-house design contract and set the Contract Status and Type.

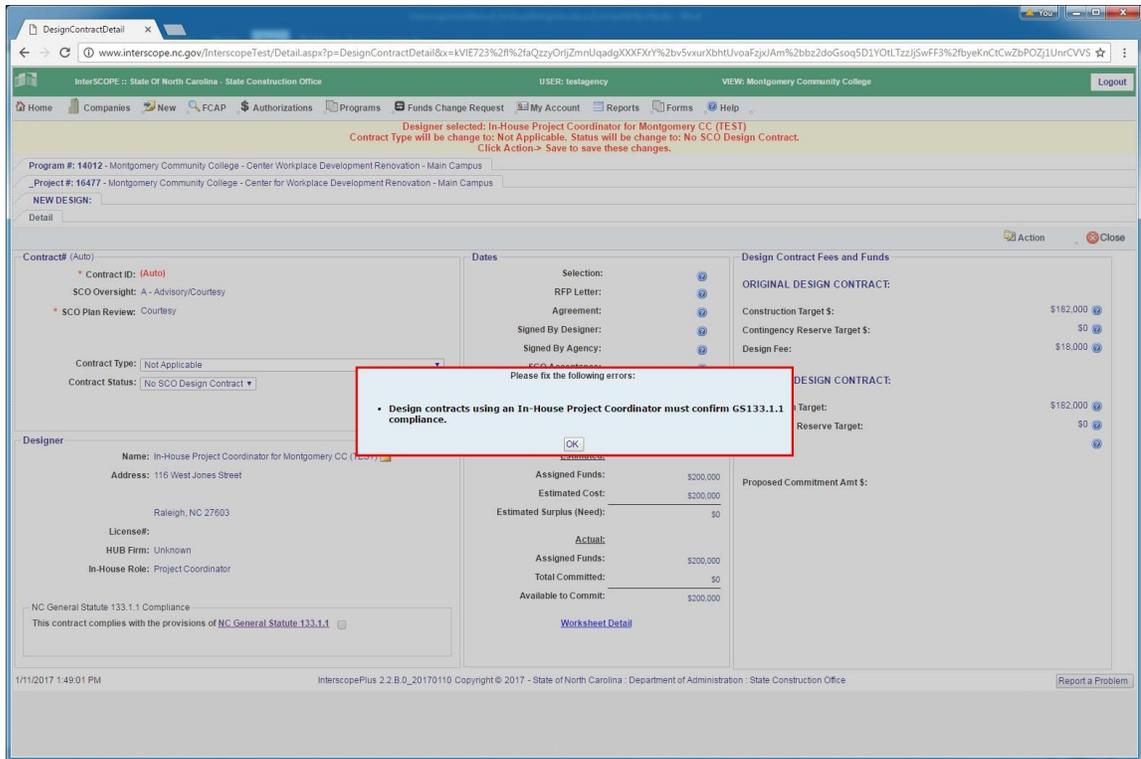


## D. Special considerations for In-House Project Coordinator profiles

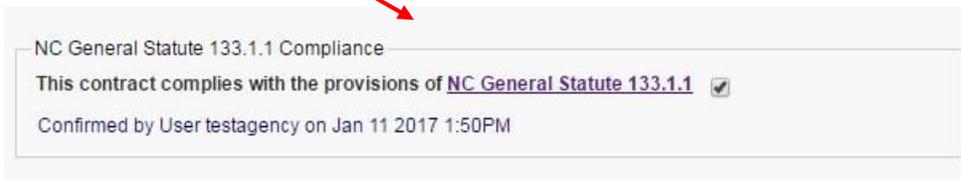
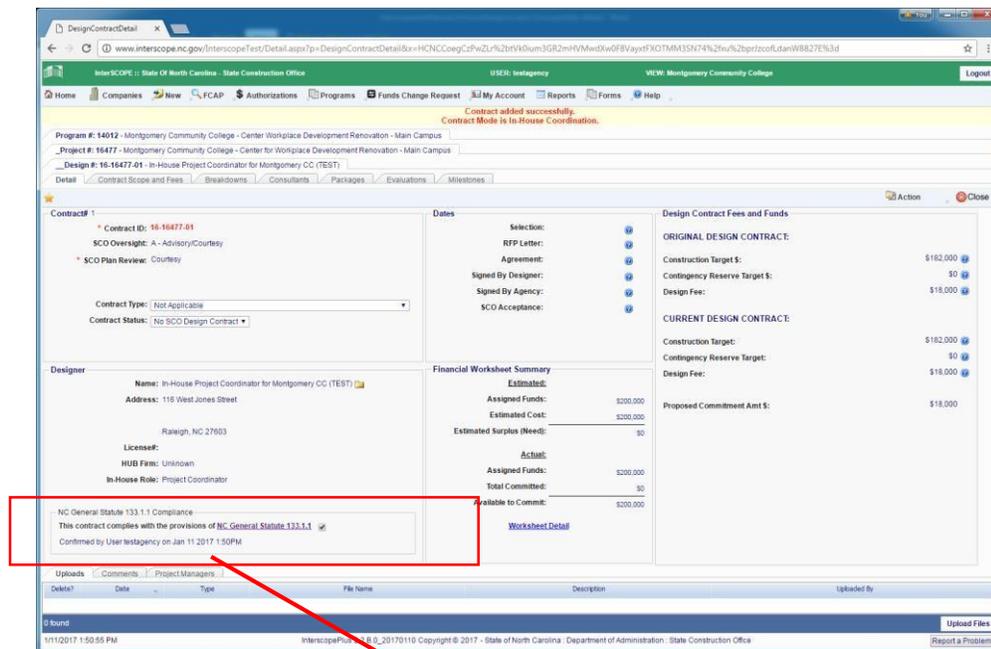
1. A. Verification of compliance with North Carolina General Statute 133.1.1  
 Design contracts created under an In-House Project Coordinator profile must be verified with compliance to [NC General Statute 133.1.1](#).

Verification of compliance is indicated using the checkbox in the **N.C. General Statute 133.1.1 Compliance** section of the design contract form.

A validation message is displayed if this checkbox is not completed when the contract is saved.



The user logon and date of verification of compliance is then recorded at the time the contract is created.



## E. Construction Contract limits

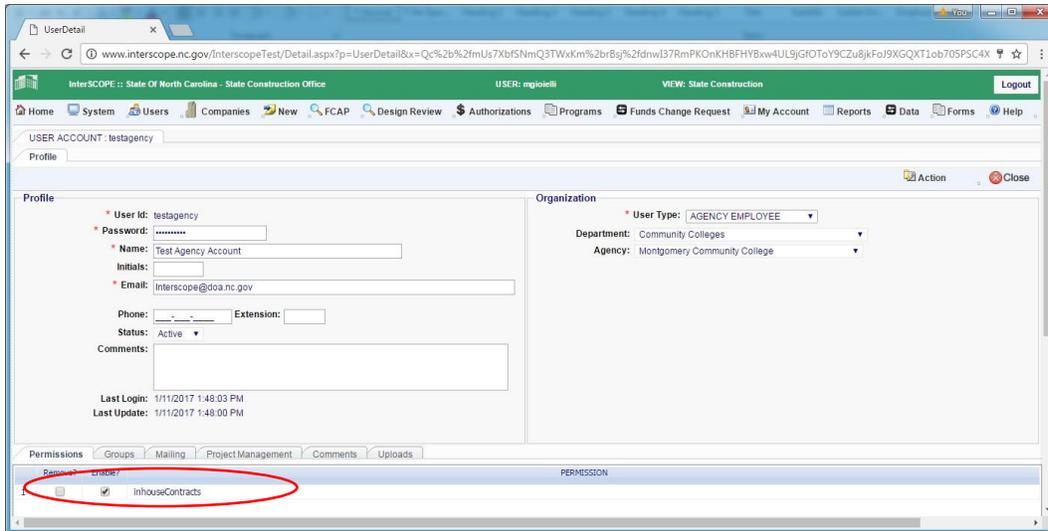
In compliance with G.S. 133.1.1 subsections (a) and (d), construction contracts created under inhouse project coordination contracts will be limited:

1. Under \$300,000 – where the project has a total projected cost of less than \$300,000 for the repair of public buildings where such repair does not include major structural change in framing or foundation support systems.
2. Under \$100,000 – where the project has a total projected cost of less than \$100,000 and does not affect life safety systems.
3. Under \$135,000 - where the project has a total projected cost of less than \$135,000 for the repair of public buildings where such repair includes major structural change in framing or foundation support systems.

## F. Permissions

To enable the use of in-house designer profiles, a Non-SCO User or Group must have the following permission enabled:

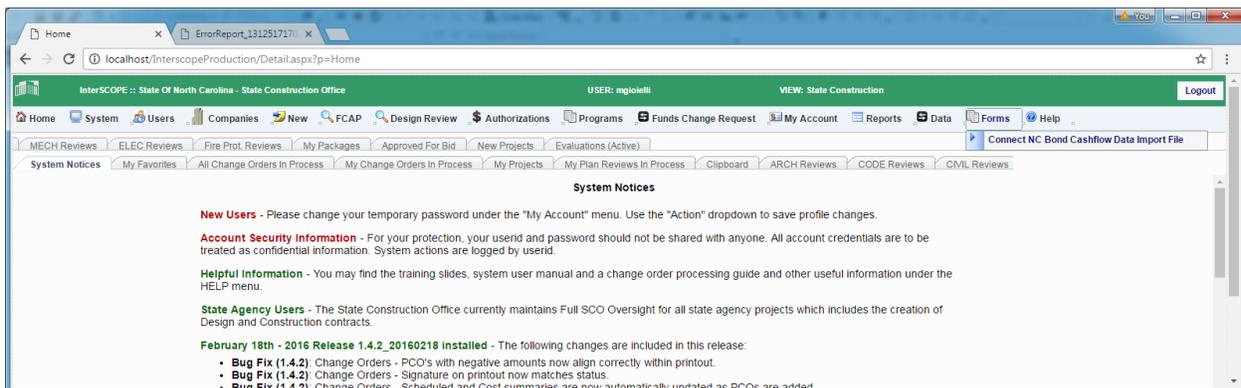
- inHouseContracts



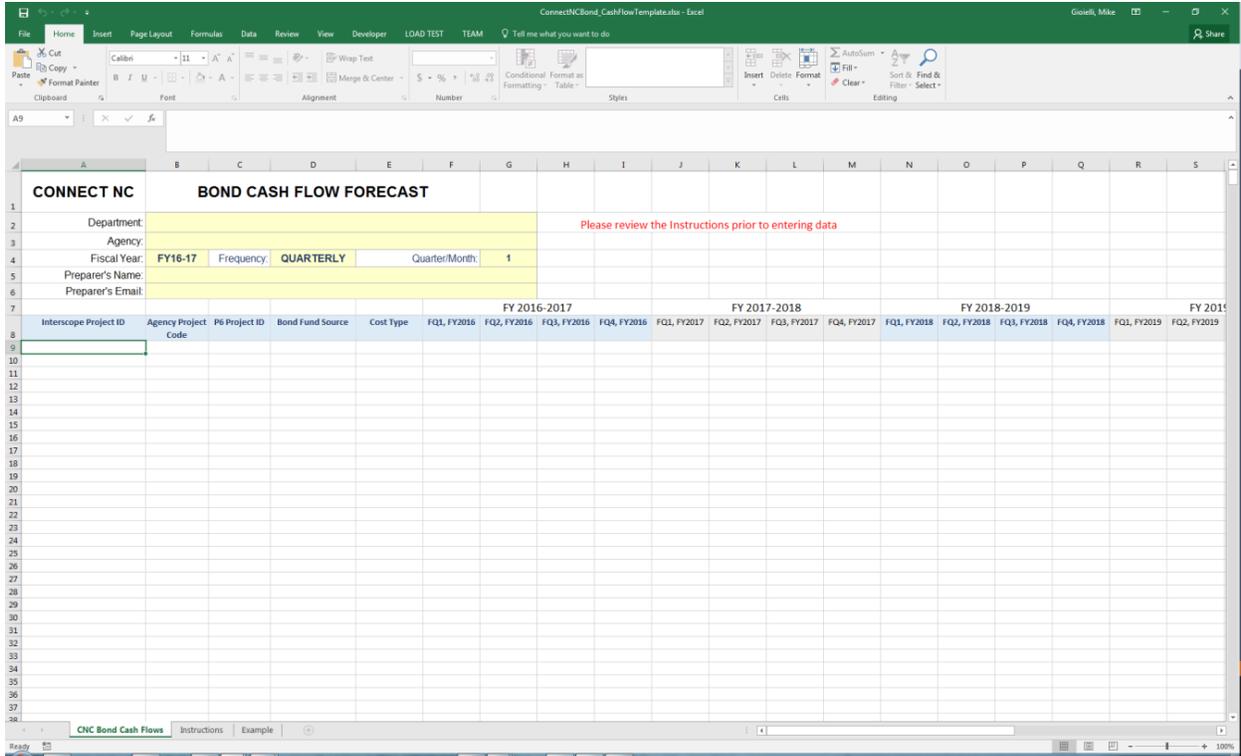
## XIII. Data Importing for Connect NC Bond Cash flows

### Preparing the Connect NC Bond Cash flow import file

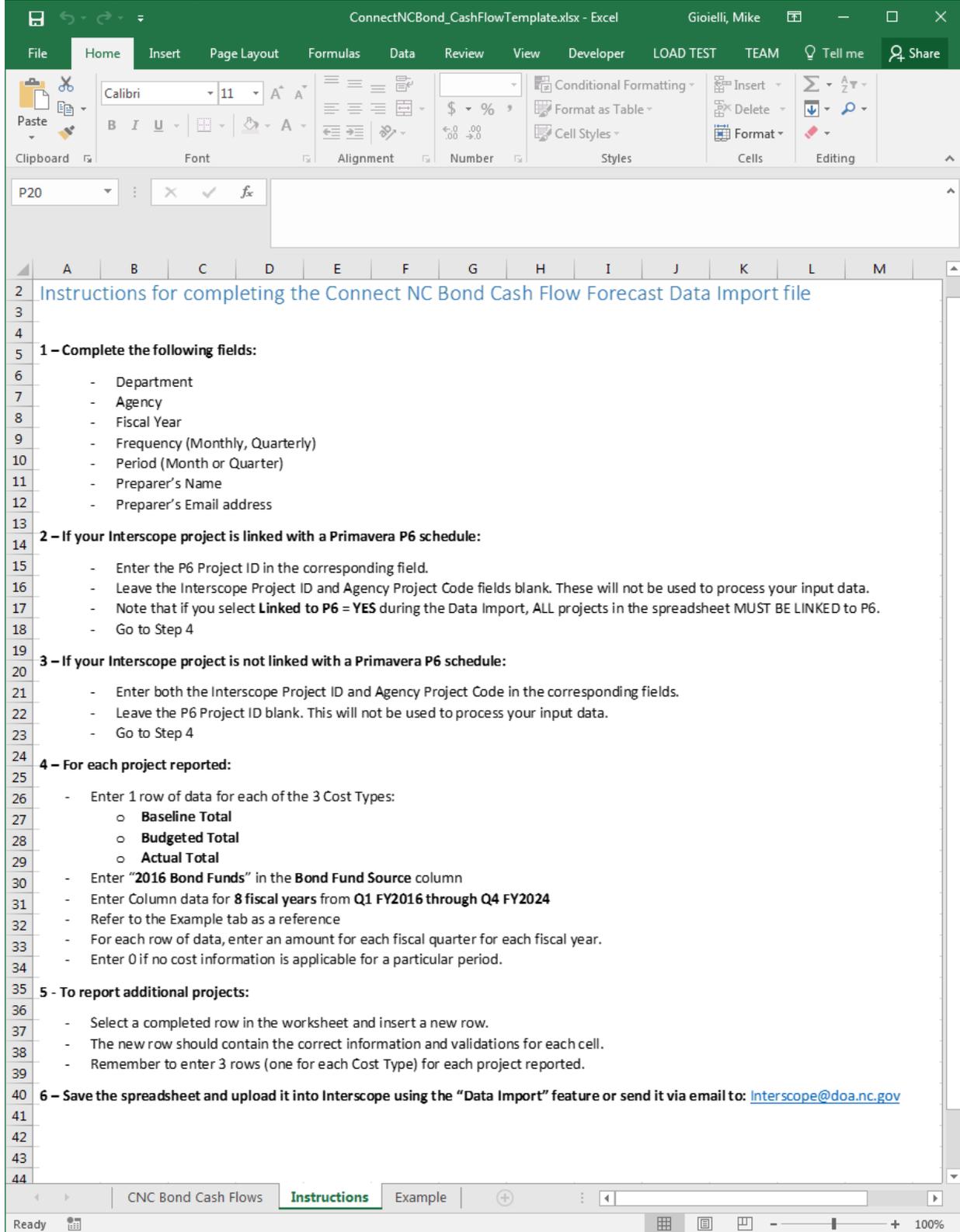
Step 1 – Download the Connect NC Bond Cash flow import spreadsheet and complete your data entry into the spreadsheet. The spreadsheet template is found under “**Forms**” on the Main Menu bar:



# InterscopePlus User Manual

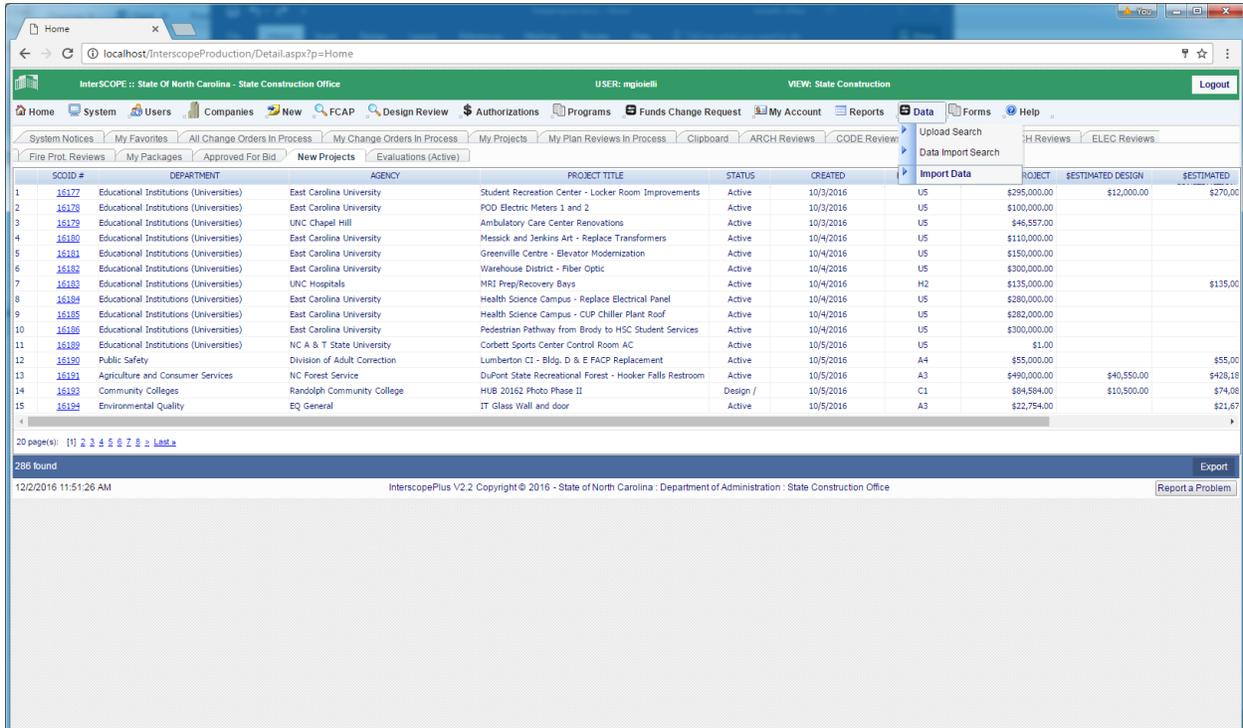


Before entering data, familiarize yourself with the Instructions and Example tabs to avoid any unnecessary data import errors.



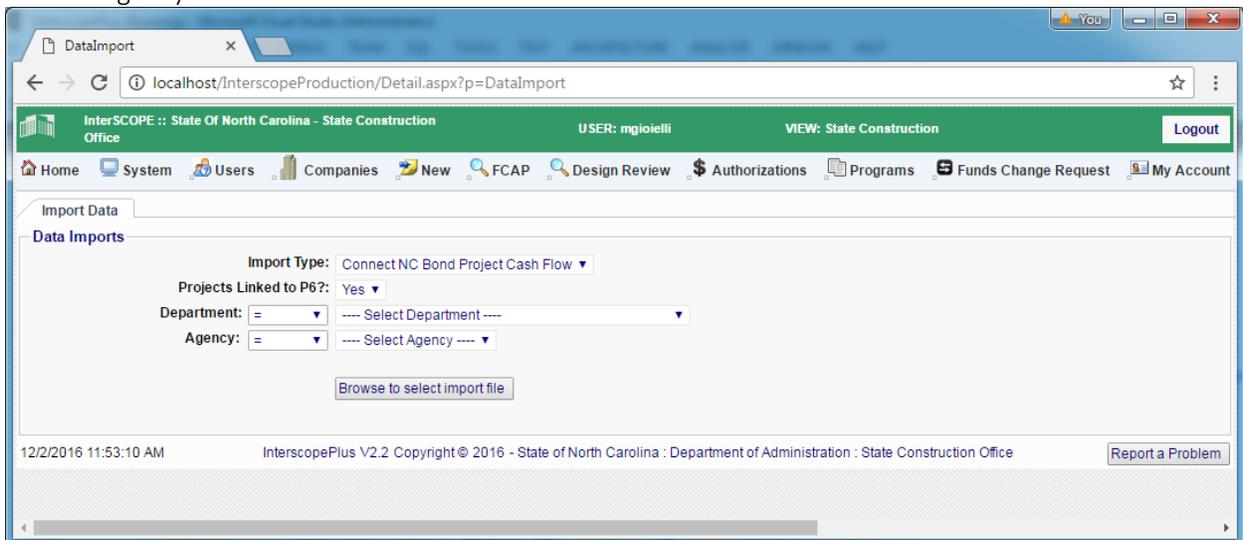
## Importing Connect NC Cash Flow projections

Step 1 – Once the cash flow spreadsheet is complete, select the **“Import Data”** option under **“Data”** on the Main Menu bar:

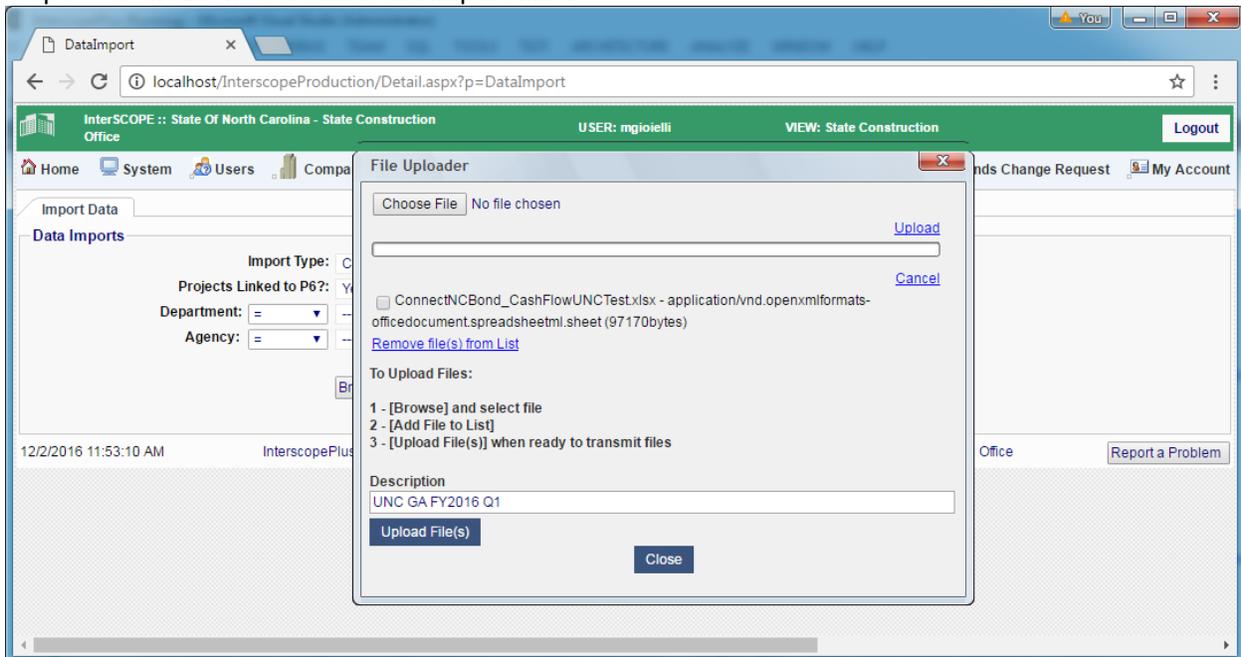


Step 2 – Select options for the following:

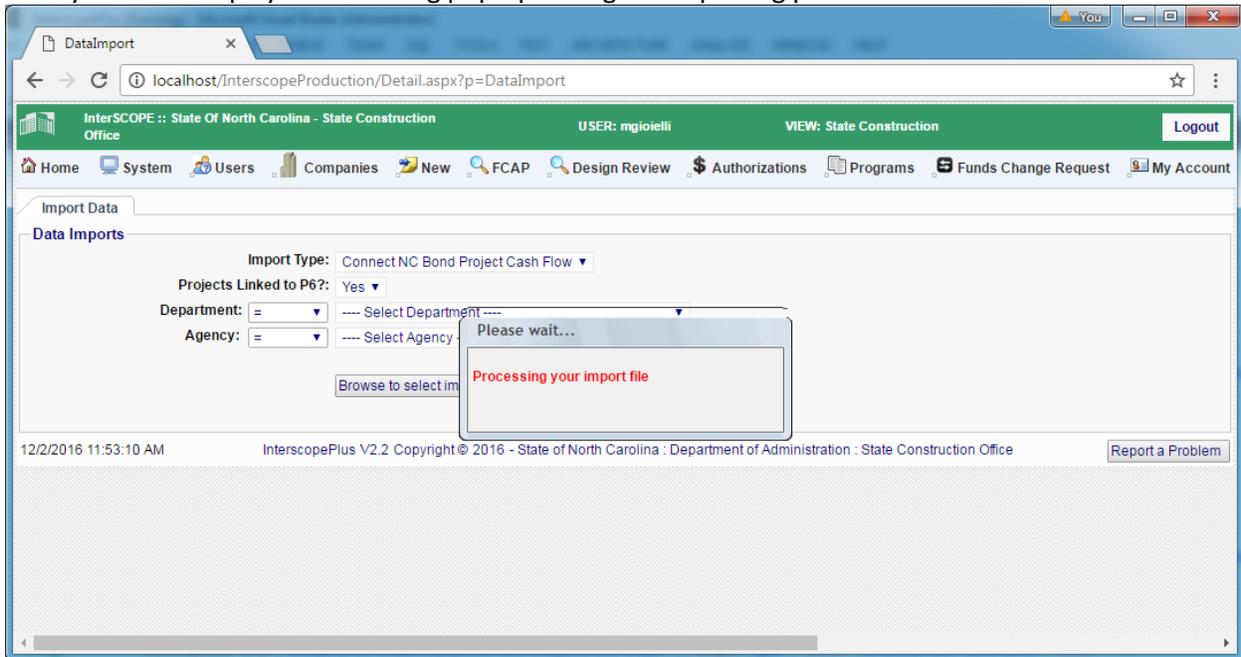
- Projects Linked to P6?
- Department
- Agency



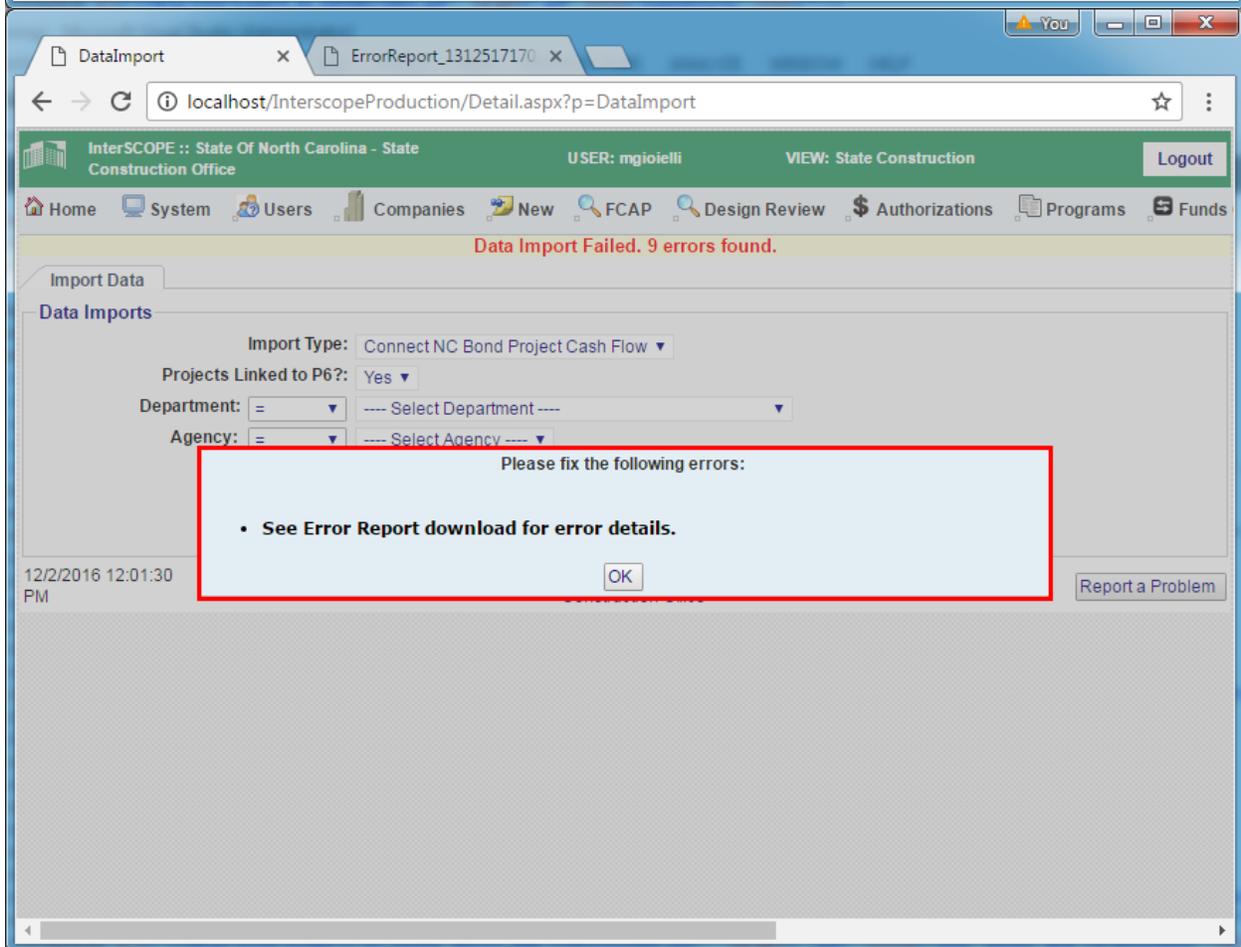
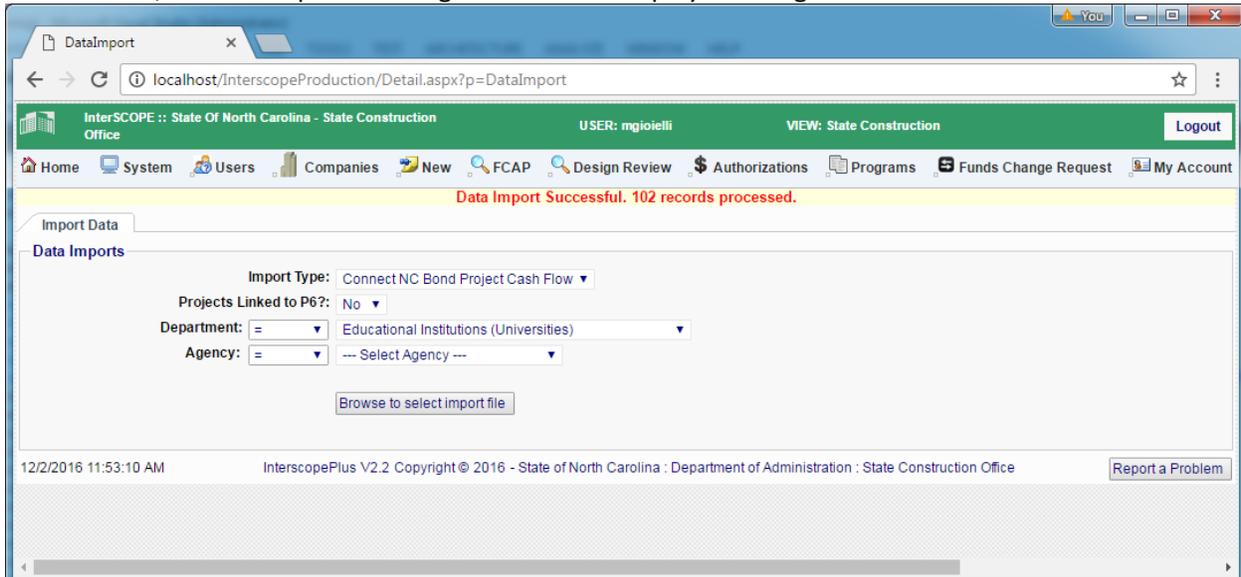
Step 3 – Click “Browse to select the import file”:

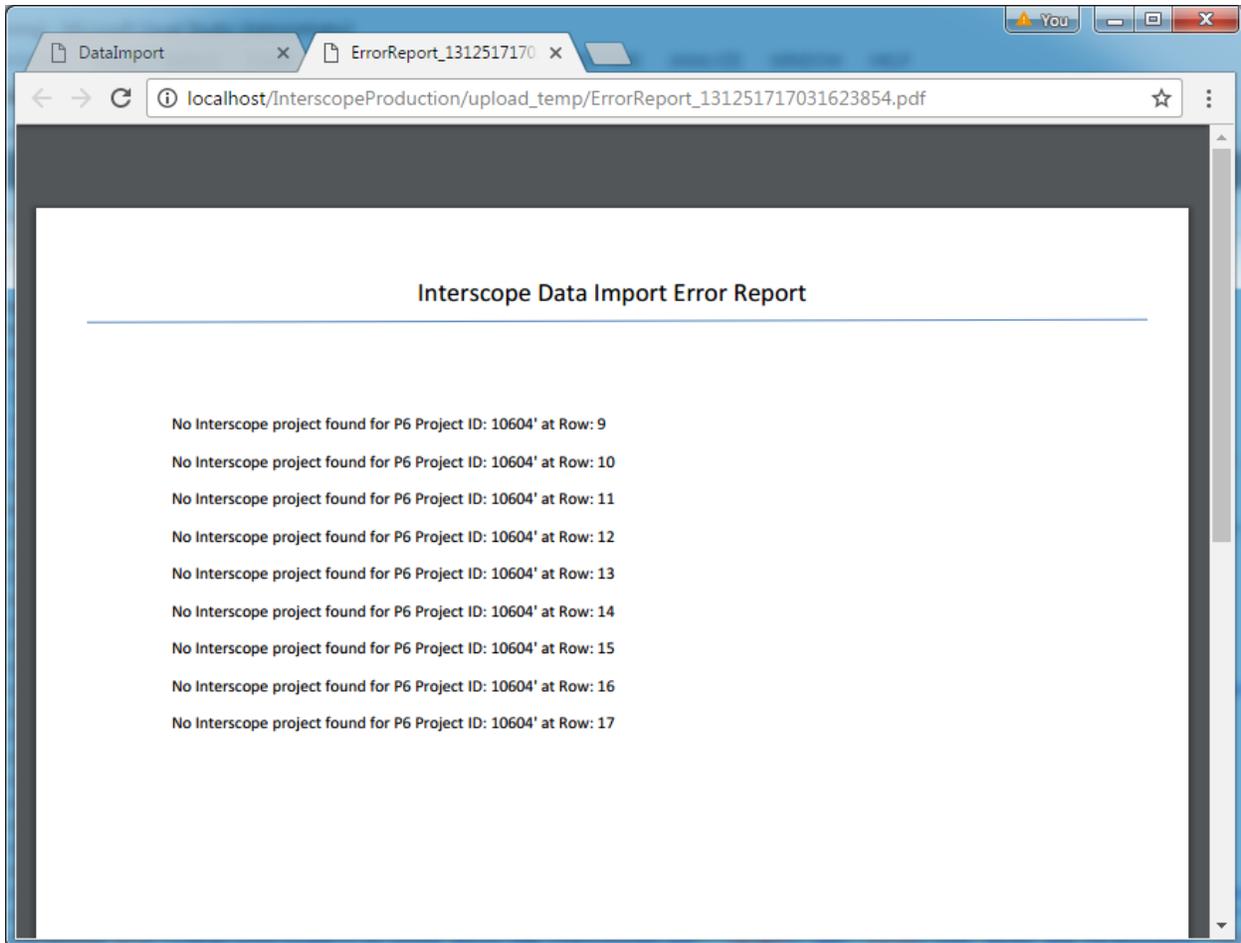


The System will display the following pop-up during the importing process.



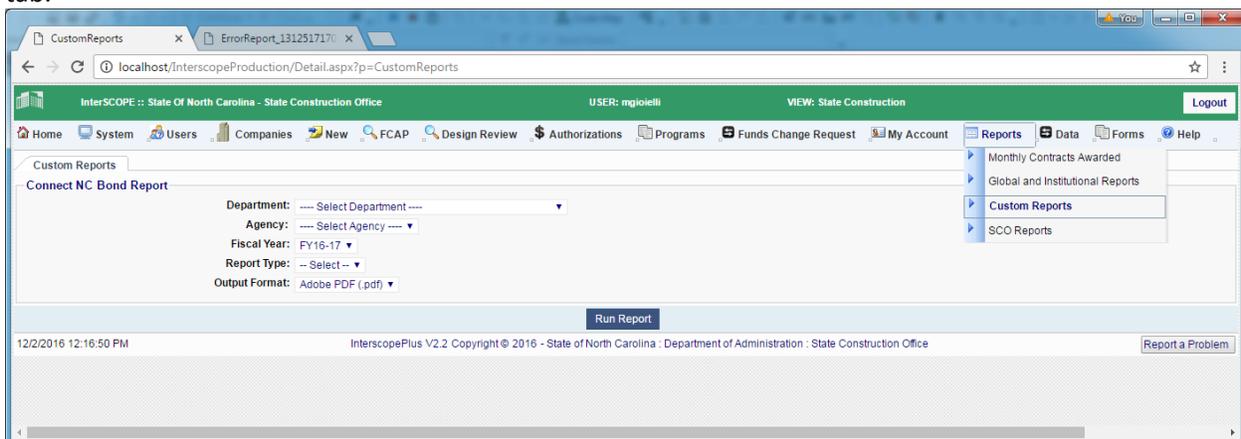
Step 4 – If the import is successful, a message will display indicating the number of records processed. If unsuccessful, an error report will be generated and displayed listing the errors found.





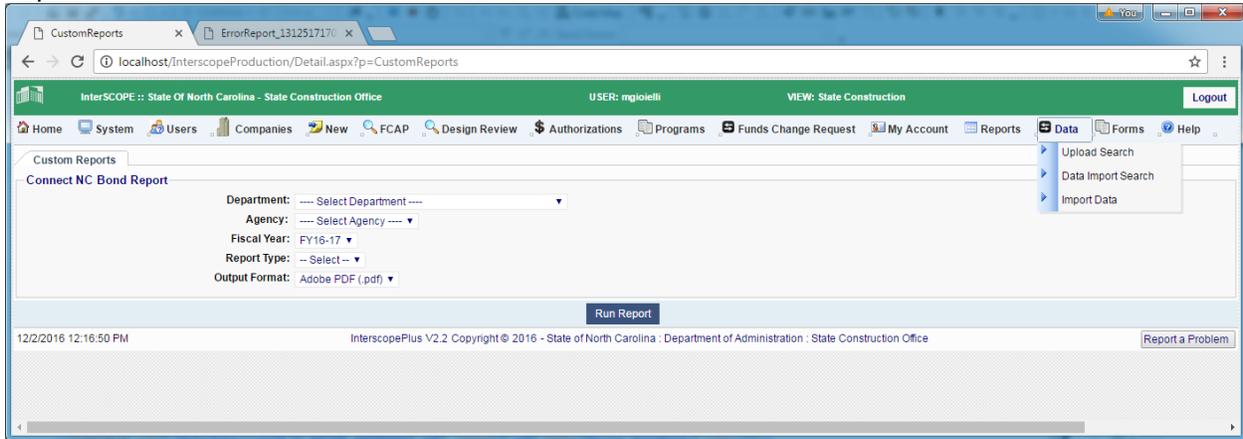
Once a successful import has been accomplished, the cash flow projections are ready for reporting. To run the Connect NC Bond report, select **“Custom Reports”** under the **“Report”** menu on the Main Menu bar.

Complete the report run criteria and press the **“Run Report”** button. Your report will display in a new tab.

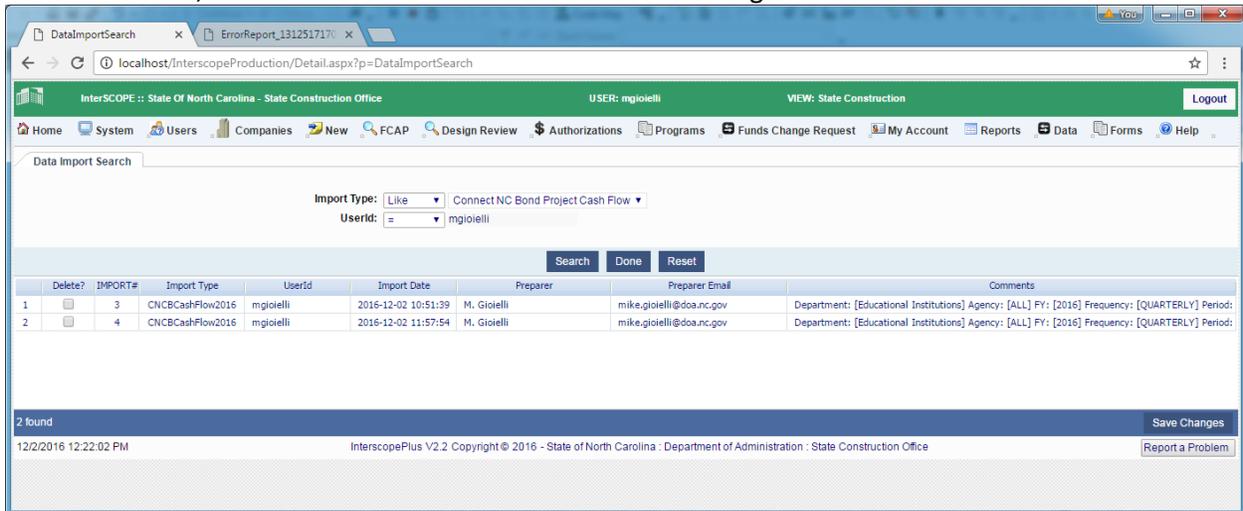


## Managing Data Import files

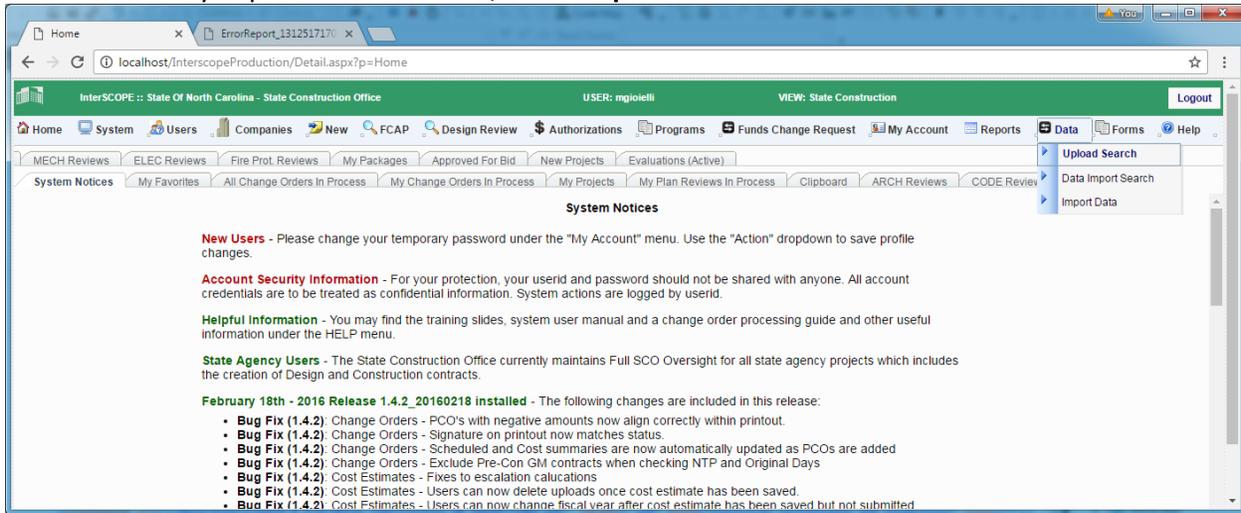
To **view** or **replace** cash flow information that has been uploaded for any given period, select “Data Import Search” under “Data” on the Main Menu bar:



To remove a file, check “Delete?” and then click on “Save Changes”



To **download** any imported cash flow file, select **“Upload Search”** under **“Data”** on the Main Menu bar:



Click on the File Name to download the file.