# 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 codeitem 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 <u>http://www.interscope.nc.gov/Interscope/Logon.aspx</u> Download the appropriate form – Agencies; Universities; Designer/Contractors, for requesting a logon.



#### 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		Instructions For Designers
	r Type: DESIGNER	Designer Users are those Companies that have engaged the State of North Carolina under contract for building projects.
* Designer	Name: Required *	Designers will only be allowed to access the data available for their company.
	Idress: Required *	Designers will only be allowed to access the data available for their company.
	State: Required *	
	er Zip: Required *	To create a Designer Logon:
* Designer P		1. Select User Type of Designer
* Designer Licens		
	0	2. Fill in all fields for your Designer.
* Designer Lic	ense #: Required •	3. Your must specify a valid Designer License from one of the following:
		(To obtain your Designer License #, go to the appropriate link below.)
IMPO	RTANT: 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.	<ul> <li>NC Board of Architecture</li> </ul>
Office/Lo		<ul> <li>NC Board of Engineers and Land Surveyors</li> </ul>
		<ul> <li><u>NC Board of Landscape Architects</u></li> </ul>
User Profile		4. Fill in the remaining fields
* Lise	mame: Required *	4. Fin in the remaining lields
	Name: Required *	5. Press the Submit button
	Email: Required *	
* User F		
* Pas	sword: Required	
	sword: Required	
	ments:	
	Submit Cancel	
	Subnic Cancer	
/8/2016 10:55:14 AM	InterscopePlus 2.2.2_20161107 Copyright © 2016 - State of	North Carolina : Department of Administration : State Construction Office

#### 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:

<u>https://vendor.ncgov.com/vendor/login</u> 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 U	SER LOGON REQUEST ~
User Logon Request	
Organization	Instructions For Contractors
* User Type: CONTRACTOR *	Contractor Users are those Companies that have engaged the State of North Carolina under contract for building projects.
HUB Firm: Search Vendor Portal	Contractors will only be allowed to access the data available for their company.
Contact:	** PLEASE NOTE **
	CONTRACTORS MUST BE REGISTERED WITH THE ELECTRONIC VENDOR PORTAL -#VP
	IF YOUR FIRM IS ALREADY REGISTERED, PLEASE FOLLOWING THE INSTRUCTIONS BELOW. IF NOT BEGISTER AT THE JUN REI UW
Search IPS VendorLink for your company VendorLink record	
Name:	Email:
HUB Certified? Select +	Contact Person:
Address:	City:
State:	Zip:
Phone: (999-399-3999)	
Seatch C	Done Reset
Password: Required Password is Required	
* Confirm Password: Required Confirmation Password is Required	2. Click Search Vendor Portal to identify your eVP registration record.
Comments:	3. Find and Select your Vendor registration record.
	4. Fill in the remaining fields
Submit Cancel	5. Press Submit
owerna Galiter	0. Fress Summe

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							nstructions For Contract	ors	
	* User Type:	CONTRACTOR V							
							Contractor Users are those C	Companies that have engaged the State of North Carolina under contract for building projects.	
	HUB Firm:	Search Vendor Portal			Contractors will only be allow	red to access the data available for their company.			
	Contact:							** PLEASE NOTE **	
		S VendorLink for your co	mpany vendo	rLink reco	ora				
	Na	me: þene					Email:		
	HUB Certifi	ed? Select •					Contact Person:		
	Addre	ess:					City:		
	St	ate:					Zip:		
	Pho	one: (999-999-999)							
						Search Done	Roset		
User Profile									
		Company	City, State	Voice	Contact	Email	HUB Type		<u>^</u>
	SELECT	2nd Generation Lawn Services	Wake Forest, NC		Rodman, Carrie	carrie@2ndgenlawn.com	Not a HUB		
	SELECT	4th Generation Builders,LLC	Kernersville, NC		McIntosh, Stephanie	stephmci@vahoo.com	Not a HUB		
	SELECT	ACCURATE GENERAL CONTRACTORS	CHICAGO, IL		NINO, WILLIAM	ACCURATEGC1@AOL.COM			
	SELECT	Alcoa Power Generating Inc	Badin, NC	704-422-5610		lydia.gill@alcoa.com	Not a HUB		
	SELECT	Andrew General Contractor Company.Inc	Cary, NC		Chavez, Maria F	mariaf.chavez@andrewgco			
	SELECT	AR General Contracting, LLC	pfafftown, NC	336-995-0199	Gilmore, Titus	associaterestora@vahoo.c	B (Not Certified)		
**	SELECT	Aztek General Contractors Inc	Chalotte, NC	(704)770-5389	Gonzalez, Raul	aztekoc@gmail.com	H (Not Certified)		
	SELECT	B@R Lawn Care/General Sub Contractor	Winston Salem, NC	336-528-5017	Fernanders, Rickey	rfernanders@live.com	B (Certified)		-
		name of the other states of the	ettiliti se	(nameno neas	n	· · · · · · · · · · · · · · · · · · ·			÷
	11 page(s): [1] 2	3 4 5 6 7 8 ≥ Last a							
		Submit Can	el				5. Press Submit		

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

	~ INTERSCOPE NEW USE	ER LOGON REQUEST ~
User Logon Request		
rganization		Instructions For Contractors
HUB Fim Contac MPORTAN OfficeLocation Jser Profile * User Fau * User Fau * User Fau	Frequired       AR General Contracting, LLC       associativerstora@yahoo.com       336-959-0199       Frequired       Required	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 BEREGISTERED WITH THE ELECTRONCY VENDOR PORTAL. eXP USERS FOLOWING THE INSTRUCTIONS BELOW, IF YOUR PIRENT SALREADY REGISTERED, PLEASE FOLOWING THE INSTRUCTIONS BELOW, IF NOT, REGISTER AT THE LINK BELOW VENDOR REGISTRATION TYPICALLY TAKES 1-2 BUSINESS DAYS. To register, go to the eVP site and click on "Register Now". Litbut/Vendor.rcgov.com/vendor/focili 1 Select User Type of Contractor 2. Click Search Vendor Porta/to identify your eVP registration record. 3. Find and Select your Vendor registration necord. 4. Fill in the remaining fields 5. Fress Submit
8/2016 10:55:14 AM		rth Carolina : Department of Administration : State Construction Office

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.

Interscope
Welcome to InterScope+
Version: 2.2.2_20161107
Please Logon User Name: Password: Logon Download New Logon Request Form (Agencies) Download New Logon Request Form (Universities)
Download New Logon Request Form (Community Colleges)
Designer and Contractor New Logon Requests Forgot Password or User Name
Please enter your Username and Password.
CONTACT ADMINISTRATOR Copyright © 2016
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.

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 Reset. 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 Export button in the lower right hand corner of the screen.

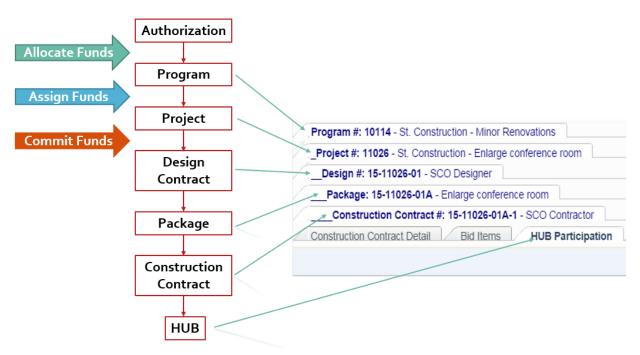
### C. Hyperlinks

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.

**<u>Note</u>:** 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.

InterSCOPE :: TRAINING SYSTEM			USER: Mrfixit71			VIEW: State Construction		Logout	
ն Home	🞾 New 🛛 🔍 FCA	P 🖧 Design Review	\$	Authorizations	Pro	grams	🖥 Funds Change Request	🔊 My Account	Help
New Pro	jects			Authorization	>				
System	Notices My Fav	orites Active Design C	0 🕨	_Authorization If	tem	on Contra	acts All Change Orders In	Process My Proje	cts

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

inte	rSCOPE ::	TRAINI	NG SYSTEM	USER:	Mrfixit71	VIEW: State Construction		Logout
🟠 Home	🞾 New 🙎	FCAP	🔍 Design Review	\$ Authorizations	Programs	B Funds Change Request	Seal My Account	🥝 Help
Authoria	zation Search							
	rization Infor horization ID: Department:	= 1			-	rmation – Code: Like ▼ Item: [ jike ▼ ]		
Institu	ution/Agency: Fiscal Year:	Select	Department Select Agency Select Fiscal Y		NCAS Co Agency Fu	enter: Like V nding Code: Like V rized: > V		
A	Status: Legislative uthorization?		<ul> <li> Select Status</li> <li> Select </li> </ul>	▼	Pro	gram: Like ▼		
			Search	Done Reset	Add a New A	uthorization		

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.

Action

NEW AUTHORIZATION:			
Authorization			
		🔯 Action	Close
Authorization Information	Funding Information	Save	
* Department: Administration	* Budget Code: <mark>41601</mark>	× Delete	
* Agency: St. Construction	▼ Budget Item:	_	
* Fiscal Year: 2015 - 2016 ▼	NCAS Center: 4T04		
* Title: Minor Renovations	Agency Funding		
Status: Allocation in Progress	Code: * Authorized Date: 09/21/2015		
Legislative Authorization: 🥑	Total Authorized: \$0.00		
	* Authorized Small Renovation p Purpose:	rojects	
	Is From Capstat: False		

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 Information       * Department:       Administration         * Department:       Administration       * Budget Code:       41601         * Agency:       St. Construction       •         * Fiscal Year:       2015 - 2016       •         * Title:       Minor Renovations       Code:         Status:       Allocation in Progress         Legislative Authorization:       Image: Code:         * Authorized Date:       09/21/2015         Total Authorized:       S0.00         * Authorized Small Renovation projects       Purpose:         Is From Capstat:       False         Comments       Authorization Item Detail       Program Allocation         Authorization Item Summary       Authorization Approved Changes       Pending Changes         Program Allocation       Audit Trail - Authorized       Available T         Authorization Item Summary       Authorization Approved Changes       Pending Changes       Program Current Allocated Assigned To Projects       Available T         Authorization Item Summary       41601-4704       \$ 0.00       \$ 0.00       \$ 0.00       \$ 0.00         Non-General Fund       41601-4704       \$ 0.00       \$ 0.00       \$ 0.00       \$ 0.00       \$ 0.00         Non-State Debt <td< th=""><th>entered,</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></td<>	entered,								
Authorization Information       * Department:       Administration         * Department:       Administration       * Budget Code:       41601         * Agency:       St Construction       •       Budget Code:       41601         * Fiscal Year:       2015 - 2016       •       NCAS Center:       4T04         * Title:       Minor Renovations       Code:       •       Authorized Date:       09/21/2015       •         Legislative Authorization:       Image: Status:       Allocation In Progress       Total Authorized:       \$0.00       *       Authorized:       \$0.00         * Authorization Item Summary       Authorization Item Detail       Program Allocation       Audit Trail - Authorized       Audit Trail - Auditorated       Upload:         Source       Orig: CI-C       Original Authorization Approved Changes       Perogram Allocation       Audit Trail - Authorized       Available T         Authorization Item Summary       Authorization Approved Changes       Proposed       Current Allocated       Available T         Authorization Item Summary       Authorization Approved Changes       Proposed       Current Allocated       Available T         Authorization Authorization       \$0.00       \$0.00       \$0.00       \$0.00       \$0.00       \$0.00       \$0.00       \$0.00	_	<b>:: 1041</b> - St. Con:	struction - Minor Renovation	IS					
* Department: Administration * Agency: St. Construction * Fiscal Year: 2015 - 2016 * Title: Minor Renovations Status: Allocation in Progress Legislative Authorization: * Code: * Authorized Date: 09/21/2015 Total Authorized: \$0.00 * Authorized: \$0.00 * Authorized: Small Renovation projects Purpose: Is From Capstat: False Comments Authorization Item Summary Authorization Item Detail Source Orig: CI-C Original Authorization Approved Changes Pending Changes Pending Changes Pending Changes Pending Changes Pending Changes Proposed Authorized Audit Trail - Authorized Authorization Amount Source Orig: CI-C Original Authorization Approved Changes Pending Changes Pending Changes Pending Changes Proposed Authorization Amount Authorization Amount Authorizati	×							Action	Close
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* Fiscal Year:       2015 - 2016       NCAS Center:       4T04         * Title:       Minor Renovations       Code:         Status: Allocation in Progress       Agency Funding       Code:         Legislative Authorization:       Image: Code:       * Authorized Date:       09/21/2015       Image: Code:         Comments       Image: Code:       * Authorized Stoll       Small Renovation projects       Purpose:         Comments       Is From Capstat:       False       Volcated       Volcated         Source       Orig. C-I-C       Original Authorization       Approved Changes       Pending Changes       Pending Changes         General Fund       41601-4T04       \$ (50.00.0)       \$ 0.00       \$ 0.00       \$ 0.00       \$ 0.00         Non-General Fund       41601-4T04       \$ (50.00.0)       \$ 0.00       \$ 0.00       \$ 0.00       \$ 0.00         Non-State Debt       41601-4T04       \$ (0.00       \$ 0.00       \$ 0.00       \$ 0.00       \$ 0.00         RaR General Fund       41601-4T04       \$ (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         R&R General Fund       41601-4T04 <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Delete</td> <td></td>								Delete	
* Title: Minor Renovations         Status: Allocation in Progress         Legislative Authorization: *         Agency Funding Code:         * Authorized Date:         09/21/2015         Total Authorized: \$0.00         * Authorized: Item Summary         Authorization Item Summary         Authorization Item Summary         Authorization Approved Changes         Propsed       Current Allocated Assigned To Projects         Available T         Amount         General Fund       41601-4T04       \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$						-			
Status: Allocation in Progress         Legislative Authorization:         Image: Note: Indicated Assigned To Progress         Legislative Authorization:         Image: Indicated Assigned To Progress         Legislative Authorization:         Image: Indicated Assigned To Progress         Legislative Authorization Item Summary         Authorization Approved Changes         Perolog Changes         Proposed         Current Allocated Assigned To Projects         Available To Anount         Authorization Amount         Authorization Amount<		* Fiscal Ye	ar: 2015 - 2016	T	NC	AS Center: 4T04			
Status: Allocation in Progress         * Authorized Date: 09/21/2015 International content of the second content of t		* Tit	le: Minor Renovations		Agen				
Legislative Authorization: Total Authorization Small Renovation projects         Comments       Small Renovation projects         Authorization Item Summary       Authorization Item Detail       Program Allocation       Audit Trail - Authorized       Surger Authorization         Source       Orig. CI-C       Original Authorization       Approved Changes       Pending Changes       Proposed       Current Allocated       Uploads         Source       Orig. CI-C       Original Authorization       Approved Changes       Pending Changes       Proposed       Current Allocated Assigned To Projects       Available To Annount         General Fund       41601-4T04       \$ (750,000.00)       \$ 0.00       \$ 750,000.00       \$ 0.00       \$ 0.00         Non-General Fund       41601-4T04       \$ (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         R&R General Fund       41601-4T04       \$ (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       \$ 0.00       \$ 0.00       \$ 0.00       \$ 0.00 </th <th></th> <th>Statu</th> <th>is: Allocation in Progress</th> <th></th> <th>* Autho</th> <th></th> <th>1 /0015</th> <th></th> <th></th>		Statu	is: Allocation in Progress		* Autho		1 /0015		
Authorization Item Summary         Authorization Item Detail         Program Allocation         Audit Trail - Authorized         Audit Trail - Allocated         Upload:           Source         Orig. CI-C         Original Authorization         Approved Changes         Pending Changes         Progosed         Current Allocated         Available To           General Fund         41601-4T04         \$                         Available To               Available To            Non-General Fund         41601-4T04              0.00               0.00               0.00               0.00               Source               Source               Sourc	Legislati	ive Authorizatio	n: 🕑		*	Authorized Smal Purpose:	I Renovation proj	jects	
Source         Orig. C-I-C         Original Authorization Amount         Approved Changes Amount         Pending Changes Authorization Amount         Proposed Authorization Amount         Current Allocated Assigned To Projects         Available To Amount           General Fund         41601-4T04         \$ (*50,000.0)         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00	Comments								
Amount         Autorization Amount         Amount           General Fund         41601-4T04         \$ (*50,000,0)         \$ 0.00         \$ 750,000,00         \$ 0.00         \$ 0.00           Non-General Fund         41601-4T04         \$ (*50,000,0)         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00           Non-General Fund         41601-4T04         \$ (*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         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00 <th>Authorization Iten</th> <th>n Summary</th> <th>Authorization Item Detail</th> <th>Program</th> <th>Allocation</th> <th>Audit Trail - Autho</th> <th>rized Audit 1</th> <th>Frail - Allocated</th> <th>Uploads</th>	Authorization Iten	n Summary	Authorization Item Detail	Program	Allocation	Audit Trail - Autho	rized Audit 1	Frail - Allocated	Uploads
Non-General Fund         41601-4T04         \$         0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00         \$0.00	Source	Orig. C-I-C	5 11	roved Changes	Pending Changes			• •	Available To Assig
Non-State Debt         41601-4T04         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00	General Fund	41601-4T04	\$ 750,000.00	\$ 0.00	\$ 0.00	\$ 750,000.00	\$ 0.00	\$ 0.00	\$ 0.0
R&R General Fund         41601-4T04         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00	Non-General Fund	41601-4T04	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.0
R&R State Debt         41601-4T04         \$         0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 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	\$ 0.0
State Debt         41601-4T04         \$         0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 0.00         \$ 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	\$ 0.0
	R&R State Debt	41601-4T04	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.0
Totals \$750,000.00 \$0.00 \$0.00 \$750,000.00 \$0.00	State Debt	41601-4T04	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.0
	Totals		\$ 750,000.00	\$ 0.00	\$ 0.00	\$ 750,000.00	\$ 0.00	\$ 0.00	\$ 0.00

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.

InterSCOPE :	: TRAINING SYSTEM	_ USER: Mrf	fixit71	VIEW: State Construction	Logout
🟠 Home 🛛 🎾 New	FCAP 💊 Design Review	\$ Authorizations	Programs	Funds Change Request	🕒 My Account 🛛 🔞 Help
New Projects		1	Cost Estim	ate	
System Notices	My Favorites Active Design	Contracts Active Con	Program	ers In Pro	ocess My Projects
TYPE		1	Project		Delete?
			Project (le	egacy funding only)	
0 found 9/21/2015 8:23:00	InterscopePlus 1.3B_TRAIN Copyrig	ght © 2015 - State of Norti	Design	Contract : State	Construction
AM		Off		ge	Report a Problem
		1	Cons	truction Contract	
			Chan	ge Order	

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

Department:	=	¥				Alternate Name:	Like	•			
	Se	lect D	epartment	¥		Budget Code:	Like	v			
nstitution/Agency:	=	v	Select Agency	¥		Budget Item:	Like	V			
Fiscal Year:	=	V	Select Fiscal Year			NCAS Center:	Like	V			
Program ID:	Like	v				Status:	=	v	Active	T	
Program Name:	Like	v			1						
Available to Transfer:		۲									

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

NEW CAPITAL PRO	GRAM:			
* Department: * Agency: * Fiscal Year: Program ID:	St. Construction	▼	* Program Name: Minor Renovations Alternate Name: Status: Active Remarks:	Action Save

Action Save

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

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 adde	d successfully.
Program #: 12153 - St. Construction - Minor Renovations	
Program Program Funding Projects Assign Amounts to Proj	ects Program Closeout
*	🖾 Action 🚽 🔞 Close
* Department: Administration	* Program Name: Minor Renovations
* Agency: St. Construction ▼	Alternate Name:
* Fiscal Year: 2015 - 2016 ▼	Status: Active
Program ID: 12153	Remarks:

#### 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.

	InterSCOPE ::	TRA	INING SYSTEM		USER:	Mrfixit71		VIEW: State Construction		Logout
🟠 Hon	ne 🞾 New	SCAP	🖧 Design Review	\$	Authorizations	Pro	grams	🗗 Funds Change Request	🧕 My Account	🥝 Help 💡
Nev	v Projects				Authorization	>				
Sys	tem Notices	My Favorit	Active Design C	0 🕨	_Authorization	tem	n Contra	All Change Orders In P	ocess My Projec	ts

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

thorization Inform	nation				-Funding Informatio	/II			
Authorization ID:	= 🔻				Budget Code:	Like	•		
Department:	= •				Budget Item:	Like	•		
	Administrati	on		v	NCAS Center:	Like	•		
stitution/Agency:	= 🔻				Agency Funding	Like	<b>T</b>		
	St. Construc	tion	T		Code:		<u> </u>		
Fiscal Year:	= 🔻	2015 - 2016	•		Total Authorized:		<u> </u>		
Title:	Like 🔻				Available Funds:		▼		
					Program:	Like	•		
Status:	= 🔻	Select Status						 	
Legislative Authorization?		Select V							

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 Inforr	nation			Fur	iding Informatio	n –		
Authorization ID:	= 🔻				Budget Code:	Like 🔻		
Department:	= 🔻				Budget Item:	Like 🔻		
	Administratio	on	•		NCAS Center:	Like <b>v</b>		
Institution/Agency:	= 🔻				Agency Funding	Like ▼		
	St. Construc	tion	•		couc.			
Fiscal Year:		2015 - 2016	•		otal Authorized: Available Funds:			
Title:	Like <b>v</b>			,    <b>'</b>	Program:	· · · · · · · · · · · · · · · · · · ·		
Status:	= 🔻	Select Statu	s 🔻			,		
Legislative Authorization?	= •	Select	1					
		Searc	h Done	Reset Ad	d a New Authoriza	ition		
SL No. Auth I	D	Title	Code-Item-Cent	Agency Fundin	g Code Institut	ion / Agency	Auth Total	Status
SELECT 1041	Minor Ren	ovations	<u>41601-4T04</u>		St. Construc	tion	\$750,000.00	Allocation in Prog

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

					🔽 Action 🚽 🔞 Close
Authoriza	ation Information				Funding Information
	* Depa	rtment: Admi	nistration		* Budget Code: 41601
	* A	gency: St. C	onstruction		Budget Item:
		al Year: 2015		•	NCAS Center: 4T04
		* Title: Minor		· · · · · · · · · · · · · · · · · · ·	Agency Funding
		Status: Allocat			Code:
			Ion in Progre	355	* Authorized Date: 09/21/2015
	Legislative Authori	zation: 🕢			Total Authorized: \$750,000.00
					* Authorized Small Renovation projects
					Purpose: Is From Capstat: False
Commer	nts ation Item Summary	Authoriza	tion Item De	tail Program /	Ilocation Audit Trail - Authorized Audit Trail - Allocated Uploads
Authoriza					
	Orig. C-I-C	Current	Pending	Available To	Allocations
	Aut	Current horization (Orig Appr Changes)	Pending Changes	Available To Allocate	Allocations
ource General Fund	Aut	horization (Orig	Changes		
ource General Fund Ion-General Fund	Aut	horization (Orig Appr Changes)	Changes	Allocate	
General Fund Jon-General und Jon-State Jebt	Aut + 41601-4T04 \$ 41601-4T04 41601-4T04	horization (Orig Appr Changes) 750,000.00	Changes	Allocate \$ 750,000.00 Add	
General Fund Ion-General und Ion-State Iebt &R General	Aut + 41601-4T04 \$ 41601-4T04 41601-4T04	horization (Orig Appr Changes) 750,000.00 \$ 0.00	Changes \$ 0.00 \$ 0.00	Allocate \$ 750,000.07 Add \$ 0.00	
Authoriza Source General Fund Non-General Fund Non-State Debt R&R General Fund &&R State Debt	Aut + 41601-4T04 \$ 41601-4T04 41601-4T04	horization (Orig Appr Changes) 750,000.00 \$ 0.00 \$ 0.00	Changes \$ 0.00 \$ 0.00 \$ 0.00	Allocate \$ 750,000.06 Add \$ 0.00 \$ 0.00	
Source Source Source Fund Non-State Debt &&R General Fund R&R State	Aut + 41601-4T04 \$ 41601-4T04 41601-4T04 41601-4T04	horization (Orig Appr Changes) 750,000.00 \$ 0.00 \$ 0.00 \$ 0.00	Changes \$ 0.00 \$ 0.00 \$ 0.00 \$ 0.00	Allocate \$ 750,000.0¢ Add \$ 0.00 \$ 0.00 \$ 0.00	

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

Authorization	PROGRAM SEARCH	
r	FROORAM SEARCH	🔞 Clos
Authorizati		
	Department: = ▼	Alternate Like
	Administration	Name:
	Institution/Agency: =	Budget Code: Like
	St. Construction	Y
	Fiscal Year: 😑 🔻 🔻	Budget Item: Like V
	2015 - 2016 🔻	
	Program ID: Like 🔻	NCAS Center: Like
	Program Name: Like V	
Le		Status: = V
	Available to = 🔻	Active
	Transfer:	Active

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

	PROGRAM SEAF						
Authorizati Le:	Department: Institution/Agency: Fiscal Year: Program ID: Program Name: Available to Transfer:	Administration = V St. Construction = V 2015 - 2016 V Like V Like V	E		Like V		
		Search	Done	Reset			
	SL No.	Institution / Agency	Program ID	P	Program Name	Alternate	
	1 SELECT St.	Construction	10676	Museum of Na		Museum of Natural !	

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.

Auti	orization								Pro-		0
×									<u>-</u> 2 А	ction	🗧 🔞 Close
Autho	rization Info	rmation				Funding Inform					
		* Department:	Administ	ration		* Budget Co	de: 41601				
		* Agency:	St. Cons	truction	•	Budget Ite	em:				
		* Fiscal Year:	2015 - 20	)16	T	NCAS Cent	ter: 4T04				
			Minor Rer			Agency Fund					
						Co	de:				
		Status:	Allocation	in Progress		* Authorized Da	ate: 09/21	/2015 📗			
	Legislative	Authorization:				Total Authoriz	ed: \$750,00	0.00			
						* Authori	zed <sub>Small</sub> F	enovation	projects		
						Purpo	se:	enovation	projects		
						Is From Caps	tat: False				
/	ments										
	nents prization Item S Orig. C-I-C	Current Authorization (Orig + Appr	thorization Pending Changes	LItem Detail Available To Allocate	Program Alloca	tion Audit Tra	iil - Authorize Alloca		idit Trail - A	Allocated	Uploads
Autho	prization Item S	Current Authorization	Pending Changes	Available To	Program Alloca Program Agency ID	tion Audit Tra			Idit Trail - A Pending Changes	Allocated Available to Available to Assign	
Autho	Orig. C-I-C	Current Authorization (Orig + Appr Changes)	Pending Changes	Available To Allocate	Program Agency	Program Name Minor	Alloca Original Allocated	Approved	Pending	Available to	Assigned to Projects
Autho	Orig. C-I-C	Current Authorization (Orig + Appr Changes)	Pending Changes	Available To Allocate	Program Agency ID 12153 St. Construction Allocation	Program Name Minor	Alloca Original Allocated Amount	Approved Changes	Pending Changes \$ 0.00	Available to Assign \$ 0.00	Assigned to Projects
Autho	Orig. C-I-C	Current Authorization (Orig + Appr Changes)	Pending Changes	Available To Allocate	Program Agency ID 12153 St. Construction Allocation Count: 1	Program Name Minor n <u>Renovations</u>	Alloca Original Allocated Amount	Approved Changes	Pending Changes \$ 0.00	Available to Assign	Assigned to Projects
Autho	Orig. C-I-C	Current Authorization (Orig + Appr Changes)	Pending Changes	Available To Allocate	Program Agency ID 12153 St. Construction Allocation	Program Name Minor n <u>Renovations</u>	Alloca Original Allocated Amount	Approved Changes	Pending Changes \$ 0.00	Available to Assign \$ 0.00	Assigned to Projects
Autho purce eneral und	Orig. C-I-C	Current Authorization (Orig + Appr Changes)	Pending Changes	Available To Allocate	Program Agency ID 12153 St. Construction Allocation Count: 1	Program Name Minor n <u>Renovations</u>	Alloca Original Allocated Amount	Approved Changes	Pending Changes \$ 0.00	Available to Assign \$ 0.00	Assigned to Projects
Autho	Arrivation Item S           Orig. C-I-C           41601-4T04           41601-4T04	Current Authorization (Orig + Appr Changes) \$ 750,000.00	Pending Changes	Available To Allocate	Program Agency ID 12153 St. Construction Allocation Count: 1	Program Name Minor n <u>Renovations</u>	Alloca Original Allocated Amount	Approved Changes	Pending Changes \$ 0.00	Available to Assign \$ 0.00	Assigned to

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".

Auth	orization #: 1	041 - St. Constr	uction - Min	or Renovation:	5					
Autho	orization									
<b>k</b>								🔯 A	ction	Close
Author	rization Infor	mation				Funding Informatio	n			
		* Department:	Administra	ation		* Budget Code:	41601			
		* Agency:	St. Constr	ruction	•	Budget Item:				
		* Fiscal Year:			<b>T</b>	NCAS Center:	4T04			
			Minor Ren		·	Agency Funding				
				ovations		Code:				
		Status:	Active			* Authorized Date:	09/21/2015			
	Legislative	Authorization:				Total Authorized:	\$750.000.00			
						* Authorized Purpose: Is From Capstat:		on projects		
Comn	ients					Purpose:		on projects		
/	nents rization Item St	ummaryAt	uthorization	Item Detail	Program Allo	Purpose: Is From Capstat:	False	on projects Audit Trail - /	Allocated	Uploads
Autho		Current	Pending	Available To	Program Allo	Purpose: Is From Capstat:	False		Allocated	Uploads
Autho	rization Item S				Program Allo	Purpose: Is From Capstat:	False		Allocated	Uploads
Autho	rization Item S	Current Authorization (Orig + Appr	Pending Changes	Available To	Program Allo Program Agency	Purpose: Is From Capstat: ocation Audit Trail - A	False	Audit Trail - / ed Pending	Allocated Allocated Available to Assign	
/	rization Item Si Orig. C-I-C	Current Authorization (Orig + Appr Changes)	Pending Changes	Available To Allocate	-	Purpose: Is From Capstat: Audit Trail - A Program Name	Authorized Allocations Original Approv	Audit Trail - / ed Pending es Changes	Available to	Assigned to

#### 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 ::	InterSCOPE :: TRAINING SYSTEM L		_ USER	: Mrfixi	it71	VIEW: State Construction		Logout
🟠 Home 🛛 😕 New	SCAP	Scheric Street Design Review	<b>\$</b> Authorizations	. Fi	Programs	🗗 Funds Change Requ	uest 🧕 My Aco	count 🤨 Help
New Projects					Cost Estim	ate		
System Notices	My Favorit	es Active Design	Contracts Active C	on 🕨	Program	) IS	In Process	ly Projects
TYPE					_Project			Delete?
					_Project (le	gacy funding only)		
0 found 9/21/2015 9:06:36	InterscopePlu	us 1.3B_TRAIN Copyri	ght © 2015 - State of N	orti 🕨	Design (	Contract	State Construction	
AM			-	Off 🕨	Packag	e		Report a Problem
				►	Const	ruction Contract		
				►	Chang	je Order		

Enter the appropriate information and search.

Department:	= 🔻			Alternate Name:	Like 🔹	r	
	Administra	tion	•	Budget Code:	Like •	·	
nstitution/Agency:	= •			Budget Item:	Like	-	
	St. Constru	uction	T	NCAS Center:	Like	-	
Fiscal Year:	= 🔻	2015 - 2016	•	Status:	= •	Active	▼
Program ID:	Like v						
Program Name:	Like 🔻						
Available to Transfer:							

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

Department	= •	]		Alternate Name:	Like 🔻		
	Administrati	ion	•	Budget Code:	Like 🔻		
Institution/Agency	= 🔻	]		Budget Item:	Like 🔻		
	St. Constru	ction	V	NCAS Center:	Like 🔻		
Fiscal Year	= 🔻	2015 - 2016	•	Status:	= 🔻	Active	T
Program ID	Like <b>v</b>	]					
Program Name	Like <b>v</b>						
Available to Transfer		]					
		s	earch Do	ne Reset Add a New Progr	am		
iL No.	Institution	n / Agency	Program ID	Program Name		Alternate Name	Status
	Institution	n / Agency	Program ID 10676	Program Name Museum of Natural Science	Museum of	Alternate Name Natural Science	Status

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

Progr	Program #: 12153 - St. Construction - Minor Renovations												
Progra	am Program Funding	Projects Assign Amounts to Projects Pro	gram Closeout										
				Close									
SL No.	Project ID Agency Project Cod	Project Title	Status	Estimated Cost Estimated									
•				۱. ۲									
Total			\$0.00										
0 Projects	found			Add Project									

Now you are on the New Capital Project screen.

Program #: 12244 - State Construction Office - Lea Anne's Test Program		
_Project#: 0		
Project		
		🖓 Action 💡 🔞 Close
Project Information - Basic	Project Information - Advanced	
* Program: 12244 - LeaAnne's Test Program	Project Type:	
* Provide under a construction of the construc	Standard Project	
* Department: Administration	Special Project Designation:     OPerformance Contract	
* Agency: State Construction Office	<ul> <li>Special Project Designation:</li></ul>	
Project ID: (Auto)	O Non-Coue-tent Project	
* Title: LeaAnne's First Test Project		
Description:	Fiscal Year Funded: 2018 - 2019	
and delingeneral.	Financial Controls: On	
	Bypass Financial Controls?	
Agency Project Code:		
Status: (Auto)		
	Estimated Cost	
	Estimated Project Cost:	(Auto)
	- Total Amount Assigned:	(Auto)
	= Estimated Need:	(Auto)
	= Estimated Need:	(400)
14/2016 8:29:25 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

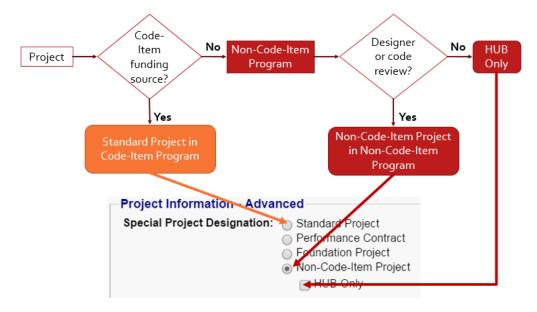
In the Advanced block, select the appropriate type of project under *Special Project Description*.

- **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.

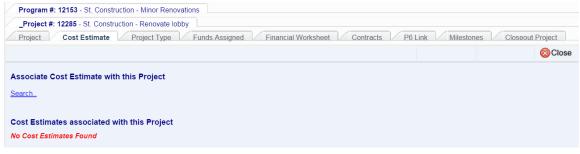
NEW CAPITAL PROJECT:			
Project			
		Action 🛛 🕺	3 Clo
oject Information - Basic	Project Information - Advanced	Save	
* Program: 12153 - Minor Renovations	<ul> <li>Standard</li> </ul>	Proje X Delete	
* Department: Administration	* Special Project Designation:  Performa Foundation	nce C	
* Agency: St. Construction		e-Item Project	
Project ID: (Auto)			
* Title: Renovate lobby	Fiscal Year Funded: 2015 - 2016	▼	
· · ·	Bypass Financial Controls?		
Description: Reconfigure lobby and upgrade finishes			
Agency Project Code:			
Status: (Auto)			
Status. (Auto)			
	Estimated Cost		
	Estimated Project Cost:		(Au
	- Total Amount Assigned:		(Aut
	= Estimated Need:	(	(Au

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

Projec	ct 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
<b>*</b>	🖾 Action 🚽 🔞 Close
Project Information - Basic	Project Information - Advanced
<ul> <li>* Program: 12153 - Minor Renovations <u>Move to Another Program.</u></li> <li>* Department: Administration</li> </ul>	Standard Project     Special Project Designation     Performance Contract     Foundation Project     Non-Code-Item Project
* Agency: St. Construction Project ID: 12285	Fiscal Year Funded: 2016
* Title: Renovate lobby	Bypass Financial Controls? No
Description: Reconfigure lobby and upgrade finishes	
Agency Project Code:	
Status: Active	
	Estimated Cost
	Estimated Project Cost: \$0.00
	- Total Amount Assigned: \$0.00
	= Estimated Need: \$0.00

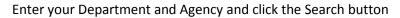
#### F. Entering Cost Estimate

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.



#### From the Programs tab, select Cost Estimate

Cost Estimate Search		
Biennium End: = v Department: = v Agency: = v NC State University OCF Sequences: = v Title: University Description: University Revision: = v v	Project Sequencef: = • Submitted By: Like • Approved By: Like • Date Approved By: Like • Date submitted: > • / / B Date submitted: > • / / B Package Type: = • Class: = • Active?: = • •	•
	Search Done Reset Add Cost Estimate	
V15/2016 4:05:08 PM InterscopePlus 2:1 A_20160830	D Copyright @ 2016 - State of North Carolina : Department of Administration : State Construction Office	Report a Problem



	Biennium End: = v Department: = v Agency: = v NC State University v OCF Sequence#: = v Title: Lite v Description: Lite v	Project Sequence#; = v	
	Status: = v v Revision: = v v		
	Search	Done Reset Add Cost Estimate	
V15/2016 4:05:08 PM	InterscopePlus 2.1 A_20160830 Copyright © 2016	6 - State of North Carolina : Department of Administration : State Construction Office	Report a Problem
	1		

	Biennium End: Department: Agency: CF Sequence#: Title: Description: Status: Revision:	= = Like =	Excatonal institutions (Universities)     Excatonal institutions (Universities)     KC State University					ect Sequence#: Submitted By: Approved By: Date Approved: Date Submitted: Package Type: Class: Active?:	Lite
AGENCY	BLENNDLM	SEQUENC	zi The	S	earch		dd Cost Estimate	ESTIMATED	720
NC State University	2007	1	Companion Animal Hospital (Veterinary Medical Ctr)	Approved	0	Hospital	New Facilities	\$34,99	
NC State University	2003	1	Leazar Hall roof replacement	Approved	0	Dormitories	Repairs, Reroofing,	\$29	0,865
NC State University	2005	1	Visitors' Center and Advancement Services Building	Approved	0	Visitor Center	New Facilities	\$5,29	6,596
NC State University	2009	1	College of Engineering Facilities - Phase II (Engr. Bldg IV)	Approved	0	Classroom Bldg.	New Facilities	\$90,00	10,000
NC State University	2011	1	JW Eisenhower Tennis Complex Expansion	Approved	0	Tennis Courts/Golf	New Facilities	\$2,22	25,000
NC State University	2013	1	CCUP Chiller Plant Capacity Expansion	Approved	0	General Bldg.	Major Renovations	\$3,50	18,000
NC State University	2017	1	Case Commons Residence Hall	Approved	11649	Residence Hall - New	New Facilities	\$15,00	10,000
NC State University	1987	1	BIOTECHNOLOGY FAC RIDDICK HALL	Approved	0	Science/Research Bldg.	Major Renovations	\$95	57,200
NC State University	2015	1	Cox Hall Renovations	Approved	11315	General Bldg.	New Facilities	\$2,23	37,000
NC State University	2015	2	Patterson Hall	Approved	11624	Office Space	Major Renovations	\$2,30	00,000
ge(s): [1] <u>2</u> <u>3</u> <u>4</u> <u>5</u> <u>6</u> <u>7</u> <u>8</u> ≥ Last									

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

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				
			Action	Close
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)	* Cost Estimate Class:	Code Compliance 🔹		
* Biennium End: 2017 v	* Construction Type:	Undetermined •		
* Department: Select Department •	Status:			
* Agency:Select Agency	Active:	2		
* Title: *	Submitted By:		,	Approved By:
* City or Location: *	Submitted:			Approved:
* 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 - 143-135.44	), Sustainable, Energy Efficient Buildings, is required.)			
Revision: 3				
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				
				_
3. Enter the Total:				企
Upload Supporting Documentation				
DESCRIPTION FILE WHE URLINDED BY D	ATE 👻			

Other Estimated Costs		
Calculate using:   Percentage  Total		
* DESIGN FEE:	0% (% of Estimated Construction Costs)	0
* PRECONSTRUCTION COSTS:	0% (% of Estimated Construction Costs [1% for CM@Risk])	0
* COMMISSIONING:	0% (0.5% simple; 1.0% moderate; 1.5% complex)	0
* SPECIAL IN SPECTION SIMATERIALS:	0% (1.25% estimated)	0
* SUSTAINABILITY:	0% (3% LEED Gold, 2% LEED Silver)	0
* ADVANCE PLANNING:	0% (% of Estimated Construction Costs - includes programming, feasibility, analysis)	0
* CONTINGENCIES:	0% (% of Estimated Construction Costs (3% New or 5% R&R))	0
ESTIMATED COSTS: (Estimated Construction Costs + Design Fee + Preconstruction Costs + Commissio	ning + Secold + Sustainable + Contingence Blanning + Contingencies]	
		_
ESCALATION COST INCREASE: (Total of Estimated Construction Costs X Escalation %) (From Est. Date	to mid-point of construction) = 0 months General: 0-5 months> 0.00 •	
Total Estimated Project Cost		纽达
TOTAL ESTIMATED PROJECT COSTS [Note: Rounded to the nearest \$1000] - (Estimated Costs + Escala	tion 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 ovisition buildings under non-electrical or other utility consists	
Association explanation or any special obtaining, mechanical, or electrical service requirements with appropriate	ussanke to existing ourionings, wate, gas, electrical of order using service.	
9/15/2016 4:22:03 PM	nterscopePlus 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

led Estimated	I Cost Breakdowns
. Download a	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 To	

The screen will open to the OC-25 Template

# Files

	OC-25-Template 9-2016.xlsx
	XLS • 17.8 KB
x	<u>Download</u> ☑

# 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 PROPOSED REPAIR & RENOVATION OR CAPITAL IMPROVEMENT PROJECT							(Rev 09/16)		
			BIEN	NUUM:	2015 - 2017				
	RTMENT and DIVISIO							DATE:	
	ECT IDENTIFICATION	_							
ROJE	ECT CITY or LOCATIC	N:							
ROJE	ECT DESCRIPTION &	JUSTIFICAT	ION: (Attach	add'l data	a as necessar	to indicate need,	size, function	of improvements as well	as a master plan.)
	1								
	ons/explanations are provi			pletion of	this form.)				
	ENT ESTIMATED CO	NSTRUCTIO	N COST			QTY	UNIT	COST PER UNIT	TOTAL
	Land Requirement								\$0
	Site Preparation								
	1. Demolition								\$(
	2. Site Work								\$(
).	Construction								
	<ol> <li>Utility Services</li> </ol>								\$0
	<ol><li>Building Construct</li></ol>		ce)						\$0
	<ol><li>Building Construct</li></ol>								\$0
	<ol><li>Plumbing (new sp</li></ol>								\$(
	<ol><li>HVAC (new space)</li></ol>								\$0
	6. Electrical (Include								\$(
	7. Fire Supression a		stems						\$0
	8. Telephone, Data,								\$(
	<ol><li>Associated Constr </li></ol>	ruction Costs							\$0
	10. Other:								\$0
	Equipment						-		
	1. Fixed								\$0
	2. Moveable								\$0
otal	Cost of Work	Enter th	nis total in	n Inter	SCOPE of	n Line 3: "E	nter the T	otal"	\$0

	ROLINA - DEPARTMENT OF ADMINISTRATION	Form OC-25
	TE CONSTRUCTION OFFICE	(Rev 09/16)
PROPOSED REPAIR & REI	NOVATION OR CAPITAL IMPROVEMENT PROJECT	
DEEL	BIENNIUM 2015 - 2017 NITIONS OR EXPLANATIONS	
	in mons or explanations ad to be self-explanatory. Questions may be directed to the State Con	struction Office )
(items for isled below are presume	su to be sell-explanatory. Questions may be directed to the State Con	sirucion Olice.)
Item on Form	Definition/Explanation	
CURRENT ESTIMATED CONSTRUCTION COS	ST Attach basis and justification for estimate. Include description	n, quantities, units, special
A. Land Requirement	Includes purchase and acquisition costs (title search, filing fe	ees, other legal fees, etc.)
B. 1. Demolition	Includes but may not be limited to lead and/or asbestos test interior space demolition in whole or part.	ing and removal, building o
B. 2. Site Work	Includes but may not be limited to grading, excavating, poo utilities relocation, roads, walks, parking, streambank repair retaining walls, rainwater harvesting systems, landscaping.	rs, stormwater managemen
C. 1. Utility Services	Attach explanation of any special building, mechanical, or e with appropriate distance to existing buildings, water, gas, e	
		electrical or other utility serv
C. 1. Utility Services C. 9. Associated Construction Costs C. 10. Other	with appropriate distance to existing buildings, water, gas, e Includes but may not be limited to construction fire alarm tes signage, security, displaced parking, staging, lock cores, ke	electrical or other utility serv ting, utility shut downs, utiliti eys, State Construction Offic
C. 9. Associated Construction Costs	with appropriate distance to existing buildings, water, gas, e         Includes but may not be limited to construction fire alarm tes         signage, security, displaced parking, staging, lock cores, ke         charges.         List other significant sources of cost not included elsewhere.	electrical or other utility serv ting, utility shut downs, utiliti ays, State Construction Offic Additional lines may be tos surveys, environmenta and destructive testing. For

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

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	
	]

#### You now have a workflow button

COST	ESTIMATE : N	/eterinariar	h Hospital Renovat	ion					
Cost E	stimate								
									Workflow Action 😵 Close
Cost E	stimate Des	cription							
(	Cost Estimate	<b>#</b> : 201748	903235		* Cost Estin	nate Class: Repairs,	Reroofing, Renova	itions	
*	Biennium En	d: 2017			* Constru	ction Type: Building	Renov.		
			and Cultural Reso	urces		Status: Submitte	d		
	-		logical Park			Active: 🖉			
			rian Hospital Rend	ovation		ubmitted By: gerrypar			Approved By:
* Ci	ty or Locatio					Submitted: 09/16/20			Approved:
	* Description				aster plan. Verify if compliance with GS 143-135.35 - 143-135.40, Sustainable, Energy E	fficient Buildings, is i	required.)		
			erinarian Hospital i	is over 25 years old and needs general renovation as follows: Painting, Floor	ring, Cabinets and Improved Lighting. The gross floor area is approximately 13,000 sf.				
	Revisio	n: 3							
Workfle	w Activity								
STEP	ACTION	ACTIVE?	ROLE	FIRM/AGENCY	USER COMPLETING STEP	COMPLETED ON	ALERTED ON	RESULT	COMMENTS
1	CREATE	N	OWNER	NC Zoological Park	gerryparker	08/29/2016 08:57		Pending	
2	SUBMIT	N	OWNER	NC Zoological Park	gerryparker	09/16/2016 07:49		Submitted	
3	APPROVE	Y	SCO	St. Construction					
Dataila	d Estimated	Cost Bre	akdowne						
Detaile	u Esumateu	COSCDIE	akuowiis						
1.1	ownload a	nd compl	ete the Proposed	Repair & Renovation Or Capital Improvement Project Worksheet	(OC-25)				
2. (	Jpload the (	completed	Worksheet and	any supporting documentation					
3. 6	nter the To	tal:							\$55,000
_									
			DESCRIPTION	FILE NAME	UPLOADED BY DATE 👻				*
				6a Vet Hospital Renovations.xls	gemyparker 9/8/2016 8:43:18 AM				*
4					and the second sec				•

### 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.

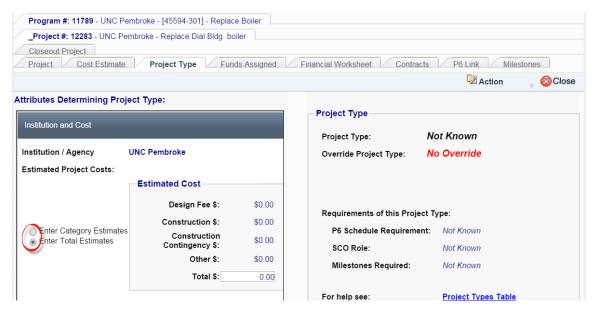
Program #: 12153 - St. Construction - Minor Renovations		
_Project #: 12285 - St. Construction - Renovate lobby		
Project Cost Estimate Project Type Funds Assigned Fina	ncial Worksheet Contracts P	6 Link Milestones Closeout Project
		🖾 Action 🚽 🔞 Close
Attributes Determining Project Type:		
Institution and Cost	Project Type Project Type:	Not Known
State Debt	Override Project Type:	No Override
State Land		
Special Project Designation	Requirements of this Project	Туре:
Special Oversight	P6 Schedule Requirement:	Not Known
	SCO Role:	Not Known
Oversight Request	Milestones Required:	Not Known
	For help see:	Project Types Table Project Type State Construction
	General Statutes:	<u>Manual</u> GS 143-129 <u>GS 116-31-11 GS</u> <u>116-40.6</u> <u>GS 116-37 <u>GS 115D-9</u></u>
	Vie	w 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.

_Project #: 12285 - St. Co	nstruction - Renovate lobby				
Project Cost Estimat	e Project Type Funds Ass	igned Finar	ncial Worksheet Contracts P6	Link Milestones C	loseout Project
				🖗 Action	Close
ttributes Determining Pro	oject Type:				
Institution and Cost			Project Type		
			Project Type:	Not Known	
Institution / Agency	St. Construction		Override Project Type:	No Override	
Estimated Project Costs:					
	Estimated Cost				
	Design Fee \$:	0.00			
	Construction \$:	0.00	Requirements of this Project Ty		
	Construction	0.00	P6 Schedule Requirement:	Not Known	
	Contingency \$:		SCO Role:	Not Known	
	Other \$:	0.00	Milestones Required:	Not Known	
	Total \$:	\$0.00			
			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.



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.

_Project #: 12285 - St. Co Project Cost Estima	enstruction - Renovate lobby te Project Type Funds Assigned Fina	ncial Worksheet Contracts	P6 Link Milestones Closeout Project
			🔯 Action 👘 🔞 Close
Institution and Cost	oject Type:	Project Type	Not Known
Institution / Agency Estimated Project Costs:	St. Construction	Override Project Type:	No Override
	Design Fee \$: 10,000.00 Construction \$: 100,000.00 Construction	Requirements of this Project	
	Contingency \$: 3.000.00 Other \$: 5.000.00 Total \$: \$118.000.00	SCO Role: Milestones Required:	Not Known Not Known
	10(413. 3110,000.00	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 Fi	nancial Worksheet Contracts P6 Link Milestones Closeout Proje	ct
	🖾 Action 🚽 🔞 Clo	se
Attributes Determining Project Type:	Project Type	
Institution and Cost	Project Type: Not Known	
State Debt	Override Project Type: No Override	
State Land		
♂ This project will affect land owned or leased by the state of North Carolina	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 SeaGrant/WRRI				
Project Cost Estimate Project Type Funds Assigned Financial Worksheet Contracts P6 Link Primavera Link Close	seout Project Evaluations			
			Action	Close
Attributes Determining Project Type:				
Institution and Cost	- Project Type			
	Project Type:	U5: UNC Project < \$500K		
State Debt	Override Project Type:	No Override		
State Land				
Anno 10 Martin Bartan Bar	SCO Override			
Special Project Designation	Requirements of this Project Type:			
Special Project Designation: Standard Project	P6 Schedule Requirement:	Not Required		
(This designation cannot be changed after the project is created)	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		
		<u>GS 116-37</u> <u>GS 115D-9</u>		
Special Oversight		View Summary		
OversightRequest				
Uploads Comments Project Managers				
	RPTEN	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 F	inancial Worksheet Contracts P6 Link Milestones Closeout Pro	oject
	🖾 Action 💡 🔞 C	lose
Attributes Determining Project Type:		
Institution and Cost	Project Type	
	Project Type: Not Known	
State Debt	Override Project Type: No Override	
State Land		
Special Project Designation	Desvirements of this Design Types	
	Requirements of this Project Type:	
Special Oversight	P6 Schedule Requirement: Not Known	
	SCO Role: Not Known	
Special Oversight: N/A 🔻	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.

Project Cost Estimate Project Type Funds Assigned	Financial Worksheet Contracts F	P6 Link Milestones Closeout Proje
		🖗 Action 👘 🔞 Clo
ributes Determining Project Type:		
nstitution and Cost	Project Type	
	Project Type:	Not Known
State Debt	Override Project Type:	No Override
State Land		
Special Project Designation	Requirements of this Project	Туре:
Special Oversight	P6 Schedule Requirement	
	SCO Role:	Not Known
Oversight Request	Milestones Required:	Not Known
SCO Advisory Oversight Requested		
Administer this project as if the estimated	For help see:	Project Types Table

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

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 🚽 🔞 Clos
ributes Determining Project Type:	
	Project Type
nstitution and Cost	Project Type: A3: Agency Project < \$500K
State Debt	Override Project Type: No Override
State Land	
Special Project Designation	Requirements of this Project Type:
Special Oversight	
Dversight Request	SCO Role: L - Limited SCO Oversight
ronaight roquaat	Milestones Required: P6 Abbreviated, SCO Full
SCO Advisory Oversight Requested	
Administer this project as if the estimated	For help see: Project Types Table
cost were:	Project Type State Construction Manual
	General Statutes: <u>GS 143-129</u> <u>GS 116-31-11</u> <u>GS</u> 116-40.6
	<u>GS 116-37</u> <u>GS 115D-9</u>
	View Summary

## 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.

	: Mrfixi	t71 VIEW: State Construction Logout
🟠 Home 🛛 😕 New 🥄 FCAP 🖧 Design Review 📲 Authorizations	. Ei	Programs 🕞 Funds Change Request 🔋 My Account 🛛 🧐 Help 💡
New Projects		Cost Estimate
System Notices My Favorites Active Design Contracts Active O	Con 🕨	Program rs In Process. My Projects
ТҮРЕ	•	_Project Delete?
	•	_Project (legacy funding only)
0 found 9/21/2015 9:06:36 InterscopePlus 1.3B_TRAIN Copyright © 2015 - State of N	orti	Design Contract State Construction
	Off 🕨	Package
	₽	Construction Contract
	►	Change Order

38

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

Department:	=	▼			Alternate Name:	Like	▼		
	Admin	istrati	on	•	Budget Code:	Like	T		
nstitution/Agency:	=	T			Budget Item:	Like	T		
	St. Co	nstruc	tion	•	NCAS Center:	Like	T		
Fiscal Year:	=	•	2015 - 2016	•	Status:	=	T	Active	▼
Program ID:	Like	•							
Program Name:	Like	T							
Available to Transfer:		V							

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

Department:	= 🔻			Alternate Name:	Like 🔻		
	Administrati	on	•	Budget Code:	Like 🔻		
Institution/Agency:	= 🔻	▼		Budget Item:	Like 🔻		
	St. Construc	ction	•	NCAS Center:	Like 🔻		
Fiscal Year:	= 🔻	2015 - 2016	•	Status:	= •	Active	V
Program ID:	Like 🔻						
Program Name:	Like 🔻						
Available to Transfer:							
		Se	arch Dor	ne Reset Add a New Progr	am		
			Deserves ID	Program Name		Alternate Name	Status
iL No.	Institution	/ Agency	Program ID	Flogrannvanie			
SL No. SELECT St. C	Institution	/ Agency	10676	Museum of Natural Science	Museum of	Natural Science	ACTIVE

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

Program	Program Fundir	ng Projec	ts Assign A	Amounts to Projec	rts / F	rogram Close	eout			
								🔯 Act	tion	Close
Assign Funds	to Projects									
ource	Authorization Title	Current C-I-C	Original C-I-C	Current Allocation (Orig. + Appr.	Pending Changes	Proposed Allocation	Assig	nments		
General Fund	Minor Renovations	41601-4T04	41601-4T04	Changes) \$ 750,000.00	\$ 0.00	\$ 750,000.00	Project ID Project Name	Agency Project Code	Assign	ment Amount
							12282 Enlarge Conference Roon To Assign	1	\$ \$7	<u>16,000.00 Dele</u> /34,000.00
				\$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 Select.

			Action 👷 🔞 Clo
Assign Funds ource	s to Projects Authorization Title Current C-I-C	Original C4-C Current Pending Proposed SELECT PROJECT Control Observation	Assignments
eneral Fund	Minor Renovations 41601-4Ti	Department: Administration Agency: St. Construction Program: 12153 - Minor Renovations Projects: Renovate lobby	Agency Assignment Amount Project Code ice Room \$ 16,000.00 \$734,000.00
Uploads	ment(s) found Comments Program N DATE	Select Cancel	DESCRIPTION

Enter the amount of funds you want to assign and then

Program	Program Fundir	ng Projec	La Maaigir /	Amounts to Projec		Program Clos		Act	tion 👔 🐼 Close
Assign Funds Source		Current C-I-C	Original C-I-C	Current Allocation (Orig. + Appr. Changes)	Pending Changes	Proposed Allocation	Assigr	nments	
General Fund	Minor Renovations	41601-4T04	41601-4T04	\$ 750,000.00	\$ 0.00	\$ 750,000.00	Project ID Project Name 12282 Enlarge Conference Room 12285 Renovate lobby To Assign Add Assignment	Agency Project Code	Assignment Amount  \$ 16,000,00 Dele \$ 120000 Dele \$734,000.00
				\$750,000.00	\$0.00	\$750,000.00			

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.

-	uction - Minor Renovations			
_Project #: 12285 - St. Constr				
Project Cost Estimate	Project Type Funds A	ssigned Financial Worksheet	Contracts P6 Link	Milestones Closeout Project
				Olose
Project Funds Assignment Su	ummary	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	<b>A</b>	
Minor Renovations	<u>41601-4T04</u>	<u>41601-4T04</u>	• •	
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 Renovat	tions				
-	St. Construction - Renovate lobb					
Project Cost E	stimate Project Type	Funds Assigned	Financial Worl	ksheet Contract	s P6 Link Milestor	nes Closeout Project
Estimated vs Comm	nitted Contingency	Expenditures - Desig	n Expenditure	es - Construction	Expenditures - Other	
						🚫 Close
Worksheet Summary	,					Save
	Assigned Funds:	\$120,000	.00	Assigned Funds:	\$120,000.00	
	Total Estimated Cost:	\$118,000	.00	Total Committed:	\$0.00	
	Estimated Surplus (Need):	\$2,000	.00 A	- vailable to Commit:	\$120,000.00	
Worksheet Detail					Assian Funds	
		Committed				
	Estimated Cost	riginal Contracts	Revised Contracts	Expended		
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		
Total	\$118,000.00	\$0.00	\$0.00	\$0.00		

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.

Dronram # 1	11531 - NC State University - [41224-311] -	Reynolds Coliseum R	Repovations					
	912 - NC State University - Reynolds Colis							
			Financial Worksheet Contracts	P6 Link Primavera Link	Closeout Project Evaluations			
	s Committed Contingency Exp							
Latinuteu va	Committee / Committency / Exp	enditaries - Design	p construction p	Experiatorea - Conter				<b>O</b> 21
								🚫 Close
								Save
Worksheet Sur	mmary							
	Assigned Funds:	\$34,243,560.00	Assigned Funds:	\$34,243,560.00				
	Total Estimated Cost:	\$35,311,060.00	Total Committed:	\$33,765,263.55				
	Estimated Surplus (Need):	(\$1,067,500.00)	Available to Commit:	\$478,296.45				
				Assign Funds				
Worksheet Det	iani							
	Enter Category Estimates							
	Enter Total Estimates							
				Committed				
			Estimated Cost	Original Contracts	Revised Contracts	Expended		
Design Fee \$:		S	3,216,523.00	\$ 2,717,849.00	\$ 3,894,473.00	\$ 0.00		
Construction \$:		S	23,473,863.00	\$ 23,734,689.00	\$ 27,501,362.00	\$ 0.00		
Contingency \$:		S	3,500,000.00					
Other \$:		s	5,120,674.00	\$ 2,369,428.55	\$ 2,369,428.55	\$ 0.00		
Total			\$35,311,060.00	\$28,821,966.55	\$33,765,263.55	\$0.00		
Uploads	Comments Project Managers							
Delete?	DATE TIPE		FILE NAME		DESCRIPTION		UPLOADED BY	
veele:			FILE INVICE		DEDCK P10/H		UPC/RED DI	
0 found								Upload Files
	19 PM				t © 2016 - State of North Carolina : Departme			Report a Problem

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.

Program #: 11531 - NC State University - [41224-311] -							
		Renovations					
_Project #: 9912 - NC State University - Reynolds Colis							
Project Cost Estimate Project Type Fu				k Closeout Project Evaluations			
Estimated vs Committee Contingency Exp	penditures - Design	Expenditures - Construction	Expenditures - Other				
							🚫 Close
							Save
Worksheet Summary							
Assigned Funds:	\$34,243,560.00	Assigned Funds:	\$34,243,560.00				
Total Estimated Cost:	\$35,311,060.00	Total Committed:	\$33,765,263.55				
Estimated Surplus (Need):	(\$1,067,500.00)	Available to Commit:	\$478,296,45				
			Assign Funds				
Worksheet Detail							
Enter Category Estimates							
Enter Total Estimates							
			Committed				
		Estimated Cost	Original Contracts	Revised Contracts	Expended		
Design Fee \$:	s	3,216,523.00	\$ 2,717,849.00	\$ 3,894,473.00	\$ 0.00		
	S	23,473,863.00	\$ 2,717,849.00 \$ 23,734,689.00	\$ 3,894,473.00 \$ 27,501,362.00	\$ 0.00 \$ 0.00		
Construction \$: Contingency \$:	S S	23,473,863.00 3,500,000.00					
Construction \$: Contingency \$: Other \$:	S	23,473,863.00 3,500,000.00 5,120,674.00	\$ 23,734,689.00 \$ 2,369,428.55	\$ 27,501,362.00 \$ 2,369,428.55	\$ 0.00 \$ 0.00		
Design Fee S: Construction S: Contingency S: Ober S: Total	S S	23,473,863.00 3,500,000.00	\$ 23,734,689.00	\$ 27,501,362.00	\$ 0.00		
Construction \$: Contingency \$: Other \$:	S S	23,473,863.00 3,500,000.00 5,120,674.00	\$ 23,734,689.00 \$ 2,369,428.55	\$ 27,501,362.00 \$ 2,369,428.55	\$ 0.00 \$ 0.00		
Construction \$: Contingency \$: Other \$: Total	S S	23,473,863.00 3,500,000.00 5,120,674.00	\$ 23,734,689.00 \$ 2,369,428.55	\$ 27,501,362.00 \$ 2,369,428.55	\$ 0.00 \$ 0.00	uncetto (v	
Construction S: Contingency S: Other S: Total Uploads Comments Project Managers	S S	23,473,863.00 3,600,000,00 5,120,874.00 \$35,311,060.00	\$ 23,734,689.00 \$ 2,369,428.55	\$ 27,501,382,00 \$ 2,389,428,35 \$ 33,765,263,55	\$ 0.00 \$ 0.00	(A)XED IF	
Construction \$: Contingency \$: Other 5: Total Uploads Comments Project Managers	S S	23,473,863.00 3,600,000,00 5,120,874.00 \$35,311,060.00	\$ 23,734,689.00 \$ 2,369,428.55	\$ 27,501,382,00 \$ 2,389,428,35 \$ 33,765,263,55	\$ 0.00 \$ 0.00	unuello fr	Upload Files

Refer to sections on <u>creating design contracts</u>, <u>creating construction contracts</u>, and <u>change orders</u> 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.

_Project #: 9912 - NC State University - Reynolds Coli							
Project Cost Estimate Project Type F				k // Closeout Project // Evaluatio	ns		
Estimated vs Committee Contingency Ex	penditures - Design	Expenditures - Construction	Expenditures - Other				
							🚫 Clos
							Save
							Save
Vorksheet Summary							
Assigned Funds:	\$34,243,560.00	Assigned Funds:	\$34,243,560.00				
Total Estimated Cost:	\$35,311,060.00	Total Committed:	\$33,765,263.55				
Estimated Surplus (Need):	(\$1,067,500.00)	Available to Commit:	\$478,296.45				
			Assign Funds				
Vorksheet Detail							
Torksheet Detail							
<ul> <li>Enter Category Estimates</li> </ul>							
<ul> <li>Enter Category Estimates</li> <li>Enter Total Estimates</li> </ul>							
			Committed		Emodel		
C Enter Total Estimates		Estimated Cost	Original Contracts	Revised Contracts	Expended		
Enter Total Estimates lesign Fee 5:	\$	3,216,523.00	Original Contracts S 2,717,849.00	\$ 3,894,473.00	\$ 0.00		
Enter Total Estimates Iesign Fee S: Ionstruction S:	s		Original Contracts				
Enter Total Estimates		3,216,523.00 23,473,863.00	Original Contracts \$ 2,717,849.00 \$ 23,734,689.00	\$ 3,894,473.00 \$ 27,501,382.00	\$ 0.00 \$ 0.00		
Enter Total Estimates	s	3,216,523.00 23,473,863.00 5,120,674.00	Original Contracts \$ 2,717,849.00 \$ 23,734,889.00 \$ 2,369,428.55	\$ 3,894,473.00 \$ 27,501,382.00 \$ 2,369,428.55	\$ 0.00 \$ 0.00 \$ 0.00		
Enter Total Estimates	s	3,216,523.00 23,473,863.00	Original Contracts \$ 2,717,849.00 \$ 23,734,689.00	\$ 3,894,473.00 \$ 27,501,382.00	\$ 0.00 \$ 0.00		
Enter Total Estimates	s	3,216,523.00 23,473,863.00 5,120,674.00	Original Contracts \$ 2,717,849.00 \$ 23,734,889.00 \$ 2,369,428.55	\$ 3,894,473.00 \$ 27,501,382.00 \$ 2,369,428.55	\$ 0.00 \$ 0.00 \$ 0.00		
Enter Total Estimates esign Fee 5: construction 5: contingency 5: thea 5: cotal cota	s	3,216,523.00 23,473,863.00 5,120,674.00	Original Contracts \$ 2,717,849.00 \$ 23,734,889.00 \$ 2,369,428.55	\$ 3,894,473.00 \$ 27,501,382.00 \$ 2,369,428.55	\$ 0.00 \$ 0.00 \$ 0.00	unuseds av	
Enter Tobli Estimates esign Free 5 onstruction 5 onstruction 5 bet 5 50 Uppoads Comments Project Managers	s	3.216.523.00 23.473.863.00 5.120.674.00 \$35.311.000.00	Original Contracts \$ 2,717,849.00 \$ 23,734,889.00 \$ 2,369,428.55	\$ 3,84,473.00 \$ 27,501,982.00 \$ 2,309,428.55 \$ 33,765,263.55	\$ 0.00 \$ 0.00 \$ 0.00	unureite av	
© Enter Total Extinutes	s	3.216.523.00 23.473.863.00 5.120.674.00 \$35.311.000.00	Original Contracts \$ 2,717,849.00 \$ 23,734,889.00 \$ 2,369,428.55	\$ 3,84,473.00 \$ 27,501,982.00 \$ 2,309,428.55 \$ 33,765,263.55	\$ 0.00 \$ 0.00 \$ 0.00	 URUNDE IN	Uplood F #

Refer to the section on entering <u>Other Commitments</u> 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.

	liseum Renovations						
Project Cost Estimate Project Type I	Funds Assigned	Financial Worksheet Contracts	P6 Link Primavera Link	Closeout Project Evaluations			
Estimated vs Committee Contingency	xpenditures - Design	Expenditures - Construction	Expenditures - Other				
							🚫 Clos
							Save
Vorksheet Summary Assigned Funds:	\$34,243,560.00	Assigned Funds:	\$34,243,560.00				
Total Estimated Cost:	\$35.311.060.00	Total Committed:	\$33,765,263.55				
Estimated Surplus (Need):	(\$1.067.500.00)	Available to Commit:	\$478,296,45				
Estimated Surplus (Need):	(\$1,057,500.00)	Available to Commit:					
			Assign Funds				
/orksheet Detail							
Enter Category Estimates							
Enter Category Estimates							
			Committed				
C Enter Total Estimates		Estimated Cost	Original Contracts	Revised Contracts	Expended		
Enter Total Estimates esign Fee 5:	\$	Estimated Cost 3.216.523.00	Original Contracts \$ 2,717,849.00	\$ 3,894,473.00	\$ 0.00		
Enter Total Estimates esign Fee 5: onstruction 5:	s	3,216,523.00	Original Contracts				
Enter Total Estimates		3,216,523.00 3,500,000.00	Original Contracts \$ 2,717,849.00 \$ 23,734,889.00	\$ 3,894,473.00 \$ 27,501,362.00	\$ 0.00 \$ 0.00		
	\$ \$	3,216,523.00	Original Contracts \$ 2,717,849.00	\$ 3,894,473.00	\$ 0.00		
Enter Total Estimates Design Fee 5: Construction 5: Contingency 5: Design Fee 7: Otal	\$ \$	3,216,523.00 3,500,000.00 5,120,574.00	Original Contracts \$ 2,717,849.00 \$ 23,734,889.00 \$ 2,369,428.55	\$ 3,894,473.00 \$ 27,501,382.00 \$ 2,368,428.55	\$ 0.00 \$ 0.00 \$ 0.00		
Enter Total Estimates esign File 5: ontinuiton 5: ontinging 5: her 5: stal Uploads Comments Project Managers	\$ \$	3.216.523.00 3.500,000.00 5.120.574.00 \$35,311,060.00	Original Contracts \$ 2,717,849.00 \$ 23,734,889.00 \$ 2,369,428.55	\$ 3,894,473,00 \$ 27,501,382,00 \$ 2,389,429,55 \$33,765,263,55	\$ 0.00 \$ 0.00 \$ 0.00		
Enter Total Estimates stiph Fee 5 ontruction 5: ontrugency 5: per	\$ \$	3,216,523.00 3,500,000.00 5,120,574.00	Original Contracts \$ 2,717,849.00 \$ 23,734,889.00 \$ 2,369,428.55	\$ 3,894,473.00 \$ 27,501,382.00 \$ 2,368,428.55	\$ 0.00 \$ 0.00 \$ 0.00	UKUKE IY	
© Enter Total Estimates esign Fae S. construction S. entrogency S. ter S. total Uploads Comments Project Managers	\$ \$	3.216.523.00 3.500,000.00 5.120.574.00 \$35,311,060.00	Original Contracts \$ 2,717,849.00 \$ 23,734,889.00 \$ 2,369,428.55	\$ 3,894,473,00 \$ 27,501,382,00 \$ 2,389,429,55 \$33,765,263,55	\$ 0.00 \$ 0.00 \$ 0.00	utundo ar	Uplood Fil

# 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.'

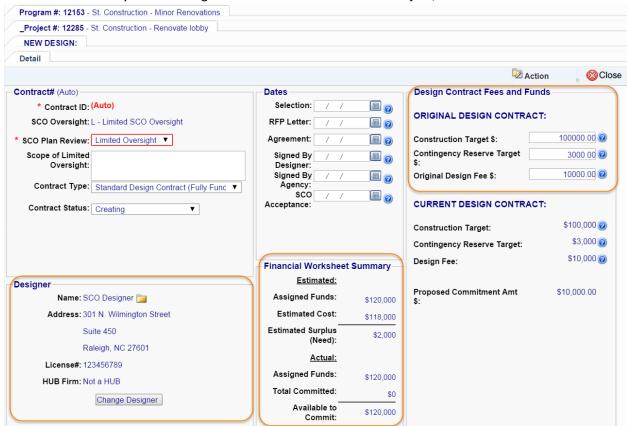
_Project #: 12285 - St. Constru	uction - Renovate lobby				
Project Cost Estimate	Project Type Funds Assigne	ed Financial Worksheet	Contracts P6	Link Milestones	Closeout Project
					🚫 Close
SCO ID#	FIRM	STATUS	PHASE	TYPE	OVERSIGHT CO

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

Program #: 1	2153 - St. Construction - Minor	Renovations		
_Project #: 12	2285 - St. Construction - Renov	ate lobby		
NEW DESIG	N:			
Detail				
				Action 🛛 😡 Close
Contract# (Au	to)	Dates	Design Cor	ntract Fees and Funds
* Contr SCO Ove	Select Designer			
* SCO Plan R	License #: Like ▼		Voice#: Like ▼	(999-999-
Scope of L Ove	Name: Like V SCO		Fax#: Like V	(999-999-
	Email: Like   Status: =   Activ	e V	9999) Website URL: Like ▼	0000.00
Contract	Contact Person: Like ▼			
Contract \$	Line 1: Like		Year = ▼ Established:	
	Line 2: Like V		Parent: Like V	100,000 @
	City: Like ▼ State: Like ▼		Parent Branch: = V - Se	\$3,000 @
	Zip: Like V		Former Name: Like V	\$10,000 @
Designer	County: = V Se	lect 🔻	ID: Like	
Na				),000.00
Addr			Last Update: > V	
		Search	Done Reset	
Licens	se#:		Actual:	
HUB Fi	rm.	Assigned	d Funds: \$120,000	

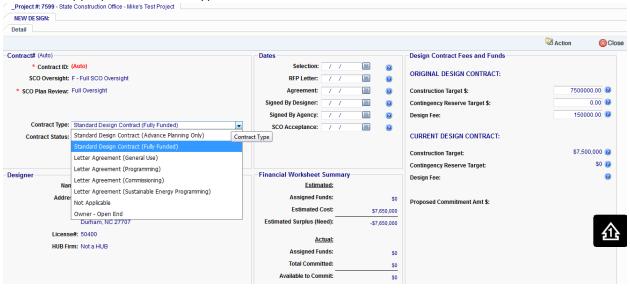
_Project #: 1	Se	elect Des	signer					
NEW DESIG			<b>.</b>					
Detail	Lie	tike	▼	Voice#: Li 999		(999	9-999-	
	N	ame: Like	▼ SCO	Fax#:		(999	9-999-	
Contract# (A	E	mail: Like	▼	99		(000		
		tatus: =	▼ Active ▼	Website URL: Li	ke 🔻			
* Contr	Co	ntact rson: Like	<b>T</b>					
SCO Ove		ine 1: Like		Year = Established:	•			
SCO Plan R		ine 1. Like	▼	Parent:	ke 🔻			0000.00
Scope of L	-	City: Like	▼		ke 🔻			3000.00
Ove		State: Like	•	Parent Branch: =	<ul> <li>Select</li> </ul>	•	_	
C		Zip: Like	▼	Former Name: Li				00.000
Contract	Co	unty: =	▼ Select ▼					
Contract \$				ID: Li Last Update: >	ke ▼			100,000 (
Contract \$				Last Update: >				100,000 ( \$3,000 ( \$10,000 (
		ID				STATE	STATUS	\$3,000 \$10,000
Designer		ID	DESIGNER	Last Update: >	<b>v</b>		STATUS	\$3,000 \$10,000
DesignerNa			Search	Done Reset	COUNTY	STATE		\$3,000
Designer	10	ID 951952316	DESIGNER	Done Reset CITY EASLEY	COUNTY OUT OF STATE	STATE SC	Active	\$3,000
DesignerNa	10 11	ID 951952316 951952012	DESIGNER HARRISCOST, LLC Michael B, Wescott	Done Reset CITY EASLEY High Point	COUNTY OUT OF STATE GUILFORD	STATE SC NC	Active Active	\$3,000
Designer Na	10 11 12	ID 951952316 951952012 951951696	DESIGNER HARRISCOST, LLC Michael B, Wescott NESCO, Inc.	Done Reset CITY EASLEY High Point Greenville	COUNTY OUT OF STATE GUILFORD PITT	STATE SC NC NC	Active Active Active	\$3,000
Designer N≀ Addr	10 11 12 13	ID 951952316 951952012 951951696 951952491	DESIGNER HARRISCOST, LLC Michael B. Wescott NESCO, Inc. NORESCO	Done Reset EASLEY High Point Greenville Cary	COUNTY OUT OF STATE GUILFORD PITT WAKE	STATE SC NC NC NC	Active Active Active Active	\$3,000
lesigner N≀ Addr Licen	10 11 12 13 14	ID 951952316 951952012 951951696 951952491 951951393 951952348	DESIGNER HARRISCOST, LLC Michael B. Wescott NESCO, Inc. NORESCO Prescott Environmental Associates	Done Reset EASLEY High Point Greenville Cary	COUNTY OUT OF STATE GUILFORD PITT WAKE ORANGE	STATE SC NC NC NC NC	Active Active Active Active Active	\$3,000
lesigner N≀ Addr	10 11 12 13 14 15	ID 951952316 951952012 951951696 951952491 951951393 951952348	Search     Designer       HARRISCOST, LLC       Michael B. Wescott       NESCO, Inc.       NORESCO       Prescott Environmental Associates       SCO - Consulting Services Section	Done Reset EASLEY High Point Greenville Cary Chapel Hill	COUNTY OUT OF STATE GUILFORD PITT WAKE ORANGE UNKNOWN	STATE SC NC NC NC NC NC NC NC	Active Active Active Active Active Active	\$3,000
Designer Na Addr Licen	10 11 12 13 14 15 16	ID 951952316 951952012 951951696 951952491 951951393 951952348 951952590	Search     D       DESIGNER       HARRISCOST, LLC       Michael B. Wescott       NESCO, Inc.       NORESCO       Prescott Environmental Associates       SCO - Consulting Services Section       SCO Designer	Last Update: > Cone Reset CITY EASLEY High Point Greenville Cary Chapel Hill Raleigh	COUNTY OUT OF STATE GUILFORD PITT WAKE ORANGE UNKNOWN WAKE	STATE SC NC NC NC NC NC NC NC	Active Active Active Active Active Active Active	\$3,000

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.



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*.



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.

		COMMENTARIA COMMENT			
Program #: 13844 - State Construction Offi	ce - Test				
_Project #: 15996 - State Construction Offic	e - Test				
NEW DESIGN:					
Detail					
					🖾 Action 💡 🔞 Close
Contract# (Auto)		Dates		Design Contract Fees and Funds	
* Contract ID:	(Auto)	Selection: / / B	0		
SCO Oversight	L - Limited SCO Oversight	RFP Letter:	0	ORIGINAL DESIGN CONTRACT:	
* SCO Plan Review	Limited Oversight •	Agreement: / / 🗐	0	Construction Target \$:	1.00 😣
Scope of Limited Oversight		Signed By Designer:	0	Contingency Reserve Target \$:	1.00 🙆
		Signed By Agency:	0	Design Fee:	1.00 0
Contract Type:	Standard Design Contract (Fully Funded)	SCO Acceptance:	0		
Contract Status	Standard Design Contract (Advance Planning Only)			CURRENT DESIGN CONTRACT:	
	Standard Design Contract (Fully Funded) Letter Agreement (General Use)				S1 🙆
	Letter Agreement (Programming)			Construction Target:	
	Letter Agreement (Commissioning) Letter Agreement (Sustainable Energy Programming)			Contingency Reserve Target:	\$1 🔞
	Not Applicable	Financial Worksheet Summary		Design Fee:	0
Designer	Owner - Open End	Estimated:			
Name: SC	O Designer 油	Assigned Funds:	\$0	Proposed Commitment Amt \$:	
Address: 30	N. Wilmington Street	Estimated Cost:	\$4		
Su	te 450	Estimated Surplus (Need):	-\$4		
Ra	eigh, NC 27601				
License#: 12	1456789	<u>Actual:</u>			
HUB Firm: No	a HUB	Assigned Funds:	\$0		
	Change Designer	Total Committed:	\$0		
	Change Designer	Available to Commit:	\$0		
		Worksheet Detail			
9/19/2016 3:45:03 PM	[pismanaDis 3.4.904	60824 Copyright © 2016 - State of North Carolina : Department of A	dministration - Ptoto	Construction Office	Report a Problem
artaizo to 3.43.03 f m	literscoperius 2.1_201	oooze oopynyntie zoro - oane of Noter Galolina : Department of A	ummau en/UTL . Oldite	CONTRACTORING CONTRACTORING	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				
			🔽 A	ction 🛛 🕺 🔇 Cl
Contract# (Auto)	Dates		Design Contract Fees ar	d Funds
* Contract ID: (Auto)	Selection: / /	E 👔	ORIGINAL DESIGN CON	TRACT
SCO R - Review Only	RFP Letter: / /	iii 👔	ORIGINAL DESIGN CON	IRACI:
Oversight: * SCO Plan Code Only	Agreement: / /		Construction Target \$:	1,542,043 🥝
Review:	Signed By / / Designer:		Contingency Reserve Target \$:	46,261 🥝
	Signed By / / Agency:	8	Original Design Fee \$:	154,204 🥝
Contract Type: Standard Design Contract (Advance P V	SCO Acceptance:	0	CURRENT DESIGN CON	TRACT:
Contract Creating   Status:			Construction Target:	\$1,542,043 🔞
			Contingency Reserve Target:	\$46,261 @
	Financial Worksheet Summary		Design Fee:	\$154,204 🤕
Designer	Estimated:			
Name: SCO Designer 🚞 Address: 301 N. Wilmington Street	Assigned Funds:	\$150,000	Limit Design Fee Commitment to the following amount:	110,000.00
Suite 450	Estimated Cost: \$	1,790,000	Proposed Commitment	\$110.000
Raleigh, NC 27601	Estimated Surplus (Need):	1,640,000	Amt \$:	
License#: 123456789	Actual:			
HUB Firm: Not a HUB	Assigned Funds:	\$150,000		
Change Designer	Total Committed:	\$0		
	Available to Commit:	\$150,000		
	Worksheet Detai	1		

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

You can time.

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



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

Clic	k: ACTION->SAVE to save	e this change		
Program #: 12153 - St. Construction - Minor Renovations				
_Project #: 12285 - St. Construction - Renovate lobby				
NEW DESIGN:				
Detail				
			🐼 Act	ion 🛛 🔞 Clos
Contract# (Auto)	Dates		Design Contract Fees and Fur	nds
* Contract ID: (Auto)	Selection: 01/13/2	015 🔳 👩		
SCO Oversight: L - Limited SCO Oversight	RFP Letter: 01/20/2	_	ORIGINAL DESIGN CONTRAC	т:
* SCO Plan Review: Limited Oversight ▼	Agreement: 01/29/2	015 🗐 👩	Construction Target \$:	100000.00 🧭
Scope of Limited Design Review Only	Signed By / /		Contingency Reserve Target	3000.00
Oversight:	Designer:		\$:	10000.00
Contract Type: Standard Design Contract (Fully Fund V	Signed By / / Agency:		Original Design Fee \$:	10000.00
	SCO / /	۲	CURRENT DESIGN CONTRAC	-
Contract Status: Created - Not Signed	Acceptance:		CURRENT DESIGN CONTRAC	
			Construction Target:	\$100,000 🥑
			Contingency Reserve Target:	\$3,000 🔞
	Financial Markabasé	<b>C</b>	Design Fee:	\$10,000 🧑
	Financial Worksheet Estimated:	Summary	-	
Designer			Proposed Commitment Amt	\$10,000,00
Name: SCO Designer 🚞	Assigned Funds:	\$120,000	\$:	
Address: 301 N. Wilmington Street	Estimated Cost:	\$118,000		
Suite 450	Estimated Surplus (Need):	\$2,000		
Raleigh, NC 27601				
License#: 123456789	<u>Actual:</u>			
HUB Firm: Not a HUB	Assigned Funds:	\$120,000		
	Total Committed:	\$0		

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 su	iccessfully.		
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 Consult	ants Packa	ages	
r			🔽 Action	Clos
Contract# 1	Dates		Design Contract Fees and Funds	
* Contract ID: 16-12285-01	Selection: 20	15-01-13 👩		
SCO Oversight: L - Limited SCO Oversight	RFP Letter: 20	15-01-20 👩	ORIGINAL DESIGN CONTRACT:	
* SCO Plan Review: Limited Oversight V	Agreement: 20	15-01-29 👩	Construction Target \$:	100,000 🧑
Scope of Limited Design Review Only	Signed By 20	15-02-10 👩	Contingency Reserve Target \$:	3,000 🧭
Oversight:	Designer: Signed By 20	15-02-12	Original Design Fee \$:	10,000 🔞
Contract Type: Standard Design Contract (Fully Fun	d V Agency:			
Contract Status	SCO Acceptance: 20	15-02-13 🔞	CURRENT DESIGN CONTRACT:	
Contract Status Active			Construction Townsh	\$100,000 @
			Construction Target:	\$3,000 @
			Contingency Reserve Target:	
	- Financial Workshee	t Summary	Design Fee:	\$10,000
Designer	Estimated:			
Name: SCO Designer	Assigned Funds:	\$120.000	Actual Commitment Amt \$:	\$10,000.00
Address: 301 N. Wilmington Street	Estimated Cost:	\$118.000	1	
Suite 450	Estimated Surplus	\$2.000	/	
Raleigh, NC 27601	(Need):	\$2,000		
License#: 123456789	Actual:	/		
HUB Firm: Not a HUB	Assigned Funds:	\$120,00		
	Total Committed:	\$10,000		
	Available to	\$110,000		
	Commit:			

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	e Construction Off	ice - Test																
_Project #: 15996 - State	Construction Off	ce - Test																
NEW DE SIGN:																		
Detail																		
																C	Action	Close
Contract# (Auto)						Dates						Design Con	tract Fees	and Funds				
	* Contract ID	(Auto)						Selection	n: / /	1	2							
	SCO Oversight	L - Limited SCO Ov	ersight					RFP Letter				ORIGINAL	DESIGN C	ONTRACT:				
	Selec	t Designer																0
Scope of L	imite	-																
		License #								Voice#:		•		99-999-9999)				
	Co			in	 ]						Like		(9	99-999-9999)				
	Cont			in-house						Website URL:								
		Statu: Contact Persor		Active •					Year	Established:		•						0
			Like •							Parent:		•						0
			Like							arent Branch: ormer Name:		<ul> <li>Select</li> </ul>	- *					0
Designer			Like							ormer Name:	Like	•						
Designer			E Like							ID:	Like	•						
			X Like							Last Update:		• / /						
		County		Select														
	Lie																	
	ни						Search	Done	Reset									
		Chang	e Designer				Availa	able to Com	mit:		\$0							
								Worksh	eet Detail									

	Contract mode is: Standard Contract		
Program #: 13844 - State Construction Office - Test			
Project #: 15996 - State Construction Office - Test			
NEW DE SIGN:			
Detail			
			Action OClose
Contract# (Auto)	Dates	Design Contract Fees and Funds	
* Contract ID: (Auto)	Selection: 01/01/2016		
SCO Oversight: L - Limited SCO Oversight	RFP Letter: 1/ / 🛄 😨		
* SCO Plan Review: Limited Oversight *	Agreement: / / 🗐 🥹	Construction Target \$:	0
Scope of Limited Oversight:	Signed By Designer: / / 🔟 😰	Contingency Reserve Target \$:	0
	Signed By Agency: / / 🔚 😢	Design Fee:	•
Contract Type: Standard Design Contract (Fully Funded)	SCO Acceptance: / / 🔟 🔞		
Contract Status: Creating		CURRENT DESIGN CONTRACT:	
		Construction Target:	
		Contingency Reserve Target:	•
	Financial Worksheet Summary	Design Fee:	
Designer	Estimated:		
Name: In-House Design by Department of Administration - Facility Management	Assigned Funds:	S0 Proposed Commitment Amt \$:	
Address:	Estimated Cost:	54	
	Estimated Surplus (Need):	-\$4	
, NC	Actual:		
License#:	Assigned Funds:	50	
HUB Firm: Unknown	Total Committed:	s0 50	
Change Designer	Available to Commit:		
	contraction of a definition of the second se	\$0	
	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'.

Program #: 12153 - St. Cons _Project #: 12285 - St. Const	ruction - Minor Renovations				
Design #: 16-12285-01 - S					
Detail Contract Scope a	nd Fees Breakdowns Amendments	Consultants Packages			
					(2) Close
#	DESCRIPTION	\$DESIGN FEE	\$CONSTRUCTION	\$CONTINGENCY	AMENDMENT DATE S
4					

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

Action

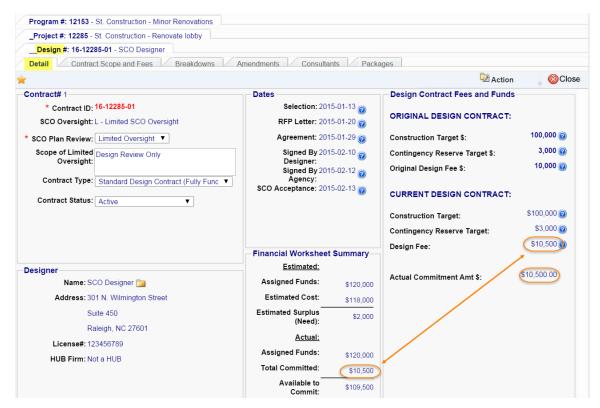
amendment is required. Enter the appropriate dates and

		Amendment added successfu	illy.		
Program #: 12153 - St. Construction - M	linor Renovations				
_Project #: 12285 - St. Construction - Re	enovate lobby				
Design #: 16-12285-01 - SCO Design	er				
Amendment #1					
Amendment					
				🖗 Action	Close
Current Design Contract		Financial Worksheet Summary		Amendment Fees and Fund	s
Construction Target:	\$100,000	Estimated:		Change to Construction	
Construction Target:	\$100,000	Assigned Funds:	\$120,000	Target\$: Change to Contingency	0
Current Design Fee:	\$10,500	Estimated Cost:	\$118,000	Target\$: Change to Design Fee \$:	0
current besign ree.	\$10,000	Estimated Surplus (Need):	\$2,000	Change to Design Fee \$:	500
		Actual:			
		Assigned Funds:	\$120,000		
		Total Committed:	\$10,500		
		Available to Commit:	\$109,500		
		Worksheet Detail			
Amendment Dates		Description			
Amendment Date:         03/09/20           Signed By Designer:         03/09/20           Signed By Agency:         03/10/20           SCO Receipt:         03/11/20	15	Add 3D rendering of new lobby			
Generate Amendment (MS Wo	rd)				

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

F	rogram #: 12153 - St. Construction - Minor Renovations					
1	Project #: 12285 - St. Construction - Renovate lobby					
	_Design #: 16-12285-01 - SCO Designer					
	etail Contract Scope and Fees Breakdowns Amendments Consulta	nts Packages	;			
					6	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	:
						*
						F
1 fou	nd			A	dd Amendment	Export

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



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

Project #: 12285 - St.	. Construction - Renovate lob	by				
Project Cost Esti	imate Project Type	Funds Assigned	Financial W	orksheet Contracts	P6 Link Milestones	Closeout Project
Estimated vs Commit	ted Contingency	Expenditures - Des	sign Expendit	tures - Construction E	kpenditures - Other	
						🚫 Close
Worksheet Summary						Save
	Assigned Funds	\$120,00	00.00	Assigned Funds:	\$120,000.00	
	Total Estimated Cost	<b>t:</b> \$118,00	00.00	Total Committed:	\$10,500.00	
	Estimated Surplus (Need)	): \$2,00	00.00	Available to Commit:	\$109,500.00	
					Assign Funds	
Worksheet Detail						
		Committed Original Contracts	Revised Contracts	Expended		
	Estimated Cost		Revised Contracts	Enponeou		
Design Fee \$:	Estimated Cost (	\$ 10,000.00	\$ 10,500.00	\$ 0.00		
		-				
Construction \$:	\$ 10,000.00	\$ 10,000.00	\$ 10,500.00	\$ 0.00		
Design Fee \$: Construction \$: Contingency \$: Other \$:	\$ <u>10,000.00</u> \$ <u>100,000.00</u>	\$ 10,000.00	\$ 10,500.00	\$ 0.00		

# 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.

Program #: 12153 - St. Construction - Minor Renovations					
_Project #: 12285 - St. Construction - Renovate lobby					
Design #: 16-12285-01 - SCO Designer					
Detail Contract Scope and Fees Breakdowns Amend	dments Consultants P	ackages			
					🚫 Close
SCO ID# PACKAGE_TITLE	STATUS	PROJECT MONITOR	% COMPLETE	TOTAL CONTRACT\$	PLAN LOCATION
16-12285-01A Renovate lobby	Under Design	Unassigned			
1 found				New Package	Export

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

Program #: 12153 - St. Construction - Minor Renovations	
_Project #: 12285 - St. Construction - Renovate lobby	
Design #: 16-12285-01 - SCO Designer	
Package: 16-12285-01A - Renovate lobby	
Electrical Certificates Construction Closeout	
	n Reviews Construction Contracts Monthly Progress Weekly Inspection
<u>.</u>	Action 🚫 Close
Pashawa A	
Package A	Bidding/Construction Contracts
Oversight: L - Limited SCO Oversight	Approved for Forma Bid: Contracts
* Title: Renovate lobby	Approved for August Type Single Prime
* Type: Undetermined	Approved for Award Type: Single Prime
* Status: Under Design ▼	Construction Administration Fees / Funds
Status	
Reason:	* Project Unassigned V Liquidated
Square 0 Footage:	Monitor: Damages 0.00
Plan	Monthly (/day): Conference: CD Cost
Location:	Conference: CD Cost 0.00 Percent <sub>0% (2)</sub> Percent
	Complete: 0.00
* County: UNKNOWN	Total Change \$0.00
Renovate lobby	Final Punchlist: Active
*	Construction \$0.00
Description:	Description Archive Information
Designer	Archive / /
Rep:	Date:
	Archive Box#:
	Box#: Micro
	Film#:

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

Program #: 12153 - St. Cons	truction - Minor Renovations						
_Project #: 12285 - St. Const	truction - Renovate lobby						
Design #: 16-12285-01 - S	CO Designer						
	Renovate lobby  ionstruction Closeout anned and Actual Plan Reviews	Construction Contracts	Ionthly Progress	Weekly Inspe	ection	⊗Clos	se
CONTRACT#	CONTRACTOR	TYPE	STATUS	\$ORIGINAL	\$CURRENT	ORIG DAYS	÷
•						Þ	
0 found					New Const	ruction Contra	

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

		nstruction - Renovate lobby					
Design #:	16-12285-01	- SCO Designer					
Package	: 16-12285-01	A - Renovate lobby					
NEW CONS		CONTRACT:					
Constructi							
	Select	Contractor					Clos
Contract S		Name: SCO C		Email:			
For		peole		HUB Certified?	Select V		
Contra * Contr	Contact	Person:		Address:			
Stat		City:		State:			
* Contr		Zip:		Phone:	(9	999-999-9999)	
Tv							
		Comme	Dens Denst Net	Found Cutorit D		-	
Negotiatic		Search	Done Reset Not	Found - Submit R	equest	-	
		Search Company	Done Reset Not	Found - Submit R	equest	Email	
Negotiatic Bid Numb Final Char	<u>SELECT</u>					Email	
Negotiatic Bid Numb Final Char Or	SELECT SELECT	Company	City, State	Voice		Email	
Negotiatic Bid Numb Final Char		Company WYSCO CONTRACTORS, INC.	City, State MOREHEAD CITY	Voice 252-726-8437	Contact Juan Francisco	Email mike.gioielli@doa.nc.gov	
Negotiatic Bid Numb Final Char Or	SELECT	Company <u>WYSCO CONTRACTORS, INC.</u> Juan Francisco Cuellar	City, State MOREHEAD CITY Mooresville	Voice 252-726-8437 980-721-8257 919-807-4100	Contact Juan Francisco		
Negotiatic Bid Numb Final Char Or	SELECT SELECT	Company <u>WYSCO CONTRACTORS, INC.</u> <u>Juan Francisco Cuellar</u> <u>SCO Contractor</u>	City, State MOREHEAD CITY Mooresville Raleigh	Voice 252-726-8437 980-721-8257 919-807-4100	Contact Juan Francisco Mike Gioielli - Young, Charlene	mike.gioielli@doa.nc.gov	
Negotiatic Bid Numb Final Char Or	SELECT SELECT REQUEST	Company <u>WYSCO CONTRACTORS, INC.</u> <u>Juan Francisco Cuellar</u> <u>SCO Contractor</u> <u>Easco Construction Co Inc</u>	City, State MOREHEAD CITY Mooresville Raleigh Charlotte, NC	Voice 252-726-8437 980-721-8257 919-807-4100 (704)780-2378	Contact Juan Francisco Mike Gioielli - Young, Charlene Frank, Larry	mike.gioielli@doa.nc.gov DOA.MIS.Developers@doa	
Negotiatic Bid Numb Final Char Or Approv	SELECT SELECT REQUEST REQUEST	Company <u>WYSCO CONTRACTORS, INC.</u> Juan Francisco Cuellar <u>SCO Contractor</u> <u>Easco Construction Co Inc</u> <u>Lansco Colors</u>	City, State MOREHEAD CITY Mooresville Raleigh Charlotte, NC Corpus Christi, TX	Voice 252-726-8437 980-721-8257 919-807-4100 (704)780-2378 (361)985-9696	Contact Juan Francisco Mike Gioielli - Young, Charlene Frank, Larry Clark, Lisa	mike.gioielli@doa.nc.gov DOA.MIS.Developers@doa DOA.MIS.Developers@doa	
Negotiatic Bid Numb Final Char Or	SELECT SELECT REQUEST REQUEST REQUEST	Company WYSCO CONTRACTORS, INC. Juan Francisco Cuellar SCO Contractor Easco Construction Co Inc Lansco Colors Lisco Cable INC	City, State MOREHEAD CITY Mooresville Raleigh Charlotte, NC Corpus Christi, TX Graham, NC	Voice 252-726-8437 980-721-8257 919-807-4100 (704)780-2378 (361)985-9696 (336)376-0616	Contact Juan Francisco Mike Gioielli - Young, Charlene Frank, Larry Clark, Lisa	mike.gioielli@doa.nc.gov DOA.MIS.Developers@doa DOA.MIS.Developers@doa DOA.MIS.Developers@doa	

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 as and

Action

_Project #: 12285 - St. Construction - Re				
Design #: 16-12285-01 - SCO Designe				
Package: 16-12285-01A - Renovate	-			
Construction Contract #: 16-12285	-01A-1 - SCO Contractor			
Construction Contract Detail Bid	tems HUB Good-Faith Efforts HUB Participation	Change Orders		
		🔯 Action	. 🙁	CI
Contract Summary	Contractor	Award Details		
Formal N		Award Type: S	Single Prime	
Contract: * Contract Valid Contract	Name: SCO Contractor 🚞	Approved For Bid: 2	2015-06-09	
Status:	Address: 301 N. Wilmington Street	Actual Bid: 2		6
* Contract General Contract 🔹	Suite 450	Awarded: 2		
Type: Negotiation? N ▼	Raleigh, NC 27601	Awarded. 2	010-07-07	۲
	License#:			
Bid Number: SCO-16-12285-01A	Contact:	Our france ( De france		
Final Change State Construction Order	contact.	Contract Dates Contract Date:	2045 07 42	
Approval:			2015-07-13	
		Contracts Approved by Agency:	2015-07-14	4 🄇
		Contracts Approved		(
		by Atty Genl: Projected Completion:	2015-09-18	8.4
				_
wner Contact		Construction Start 07/2 (NTP):	20/2015	1
			/	
		Contract Amounts		
	Surety	Project Financial Worksheet	Summary:	
	Name:	Assigned Funds:	\$120,	0
		_		
- (- h - Office	Address:	Total Committed:	\$109,	,0
afety Officer		Available to Commit:	\$11,	,0
	A	This Contract:	\$98,	,50
	Agent:	Available to Commit—		
	Address:	After Contract Approval	\$11,0	,0
		Worksheet Det	- il	
		worksheet Det	all	
eets		Contract Amounts:		
eels		contract Amounts.		
			Amount Da	)a
		Original:	\$98,500.00	
		Change Order:		
		Change Order:	\$0.00	

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

	- St. Construction - Renovate lobb	ly			
Project Cost	t Estimate Project Type	Funds Assigned	Financial Worksheet Contrac	ts P6 Link Mile	stones Closeout Project
Estimated vs Con	mmitted Contingency	Expenditures - Design	Expenditures - Construction	Expenditures - Other	
					🚫 Close
Vorksheet Summa	ıry				Save
	Assigned Funds:	\$120,000.00	Assigned Funds:	\$120,000.00	
	Total Estimated Cost:	\$118,000.00	Total Committed:	\$109,000.00	
	Estimated Surplus (Need):	\$2,000.00	Available to Commit:	\$11,000.00	
				Assign Funds	
Worksheet Detail					
		Committed			
	Estimated Cost O		vised Contracts Expended		
Design Fee \$:	Estimated Cost O	Driginal Contracts Rev	vised Contracts Expended \$ 10,500.00 \$ 0.00		
	\$ 10,000.00	Vriginal Contracts Rev \$ 10,000.00			
Construction \$:	\$ 10,000.00	Vriginal Contracts Rev \$ 10,000.00	\$ 10,500.00 \$ 0.00		
Design Fee \$: Construction \$: Contingency \$: Other \$:	\$ <u>10,000.00</u> \$ <u>100,000.00</u>	Vriginal Contracts Rev \$ 10,000.00	\$ 10,500.00 \$ 0.00		

# 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 Action Add Change Order × Export \_\_\_\_Design #: 14-11339-01 - SCO Designer Package: 14-11339-01A - Enlarge Conference Room Construction Contract #: 14-11339-01A-1 - SCO Contractor Construction Contract Change Orders Bid Items HUB Participation Action Close CHANGE ORDER # DAYS AMOUNT LAST STATUS Add Change Order RECEIVED STATUS Export

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

	Choose File No file chosen			
		Add File to Lis	st	
		Cance	el l	
	ChangeOrders.doc - application/msword (2068992bytes	s)		
	Change Order Proposal 04-06-15.xlsx - application/vnd.	.openxmlformats-		
1	Officedocument.spreadsheetml.sheet (8519bytes)			
4	Remove file(s) from List			
1	To Upload Files:			
1	1 martine to the standard file			
	1 - [Browse] and select file 2 - [Add File to List]			
	3 - [Upload File(s)] when ready to transmit files			
	Description			
•	Contractors Proposal			
ſ		Close		
ſ	Contractors Proposal	Close		
•	Contractors Proposal	Close		
CO Breakdowns	Contractors Proposal	Close		
	Contractors Proposal	Close		
20 Breakdowns ⊡ PC0 #1 ⊃ESCRIPTION OF PC0	Contractors Proposal	PCO CC	DST #DAYS	
20 Breakdowns ⊡ PC0 #1 ⊃ESCRIPTION OF PC0	Contractors Proposal	PCO CC	DST #DAYS	
CO Breakdowns  PCO #1 DESCRIPTION OF PCO Provide adequate detail to enable SCO to propodes)	Contractors Proposal Upload File(s)  REASON(S) FOR CHANGE(S)  rly assign the cause (Provide adequate detail to properly justify cause code	es) PCO CO		
CO Breakdowns = PCO #1 DESCRIPTION OF PCO Provide adequate detail to enable SCO to prop	Contractors Proposal	es) PCO CO		
CO Breakdowns  PCO #1 DESCRIPTION OF PCO Provide adequate detail to enable SCO to propodes)	Contractors Proposal      Contractors Proposal      REASON(5) FOR CHANGE(5)  erly assign the cause (Provide adequate detail to properly justify cause code      Original design was for all wireless internet. Projecto	es) PCO CO		
CO Breakdowns  PCO #1 DESCRIPTION OF PCO Provide adequate detail to enable SCO to propodes)	Contractors Proposal      Contractors Proposal      REASON(5) FOR CHANGE(5)  erly assign the cause (Provide adequate detail to properly justify cause code      Original design was for all wireless internet. Projecto	es) PCO CO		
CO Breakdowns  PCO #1 DESCRIPTION OF PCO Provide adequate detail to enable SCO to propodes)	Contractors Proposal      Contractors Proposal      REASON(5) FOR CHANGE(5)  erly assign the cause (Provide adequate detail to properly justify cause code      Original design was for all wireless internet. Projecto	es) PCO CO		
CO Breakdowns  PCO #1 DESCRIPTION OF PCO Provide adequate detail to enable SCO to propodes)	Contractors Proposal      Contractors Proposal      REASON(5) FOR CHANGE(5)  erly assign the cause (Provide adequate detail to properly justify cause code      Original design was for all wireless internet. Projecto	es) PCO CO		
CO Breakdowns 	Contractors Proposal  REASON(S) FOR CHANGE(S)  erly assign the cause (Provide adequate detail to properly justify cause code  Original design was for all wireless internet. Projecto  hard wired connection	es) PCO CC r requires 1.000		

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 <sup>@Workflow</sup> icon appears.

De												
			- Enlarge conference									
_			#: 15-11026-01A-1	- SCO Contractor								
(	Change Orde	er #: 1)										
etai	1											
										Workflow	Action	0 🚫 Ck
tus												
	Package S Contract S		der Construction id Contract		Status: Created Is Date: 4/21/2015 2:50:00 PM		Date Received: Last Update: 4	/21/2015 2:50:0	0 PM	Total Days: Total Amount:	0 \$1,000	
rkf	low Activity	,										
EP	ACTION										_	
P	CREATE	ACTIVE?	ROLE	FIRM/AGENCY SCO Designer	USER COMPLETING STEP scodesigner	COMPLETED ON 04/21/2015 14:50	ALERTED ON	RESULT		COMMENT	5	
+	SUBMIT	Y	DESIGNER	SCO Designer	sedesigner	0.02.02010.14.00		orcalco				
	APPROVE	N	CONTRACTOR	SCO Contractor								
+	APPROVE	N	DESIGNER	SCO Designer								
1	APPROVE	N	OWNER	St. Construction								
1	APPROVE	N	SCO	St. Construction								
stii	mated Cost o	of Change:			ue to this change: f so, include in items 5&6 bel Contractor Des 0 0.00	ow): N⊂ ▼ signer 0 0.00						
stin	mated Cost o	of Change: extension f	: ield cost (\$), if an <u>i</u> vised Contract" da	/:	f so, include in items 5&6 bel Contractor Des 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00	signer 0	(+/-) THIS ORDER	- Rev	ised Contract (PEND	NNG)		
stii	mated Cost o	of Change: extension f Note: "Rev	ield cost (\$), if any vised Contract" da truction Days	y: and amounts are vTRACT START + 30 +	charoscope construction constru	SIGNER 0 0.00 CURRENT CONTRACT 30	(+/-) 0	-	30	ING)		
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stin stin co O I Pro ode	mated Cost of mated time e Summary - dule Summary - dule Summary - 04/03/2015 Breakdown PCO1 SCRIPTION C SCRIPTION c scription adquat es)	of Change: Xtension f Note: "Rev Cons Cons ary - Note: + + + - - - - - - - - - - - - -	ield cost (\$), if any vised Contract" du cor truction Days Cost (\$) : : "Revised Comple origina Days 30	ys and amounts are           and amounts are           30           3135,000           •           ston" date is pendir           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •           •	f so, include in items 5&6 bel     Contractor Des     OOO	signer CURRENT CONTRACT 30 \$135,000 OVED CO DAYS 0 = 5) operhy justify cause c eless internet. Proje	(+-) 0 (+-) \$1,000 PRIOR APPROVED C 05/03/2 odes)	= = 00MPLETION DATE 2015	30 \$136,000.00 + THIS ORDER + 0 PCO COST	- Revis		PENDING)
still still st co O I F Pro ode	mated Cost of mated time e Summary - dule Summary - dule Summary - 04/03/2015 Breakdown PCO1 SCRIPTION C SCRIPTION c scription adquat es)	of Change: xxtension f Note: "Rev Cons ary - Note: s 	ield cost (\$), if any vised Contract" di cor truction Days Cost (\$) : : "Revised Comple original Days 30 : : able SCO to prop jector	r: us and amounts are stract start + + 30 • stiss.000 • etion" date is pendir - ORIGINAL COMPL - ORIGINAL COMPL	f so, include in items 5&6 bel     Contractor Des     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00     0.00	SURRENT CONTRACT 30 \$135,000 30 50 CD DAYS = 0 = 5) porefy justify cause c eless intermet. Projection	(+/-) 0 (+/-) \$1,000 PRIOR APPROVED 0 05/03/2 odes)	= = 00MPLETION DATE 0015	30 \$136,000.00 + THIS ORDER + 0 PCO COST 1,000	# DAYS		PENDING)

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



up until the time that the Change Order is submitted.

	CONTRACT START	+	CHANGE ORDERS (APPROVED)		CURRENT CONTRACT	(+/-)	THIS ORDER	-	Revised Contract (PENE	DING)	
Construction Days Cost (\$)	30 \$135,000	+	0 \$0	-	30 \$135,000	(+/-) (+/-)	0 \$1,000	=	30 \$136,000.00		
nedule Summary - Note: "Revised Co Contract start + original day 04/03/2015 + 30	s = ORIGINA	÷	LETION DATE +	PRIOR A	PPROVED CO DAYS = 0 =		APPROVED COM 05/03/20		DATE + THIS ORDER + 0	-	Revised Completion (PENDING) 05/03/2015
ESCRIPTION OF PCO Provide adequate detail to enable SCO to odes) vdd data connection for projector	properly assign th	e caus		detail to			quires	C	PCO COST 1,000	# DA	
DESCRIPTION				FILE	AME		UPLOADED E	3Y	DATE 💎		
Contractors Proposal			Change Order Propos	al 04-0	i-15.xlsx	sco	designer		4/21/2015 2:49:48 PM	Delete	

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. A Confirmation window will appear to confirm this action. Select **Yes** to continue or **No** to return.

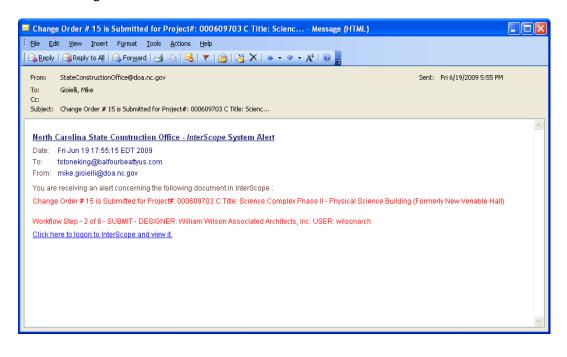
The Change Order workflow is updated and processes any Alerts that are defined for this step.

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.

						created for user has been subm		gner				
De	sign #: 15-11	026-01 - S	CO Designer									
P	ackage: 15-11	1026-01A -	Enlarge conferenc	e room								
	Construction	Contract	#: 15-11026-01A-1	- SCO Contractor								
	Change Orde	r#:1										
Detai												
										<b>Workflow</b>	Action	Clos
Status											0	
			der Construction id Contract		Status: Submitted s Date: 4/21/2015 2:50:00 PM		Date Received: Last Update: 4	/21/2015 2:50:0	) PM	Total Days: Total Amount:	0 \$1,000	
Norkf	low 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								
	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

Approve	¢	Workflow
- Deiest	è	Approve
available from the	available from the	Reject

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.

_	_Change	Order #	:1						
	tail								
٢									Workflow Action 🚫 Close
Stat	us								Approve
	•		der Constructio		tatus: Subn			Date Rec	(Reject)
Co	ontract Sta	tus: Va	id Contract	Status	Date: 4/21/	2015 2:50:0	0 PM	Last U	Jpdate: 4/21/2015 2:50:00 \$1,000
Wor	kflow Act	tivity							
STEP	ACTION	ACTIVE?	ROLE	FIRM/AGENCY	USER COMPLETING	COMPLETED		RESULT	COMMENTS
				,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	STEP	ON	ON		
1	CREATE	N	DESIGNER	SCO Designer	scodesigner	04/21/2015 14:50		Created	
				Designer					
1	SUBMIT	N	DESIGNER	SCO Designer	scodesigner	04/21/2015 15:41		Submitted	[
2			DESIGNER	SCO Designer	scodesigner			Submitted	
2	SUBMIT	Y		SCO Designer SCO	scodesigner			Submitted	
2 3 4	SUBMIT	Y N		SCO Designer SCO Contractor SCO	scodesigner			Submitted	

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		
Available to Commit:	\$5,000	The owner certifies that the project's Assigned Funds are adequate to support this change order:	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.

Action

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.

Construction Contrac	<mark>t</mark> #: 15-11461-01	A-1	- I. L. Long Const	truct	ion Co., Inc.						
Construction Contract Detail	Bid Items		HUB Good-Fai	th E	fforts HUB P	articipa	ition	Cha	nge Orders		
										🖗 Action	Close
Change Orders Summary	/										
	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				DAY	s	AMOUNT		
									×		

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 **I** the changes are reflected in the Change Orders Summary.

Construction Co	ontract Detai	il Bid Items		HUB Good-Fa	ith E	fforts HUB	Particip	ation	Chan	ge Orders		
											🖗 Action	Clos
Change Order	s Summar	у										
		CONTRACT START	+	CHANGE ORDERS (CURRENT)	-	CONTRACT (CURRENT)	(+/-)	CHANGE ORDERS (NEW)	-	CONTRACT (NEW)		
Constr	uction Days	45	+	0	=	45	(+/-)	3	=	48		
	Cost (\$)	\$450,000.00	+	\$0.00	=	\$450,000.00	(+-)	\$2,500.00	-	\$452,500.00		
CHANGE ORDER #				DESCRIPTION			1	DAYS	5	AMOUNT		
	Add additio	onal curb cut							3	2,500.00 ×		

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

Contract Amounts		
Project Financial Worksho	eet Summary:	
Assigned Funds	: \$498	000
Total Committed	: \$493	606
Available to Commit	: \$4	394
This Contract	: \$452	500
Available to Commi After Contract Approva		394
Worksheet	<u>Detail</u>	
Contract Amounts:		
	Amount D	ays
Original:	\$450,000.00	45
	\$2,500.00	
Change Order:		3
Change Order:  Current:	\$452,500.00	3 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.

_Project #: 10876 - UNC	School OF The Arts	- Replace roof - Workplace			_
Project Cost Estima	ate Project Ty	pe Funds Assigned Financial Worksheet	Contracts Milestones	Closeout Project	ct
Estimated vs Committed	Contingency	Expenditures - Design Expenditures - Cor	struction Expenditures - Oth	er	
					🚫 Clo
rack Contingency Am	ounts				Save
····· ································					
Automatically draw d	down contingency	amounts to fund change orders			
Automatically draw d	down contingency	amounts to fund change orders			
-	down contingency	amounts to fund change orders			
-		amounts to fund change orders	Transfer To	Recorded On	Recorded By
Conti	ingency Amount	-	Transfer To	Recorded On       5/8/2015	Recorded By trainer
Contii Current Total \$10,000.00 \$	ingency Amount Change	New TotalReason for Change			-
Contii Current Total \$10,000.00 \$	ingency Amount Change	New TotalReason for Change			-
Contri Current Total \$10,000.00 \$	ingency Amount Change	New TotalReason for Change		▼ 5/8/2015	-

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 su	ccessfully.			
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 Milest	ones Closeo	ut Project	
Estimated vs Committed Contingency Expenditures - Design Expenditures - Constru	uction 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.

	C School Of The Arts - 2016 F					
	C School Of The Arts - Repla					
Project Cost Esti	mate Project Type	Funds Assigned	Financial V	Vorksheet Contracts	P6 Link Milestones	5
Estimated vs Committ	ed Contingency	Expenditures - Design	Expend	itures - Construction E	xpenditures - Other	
						(Close
Worksheet Summary						Save
	Assigned Funds	\$100,000.00	D	Assigned Funds:	\$100,000.00	
	Total Estimated Cost	\$350,000.00	D	Total Committed:	\$98,000.00	
	Estimated Surplus (Need)	: (\$250,000.00	)	Available to Commit:	\$2,000.00	
	er Category Estimates er Total Estimates	Committed				
	Estimated Cost		evised Contracts	Expended		
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		
otrier ψ.						

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	
	Close
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 4 sign.

Program #: 9882 - UNC School Of The Arts - 2016 R&R	]	
_Project #: 10876 - UNC School Of The Arts - Replace ro	of - Workplace	
Project Cost Estimate Project Type Fu	Inds Assigned Financial Worksheet Contracts P6 Link Milestones	
Estimated vs Committed Contingency Expendence	ditures - Design Expenditures - Construction Expenditures - Other	
		🚫 Close
Expenditure Details		Save
Cost Category: Other		
Add 1 line(s) 🐈		
	Commitment Amt Open Amt Invoice	
Add 1 line(s) 🜵	Commitment Amt         Open Amt         Invoice           \$         0.00         \$0.00         Add Invoice	Delete Commitmen

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.

C	ommitment(s) and Expenditures Saved succes	sfully
Program #: 9882 - UNC School Of The Arts - 2016 R&F	2	
Project #: 10876 - UNC School Of The Arts - Replace	roof - Workplace	
Project Cost Estimate Project Type F	Funds Assigned Financial Worksheet Cor	ntracts P6 Link Milestones
Estimated vs Committed Contingency Expe	enditures - Design Expenditures - Construction	Expenditures - Other
		(Close
Expenditure Details		Save
Cost Category: Other		
Add line(s) 🖶		
JB?Commitment # Purpose Vendor	Commitment Amt Open Amt	Invoice
✓ 1 Survey Regional Land Survey Survey S		voice Delete
Surveyors, Inc	s <u>Search</u> 1,500.00	Commitm
Total	\$1,500.00 \$1,500.00	\$0.00

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 <u>Save</u>. 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.

	6 - UNC School Of The Arts - Replaced and the school of the Arts - Replaced and the school of the Arts - Replaced and the school of the school of the Arts - Replaced and the school	ace roof - Workplace				
Project Cos	st Estimate Project Type	Funds Assigned	Financial Worksh	eet Contracts	P6 Link Milestone	es
Estimated vs Cor	mmitted Contingency	Expenditures - Design	Expenditures -	Construction	xpenditures - Other	
						🚫 Close
Vorksheet Summa	ary					Save
	Assigned Funds	\$100,000.00	<b>م</b> د	ssigned Funds:	\$100,000.00	
	Total Estimated Cost	t: \$350,000.00	יד נ	otal Committed:	\$99,500.00	
	Estimated Surplus (Need)	(\$250,000.00)	) Avail	able to Commit:	\$500.00	
					Assign Funds	
•	) Enter Category Estimates Enter Total Estimates					
		Committed				
	Estimated Cost	Original Contracts Re	evised Contracts	Expended		
)esign Fee \$:	Estimated Cost	-	vised Contracts \$ 26,000.00	Expended \$ 0.00		
<b>U</b>		\$ 25,000.00				
Construction \$:	\$ 25,000.00	\$ 25,000.00	\$ 26,000.00	\$ 0.00		
Design Fee \$: Construction \$: Contingency \$: Dther \$:	\$ 25,000.00 \$ 300,000.00	\$ 25,000.00	\$ 26,000.00	\$ 0.00		

# 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.'

_Project #: 10929 - St. Constr			
Project Cost Estimate	Project Type Funds Assigned	Financial Worksheet Contracts	P6 Link Milestones
Estimated vs Committed	Contingency Expenditures - Desigr	Expenditures - Construction	xpenditures - Other
			(S) C
Expenditure Details			Save
Cost Category: Des	ign		
ommitment: #1 - SCO Designer		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.

Program #: 9920 - St. Construction - New Office C	omplex						
_Project #: 10929 - St. Construction - Construct Bu	uilding						
Closeout Project							
Project Cost Estimate Project Type	Funds Assigned	Financ	cial Worksheet	Contracts Milestones	]		
Estimated vs Committed Contingency	Expenditures - Desig	n Ex	penditures - Co	enstruction Expenditures - Oth	er		
Expenditure Details							Save
Cost Category: Design							
Commitment: #1 - SCO Designer				Add New	Row		
•	Committed	Invoice	Date	Amount Agency Funding	Row Open		
Vendor	Committed	Invoice		Amount Agency Funding Code	Open		
Vendor	Committed	Invoice	Date 03/17/2015	Amount Agency Funding Code	Open	elete	
Commitment: #1 - SCO Designer Vendor SCO Designer	Committed 1	Invoice		Amount Agency Funding Code	Open	olata	

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

#### annears

Program #: 9920 - St.	Construction - New Offic	e Complex				
Project #: 10929 - St	. Construction - Construc	t Building				
Project Cost Es	timate Project Type	e Funds Assig	ned Financial	Worksheet Contrac	ts Milestones	
Estimated vs Commit	tted Contingency	Expenditures -	Design Exper	ditures - Construction	Expenditures - Other	
						🚫 Close
Norksheet Summary						Save
	Assigned F	unds: \$25,00	0,000.00	Assigned Funds:	\$25,000,000.00	
	Total Estimated	Cost: \$50,00	0,000.00	Total Committed:	\$22,000,000.00	
	Estimated Surplus (N	leed): (\$25,000	),000.00)	Available to Commit:	\$3,000,000.00	
					Assign Funds	
Worksheet Detail						
		Comn	hitted			
	Estimated Cost	Original Contracts	Revised Contracts	Expended		
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		

#### 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.'

Project #: 10929 - St. Construction	- Construct Building				
	Project Type Funds Assigned	Financial Worksheet	Contracts	P6 Link Milestones	
Estimated vs Committed Cont	ingency Expenditures - Desi	ign Expenditures - Con	struction Expe	nditures - Other	
					🚫 Close
Expenditure Details					Save
Cost Category: Construc	tion				
		6	Add New Row		
ommitment: #1 - SCO Contractor		· · · · · · · · · · · · · · · · · · ·	The Province of the Province o		

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. Cor	nstruction - New Office Complex			
_Project #: 10929 - St. Co	onstruction - Construct Building			
Project Cost Estima	te Project Type Funds Assigned Fir	nancial Worksheet Co	ntracts P6 Link	Milestones
Estimated vs Committed	Contingency Expenditures - Design	Expenditures - Construction	Expenditures - Othe	er
				(Close
Expenditure Details	Construction			Save
Cost Category:	Construction	Add New	Row	Save
		Add New Amount Agency	/ <u>Row</u> Open	Save
Cost Category: Commitment: #1 - SCO Cont	ractor			Save
Cost Category: Commitment: #1 - SCO Cont	ractor	Amount Agency Funding Code		Save
Cost Category: Commitment: #1 - SCO Cont	Committed Invoice Date	Amount Agency Funding Code	Open	Save

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.

		Exp	enditures Saved	successfully		
Program #: 9920	- St. Construction - New Office (	Complex				
_Project #: 10929	- St. Construction - Construct B	Building				
Project Cos	t Estimate Project Type	Funds Assig	ned Financial	Worksheet Contracts	B P6 Link Milestor	nes
Estimated vs Cor	mmitted Contingency	Expenditures -	Design Exper	nditures - Construction	Expenditures - Other	
						(Close
Norksheet Summa	ıry					Save
	Assigned Fun	ds: \$25,00	0,000.00	Assigned Funds:	\$25,000,000.00	
	Total Estimated Co	ost: \$50,00	0,000.00	Total Committed:	\$22,000,000.00	
	Estimated Surplus (Nee	ed): (\$25,000	,000.00)	Available to Commit:	\$3,000,000.00	
					Assign Funds	
Worksheet Detail						
		Comm				
	Estimated Cost	Original Contracts	Revised Contracts	Expended		
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		
Total	\$50,000,000.00	\$22,000,000.00	\$22,000,000.00	\$110,000.00		

# 3. Other Expenditures

To enter Other expenditures, a commitment needs to exist first. See <u>Entering Other</u> <u>Commitments</u>. 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	
1         Survey         Survey Master         \$ 12,000.00         \$12,000.00	Delete Commitment
Total \$12,000.00 \$12,000.00 \$0.00	

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

		Commit	tment(s) and Expendi	tures Saved succ	essfully		
Program #: 9	9920 - St. Constructio	n - New Office Complex					
_Project #: 1	0929 - St. Constructi	on - Construct Building					
Project	Cost Estimate	Project Type Funds A	Assigned Financial	Worksheet C	ontracts P6 Link	Milestones	
Estimated vs	Committed Co	ntingency Expenditure	s - Design Expendi	itures - Construction	Expenditures - Oti	her	
							Close
Expenditure I	Details						Save
Cost Category:	Other						
Cost Category:	Other						
	line(s) 💠						
Add		Vendor	Commitment Amt	Open Amt	Invoice	3	
Add	line(s) 🖕 Purpose				Invoice	e Invoice Amt Agency	
Add	line(s) 🛖	Vendor Survey Master	Commitment Amt				
Add	line(s) 🖕 Purpose				e # Invoice Date	Invoice Amt Agency	
Add	line(s) 🖕 Purpose				e # Invoice Date	Invoice Amt Agency Funding Code	
Add	line(s) 🖕 Purpose			\$6,000.00	e # Invoice Date	Invoice Amt Agency Funding Code	
Cost Category: Add UB?Commitment #	line(s) 🖕 Purpose				e # Invoice Date	Invoice Amt Agency Funding Code	e <u>Commitm</u>

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

	- St. Construction - Construct Bu	ilding				
Project Cos	t Estimate Project Type	Funds Assigned	Financial We	orksheet Contracts	P6 Link Milestone	s
Estimated vs Con	mmitted Contingency	Expenditures - Desi	ign Expendit	ures - Construction	Expenditures - Other	
						🚫 Clos
Vorksheet Summa	ry					Save
	Assigned Fund	s: \$25,000,000	).00	Assigned Funds:	\$25,000,000.00	
	Total Estimated Cos	st: \$50,000,000	).00	Total Committed:	\$22,012,000.00	
	Estimated Surplus (Need	i): (\$25,000,000	.00)	Available to Commit:	\$2,988,000.00	
					Assign Funds	
Worksheet Detail		Committee				
			1			
	Estimated Cost		Revised Contracts	Expended		
Design Fee St	Estimated Cost	Original Contracts	Revised Contracts	Expended		
-			Revised Contracts \$ 3,500,000.00 \$ 18,500,000.00	Expended \$ 60,000.00 \$ 50,000.00		
Construction \$:	\$ 5,000,000.00	Original Contracts \$ 3,500,000.00	\$ 3,500,000.00	\$ 60,000.00		
Design Fee \$: Construction \$: Contingency \$: Other \$:	\$ 5,000,000.00 \$ 40,100,000.00	Original Contracts \$ 3,500,000.00	\$ 3,500,000.00	\$ 60,000.00		

#### 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 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.

_	<u> </u>	- St. Construction - Renovate lobby Estimate Project Type Funds Assig	gned Financial Workshe	et Contracts	P6 Link Mileston	nes Closeout Proje	ect
						8	Close
	SCO ID#	FIRM	STATUS	PHASE	TYPE	OVERSIGHT	C.
L	<u>16-12285-01</u>	SCO Designer	Active	Design	Standard Design	Limited Oversight	2
2	16-12285-01A-1	SCO Contractor	Valid Contract	Construction	General Contract		2
							•

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,

Action

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 HU	B Participation Change Orders
	Action 🔬 🚫 Clos
<ul> <li>Construction Contractor's Good-Faith Effort Affidavit</li> <li>1 - (10 pts) Contacted minority businesses.</li> <li>2 - (10 pts) Made the construction plans, specifications and requirements available.</li> <li>3 - (15 pts) Broken down or combined elements of work.</li> <li>4 - (10 pts) Worked with minority trade, community or contractor organizations.</li> <li>5 - (10 pts) Attended prebid meetings scheduled by the public owner</li> <li>6 - (20 pts) Provided assistance in getting required bonding or insurance</li> <li>7 - (15 pts) Negotiated in good faith with interested minority businesses.</li> </ul>	State Construction Manual: Good-Faith Efforts         Affidavit Execution         * Company Submitting Affidavit: SCO Contractor         * Date: 07/02/2015 Im
<ul> <li>8 - (25 pts) Provided assistance to an otherwise qualified minority business.</li> <li>9 - (20 pts) Negotiated joint venture and partnership arrangements.</li> <li>10 - (20 pts) Provided quick pay agreements and policies.</li> </ul>	GFE Assessment (50 points required to be considered responsive) Points Achieved: 0 X Not Responsive

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

·	Affidavit and Good Faith Effo	rts updated successfully.
Pr	ogram #: 12153 - St. Construction - Minor Renovations	
	Project #: 12285 - St. Construction - Renovate lobby	
1	Design #: 16-12285-01 - SCO Designer	
1	Package: 16-12285-01A - Renovate lobby	
	Construction Contract #: 16-12285-01A-1 - SCO Contractor	
Co	onstruction Contract Detail Bid Items HUB Good-Faith Efforts HUB	B Participation Change Orders
		Action 😡 Close
Cor V V	<ul> <li>hstruction Contractor's Good-Faith Effort Affidavit</li> <li>1 - (10 pts) Contacted minority businesses.</li> <li>2 - (10 pts) Made the construction plans, specifications and requirements available.</li> <li>3 - (15 pts) Broken down or combined elements of work.</li> <li>4 - (10 pts) Worked with minority trade, community or contractor organizations.</li> <li>5 - (10 pts) Attended prebid meetings scheduled by the public owner</li> <li>6 - (20 pts) Provided assistance in getting required bonding or insurance</li> <li>7 - (15 pts) Negotiated in good faith with interested minority businesses.</li> <li>8 - (25 pts) Provided assistance to an otherwise qualified minority business.</li> <li>9 - (20 pts) Negotiated joint venture and partnership arrangements.</li> <li>10 - (20 pts) Provided quick pay agreements and policies.</li> </ul>	State Construction Manual: Good-Faith Efforts  Affidavit: Execution  * Company Submitting Affidavit: SCO Contractor  * Date: 07/02/2015   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 Participa	ation Change Orders
	🖾 Action 💡 🔞 Close
Construction Contract HUB Participation	HUB Participation Summary (Certified Only) Awarded Curren
General Contractor: SCO Contractor	Construction Contract Amount: \$98,500.00 \$98,500.00
GC HUB Type: Unknown	Total HUB Participation: \$0.00 \$0.00
HUB Data is     / /       FINAL as of:     ///	HUB %: 0.00 % 0.00 %
Details/Status as of Award V Source of Information: C	s req'd)
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

Add Sub	contractor					
N	ame: Paint			Email:		
HUB Certi	fied? Y ▼		Contact Person:			
				Address:		
	City:			State:		
	Zip:			Phone:	(	999-999-9999)
	Search	h Done	Reset Not	Found - Submit R	equest	
	Company		City, State	Voice	Contact	Email
THE TO THE	Mautin and a Defection Ca	Wile	nington, NC	(910)231-7515	Martinez, Joseph	DOA.MIS.Developers@
INK TO IPS	Martinez's Painting Co.	vviii	31			
	Martinez's Painting Co. MECKLENBURG PAINT CO INC		rlotte, NC	(704)588-3113	ETHEREDGE, LIZ	DOA.MIS.Developers@
INK TO IPS		Cha		(704)588-3113 (919)638-0332	ETHEREDGE, LIZ Withrow, Leroy	
INK TO IPS	MECKLENBURG PAINT CO INC	Chai Knig	rlotte, NC			DOA.MIS.Developers@
INK TO IPS	MECKLENBURG PAINT CO INC Meticulous painting and drywall	Chai Knig nc. Terr	rlotte, NC hdale, NC	(919)638-0332	Withrow, Leroy	DOA.MIS.Developers@ DOA.MIS.Developers@
INK TO IPS	MECKLENBURG PAINT CO INC Meticulous painting and drywall Morrison ElectroStatic Painting, Ir	Char Knig nc. Terr Sant	rlotte, NC hdale, NC ell, NC	(919)638-0332 828-851-4779	Withrow, Leroy Crowder, Susan	DOA.MIS.Developers@ DOA.MIS.Developers@ DOA.MIS.Developers@
INK TO IPS	MECKLENBURG PAINT CO INC Meticulous painting and drywall Morrison ElectroStatic Painting, Ir Paint Master	Chai Knig nc. Terr Sant Mou	rlotte, NC hdale, NC ell, NC ford, NC	(919)638-0332 828-851-4779 (919)776-9251	Withrow, Leroy Crowder, Susan Harris, Larrry	DOA.MIS.Developers@ DOA.MIS.Developers@ DOA.MIS.Developers@ DOA.MIS.Developers@ DOA.MIS.Developers@ DOA.MIS.Developers@

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.

quest Contractor:	
ofile	
	(Q)
but the form below as completely as possible and click "F fied once a decision has been made. uest Contractor * Name: Required * Status: Pending * Email: Required * * Contact Required * Person:	Request Contractor." An Administrator will review your request, and you will           Website URL:         Parent:           Parent:         Former Name:           Firm ID#: (Auto)         Last Update:
* Line 1: Required * Line 2: * City: Required * * State: ▼	Last Update:
* Zip: Required ★ County: UNKNOWN ▼ Voice#:	IPS Vendor:
Voice#:	
	Address:
	Contact:
	Email:
	IPS Location:
	IF'S Location.

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.

	Na	me:	paint	Emai	il:		
HUB C	ertifi	ed?	Y 💌	Contact Persor	n:		
	Addre	ess:		Cit	y:		
	St	ate:		Zij	p:		
	Pho	ne:	(999-999-9999)				
			Search	Done Reset			
			Search	Done Reset			
	Int	IPS	Company	City, State	Voice	Contact	
EQUEST	Int	IPS ×	Company Maze Custom Painting, LLC	City, State Charlotte, NC	Voice (704)778-6288	Contact Felisbret, Jason	
REQUEST REQUEST	Int		1 7				_
	Int	×	Maze Custom Painting, LLC	Charlotte, NC	(704)778-6288	Felisbret, Jason	
EQUEST	Int	× ×	Maze Custom Painting, LLC MECKLENBURG PAINT CO INC	Charlotte, NC Charlotte, NC	(704)778-6288 (704)588-3113	Felisbret, Jason ETHEREDGE, LIZ	
EQUEST EQUEST ELECT		× × ×	Maze Custom Painting, LLC MECKLENBURG PAINT CO INC Meticulous painting and drywall	Charlotte, NC Charlotte, NC Knighdale, NC	(704)778-6288 (704)588-3113 (919)638-0332	Felisbret, Jason ETHEREDGE, LIZ Withrow, Leroy	
EQUEST EQUEST EQUEST		× × × ×	Maze Custom Painting, LLC MECKLENBURG PAINT CO INC Meticulous painting and drywall Paint Master	Charlotte, NC Charlotte, NC Knighdale, NC Sanford, NC	(704)778-6288 (704)588-3113 (919)638-0332 (919)776-9251	Felisbret, Jason ETHEREDGE, LIZ Withrow, Leroy Harris, Larrry	
EQUEST		× × × × ×	Maze Custom Painting, LLC MECKLENBURG PAINT CO INC Meticulous painting and drywall Paint Master Painting & Drywall By Villanueva Inc	Charlotte, NC Charlotte, NC Knighdale, NC Sanford, NC Raleigh, NC	(704)778-6288 (704)588-3113 (919)638-0332 (919)776-9251 (919)349-0204	Felisbret, Jason ETHEREDGE, LIZ Withrow, Leroy Harris, Larrry Villanueva, Patrick	

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 the set of the set

HUB Participation data save	d.	
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 Ord	ers
	م 🔯	Action 🔞 Close
Construction Contract HUB Participation General Contractor: GC HUB Type: Not a HUB HUB Data is FINAL	- HUB Participation Summ Construction Contract Amount: Total HUB Participation: HUB %:	Awarded         Current           \$135,000.00         \$135,000.00           \$15,000.00         \$0.00           11.11 %         0.00 %
Show HUB       Award       ▼       Source of       ● Affidavit B         Details/Status as of       Award       ▼       Information:       ● Affidavit C         (MUST first enter Good-Faith Efforts)		
Contractor HUB Type HUB Certified? CSI Division Work	Awarded Current Contrac	t Payments To Date Final
Paint Master B Y 09700 - Wall F ▼ Vinyl Wall Coverin	ng \$ 15,000.00 \$ 0.00	Payment?
1 found		Add Subcontractor

The HUB particpation 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 Order	s
		Action	Close
Construction Contract HUB Participation - CMAR Contract	HUB Participation S	ummary (Certif	fied Only)
Construction Menomery SCO Contractor		Awarded	Current
Construction Manager:     SCO Contractor       CMAR HUB Type:     Not a HUB	Construction Contract Amount:	\$18,500,000	\$18,500,000
Hub Data is FINAL	Total HUB Participation:	\$0	\$0
	HUB %:	0.0%	0.0%
Trade / Sub Packages Show HUB Details/Status as of: Add Trade / Sub Package	Award V		
Pkg # 2 For Sitework	ect 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.

Name:	Hine	Email:		
HUB Certified?	Select 🔻	Contact Person:		
Address:		City:		
State:		Zip:		
Phone:	(999-9	999-9999)		
	s	Search Done Reset		
	Company	City, State	Voice	C
EQUES) Hi	ne Sitework, Inc.	Goldsboro, NC	(919)736-8990	Hine, Ann

Search for the desired contractor and select them.

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 C	rders	
		🖗 Action	. 🚫 Close
Construction Contract HUB Participation - CMAR	HUB Participation Sun	nmary (Certified C	only)
Contract		Awarded	Current
Construction Manager: SCO Contractor CMAR HUB Type: Not a HUB	Construction Contract Amount:	\$18,500,000	\$18,500,000
Hub Data is FINAL	Total HUB Participation:	\$0	\$0
	HUB %:	0.0%	0.0%
Trade / Sub Packages         Show HUB Details/Status as of           Pkg # 2         For Sitework	Award		×
Pkg Prime Hine Sitework, Inc. Change Hub Type: F (Certified)	Pkg Amount at Award: \$	Current: \$	
Contractor HUB Type HUB Certified? CSI Division	Work Awarded Curr	ent Contract Payments T	Final Payment?
Add Subcontracto			
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.

Action

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	HUB Participation Summary (Certified Only)
	Awarded Current
Construction Manager: SCO Contractor CMAR HUB Type: Not a HUB	Construction Contract Amount:         \$18,500,000         \$18,500,000
	Total HUB \$1,500,000 \$0
Hub Data is FINAL	Participation: 51,500,000 50 HUB %: 8.1% 0.0%
	NUB %: 0.0/
Trade / Sub Packages Show HUB Details/Status as of: Award	v
Pkg # 2 For Sitework	×
	nount at Award: \$ Current: \$ 0.00
Contractor HUB Type HUB Certified? CSI Division Work	Awarded Current Contract Payments To Date Final Payment?
Add Subcontractor	
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'.

Progr			Office - 2015-2016 Non-Code-Item Projects Projects Assign Amounts to Projects Program	n Closeout			
						(S) CI	lose
SL No.	Project ID	Agency Project Code	Project Title	Status	Estimated Cost	Estimated Need	Hu
4							×
Total				\$0.00			
0 Projects	found					Add Pro	oject

Enter the *Title* and *Description*, then select the Special Project Designation "Non-Code-Item." Refer to <u>Determining the Special Project Designation</u>. The HUB Only checkbox will appear and must be clicked to enter the checkmark. Enter an *Estimated Project* 

Program #: 12155 - State Construction Office - 2015-2016 Non-Code-Item Projects	;				
NEW CAPITAL PROJECT:					
Project					
		Action	🛛 🚳 Clos		
Project Information - Basic	Project Information - Advanced	Save			
* Program: 12155 - 2015-2016 Non-Code-Item Projects	Project Type:		1		
* Department: Administration	O Performan				
* Agency: State Construction Office	* Special Project Designation:  Foundation Project NonCode-Item Project				
Project ID: (Auto)	I HUB C	Inly			
* Title Paint 4th floor spaces	Estimated Project Completion 11/01/2015				
Description: Paint all spaces on 4th floor					
	Funding Source: General Fund	i V			
	Fiscal Year Funded: 2015 - 2016	▼			
Agency Project Code:	Financial Controls: On				
Status: (Auto)	Bypass Financial Controls?				
	Estimated Cost				
	Estimated Project Cost:		(Auto		
	- Total Amount Assigned:		(Auto		
	= Estimated Need:		(Auto		

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

CONFIRMATION!	<u> </u>
This project design changed later. A	
	ncel

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."

Program #: 12155 - State Construction Office - 2015-2016 Non-Code-Item Projects									
_Project #: 12287 - State Construction Office - Paint 4th floor spaces									
Closeout Project Project Cost Estimate Project	Closeout Project								
					(	Close			
SCO ID#	FIRM	STATUS	PHASE	TYPE	PLAN REVIEW	CONTR			
4						×.			
0 found					Add Construction	Contract			

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

Name: Email: Status: Contact Person: Line 1:	Like V = V Like V	Paint	Voice Faxt Website URI Year Established	Like Like	•	(999-999-999) (999-999-999)
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			Search Done Reset			

Click on the desired contractor from the list.

Select Contractor...

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Emai		•			999	9)			
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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 P	rojects	
_Project #: 11029 - St. Construction - Paint 4th floor spa	ices	
Construction Contract #: 15-11029-01A-1 - Produ	ction Painting Company	
Construction Contract Detail HUB Participation	HUB Good-Faith Efforts	
÷		Action 🔗 🚫 Clos
Contract Summary	Contractor	Award Details
Formal Contract: N		Award Type: Unknown
Contract Status	Name: Production Painting Company 늘	
	Address: 8411 Garvey Drive, Suite 105	Awarde <mark>d:</mark> 04/01/2015 🗐 🙆
Contract Type Painting Contract		Construction Start (NTP): 04/13/2015
	Raleigh, NC 27616	
	License#:	
	Contact:	-Contract Dates
		Contract Date: (2015-04-01 @)
	(HUB Type: B (Not Certified)	
Owner Contact		
		Contract Amounts
		Contract Amounts
		Project Financial Worksheet Summary:
	Surety	Total Committed: \$36,500
	Name:	
		Worksheet Detail
Safety Officer	Address:	
		Contract Amounts:
	Agent:	
	Address:	Amount Days
L		Original: \$36,500.00 45
		Change Order: \$0.00 0
		0000 0
		Current: \$36,500.00 45
		Current. \$30,500.00 45

Enter <u>Good Faith Efforts</u> and additional <u>HUB Participation</u> 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:

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#### This will display the input form:

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4									÷

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.

New Electrical Certificate	<u> </u>
Project Find Package	
Certificate	

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:

ElectricalDetail			
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#### InterscopePlus User Manual

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3/30/2016 9:16:42 AM	4 1 page(s): [1] 4 found	_		Report a Problem

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.

New Electrical Certificate		
		🖗 Action
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Find Package		
scoid#: 11-08024-03B		
Project Title and Location: SCO Change Order Test Project	Owning Agency or University: Miscellaned	ous
Package Title: Test for Release 7.4	Project Monitor: Unassigned	d

#### 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 NCBEE	EC Search	
		Creating	
	Date:	03/30/2016	
Uti	lity 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:

ElectricalDetail	×	122.0	**								A Ye		x
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3/30/2016 9:16:42 AM			InterscopePlus 1.6_0	QA Copyright © 2	016 - State of North Ca	arolina : Departm	nent of Admin	istration : State	Construction	Office		Report a Prot	blem

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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).

Certificate		
Find Contractor	Popup NCBEEC Sea	<u>rch</u>
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Util	ity Work Order:	

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:

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

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.

	Name License Details	License L	isted Company		DBA	Name	City	Coun	ity A	dditional Qu	alifiers → _ [	1 ×	
Detail	License Details State of Nort Lookup Detail View	h Carolina Board of Exa	miners of Electrical Contractors										
	Contact Name		Mail Address		Phone Numb	Ler.		E-Mail					
	William Lee Powell		P. O. Box 849 Elm City, NC 27822		(252) 236-31			bill@barnesp	owell.com				
	Credential		1										
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#### 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.

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	Electrical Contractor (EC): EC Phone Number:	Barnes & Powell Electrical Company Inc			entative: Willia	m Lee Powell s@barnespowell.com	 	
		P. O. Box 849 Elm City, NC 27822				s@barnespowell.com		
	EC License#:	03480-U			(Alert	s are sent to this email address)		
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Figure 2 – Completed Inspection ready to be created

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#### 5. Step 5 – Save the record

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

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#### 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.

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EC Phone Number:			(On File): james@barnespowell.com			
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A message will be displayed listing the users alerted:

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#### 7. Step 7 – Print the document

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

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#### 8. Maintaining Electrical Contractor Profiles

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Ľ	William Lee Powell		P. O. Box 849 Elm City, NC 27822		(252) 236	-3111	bill@barn	espowell.com			
	Credential										
	Credential	License Type		Issue Date		Expiration Date	e Status Reason				
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* Name:	Barnes & Powe	II Electrical C	ompany Inc.			Licens	e Issue Date: 02/		×	Delete
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#### 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.

System Notices	My Favorites Active Design Contracts	Active Construction Contracts	All Change Orders In Process My Ch	ange Orders In Process   My Projects	My Plan Reviews In Process Cli	pboard ARCH Reviews	CODE Reviews	CIML Review	/8 MECH Re	views 🖹 E	LEC Revie	W8
CONTRACT	DEPARTMENT	AGENCY	PROJECT	DESIGNER	CONTRACTOR	TYPE	STATUS	SORIODIAL	SOURRENT	ORIG DAYS	CUR DAYS	PROJECTER
49-97074-706A-1	Crime Control & Public Safety (Inactive)	National Guard (Inactive)	LSC Modifications, 9 Armories	AMEC North Carolina, Inc. (Inactive)	Diamond Contracting, Inc.	General Contract	Valid Contract	\$122,870.00	\$98,750.00	0	0	2000-
04-C0167-01E-4	Natural and Cultural Resources	Archives & History	Archives & Library Building Renovation	Cannon Architects, P.C.	Clancy & Theys Construction Company	General Management Contract	Under	\$10,703,172.00	\$15,322,287.12	560	3288	2015-
04:C0167:01E-3	Natural and Cultural Resources	Archives & History	Archives & Library Building Renovation	Cannon Architects, P.C.	Clancy & Theys Construction Company	Pre-Con General Management	Under	\$74,924.00	\$74,924.00	0	0	2006-
41-95014-507C-1	Administration	Facility Management	Gov't Complex, Chilled Water Sys Improv	[OBSOLETE ! - USE AGENCY IN HOUSE	Bolton Construction and Service, LLC	HVAC Contract	Under	\$50,000.00	\$100,521.00	0	55	
60-97230-3168-1	Educational Institutions (Universities)	UNC Chapel Hill	5. Building Building Code Upgrade Study	John B. Hawkins, AIA, Architect	WOODS, C. C. CONSTRUCTION, CO.	General Contract	Valid Contract	\$495,748.00	\$495,748.00	0	0	
00-96240-3268-3	Educational Institutions (Universities)	NC State University	DH Hill Libr Reroofs Ph 1	Robert M. Stafford, Inc. (Inactive)	DRISCOLL, T. R., INC.	General Contract	Valid Contract	\$163,500.00	\$163,500.00	0	0	
06-00903-01F-5	General Assembly	Legislative Services Office	Legislative Building - Renovation of	Sears, Hackney, Keener & Williams, Inc.	Owens Roofing, Inc.	Roofing Contract	Under	\$377,404.00	\$1,786,952.07	60	829	2011-
60-95390-102A-1	Educational Institutions (Universities)	UNC Hospitals	Sleep Studies Renov	EYP/BJAC, P.A.	C.T. Wilson Construction Company, Inc.	General Contract	Under	\$297,960.00	\$349,319.00	0	167	1997-
60-96300-3038-1	Educational Institutions (Universities)	Appalachian State University	Dougherty & Duncan Bidgs Reroofing	CJMW Architecture, PA (Inactive)	Greene Construction, Inc.	General Contract	Valid Contract	\$301,960.00	\$381,968.00	0	0	
12-06400-001A-1	Transportation	Hwy Division Office	Greenaboro Div., Office Bldg.	In-House Design by Department of	NC MONROE CONSTRUCTION CO	General Contract	Under	\$444,585.00	\$444,585.00	0	0	
44-94410-0228-1	Health and Human Services	Dorothea Dix Campus	D. Dix, Harvey Bldg Window Replacmt In-	(OBSOLETE 1 - USE AGENCY IN HOUSE	PRECISION WALLS, INC.	General Contract	Under	\$15,308.00	\$16,266.00	0	0	1995-
68-00892-943A-2	Community Colleges	Wayne Community College	Learning Bldg. & Mezzanine Bldg.	Hayes Howell Professional Associates	DRISCOLL, T. R., INC.	General Contract	Valid Contract	\$492,000.00	\$492,000.00	0	0	
07-04039-02G-3	Commerce	NC State Ports Authority (Inactive)	Modify Berths to 42 foot depth	Moffatt & Nichol, Inc.	T. A. Loving Company	General Contract	Under	\$1,434,646.00	\$1,035,614.07	100	212	2012-
04-04054-01A-2	Administration	State Construction Office	Capitol Square - Electrical Distribution	Utility Electrical Consultants, P.C.	Barnes & Powell Electrical Co., Inc.	Electrical Contract	Valid Contract	\$444,700.00	\$429,628.57	160	1102	2011-
99-04300-01A-1	Environmental Quality	Wildlife Resources Commission	WRC Administrative	Williard Stewart Caliendo Architects, PA	GRIFFIN, D. H. WRECKING CONSTR. CO	General Contract	Under	\$12,062,918.00	\$14,318,186.00	548	763	2005-
												1
	5 5 7 5 = Lesta											

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

Program #: 1	927 - Leg	islative Services	Office - Legislative Bui	Iding - Renovation of S	enate/House Cham	bers	
_Project #: 9	)3 - Legis	lative Services O	ffice - Legislative Build	ing - Renovation of Ser	nate/House Chamb	ers	
_Design #:	06-00903	-01 - Sears, Hack	ney, Keener & William	s, Inc.			
Package	06-0090	3-01F - Legislativ	ve Building - Roof Rep	lacement			
Constru	ction Cor	ntract #: 06-0090	3-01F-5 - Owens Roof	ing, Inc.			
Construction	Contract E	Detail Bid It	ems HUB Good-	Faith Efforts HUB	Participation	Change Orders Evaluations Milestones	
							Action OCIOse
CHANGE ORDER #	DAYS	AMOUNT	RECEIVED	LAST STATUS	STATUS	CONTRACTOR	DESCRIPTION Add Change Order
1	505	\$340,943.00	12/23/2009 00:00		Approved	Owens Roofing, Inc.	2ND RECEIVED INFORMATION ON 2/3/2010: Item 1: Extend Contract Time by Two Hundred Five (SIG) Calendar Days in order to complete the work of pending Part Iner for Perimeter Roof Garden) and previously completed Proposal Requests No.G-2 thru No. G-5 (roof work). Item 2: Replace waterproving system in continuous palmer as perimeter unw nour
2	0	\$3,559.00	02/03/2010 00:00		Approved	Owens Roofing, Inc.	Item 1: Reduce size of termination bar as per attached Proposal Request No. G-2 and Contractor's response dated 12-12-08 for the credit sum of Nine Hundred Sixty-Three and no/100 (\$963.00)

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

#### Fields in Red are required

Proven 6 4037 Localetics Devices Office Localetics Duilding Departments of Constanting Office	HINT: To add more PCOs, use 'Action> Save' to create the chang	e order first.	
Program #: 1927 - Legislative Services Office - Legislative Building - Renovation of Senate/House Cham Project #: 903 - Legislative Services Office - Legislative Building - Renovation of Senate/House Cham			
_project #: 903 - Legislative Services Once - Legislative Building - Renovation of Senate/House Chami Design #: 06-00903-01 - Sears, Hackney, Keener & Williams, Inc.	ers		
Package: 06-00903-01F - Legislative Building - Roof Replacement			
Construction Contract #: 06-00903-01F-5 - Owens Roofing, Inc.			
NEW CHANGE ORDER:			
Detail			
			Action Scione
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: Required .	Description	1 C	
2. Can Contractor mitigate the change without requiring a contract time extension:			
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):	*		
Contractor Design	ir -		
5. Estimated Cost of Change:			
6. Estimated time extension field cost (\$), if any:			
Project Financial Worksheet Summary			
Assigned Funds \$0			
Total Committed: \$8,656,043.07			
Available to Commit: -\$8,856,043.07			
This Change:			216
Available to Commit After this Change: -\$8,656,043.07			
Worksheet Detail			
WORSHING CONST.			
Cost Summary - Note: "Revised Contract" days and amounts are pending final approval.			
CONTRACT START +	CHANGE ORDERS (APPROVED) = CURRENT CONTRACT (+/-) THIS OR	DER = Revised Contract (PENDING)	
Construction Days 60 +	0 = 60 (+/-) 0	= 829	
,			
Cost (\$) \$377,404 +	= \$377,404 (+/-)	= \$1,786,952.07	
Schedule Summary - Note: "Revised Completion" date is pending final approval.			
CONTRACT START + ORIGINAL DAYS = ORIGINAL COMPLETE	IN DATE + PRIOR APPROVED CO DAVS = PRIOR APPROV	ED COMPLETION DATE + THIS ORDER =	Revised Completion (PENDING)
10/13/2008 + 60 = 12/12/2008		+ 0 =	12/12/2008
			12122000
PCO Breakdowns			
E PCO #1			
DESCRIPTION OF PCO RI	EASON(S) FOR CHANGE(S)	PC0 COST # DAYS	CAUSE
(Provide adequate detail to enable SCO to properly assign the cause codes) (P	rovide adequate detail to properly justify cause codes)		(Far SCO Use Only)
			Unassigned 🔻
		To upload	
			<u></u>
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·		ines, ellek	
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			Upload Files
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22/2016 2:45:09 PM	InterscopePlus 2.1 20160824 Copyright © 2016 - State of North Carolina : Department of Adv	ninistration - State Construction Office	Report a Problem

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

ſ	File Uploader
	Choose File No file chosen
	Add File to List
	Cancel
-	
AF	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
l	

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

Workflow icon appears.

					Chan	ge Order added	successfully				
	sign #: 15-11										
	-		<ul> <li>Enlarge conference</li> </ul>								
		_	#: 15-11026-01A-1	- SCO Contractor							
_	Change Orde	r #: 1									
Deta	I										
r									Workflow	Action	Close
Status											
			der Construction lid Contract		Status: Created s Date: 4/21/2015 2:50:00 PM		Date Received: Last Update: 4	/21/2015 2:50:00	PM Total Days:	0 \$1,000	
Workf	low Activity										
STEP	ACTION	ACTIVE?	ROLE	FIRM/AGENCY	USER COMPLETING STEP	COMPLETED ON	ALERTED ON	RESULT	COMMENT	s	
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							
1. Schi 2. Can 3. Sele 4. Are 5. Esti	Contractor n ct the Contra additional co mated Cost o	ffected by hitigate th ctors that sts incurr of Change	t will need a contra ed by reason of th	equiring a contract i ict time extension du e time extension? (if	so, include in items 5&6 belo	w): Nc V igner 0					
he	Desigi	ner n	nay cont	inue to m	ake changes t	o the Ch	ange Oro	der usin	Action	p until	the time

that the Change Order is submitted.



. However,

The Designer may choose to abandon or delete the Change Order using the Add PCO 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 Reject this action. Select **Yes** to continue or **No** to return.

. A Confirmation window will appear to confirm

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.

						created for user has been subm		gner			
D	sign #: 15-11	026-01 - S	CO Designer								
1	ackage: 15-1	1026-01A	Enlarge conferenc	e room							
	Construction	Contract	#: 15-11026-01A-1	- SCO Contractor							
	Change Orde	r #: 1									
Deta											
*									💞 Workflow	Action	Close
Statu	5										
	Package S Contract S		der Construction id Contract		Status: Submitted 5 Date: 4/21/2015 2:50:00 PM		Date Received: Last Update: 4	21/2015 2:50:0	D PM Total Days: Total Amount:	0 \$1,000	
Work	flow Activity										
STEP	ACTION	ACTIVE?	ROLE	FIRM/AGENCY	USER COMPLETING STEP	COMPLETED ON	ALERTED ON	RESULT	COMMENTS	5	
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							

#### 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.

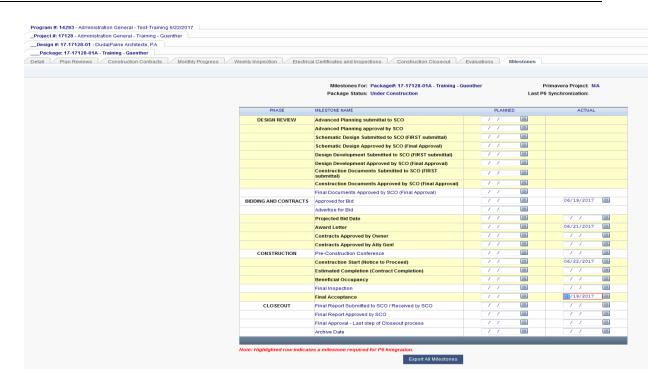
Program #	#: 13844 - State	e Construction Of	fice - Test								<b>\</b>						
_Project#	t: 15996 - State	Construction Off	ice - Test														
_Design	#: 16-15996-0	1 - SCO Designer	r														
Packa	ige: 16-15996-i	01A - Test										4					
Detail	SCHEDULE	- Planned and Ad	ctual / Pla	n Reviews	Constru	ction Contracts Monthly	y Progress Weekly Inspection El	lectrical Cer	ificates and In	spections	Construction Closeou	t Evaluations	Milestones				
																(	Close
EVALUATION #		FIRM NAME		TYPE	SOD ID	DEPARTMENT	AGENCY	SCORE	RATING	STATUS	CONSTRUCTION STATUS	DUE	FINAL ACCEPTANCE	PROJECT COMPLETION	VERSOW		
<u>11402</u>	SCO Designer			D	<u>16-15996-01A</u>	Administration	State Construction Office			PENDING	Under Design				2		
1 found																Add Designer Evaluation	Export
Uploads	Comments	Project Man	agers / Proj	ectManag	ers												
Delete?	DATE	7	TYPE			FLE NAME		DESCRIPTION						UPLOADED BY			
) found																Uplo	ad Files
10/3/2016 1:5	6:45 PM					In	terscopePlus 2.1.A_20160830 Copyright @	2016 - Stat	e of North Card	olina : Departn	nent of Administration : S	tate Construction Of	ice			Report a	Problem

Review and update HUB data on the 'HUB Participation' tab. Change HUB status to

Program #, reve - State Construction C	office - Womack Buildin	ng Renovations											
_Project #: 233 - State Construction Offi	fice - Womack Building	Renovations											
Design #: 41-97014-731 - State Cons	struction Office												
Package: 41-97014-731 - WOMAC	K BLDG RENOVATION	N 5											
Construction Contract #: 41-9701	14-731A-1 - Diversified	d Contracting, Inc.											
Construction Contract Detail Bid It	tems HUB Good-	I-Faith Efforts HUB Pa	rticipation Change (	Orders Evaluations	Milestones								
											C Action	<u>ु</u> 🙆 🕻	Close
onstruction Contract HUB Participat	tion						HUB	Participation Summary (Certifie	d Only)				
											Awarded	Curren	at
eneral Contractor:		Contracting, Inc.					Cons	truction Contract Amount:			\$276,465.00	\$290,981.0	00
C HUB Type:	Unknown						Total	HUB Participation:			\$22,239.00	\$0.0	00
HUB Data is FINAL as of:							HUB	%:			8.04 %	0.00 %	%
Show HUB Details/Stat		•	Source of Inf	ormation:	<ul> <li>Affidavi</li> <li>Affidavi</li> </ul>								
					<ul> <li>Affidavi</li> </ul>	tD (GFEs reg'd)							
	Award	_			U Pandan								
ntractor	Enalization Now		HUB Certified?	C SI Division	() All Martin	Work		Awarded		Current Contract	Payments To Date Fir	al Payment?	
	Finalization	HUB Type	HUB Certified?	CSI Division	•	Work		Awarded \$ 1,621.00	S	Current Contract	Payments To Date Fir \$0.00	al Payment?	×
A Signs Inc	Finalization	HUB Type	HUB Certified? Y Y			Work							×
A Signs Inc In Fairweather & Sons	Finalization	HUB Type F	Y	Select	•	Work Sinage		\$ 1,621.00	\$	0.00	\$0.00	N	
intractor A Signa Inc din Fairweather & Sons Watard Corporation Islec Network Services	Finalization	HUB Type F F	Y	Select Select	•	Work Sinage Painting Aluminum Windows		\$ 1,621.00 \$ 6,720.00	\$ \$	0.00	\$0.00 \$0.00	N N	×
DA Signs Inc din Fairweather & Sons sulgard Corporation	Finalization	HUB Type F F	Y Y	Select Select Select	• • •	Work Sinage Painting Aluminum Windows		\$ 1,621.00 \$ 6,720.00 \$ 2,193.00	\$ \$	0.00 0.00 0.00	\$0.00 \$0.00 \$0.00	N N N	××××
DA Signs Inc. Vin Fairweather & Sons sulgard Corporation stec. Network Services	Finalization Now	HUB Type F F	Y Y	Select Select Select	• • •	Work Sinage Painting Aluminum Windows		\$ 1,621.00 \$ 6,720.00 \$ 2,193.00	\$ \$	0.00 0.00 0.00	\$0.00 \$0.00 \$0.00	N N N N	××××
A Signs Inc In Fairweather & Bons Jugard Corporation ster. Network: Services sund Comments // Uploads // Project M	Finalization Now	HUB Type F F	Y Y	Select Select Select	• • •	Work Sinage Painting Aluminum Windows		\$ 1,621.00 \$ 6,720.00 \$ 2,193.00	\$ \$	0.00 0.00 0.00	\$0.00 \$0.00 \$0.00	N N N N	××××
A Signs Inc In Fairwasher & Bons Jean Corporation Jean Composition and Comments Uploads Project M DATE US	Finalization Now	HUB Type F F U B	Y Y	Select Select Select	· · · · · · · · · · · · · · · · · · ·	Work Sinage Painting Aluminum Windows		\$ 1,621.00 \$ 6,720.00 \$ 2,193.00 \$ 13,898.00	\$ \$	0.00 0.00 0.00	\$0.00 \$0.00 \$0.00	N N N N	××××
A Signs Inc Im Fairweather & Bons uidard Comportion static Network, Siervices bund Comments Uploads Project M DATE US	tanagers see_to	HUB Type F F U B	Y Y	Select Select Select Select	· · · · · · · · · · · · · · · · · · ·	Work Sinage Painting Aluminum Windows		\$ 1,621.00 \$ 6,720.00 \$ 2,193.00 \$ 13,898.00	\$ \$	0.00 0.00 0.00	\$0.00 \$0.00 \$0.00	N N N N	× × tracto

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.

"Finalization," check the HUB Data is FINAL box and



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.

	y Department of Administration							
Package: 17-17127-01A - Test-Training 6	22/2017							
Progress Report								
ew Progress Report								-
							🔀 Action	(C)
ates	Percentages	Not There	Problem Codes					
Monthly			Future Work	Schedules				
Conference:	* Scheduled (to date): 100 % Previous Completed: %		Submittals	Material Deliveries				
Conference Date: 06/08/2017	* Completed This Month: 100 %		Change Orders					
Date Received: 06/09/2017	Total Completed (to date): %							
			Job Conditions	Carler				
nments								
loseout project								
ogram #: 587 - Coastal Carolina Comm	nity College - Dynamometer Test Cell Facility							
	nity College - Dynamometer Test Cell Facility							
	nunity College - Com College Informal Test Projec							
roject #: 16764 - Coastal Carolina Com Design #: 17-16764-01 - In-House Coord	nunity College - Com College Informal Test Project ination Coastal Carolina CC							
roject #: 16764 - Coastal Carolina Com Design #: 17-16764.01 - In-House Coord Package: 17-16764.01B - Com Colleg	nunity College - Com College Informal Test Projec ination Coastal Carolina CC e Informal test Project Package		and Inspections // Construction Closeout // E	valuations. Milesto	nes			
roject #: 16764 - Coastal Carolina Com Design #: 17-16764.01 - In-House Coord Package: 17-16764.01B - Com Colleg	nunity College - Com College Informal Test Projec ination Coastal Carolina CC e Informal test Project Package		and Inspections Construction Closend E	valuations // Milestor	nes		Que Action	. @0
roject #: 16764 - Coastal Carolina Com Design #: 17-16764.01 - In-House Coort Package: 17-16764.01B - Com Colleg tail Plan Reviews Construc	nunity College - Com College Informal Test Projec ination Coastal Carolina CC e Informal test Project Package				nes		Continue Action	, ©c
oject #: 16764 - Coastal Carolina Com tesign #: 17.16764.01 - In-House Coorc Package: 17.16764.01B - Com Colleg all Plan Reviews Construc kage B Oversight: A - Advisory/Cour	nunity College - Com College Informal Test Projec Ination Coastal Carolina CC e Informal test Project Package ion Contracts Monthly Progress Weel		Bidding/Construction Approved for Bid:	Contracts 2017-03-13 Forma	I Contracts? N *		Action	, ©0
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Click on the "Go to Construction Closeout Details" tab.

Program #: 587 - Coastal Carolina Community College - Dynamor	meter Test Cell Facility			
_Project #: 16764 - Coastal Carolina Community College - Com C	ollege Informal Test Project			
Design #: 17-16764-01 - In-House Coordination Coastal Carolin	a CC			
Package: 17.16764-01B - Com College Informal test Project	Package			
Detail Plan Reviews Construction Contracts Mo	onthly Progress Weekly Inspection Electrica	al Certificates and Inspections Construction Closeout Evaluations	Milestones	
				(Close
Closeout Summary				
Package Status: Punchlist				
Final Acceptance:				
Closeout Due:	Construction closeout is due 60 days after Final A	cceptance Date.		
Closeout Status: Created				
Closeout Submitted:				
Closeout Approved: Last Update: 03/13/2017				
Last opdate: US/15/2017	Go to Construction Closeout Details			
Uploads Comments Project Managers				
Delete? Date _ Type	File Name	Description	Uploaded By	
found				Upload Files
13/2017 10:10:28 AM	InterscopePlus 2.2.B.5_20	0170310 Copyright © 2017 - State of North Carolina : Department of Administrati	on : State Construction Office	Report a Problem

			ynamometer Test Cell Facility							
ect #: 16764 -	Coastal Ca	olina Community College -	Com College Informal Test Project							
ign #: 17-16i	764-01 - In-H	ouse Coordination Coastal	Carolina CC							
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t Summary										
Iow Activity ACTION UPDATE SUBMIT	Proj Percen Final Insp Final Accee L Active? N Y	Department: Community G Agency: Coastal Caro Designer: Inflose Coc ect Monitor: Unassigned t Complete: Obsection tance Date: stance Date: ast Update: 3/13/2017 10 ROLE DESIGNER DESIGNER	olleges edination Coastal Carolina CC 10:00 AM FREKKelsecy In House Coordination Coastal Carolina CC In-House Coordination Coastal Carolina CC	Description: Test Package: Com Col	llege informal test P	-	RESULT Created	сониват		
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Here you will see a workflow and five (5) tabs for document upload.

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 <u>State Construction</u> <u>Manual</u>
  - 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.

_Des	ign #: 17-171	27-01	Agency: Admi	inistration General					
Pa	ckage: 17-17	127-01A - 1	est-Training 6/22	2017					
Const	uction Close	out							
									Superior Workflow
rojec	t Summary								
			SCO ID	R 17-17127-01A	Pr	oject: Test-Training 6	22/2017		
				Administration		ption: Test-Training 6			
				y: Administration General		kage: Test-Training 6	22/2017		
			Designer Project Monitor	r: In-House Design by Department of Administration	Package 5	tatus: Closeout			
			ercent Complete		Closeou	Due: 8/11/2017			
		Fina	I Inspection Date	e: 06/09/2017	Closeout Submitted	Date: 06/12/2017			
		Final	Acceptance Date		Closeout Approved				
			Last Update	e: 6/12/2017 4:16:00 PM	Close Out 5	tatus: Submitted			
Vorkfl	ow Activity								
STEP	ACTION	ACTIVE?	ROLE	FERM/AGENCY	USER COMPLETING STEP	COMPLETED ON	ALERTED ON	RESULT	COMMENTS
1	UPDATE	N	DESIGNER	In-House Design by Department of Administration	hahnel	05/12/2017 11:07		Created	
2	SUBMIT	N	DESIGNER	In-House Design by Department of Administration	halnoi-des	06/12/2017 16:15		Submitted	
3	APPROVE	Y	sco	St. Construction					
Docum	ents								
	I. INSPECTIO	N a	CLAIM VERIFIC	ATION Y 3. CONSTRUCTION CLOSEOUT Y 4. DESIGNER CERTIFICATE! Y 5. RECORD DRA	WINGS				
Inst	ructions								
1. Com	plete the follo	wing docur	ents according to	o the instructions in Section 602 Final Report of the State Construction Manual. If applicable, a link is	s provided to download a blank form.				
		-	-						
				tion (If Applicable)					
	al Inspection		cial Occupancy (I	If Annieshia)					
- Pa		for senen	call Occupancy i	IT ADDICADIO)					
		conv of any	th document unio	ig 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 Builliding		
_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
*		Action Solose
Package A	Bidding/Construction Contracts	Save
Oversight: Full Oversight	Approved for Bid: For	mal Contracts? Y
Title: SCO Office Project	Approved for Award: 2015-02-05	Award Type: Sing
Type: Undetermined		
Status: Complete	Construction Administration	Fees / Funds
Status Reason:		
Square Footage: 0 Plan Location:	Project Monitor: Unassigned	Liquidated Damages (/day): \$0
Plan Location:	Monthly Conference:	CD Cost Estimate: \$0
	Percent Complete: 0% 🔞	Plan Deposit: \$0.00
		Total Change Orders: \$0
County: UNKNOWN	Final Punchlist: Y	Total Construction Contract: \$0
Description: SCO Office Project		
Designer Rep:		
	Archive Information	
	Archive Date: / /	
	Archive Box#:	

### 3. Design Contract

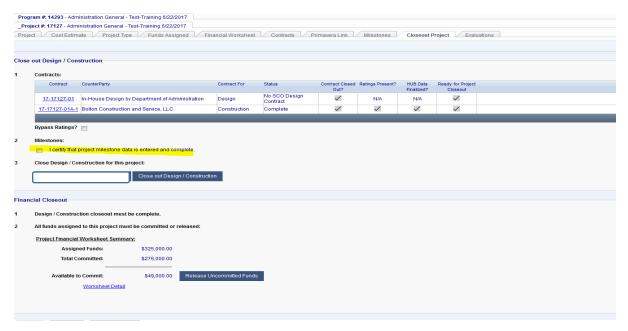
Select the 'Design'> 'Evaluation' tab, and complete designer evaluation.

Program #: 9809 - St. Construction - SCO office Buililding				
_Project #: 10963 - St. Construction - SCO Office Project				
Design #: 15-10963-01 - SCO Designer				
Detail Contract Scope and Fees Breakdowns Amendm	ents Consultants Package	es		
÷.			2	Action 🚫 Cle
Contract# 1	Dates		Design Contract Fees and Funds	Save
Contract ID: 15-10963-01	Selection:	0	×	Delete
SCO Oversight: Full Oversight	RFP Letter:	0	ORIGINAL DESIGN CONTRACT:	
SCO Plan Review: Full Oversight	Agreement: 201	5-01-05 🔞	Construction Target \$:	8,800,000 🔞
	Signed By 201	5-01-08 👩	Contingency Reserve Target \$:	270,000 🔞
	Designer: Signed By Agency: 201	5-01-12 🔞	Original Design Fee \$:	800,000 🔞
Contract Type: Standard Design Contract (Fully Funded)	SCO Acceptance: 201	-		
Contract Status: Complete			CURRENT DESIGN CONTRACT:	
Generate Contract			Construction Target:	\$8,800,000 😡
Scherale Sonnact			Contingency Reserve Target:	\$270,000 🔞
	Financial Worksheet St	immary	Design Fee:	\$800,000 🔞
Designer	Estimated:	anning (		
Name: SCO Designer	Assigned Funds:	\$10,000,000	Actual Commitment Amt \$:	\$800,000.00
Address: 301 N. Wilmington Street	Estimated Cost:	\$9.970.000		
Suite 450	Estimated Surplus			
Raleigh, NC 27601	(Need):	\$30,000		
License#: 123456789	Actual:			
HUB Firm: Not a HUB	Assigned Funds:	\$10,000,000		
	Total Committed:	\$800.000		
	Available to Commit:	\$9,200,000		

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.



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

		inistration General - Test-Training 6/22/2017								
rojec	ct Cost Estima	ate Project Type Funds Assigned Fi	nancial Worksheet	Contracts	Primavera Link	Milestones	Closeout P	roject Eval	uations	
ose o	out Design / Cons	struction								
	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	N/A	$\checkmark$		
	<u>17-17127-01A-1</u>	Bolton Construction and Service, LLC	Construction	Complete	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$		
						_	_	_		
	Punace Patinge?									
	Bypass Ratings?									
	Milestones:						<b>C D D D</b>			
	Milestones:	project milestone data is entered and complete.				Certi	fy Mil	estones	and click "Clos	se
	Milestones:									se
	Milestones:	oroject milestone data is entered and complete.	ion						s and click "Clos construction	se
	Milestones:	project milestone data is entered and complete nstruction for this project:	ion							se
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	Milestones: Learlify that p Close Design / Co Force Design / Co clal Closeout Design / Construc All funds assigned <u>Project Financial</u> Assign	vroject milestone data is entered and compista nstruction for this project: Construction Close Close out Design / Construct tion closeout must be complete. d to this project must be committed or released: Worksheet Summary:	ion							se
	Milestones: Learlify that p Close Design / Co Force Design / Co clal Closeout Design / Construc All funds assigned <u>Project Financial</u> Assign	voijed milestone data is entered and compisia nstruction for this project: Construction Close Close out Design / Construct tion closeout must be complete. d to this project must be committed or released: <u>Worksheet Summary:</u> ed Funds: \$325,000,00 xmmitted: \$276,000,00	Jncommitted Fund	3						se
	Milestones: Leartify that p Close Design / Co- Force Design / Co- Force Design / Co- Stal Closeout Design / Construct All funds assigned Project Financial Assign Total Co-	voijed milestone data is entered and compisia nstruction for this project: Construction Close Close out Design / Construct tion closeout must be complete. d to this project must be committed or released: <u>Worksheet Summary:</u> ed Funds: \$325,000,00 xmmitted: \$276,000,00	-	6						se

### 5. Financial Closeout

### a) Standard, Performance and Foundation Closeout

After the Design and Construction contracts have been closed, the next step is Financial Closeout.

Project #: 10963	- St. Construction - S	CO Office Project							
roject Cost	Estimate Proje	ct Type Funds Assign	ed Financial Work	ksheet Contrac	ts Milestones	Closeout Pr	oject		
									🚫 Cla
									••••
se out Design	/ Construction								
Contracts:									
Contract	CounterParty		Contract For	Status	Contract Closed	Ratings Present?	HUB Data	Ready for Project	
	000 0		During	0. milita	Out?	1	Finalized?	Closeout	
15-10963-01 15-10963-01A-1	SCO Designer SCO Contractor		Design Construction	Complete Complete	~ ~	✓ ✓		$\checkmark$	
15-10963-01A-1	SCO Contractor		Construction	Complete	~	V	~	V	
ilestones:									
	it project milestone d	ata is entered and complete							Certified by InterScope Administrator on 6/10/2
<ul> <li>I certify that</li> </ul>									Certified by InterScope Administrator on 6/10/20
	at project milestone d								Certified by InterScope Administrator on 6/10/20
<ul> <li>I certify that</li> </ul>	onstruction for this p								Certified by InterScope Administrator on 6/10/20
I certify tha	onstruction for this p								
I certify tha	onstruction for this p								
I certify tha	onstruction for this p								
I certify tha lose Design / Co Reopen Design	onstruction for this p	roject:							
I certify tha lose Design / Co Reopen Design ancial Closeou Design / Cons	onstruction for this p n / Construction ut truction closeout mu	roject: ust be complete.							
I certify tha lose Design / Co Reopen Design ancial Closeou Design / Cons	onstruction for this p n / Construction ut truction closeout mu	roject:							
I certify tha lose Design / Co Reopen Design ancial Closeou Design / Cons All funds assig	onstruction for this p n / Construction ut truction closeout mu	roject: ist be complete. nust be committed or relea							
I certify tha lose Design / Co Reopen Design ancial Closeou Design / Cons All funds assig <u>Project Finan</u>	n / Construction n / Construction ut struction closeout mu gned to this project i	roject: ist be complete. nust be committed or relea							
I certify tha lose Design / Co Reopen Design ancial Closeou Design / Cons All funds assig <u>Project Finan</u> Ast	n / Construction for this p n / Construction ut truction closeout mu gned to this project i ccial Worksheet Sum	roject: ust be complete. must be committed or relea <u>mary:</u>							
I certify tha lose Design / Co Reopen Design ancial Closeou Design / Cons All funds assig <u>Project Finan</u> Ast	nt / Construction for this p n / Construction at truction closeout mu gned to this project i cicial Worksheet Sum signed Funds:	roject: ust be complete. must be committed or relea <u>marr:</u> \$10,000,000.00							
Icertify that     Iose Design / Co     Reopen Design     Cons     Design / Cons     Design / Cons     All funds assig <u>Project Finan     Ass     Toti     Toti     Toti     Toti </u>	nt / Construction for this p n / Construction at truction closeout mu gned to this project i cicial Worksheet Sum signed Funds:	roject: ust be complete. must be committed or relea <u>marr:</u> \$10,000,000.00 \$9,600,000.00		unds					
Icertify that     Iose Design / Co     Reopen Design     ancial Closeou     Design / Cons     All funds assig <u>Project Finan     Ass     Tot:      </u>	nt Construction for this p n / Construction at truction closeout mu gned to this project it cicial Worksheet Sum signed Funds: al Committed:	roject: ust be complete. mary: \$10,000,000,00 \$9,600,000,00 \$400,000,00 \$400,000,00	ased:	unds					

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 Action

This example illustrates multiple funding sources.

	#: 9903 - UNC Pe					D 01			
Program	Program Fu	naing 12 Pi	rojects Ass	ign Amounts to F	rojects	Program Closed		🖗 Acti	ion 🔹 🐼 Close
Assign Funds	to Projects								
Source	Authorization Title	Current C-I-C	Original C-I-C	Current Allocation (Orig. + Appr. Changes)	Pending Changes I	Proposed Allocation	Ass	iignments	
General Fund	Performing Arts Building	41531-301	41631-302	\$ 600,000.00	\$ -100,000.00	\$ 500,000.00	Project ID Project Name	Agency Project Code	Assignment Amount           \$         350,000.00         Deletes           \$150,000.00         Deletes         100,000.00
State Debt	Performing Arts Building	41531-301	41531-301	\$ 30,000,000.00	\$ 0.00	\$ 30,000,000.00	Project ID Project Name  10912 Purchase Land  10913 Performing Arts buildin  10921 Parking Iof  10921 Parking Iof  10922 Extend campus utilities  To Assign  Add Assignment	-	Assignment Amount           \$ 1,750,000.00         Deleter           \$ 25,000,000.00         Deleter           \$ 50,000.00         Deleter           \$ 1,750,000.00         Deleter
				\$30,600,000.00	(\$100.000.00)		rad roogninen		

Return to the 'Project'>'Closeout Project' tab and the Available to Commit should equal \$0.

Program #: 9809 - S									
	St. Construction - SCO								
Project Cost E	Estimate / Project 1	Type Funds Assigned	Financial Wor	rksheet 📝 Contracts	Milestones	Closeout Pr	roject		
									(2) Cl
Close out Design / (	Construction								
1 Contracts:									
Contract	CounterParty		Contract For	Status	Contract Closed Out?	Ratings Present?	HUB Data Finalized?	Ready for Project Closeout	
15-10963-01	SCO Designer		Design	Complete	$\checkmark$	$\checkmark$	N/A	$\checkmark$	
15-10963-01A-1	SCO Contractor		Construction	Complete	$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	
	project milestone data	is entered and complete.							Certified by InterScope Administrator on 6/10/20
I certify that p	project milestone data Instruction for this proje								Certified by InterScope Administrator on 6/10/20
I certify that p Close Design / Con	struction for this proje								
I certify that p	struction for this proje								
I certify that p Close Design / Con	struction for this proje								
I certify that p Close Design / Con: Reopen Design /	nstruction for this proje								
I certify that p Close Design / Con: Reopen Design /	nstruction for this proje	ect:							
I certify that p     Conse Design / Conse     Reopen Design /  Financial Closeout     Design / Constru	Instruction for this proje	ect:	d:						Certified by InterScope Administrator on 6/10/20 Closed out by InterScope Administrator on 6/10/20
I certify that ;     Conse Design / Conse     Reopen Design /  Financial Closeout     Design / Constru     All funds assign	Instruction for this proje	ect: be complete. st be committed or release	d:						
I certify that pr     Construction     Construction	Istruction for this project	ect: be complete. st be committed or release	d:						
I certify that pr     Cose Design / Con     Reopen Design /  Financial Closeout     Design / Constrn     All funds assign     Project Financi     Assign	Astruction for this proje	bect: be complete. st be committed or release INE \$9,600,000.00	d:						
I certify that pr     Certify that pr     Cose Design / Con     Reopen Design /  Financial Closeout     Design / Constrn     All funds assign     Project Financi     Assign	Struction for this project / Construction	bect: be complete. at be committed or release	d:						
I certify that pr     Cose Design / Com     Reopen Design /  Financial Closeout     Design / Constr     Design / Constr     All funds assign     Protect Financi     Assign     Total	Astruction for this proje	bect: be complete. st be committed or release INE \$9,600,000.00	d:						
Cose Design / Con:     Reopen Design /     Financial Closeout     Design / Constr     Design / Constr     All funds assign <u>Protect Financi</u> Assign     Total	Instruction for this projection of this projection of the projection of the project must in the projection of	ect: be complete. st be committed or release IXC \$9,600,000.00 \$9,600,000.00	d:						
Certify that p     Certify that p     Cose Design / Con     Reopen Design /     Financial Closeout     Design / Constr     All funds assign     ProjectFinanci     Assig     Total     Available	Instruction for this projection of this projection of the project must line of this project must line of the project m	ect: be complete. st be committed or release IXC \$9,600,000.00 \$9,600,000.00	d:						

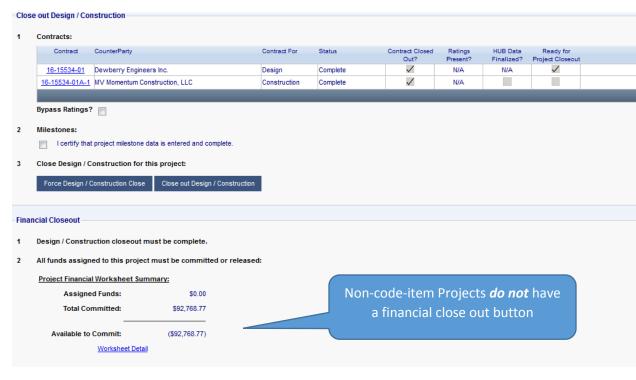
Select Close out Project Financials . After executing this, the project is closed.

# InterscopePlus User Manual

			Financi		aut.			
Program #: 9809 - St. Construc	tion - SCO office Buililding							
Project #: 10963 - St. Constru	ction - SCO Office Project							
Project Cost Estimate	Project Type Funds Assig	ned Financial Wor	ksheet Contra	cts Milestones	Closeout Pro	oject		
								🚫 Clos
								<b>0</b> 000
ose out Design / Construct	ion							
Contracts:								
Contract CounterParty		Contract For	Status	Contract Closed Out?	Ratings Present?	HUB Data Finalized?	Ready for Project Closeout	
15-10963-01 SCO Design	er	Design	Complete		$\checkmark$	N/A		
15-10963-01A-1 SCO Contra		Construction	Complete		~	~	~	
		our out of the	Southers					
V	estone data is entered and comple	te.						Certified by InterScope Administrator on 6/10/201
I certify that project mile		te.						Certified by InterScope Administrator on 6/10/201
V	or this project:	te.						
Close Design / Construction f	or this project:	te.						
Close Design / Construction f	or this project:	te.						
Close Design / Construction f	or this project:	te.						
Close Design / Construction f	or this project:	te.						
Close Design / Construction f Reopen Design / Construct nancial Closeout Design / Construction closeo	or this project:							
Close Design / Construction f Reopen Design / Construct nancial Closeout Design / Construction closeo	or this project: ion ut must be complete. ject must be committed or releas							
Close Design / Construction f Reopen Design / Construct nancial Closeout Design / Construction closeo All funds assigned to this pro	or this project: ion ut must be complete. ject must be committed or releas							
Close Design / Construction f Reopen Design / Construction nancial Closeout Design / Construction closeou All funds assigned to this pro Project Financial Worksheet Assigned Funds:	or this project: Ion ut must be complete. ject must be committed or releas Summary: \$9,600,000.00							
Close Design / Construction f Reopen Design / Construction nancial Closeout Design / Construction closeou All funds assigned to this pro Project Financial Worksheet	or this project: Ion ut must be complete. ject must be committed or releas <u>Summary</u> :							
Close Design / Construction f Reopen Design / Construction nancial Closeout Design / Construction closeou All funds assigned to this pro Project Financial Worksheet Assigned Funds:	or this project: Ion ut must be complete. ject must be committed or releas Summary: \$9,600,000.00							
Close Design / Construction f Reopen Design / Construction nancial Closeout Design / Construction closeou All funds assigned to this pro Project Financial Worksheet Assigned Funds: Total Committee:	or this project: In this project: ut must be complete. ject must be committed or releas <u>Summary:</u> \$9,600,000.00 \$9,000,000.00 \$0,000							Certified by InterScope Administrator on 6/10/201 Closed out by InterScope Administrator on 6/10/201
Close Design / Construction f Reopen Design / Construction nancial Closeout Design / Construction closeou All funds assigned to this pro Project Financial Worksheet Assigned Funds: Total Committe: Available to Commit:	or this project: In this project: ut must be complete. ject must be committed or releas <u>Summary:</u> \$9,600,000.00 \$9,000,000.00 \$0,000							

#### b) Non-Code-Item Financial Closeout

This type of project will not have a financial close out as shown below.



# 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.

Pr	ogram #: 98	809 - St. Construction - SCO office Buililding										
Pr	ogram /	Program Funding Projects Assi	ign Amounts to Projects Prog	gram Closeout								
								🚫 Close				
Clo	se out Pro	ojects										
1. P	rojects:											
	Project ID	Title	Project Status	Ready for Program Closeout								
	10963	SCO Office Project	Financials Closed O	ut 🕢								
-Clo	se out Fina	ancials										
2.	There ma	ay not be any pending Funds Transfer or Incr	rease / Decrease Authorization re	quests that affect this program.								
3.	All funds	allocated to this program must be assigned	l, 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	ot 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 succ	essful. The status of	the program has been cha	nged to Complete.					
P	rogram #: 9	809 - St. Construction - SCO office Buil	ilding									
P	rogram	Program Funding Projects	Assign Amounts	to Projects Program	Closeout							
									🚫 Close			
Clo	Close out Projects											
1.	1. Projects:											
	Project ID	Title		Project Status	Ready for Program Closeout							
	10963	SCO Office Project		Financials Closed Out	$\checkmark$							
	_		_	_	_							
Clo	se out Fin	ancials										
2.	There may n	not be any pending Funds Transfer or I	ncrease / Decreas	e Authorization requests t	hat affect this progra	m.						
3. /	All funds allo	ocated to this program must be assig	ned, transferred o	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	41501-4T0	1	\$9,600,000.00	\$0.00	\$9,600,000.00	\$9,600,000.00	\$0.00			
	_	_	_	_	_	_	_	_				
	Reopen P	rogram						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.

InterSCOPE :: State Office	Of North Caro	ina - State Construction	USER: Mrfixit7	'1 VIEW:	State Cons	truction		Logout
ն Home 🛛 🖄 New 🔗	FCAP 🔍	Design Review 🔤 💲 Authorizatio	ons 📲 Program	s 🚦 Funds Change	Request	🔊 My Account	Reports	🮯 Help
		Funds Transfers	Search: Enter cr	iteria and press sear	ch			
Department:	= 🔻			Request Status: =	•	Select Status		
		epartment	•	Budget Code:	ke 🔻			
Institution/Agency:	=	Select Agency V		Budget Item:	ke 🔻			
Fiscal Year:	= •	Select Fiscal Year V		NCAS Center:	ke 🔻			
Change Amount:	> •							
Request Type:	= •	Select Transfer Type V						
		Search Done Reset	New Funds Tr	ansfer New Increas	o/Docroac			

### 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 <u>contrue</u>.

									Action	. 😣
	ncy: UNC Pembro ram: Performing A				Search					
Source Of Funds	Code Item Center	Original Code Item	Allocated Amount	Assigned To Projects	Pending Changes	Available To Assign	Transfer Amount			
SD	41531-301	41531-301	\$30,000,000.00	\$30,000,000.00	\$0.00	\$0.00	\$0.0	0		
GF	41531-301	41631-302	\$600,000.00	\$350,000.00	\$0.00	\$250,000.00 1	00000	7		
Transfer To:	Agency: UNC Program: Agri	C Pembroke cultural Center (990	4)		Search					
		17 - 41631-302Agr			•					
		e utility work t								
,	Remarks: Mov									

This brings up the summary of the request, above. Select 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.

Èr 👘										🚫 Clos
Au	thorization Information	tion				Funding Inform	ation			
	F	Agency: UNC F iscal Year: 2016	ming Arts Building	ities)		Agency F Aur Tot Author	Budget Code: 41531 Budget Item: 301 NCAS Center: unding Code: thorized Date: 1/21/2015 al Authorized: \$30,000,00 ized Purpose: Construct f From Capstat: False		orming Arts	
	uthorization Item Sum	amary Author	ization Item Detail	ogram Allocation	Authorization Ite	m Audit Trail / Uploads	Comments			
. <mark>.</mark> A	uthorization Item Sum Source	nmary Author	ization Item Detail // Pr	ogram Allocation	Authorization Ile Pending Changes	m Audit Trail Uploads	Comments Current Allocated Amount	Assigned To Projects	Available To Assign	
. A				-	-		1	Assigned To Projects \$350,000.00	Available To Assign \$150,000.00	
	Source	Orig. C·I·C	Original Authorized Amount	Approved Changes	Pending Changes	Proposed Authorization Amount	Current Allocated Amount		-	
. A	Source General Fund	Orig. C-I-C 41531-301	Original Authorized Amount \$0.00	Approved Changes \$600,000.00	Pending Changes \$-100,000.00	Proposed Authorization Amount \$500,000.00	Current Allocated Amount \$600,000.00	\$350,000.00	\$150,000.00	
	Source General Fund Non-General Fund	Orig. C-I-C 41531-301 41531-301	Original Authorized Amount \$0.00 \$0.00	Approved Changes \$600,000.00 \$0.00	Pending Changes \$-100,000.00 \$0.00	Proposed Authorization Amount \$500,000.00 \$0.00	Current Allocated Amount \$600,000.00 \$0.00	\$350,000.00 \$0.00	\$150,000.00 \$0.00	
	Source General Fund Non-General Fund Non-State Debt	orig. C-I-C 41531-301 41531-301 41531-301	Original Authorized Amount \$0.00 \$0.00 \$0.00	Approved Changes \$600,000.00 \$0.00 \$0.00	Pending Changes \$-100,000.00 \$0.00 \$0.00	Proposed Authorization Amount \$500,000.00 \$0.00 \$0.00	Current Allocated Amount \$600,000.00 \$0.00 \$0.00	\$350,000.00 \$0.00 \$0.00	\$150,000.00 \$0.00 \$0.00	
	Source General Fund Non-General Fund Non-State Debt R&R General Fund	orig. C-I-C 41531-301 41531-301 41531-301 41531-301	Original Authorized Amount \$0.00 \$0.00 \$0.00 \$0.00	Approved Changes \$600,000.00 \$0.00 \$0.00 \$0.00	Pending Changes \$-100,000.00 \$0.00 \$0.00 \$0.00	Proposed Authorization Amount \$500,000.00 \$0.00 \$0.00 \$0.00	Current Allocated Amount \$600,000.00 \$0.00 \$0.00 \$0.00	\$350,000.00 \$0.00 \$0.00 \$0.00	\$150,000.00 \$0.00 \$0.00 \$0.00	

×												Olos
Authorizatio	n Information					Fundin	g Information					
Leg	Agenc Fiscal Yea Titl	e: Performing Arts Build s: Active						em: 301 ter: de: ate: 1/21/2015 red: \$30,000,000.00 ose: Construct news	chool for Perfor	rming Arts		
Authorization	Item Summary	Authorization Item Detai		ocation Auth	orization	Item Audit Trail	Uploads Comme	ents				
ource	Orig. C-I-C	Current Authorization (Orig + Appr Changes)	Pending Changes	Available To Allocate				Allocatio	ns			
	41531-301	\$ 0.00	\$ 0.00	\$ 0.00								
eneral Fund	41631-302	\$ 600,000.00	\$ -100,000.00	\$ 500,000.00	ID 9903	Agency UNC Pembroke Allocation Count: 1	Program Name Performing Arts Sch To Allocate	Amount	- (	Pending Changes \$ -100,000.00	Available to AssignA \$ 500,000.00 \$0.00	ssigned to Projects \$ 350,000.00
on-General Fund	41531-301	\$ 0.00	\$ 0.00	\$ 0.00								
on-State Debt	41531-301	\$ 0.00	\$ 0.00	\$ 0.00								
&R General Fun	d 41531-301	\$ 0.00	\$ 0.00	\$ 0.00								
&R State Debt	41531-301	\$ 0.00	\$ 0.00	\$ 0.00								
tate Debt	41531-301	\$ 30,000,000.00	\$ 0.00	\$ 30,000,000.00	Program ID	Agency	Program Name	Original Allocated A Amount	pproved Changes	Pending Changes	Available to Assign A	ssigned to Projects
					<u>9903</u>	UNC Pembroke	Performing Arts School	\$ 30,000,000.00	\$ 0.00	\$ 0.00	\$ 30,000,000.00	\$ 30,000,000.00
						Allocation Count: 1	To Allocate				\$0.00	
				\$30,500,000,00								

Select **Select** to send the request forward for approval.

Approve

Amour Effect			UNC Pembroke \$100,000.00 41531-301 Perfo	rming Arts Building		Transactio Remarks: Effect on I Authorized	Destination Author		work to Program		
unds	on Source Progr Allocated to Pro		- Performing Arts	School			Destination Program ocated To Program		al Center		
STEP	ACTION	ACTIVE?	ROLE	ORGANIZATION	APPROVER.	COMPLETED ON	ALERTED ON	DISPOSITION		COMMENTS	
	CREATE	N	AGENCY	UNC Pembroke		4/13/2015		Created	rcox		
1			AGENCY	UNC Pembroke							
-	SUBMIT	Y	AGENCI	one remotoke							
2	SUBMIT APPROVE	Y	AGENCY	UNC Pembroke							
2 3											

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.

mour ffect (			UNC Pembroke \$100,000.00 2017 - 41631-30	2 - Agricultural Center		Transaction: Transfer Funds Remarks: Shifu utility work to this project. Effect on Destination Authorization: <u>41531-301 Performing Ans Building</u> Authorized Funds						
			- Agricultural Cen	ter			stination Program	9903 - Performin	ig Arts School			
	Allocated to Pro	ogram				Funds Alloc	ated To Program					
		ACTIVE?	ROLE	ORGANIZATION	APPROVER	COMPLETED ON	ALERTED ON	DISPOSITION		COMMENTS		
itep	Vorkflow		ROLE	ORGANIZATION	APPROVER			DISPOSITION	гсох	COMMENTS		
STEP	Vorkflow ACTION	ACTIVE?			APPROVER	COMPLETED ON			rcox	COMMENTS		
STEP	ACTION CREATE	ACTIVE?	AGENCY	UNC Pembroke	APPROVER	COMPLETED ON 4/13/2015		Created		COMMENTS		
<mark>ГЕР</mark> W	ACTION CREATE SUBMIT	ACTIVE? N N	AGENCY	UNC Pembroke UNC Pembroke	APPROVER	COMPLETED ON 4/13/2015		Created		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.

Amou Effect			UNC Pembroke \$100,000.00 41631-302 Agrice	ultural Center		Remarks: Effect on I	Transaction: Transfer Funds Remarks: Shift dillity work to this project. Effect on Destination Authorization: 41531-301 Performing Arts Building Authorized Funds					
unds	on Source Prog Allocated to Pro		- Agricultural Cent	ler			Destination Program: 9 Acated To Program	903 - Performi	ng Arts School			
STEP	ACTION	ACTIVE?	ROLE	ORGANIZATION	APPROVER	COMPLETED ON	ALERTED ON	DISPOSITION	COM	MENTS		
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	Y	DEPARTMENT	Educational Institutions (Universities)								
5	APPROVE	N	OSBM	State Budget And Management								
5 APPROVE N OSBM State Budget And Management												



They have the option of approving or disapproving the request using the Revet , 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.

Amour Effect		orization	UNC Pembroke \$100,000.00 : 2017 - 41631-30	2 - Agricultural Center		Transactio Remarks: Effect on D Authorized	Destination Authori		Funds y work to this project. 01 Performing Arts Building					
unds	on Source Progr Allocated to Pro		4 - Agricultural Cen	ter			estination Program cated To Program	: 9903 - Performir	ng Arts School					
- 🗁 V	vorknow													
STEP	ACTION	ACTIVE	? ROLE	ORGANIZATION	APPROVER	COMPLETED ON	ALERTED ON	DISPOSITION		COMMENTS				
STEP		ACTIVE	Role	ORGANIZATION UNC Pembroke	APPROVER	COMPLETED ON 4/13/2015	ALERTED ON	DISPOSITION	rcox	COMMENTS				
STEP	ACTION				APPROVER		ALERTED ON		гсох	COMMENTS				
STEP 1 2	ACTION CREATE	N	AGENCY	UNC Pembroke	APPROVER	4/13/2015	ALERTED ON	Created		COMMENTS				
STEP 1 2	ACTION CREATE SUBMIT	N N	AGENCY	UNC Pembroke UNC Pembroke	APPROVER	4/13/2015 4/13/2015	ALERTED ON	Created Pending	rcox	COMMENTS				

The status for the request remains in "Pending" until disapproved, or until the top level of the approval process approves it.

ffect			UNC Pembroke \$100,000.00 41631-302 Agric	ultural Center		Transaction: Transfer Funds Remarks: Shift utility work to this project. Effect on Destination Authorization: <u>41531-301 Performing Arts Building</u> Authorized Funds					
	on Source Prog Allocated to Pro		- Agricultural Cen	ter			estination Progran cated To Program	a: 9903 - Performin	ng Arts School		
<u>ا </u>	Vorkflow										
- 🚰 V		ACTIVE?	ROLE	ORGANIZATION	APPROVER	COMPLETED ON	ALERTED ON	DISPOSITION		COMMENTS	
_		ACTIVE?	ROLE	ORGANIZATION	APPROVER	COMPLETED ON 4/13/2015	ALERTED ON	DISPOSITION	rcox	COMMENTS	
STEP	ACTION				APPROVER		ALERTED ON		rcox	COMMENTS	
STEP	ACTION CREATE	N	AGENCY	UNC Pembroke	APPROVER	4/13/2015	ALERTED ON	Created		COMMENTS	
STEP 1 2	ACTION CREATE SUBMIT	N N	AGENCY	UNC Pembroke UNC Pembroke	APPROVER	4/13/2015 4/13/2015	ALERTED ON	Created Pending	rcox	COMMENTS	

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.

Home 🧂 Companie	s 🤔 New	\$ Authorizations	Program	ms 🛛 🕒 Funds Transfer	Se My A	ccount	0 H	Help "	
		Funds Ti	ransfers S	earch: Enter criteria ar	id press se	arch			
Department:	= 🔻			Requ	est Status:	=	•	Select Status V	
	Educational	Institutions (Universities)	V	Bu	dget Code:	Like	•		
Institution/Agency:	= 🔻	Select Agency	v	В	udget item:	Like	T		
Fiscal Year:	= 🔻	Select Fiscal Year	V	NC	AS Center:	Like	T		
Change Amount:	> 🔻								
Request Type:	= 🔻	Select Transfer Type	<b>V</b>						

#### NOTE: You may only increase or decrease existing authority.

Search for and select the authorization you wish to increase. Enter amount and remarks, then continue.

	on Change										(S) CI
	Decrease	Authority									
		-									
	Existing Aut	norization:				Search Total A	ithorized:				
Original C-I-C	Current C	I-C Source	Original Auth Amt	Approved Changes	Pending Changes	Current Auth Amt	Proposed Change	Proposed Total			
631-313	41631-313	SD	0	\$0.00	0	0	\$0.00	\$0.00			
31-313	41631-313	NSD	0	\$0.00	0	0	\$0.00	\$0.00			
31-313	41631-313	GF	0	\$0.00	0	0	\$0.00	\$0.00			
531-313	41631-313	NGF	50000	\$0.00	0	50000	10000	\$60,000.00			
531-313	41631-313	RRGF	0	\$0.00	0	0	\$0.00	\$0.00			
531-313	41631-313	RRSD	0	\$0.00	0	0	\$0.00	\$0.00			
Change in A	Authority: \$10,	00.00									
cate To I	Program										
		Brogram:			_						
			tural Center (9904)		۲						
		Supple	ment for increased c	ost							
							Continue				
							Action				
nis br	ings i	in the si	ummary c	of the r	eauest	. Selec	Save	and vo	u will	see the wo	rkflow
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				Workflow							
ith th	he cuir	rent sta	tus. Sele	🕂 🎾 Submi	to e	end th	e reau	est forw	ard fo	or approval.	
	ic cui	Tent Stu	tus. seite		10 .		crequ				
Authorizatio	on Change										
										Workflow	_ @c
										Workflow Action	. ©C
stitution / Ag		C Pembroke				Transacti	on:	Increase/Decreas			, ©C
mount:	\$10	0,000.00				Remarks:		Supplement for in	creased cost		. 800
nount: fect on Auth	\$10 stion: 20		enter NGF			Remarks: Effect on	Program:	Supplement for in 9904 - Agricultura	creased cost		<u></u> ©c
nount: lect on Auth thorized Fur	\$10 orization: 20 nds	0,000.00	ienter NGF			Remarks: Effect on		Supplement for in 9904 - Agricultura	creased cost		. 800
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iount: lect on Auth thorized Fur	\$10 norization: 20 nds	0,000.00	ienter NGE	50N	APPROVER	Remarks: Effect on	Program:	Supplement for in 9904 - Agricultura	creased cost		. 80
Tep AC	\$10 norization: 20 nds w	0,000.00 17 - 41631-313 - Ag C	ORGANIZAT	SON	APPROVER	Remarks: Effect on Funds All	Program: ocated to Progran	Supplement for in 9904 - Agricultura n DISPOSITION	creased cost al Center	Submit	. 80
nount: fect on Auth thorized Fur Workflov TEP AC	\$10 norization: 20 nds w ETEON AC	0,000.00 17 - 41631-313 - Ag C TIVE? ROLE 4 AGENCY			APPROVER	Remarks: Effect on Funds All	Program: ocated to Progran	Supplement for in <u>9904 - Agricultura</u> n	creased cost	Submit	. 8
TEP AC CREATE CREATE	\$10 loorization: 20 nds TTION AC SMIT	0,000.00 17 - 41631-313 - Ag C TIVE? ROLE 4 AGENCY 7 AGENCY	ORGANIZAT UNC Pembroke		APPROVER	Remarks: Effect on Funds All	Program: ocated to Progran	Supplement for in 9904 - Agricultura n DISPOSITION	creased cost al Center	Submit	. 8
Mount: fect on Auth thorized Fur Workflow TEP AC 1 CREATE 2 SUB	\$10 iorization: 20 inds W ETTON AC I SMIT YE T	0,000.00 17 - 41631-313 - Ag C TWEP ROLE A AGENCY AGENCY A AGENCY A AGENCY	ORGANIZAT UNC Pembroke UNC Pembro	oke	APPROVER	Remarks: Effect on Funds All	Program: ocated to Progran	Supplement for in 9904 - Agricultura n DISPOSITION	creased cost al Center	Submit	

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.

Program #: 11679 -	East Carolina University - [41136-306] - New Student Union & Health Sciences Student Servi	e Building			
_Project #: 9263 - E	ast Carolina University - Main Campus Student Union & Parking Deck				
Project Cost E	stimate Project Type Funds Assigned Financial Worksheet Contract	s <b>P6 I</b>	.ink / Milestone	es Closeout Project	Evaluations
				🔀 Action	Close
Project ID:	9263				
Project Title:	Main Campus Student Union & Parking Deck				
Link Project Mile	stones to P6 Schedule?				
Df Deviewt		_			
P6 Project:	Select a P6 Project Select a P6 Project + - Wright Circle - Mill and Repave 09246 - Belk CM-Split-Construction			Auto-Map Mi	lestones
	09263 - Student Union (CM at Risk) 09610 - Freicher Res, Half Renov, & Access, Improv, - PH1				
	ATE 10217 - HSC Student Services Bldg 1421 10401 - 2013 R&R - Replace Sectionalizing Switches 23, 24, 29			DESCRIPTION	
2014-12-02	14:21 10488 - Replacement Condensate Electrical Utilities at Greenmill Run (Single Prime)	l and	Pre-Con CMR		
1 found	10492 - North Recreation Complex Phase 3			Delete Selected Files	Upload Files
	11182 - Aycock Basement (Single Prime) 40000-10 - Guaranteed Energy Savings Performance Contracting				
12/1/2015 7:14:47 AM	40000-22 - Service Learning Center - CSLC #10 (Single Prime)	Departr	nent of Administratio	on : State Construction Office	Report a Problem
	40000-29 - Brody - GE-99 (Single Prime)				
	40000-43 - Service Learning Center - CSLC #9 (Single Prime) 40136-2 - Craft Lab				
	40436-3 - Coastal Studies Revised Site (CM at Risk) COPS				
	40436-307 - Coastal Studies Revised Site (CM at Risk) COPS 40483-2 - Eastern Carolina Cardiovascular Institute				
	404052 - Lastern Calolina Caldiovascular Institute 40536-2 - Residence Hall HVAC Improvements (Cotten)				
	40536-303A - BSOM-Family Medicine Center Bldg. (Single Prime)	•			

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

_Project #: 9	263 - East Carolin	na University - Main Campus Student Unio	n & Parking D	leck				
Project	Cost Estimate	Project Type Funds Assigned	Financia	I Worksheet Contracts P6 Li	nk Milestones	Closeout P	roject Evalu	uations
						2	Action	🚫 Clo
Milestones Fo	r: Pro	ject #: 9263 - East Carolina University - I	Main Campu	s Student Union & Parking Deck	Note	: Red border in	dicates a require	ed miles
P6 Project:	092	63 - Student Union (CM at Risk)						
	032	ou - oradent omon (om at kisk)						
Project Milest		Name	P6 Activity	P6 Activity Name	Change P6 Activity	Planned	Actual	
Project Milesto Code DESADVPRJ	ones		P6 Activity	P6 Activity Name	Change P6 Activity	Planned		
Project Milesto Code DESADVPRJ	P6 Code	Name	P6 Activity A2930	P6 Activity Name Advertise for Commissioning Agent		Planned 3/9/2015		
Project Milesta Code DESADVPRJ CXADVPRJ	P6 Code DESADVPRJ	Name Date of FIRST advertisement for designer Date of advertisement for commissioning			changenlink			
Project Milest	P6 Code DESADVPRJ CXADVPRJ	Name Date of FIRST advertisement for designer Date of advertisement for commissioning authority	A2930	Advertise for Commissioning Agent	change unlink	3/9/2015		

In this case, the Designer Advertisement milestone did not map. Select 'change' for that activity

Action

and pick the activity from the dropdown list, then

Project C	P6 Activity	Main Campus Student Union & Parkinn Deck				Evaluations
	Milestone Name:	Date of FIRST advertisement for designer				💡 🚫 Close
ilestones For:	Code:	DESADVPRJ				required milesto
	P6 Project:	09263 - Student Union (CM at Risk)				equired milesio
8 Project:	P6 Code:	DESADVPRJ				
oject Mileston						
ode						vctual
ESADVPRJ					Filter	
XADVPRJ	Select Activity ID	Activity Description	Mstn Code	Planned	Actual	
XCONPRJ	SELECT A1000	Advertise for Designer Milestone	DESADVPRJ	11/17/2011	11/17/2011	
	SELECT A1040	Designer Selected Milestone	DESSELDC	2/27/2012	2/27/2012	
LOSEPR.L	SELECT A1090	Design Contract Milestone	DESCONDC	9/4/2012	9/4/2012	
	AI090					
LOSEPRJ MADVPRJ	SELECT A1120	Programming submittal to SCO	APSSCOPKG	8/31/2015	5/30/2013	
		Programming submittal to SCO Programming submittal approval by SCO	APSSCOPKG APASCOPKG		5/30/2013 6/18/2013	

It is now linked and shows the planned advertisement date.

<u> </u>		na University - Main Campus Student Unior						
Project	Cost Estimate	Project Type Funds Assigned	Financia	al Worksheet Contracts P6 Lin	nk Milestones	Closeout Pr	roject Ev	aluations
							Action	Close
Milestones Fo	r: Pro	ject #: 9263 - East Carolina University - N	Main Campu	s Student Union & Parking Deck	Note	e: Red border in	dicates a requ	ired milesto
P6 Project:	092	63 - Student Union (CM at Risk)						
Project Mileste	ones							
•	P6 Code	Name	P6 Activity	P6 Activity Name	Change P6 Activity	Planned	Actual	
Code		Name Date of FIRST advertisement for designer	P6 Activity	P6 Activity Name Advertise for Designer Milestone	Change P6 Activity change unlink	Planned	Actual	
Code DESADVPRJ	P6 Code		-		, ,		Actual	
Code DESADVPRJ CXADVPRJ	P6 Code DESADVPRJ	Date of FIRST advertisement for designer Date of advertisement for commissioning	A1000	Advertise for Designer Milestone	change unlink	11/17/2011	Actual	
Project Milesto Code DESADVPRJ CXADVPRJ CXCONPRJ CLOSEPRJ	P6 Code DESADVPRJ CXADVPRJ	Date of FIRST advertisement for designer Date of advertisement for commissioning authority	A1000 A2930	Advertise for Designer Milestone Advertise for Commissioning Agent	change unlink change unlink	11/17/2011 3/9/2015	Actual	

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.

	InterSCOPE :: Office	State Of Nort	h Carolina - State Constr	uction	USER: Mrfixit71	VIEW: State Cons	truction		Logout
🟠 Hom	e 🎾 New	SCAP	🔍 Design Review	<b>\$</b> Authorizations	Programs	🖥 Funds Change Request	Seal My Account	Reports	🥺 Help 💡
Pro	gram #: 12153	- State Cons	truction Office - Minor R	enovations			Global	and Institution	al 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.

Global Reports Institutional Reports	
	Reports will appear in a new tab. Please disable any popup blockers for this site.
HUB Reports	
HUB Participation Annual Summary	
Design Contracts	
Designer Selections	
Construction Contracts	
Capital Improvement Reports	
Capital Improvements Projects	

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.

etmont					Departme	ent: Administration		
rtment nistration	D	esigner Selections			Agency:	ALL		
cy		C .			Project St			
▼	Interscope							
ct Status								
View report	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	\$0	RND Architects, P.A.	50	06/02/20
	Administration General	Watson House Accessibility Modifications	4431	Watson House Accessibility Modifications	SO	H. S. Annis, Architect, AIA	SO	10/23/20
	Administration General	Cooper Building Elevator Upgrades	4443	Cooper Building Elevator Upgrades	SO	The Wooten Company	\$63,625	11/15/20
	Administration General	New Juvenile Youth Development Centers (YDC)	5644	New Juvenile Youth Development Centers (YDC)	\$0	O'Brien / Atkins Associates, P.A.	\$997,966	04/16/200
						O'Brien / Atkins Associates, P.A.	\$5,171,038	09/23/20
	Administration General	Garner Rd Complex Facility & Utility Upgrades	6825	Garner Rd Complex Facility & Utility Upgrades	so	United Engineering Group, Inc. (Inactive)	SO	11/19/20

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.

	Ехро
What word or phrase would you like search for?	
Use these additional criteria: Whole words only Match case Find results:	Interscope
	Projects Less than \$2M
	Agency Appalachian State Univer
Search Clear	Appalachian State Univer
	Appalachian State Univer
	Appalachian State Univer

To return to the parameters, click on the 🗾 at the bottom of the sidebar.

# VIII. Problem Reporting/ User Feedback/Help

# A. Problem Reporting

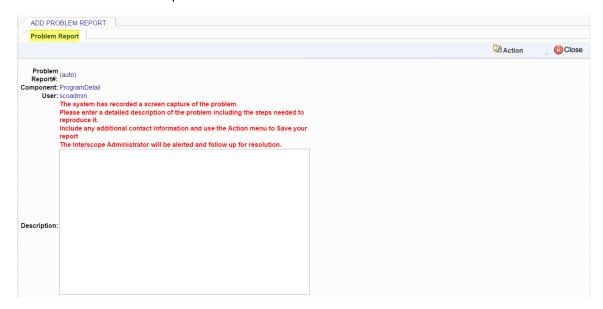
The system has a tool for reporting problems that can be found at the bottom of each screen

_FTOJECT#. 12207 - State CO	nstruction Office - Paint 4th floor spa	1005				
Closeout Project						
Project Cost Estimate	Project Type Funds Ass	igned Financial Worksheet	Contracts HI	JB Data P6 Link	Milestones	
					8	Close
SCO ID#	FIRM	STATUS	PHASE	TYPE	PLAN REVIEW	CO
•						+
) found					Add Construction Co	ontract
Uploads Comments	Project Managers					
Delete? DATE	TYPE	FILE NAME			DESCRIPTION	
4						Þ
found					Unioa	d Files

When a problem is encountered, click the button and the system will automatically capture a

Action

screen shot. Enter the requested information and



### 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
Designer	0	Unrated
	0 < 3.5	Unacceptable
	3.5 < 5.0	Acceptable
	5.0	Excellent
Contractor	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 - Stat	e Const	ruction Office				SER: sconcsu			VIEW: NC State Un	iversity		
Home 🔒	Companies 🎾 New 🔍 FCAP 💲	Authori	izations 🛄 Pro	grams 📴 Funds Change Reque	st 🔎 My Account 🖽 Rep	orts 🧔 Hel	р "						
System Not	ices My Favorites Active Design Cont	tracts	Active Constru	ction Contracts All Change Orde	s In Process My Projects	Evaluations	(Active)						
EVALUATION #	FIRM NAME	TYPE	SCO ID	DEPARTMENT	AGENCY	SCORE	RATING	STATUS	CONSTRUCTION STATUS	DUE	FINAL ACCEPTANCE	PROJECT COMPLETION	VERSI
9695	Perkins + 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	15-11655-01A	Educational Institutions (Universities)	NC State University	0		PENDING	Under Design				2
2367	Engineered Designs, Inc. (EDi)	D	07-07214-01E	Educational Institutions (Universities)	NC State University	0	UNRATED	PENDING	Combined				2
8817	LeChase Construction Services, LLC	С	14-11335-01A-1	Educational Institutions (Universities)	NC State University		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	15-12342-01A	Educational Institutions (Universities)	NC State University	0		PENDING	Approved for Bid				2
6794	RodgersRussell DayeCo	м	08-07847-03A-2	Educational Institutions (Universities)	NC State University	0	UNRATED	PENDING	Beneficial Occupancy				2
9963	Wagner 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	FDH Engineering, Inc. (Inactive)	D	14-11372-01A	Educational Institutions (Universities)	NC State University	0		PENDING	Approved for Bid				2
6795	RodgersRussell DayeCo	м	08-07847-03B-3	Educational Institutions (Universities)	NC State University	0	UNRATED	PENDING	Approved for Bid				2
9055	Barnes & Powell Electrical Co., Inc.	С	15-11464-01A-1	Educational Institutions (Universities)	NC State University		UNRATED	PENDING	Review Only				2
2753	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.

<b>1</b> -	InterSCOPE :: State Of North Care	olina - St	ate Construction Of	lice		USER: scomisc			VIEW: Administration				
🕯 Home 🚽	🛚 Companies 🏾 🔊 New 🖞	<b>FCA</b>	P ॢ 💲 Authoriza	itions 💭 Programs	Funds Change Request	S My Accou	nt 🖻 Rep	orts 🥺 He	lp .				
Program #: 12339 - State Construction Office - New NC Legislature Complex (system example)													
_Project #:	: 12757 - State Construction Off	ice - Ne	w NC Legislature E	uilding - (sample project)									
Project	Cost Estimate Project	Туре	Funds Assigned	Financial Workshee	t Contracts P6 Link	Closeout F	Project	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	С	16-12757-01A-1	Administration	State Construction Office			PENDING	Under Construction				2
<													
found													
	K K												

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.

	InterSCOPE :: State Of North Carolina - State Con	struction	n Office			USER: scomisc			VIEW: Ad	Iministration			
🟠 Home	📗 Companies 🛛 🔊 New 🔍 FCAP 🗍 \$	Autho	rizations 🛛 🛄 P	rograms	B Funds Change Reques	t 📲 My Account	Report	s 🧕	Help _				
Program	Program #: 12339 - State Construction Office - New NC Legislature Complex (system example)												
_Project #	: 12757 - State Construction Office - New NC L	egislatu	re Building - (samp	ole project)									
Design	#: 16-12757-01 - SCO Designer												
Detail	Contract Scope and Fees Breakdowns		mendments	Consultants	Packages Evalu	ations							
												DUE	
EVALUATION #	FIRM NAME	TYPE	SCO ID		DEPARTMENT	AGENCY		SCORE	RATING	STATUS	CONSTRUCTION STATUS	DUE	FINAL ACCEPTANCE
10356	SCO Designer	D	16-12757-01A	Administra	ation S	tate Construction Office				PENDING	Under Construction		
10357	SCO Contractor	С	16-12757-01A-1	Administra	ation S	tate Construction Office				PENDING	Under Construction		
4													
2 found													

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.

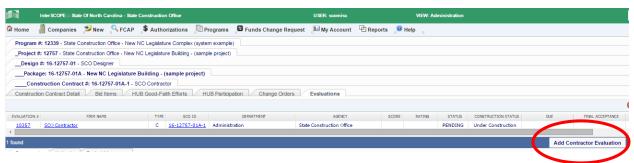
The designer evaluation can be added from this tab.

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Program #	#: 12339 - State Co	onstruction O	ffice - New NO	C Legislatu	re Complex (syster	m example)							
_Project #	#: 12757 - State Cor	Instruction O	ffice - New NC	Legislatu	re Building - (samp	le project)							
Design	#: 16-12757-01 - S	SCO Designe	er										
compile to 4-17257-014 - New NC Legislature Building - (sample project)													
Раска;	ge: 16-12/5/-01A -	- New NC L	egislature Bu	ulding - (	sample project)								
	5					An Contracte Monthly Progra	weekly Inspection	etrical Inepactio	ne Flar	trical Cartificat	e Construction Clos	eout Eval	luatione
Detail	SCHEDULE - Pla			an Review		on Contracts Monthly Progre	ess Weekly Inspection Ele	ctrical Inspectio	ins Elec	trical Certificat	es Construction Clos	eout Eval	luations
	5					on Contracts Monthly Progre	ess Weekly Inspection Ele	ectrical Inspectio	ons Elec	trical Certificat	es Construction Clos	eout Eva	luations
	SCHEDULE - Pla					DEPARTMENT	Weekly Inspection Ele	ctrical Inspectio	RATING	trical Certificat	Construction Clos	eout Eval	FINAL ACCEPTANCE
	SCHEDULE - Pla	anned and A		an Review	s Constructio								
Detail	SCHEDULE - Pla	anned and A		TYPE D	s Constructio	DEPARTMENT	AGENCY			STATUS	CONSTRUCTION STATUS		
Detail	SCHEDULE - Pla	anned and A		TYPE D	s Constructio sco ID <u>16-12757-01A</u>	DEPARTMENT Administration	AGENCY State Construction Office			STATUS PENDING	CONSTRUCTION STATUS Under Construction		

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

	Inter SCOPE	E :: State Of North Ca	arolina - State	Construction Office			USER: scor	nisc		VIEW: Adminis
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Pro	gram #: 12339 -	State Construction	Office - New I	NC Legislature Comple	ex (system example	)				
_Pr	oject #: 12757 - :	State Construction	Office - New N	IC Legislature Building	g - (sample project)					
Pro	ect Cost Es	stimate Projec	t Type	Funds Assigned	Financial Workshe	eet Contracts	P6 Link Clos	eout Project	Evaluat	tions
los	e out Design / (	Construction								
	e out Design / ( ontracts:	Construction —								
	Ŭ	Construction			Contract For	Status	Contract Closed	R tings Preser ?	HUB Data	Ready for Project
	ontracts:				Contract For	Status	Contract Closed Out?	R. tings Preser ?	HUB Data Finalized?	Ready for Project Closeout
	ontracts:				Contract For Design	Status Active		R tings Preser ?		
	ontracts: Contract	CounterParty						R Ings Preser ?	Finalized?	

# 7. Evaluation Search Page

The evaluation search page can be used to perform more complex queries of evaluation information.

	InterSCOPE :: State Of North Carolina - State	te Cons	truction Office			USER: sconcsu			VIE	W: NC State University				
Home	🛚 Companies 🏂 New 🔍 FCAP 🛸	Autho	izations 🔲 Programs	B Funds Change Reque	st 🔎 My Accou	unt 🕀 Reports  🤨 Help 💡								
Evaluation	s Search													
	Department:         Image: Transmission of tra		Institutions (Universities) niversity	•		Rating:         •           Final Grade:         •           Status:         •           Status:         •           Construction         •           Status:         •           Version#:         •	•			Final Acceptance: Project Completion: Due Date:	· · · /	/ E		
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	FIRM NAME			AGENCY	500 ID	PROJECT	GRADT	RATING	STATUS	CONSTRUCTION STATUS	FINAL ACCEPTANCE	PROJECT COMPLETION	DUE	VE
ALUATION #			DEPARTMENT											
5084	INLAND CONSTRUCTION CO.	с	Educational Institutions	NC State University	10-08698-02A-1	Cherry Building Renovation (Early College High	5	EXCELLENT	COMPLETE	Complete	7/22/2013	1/5/2015	9/20/2013	
5084 6293	Pearce, Brinkley, Cease & Lee, P.A. (Inactive)	C D	Educational Institutions Educational Institutions	NC State University NC State University	10-08698-02A-1 07-07171-02A	James B. Hunt Jr. Library	5 4.8	EXCELLENT	COMPLETE COMPLETE	Complete Complete	12/13/2012	8/27/2013	10/26/2013	
5084 6293 2395	Pearce, Brinkley, Cease & Lee, P.A. (Inactive) Swanson + Stewart Architects, PA	C D D	Educational Institutions Educational Institutions Educational Institutions	NC State University NC State University NC State University	10-08698-02A-1 07-07171-02A 09-08180-01A	James B. Hunt Jr. Library North Residence Hall Improvements	5 4.8 4.7	EXCELLENT EXCELLENT EXCELLENT	COMPLETE COMPLETE COMPLETE	Complete Complete Complete	12/13/2012 8/8/2011	8/27/2013 7/31/2012	10/26/2013 9/29/2012	
5084 6293 2395 5223	Pearce, Brinkley, Cease & Lee, P.A. (Inactive) Swanson + Stewart Architects, PA Becker Morgan Group, Inc.	C D D	Educational Institutions Educational Institutions Educational Institutions Educational Institutions	NC State University NC State University NC State University NC State University	10-08698-02A-1 07-07171-02A 09-08180-01A 08-09394-01A	James B. Hunt Jr. Library North Residence Hall Improvements Corporate Research One (CR1) – Renovation of	5 4.8 4.7 4.3	EXCELLENT EXCELLENT EXCELLENT ACCEPTABLE	COMPLETE COMPLETE COMPLETE COMPLETE	Complete Complete Complete Complete	12/13/2012 8/8/2011 7/22/2014	8/27/2013 7/31/2012 3/16/2015	10/26/2013 9/29/2012 5/15/2015	
5084 6293 2395 5223 4063	Pearce, Brinkley, Cease & Lee, P.A. (Inactive) Swanson + Stewart Architects, PA Becker Morgan Group, Inc. Davis Kane Architects, P.A.	C D D D	Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions	NC State University NC State University NC State University NC State University NC State University	10-08698-02A-1 07-07171-02A 09-08180-01A 08-09394-01A 96-05551-01A	James B. Hunt Jr. Library North Residence Hall Improvements Corporate Research One (CR1) – Renovation of Weisiger-Brown/Case Athletic Center/Reynolds	5 4.8 4.7 4.3 4.3	EXCELLENT EXCELLENT EXCELLENT ACCEPTABLE ACCEPTABLE	COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE	Complete Complete Complete Complete Complete	12/13/2012 8/8/2011 7/22/2014 9/8/2006	8/27/2013 7/31/2012 3/16/2015 3/30/2011	10/26/2013 9/29/2012 5/15/2015 5/29/2011	
5084 6293 2395 5223 4063 3475	Pearce, Brinkley, Cease & Lee, P.A. (Inactive) Swanson + Stewart Architects, PA Becker Morgan Group, Inc. Davis Kane Architects, P.A. HH Architecture, P.A.	C D D D D D	Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions	NC State University NC State University NC State University NC State University NC State University NC State University	10-08698-02A-1 07-07171-02A 09-08180-01A 08-09394-01A 96-05551-01A 10-08698-02A	James B. Hunt Jr. Library North Residence Hall Improvements Corporate Research One (CR1) – Renovation of Weisiger-Brown/Case Athletic Center/Reynolds Cherry Building Renovation (Early College High	5 4.8 4.7 4.3 4.3 4.3	EXCELLENT EXCELLENT EXCELLENT ACCEPTABLE ACCEPTABLE	COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE	Complete Complete Complete Complete Complete Complete	12/13/2012 8/8/2011 7/22/2014	8/27/2013 7/31/2012 3/16/2015 3/30/2011 1/5/2015	10/26/2013 9/29/2012 5/15/2015 5/29/2011 3/6/2015	
5084 6293 2395 5223 4063 3475 2822	Pearce, Brinkley, Cease & Lee, P.A. (Inactive) Swanson + Stewart Architects, PA Becker Morgan Group, Inc. Davis Kane Architects, P.A. HH Architecture, P.A. LS3P Associates LTD.	C D D D D D D	Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions	NC State University NC State University NC State University NC State University NC State University NC State University NC State University	10-08698-02A-1 07-07171-02A 09-08180-01A 08-09394-01A 96-05551-01A 10-08698-02A 08-07880-02A	James B. Hunt Jr. Library North Residence Hall Improvements Corporate Research One (CR1) – Renovation of Weisiger-Brown/Case Athletic Center/Reynolds Cherny Building Renovation (Earth College High Centennial Campus Student Housing	5 4.8 4.7 4.3 4.3 4.3 4.3 4.2	EXCELLENT EXCELLENT EXCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE	COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE	Complete Complete Complete Complete Complete Complete Complete	12/13/2012 8/8/2011 7/22/2014 9/8/2006 7/22/2013	8/27/2013 7/31/2012 3/16/2015 3/30/2011 1/5/2015 10/23/2015	10/26/2013 9/29/2012 5/15/2015 5/29/2011 3/6/2015 12/22/2015	
5084 6293 2395 5223 4063 3475 2822 4062	Pearce, Brinkley, Cease & Lee, P.A. (Inctive) Swarson + Stewart Architects, P.A. Becker Morgan Group, Inc. Davis Kane Architects, P.A. HH Architecture, P.A. LSP Associates ITD. Affiliated Engineers, Inc.	C D D D D D D D D	Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions	NC State University NC State University	10-08698-024-1 07-07171-02A 09-08180-01A 08-09394-01A 96-05551-01A 10-08698-02A 08-07880-02A 00-05169-01A	James B. Hurt Jr. Library North Residence Hall Improvements Corporate Research One (CR1) – Renovation of Weisiger-Bronn/Case Athletic Center/Reynolds Cherry Building Renovation (Early College High Centernial Campus Student Housing Centernial Campus Student Housing	5 4.8 4.7 4.3 4.3 4.3 4.3 4.2 4.1	EXCELLENT EXCELLENT ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE	COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE	Complete Complete Complete Complete Complete Complete Complete Complete	12/13/2012 8/8/2011 7/22/2014 9/8/2006 7/22/2013 3/30/2011	8/27/2013 7/31/2012 3/16/2015 3/30/2011 1/5/2015 10/23/2015 3/30/2011	10/26/2013 9/29/2012 5/15/2015 5/29/2011 3/6/2015 12/22/2015 5/29/2011	
5084 6293 2395 5223 4063 3475 2822 4062 4062 4703	Pearce, Brinkley, Cease B. Lee, P.A. (Inactive) Swarson + Stewart Architects, P.A. Becker Morgan Group, Inc. Davis Kane Architects, P.A. Hi Architecture, P.A. LSIP Associates LTD. Affiliated Engineers, Inc.	C D D D D D D D D D D D	Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions	NC State University NC State University	10-08698-024-1 07-07171-02A 09-08180-01A 08-09394-01A 96-05551-01A 10-08698-02A 08-07880-02A 00-05169-01A 60-98240-0438	James B. Hurt Jr. Library North Residence Hall Insprovements Corporate Research One (CR1) – Renovation of WeisignerBrown/Case Athletic Center/Reyrolds Cherry Building Renovation (Carly Colligne High Centernial Campus Student Housing Centernial Campus Central Utilities Plant College of Engineering Relocation Cort.	5 4.8 4.7 4.3 4.3 4.3 4.3 4.2 4.1 4.1	EXCELLENT EXCELLENT ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE	COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE	Complete Complete Complete Complete Complete Complete Complete Complete Complete	12/13/2012 8/8/2011 7/22/2014 9/8/2006 7/22/2013	8/27/2013 7/31/2012 3/16/2015 3/30/2011 1/5/2015 10/23/2015	10/26/2013 9/29/2012 5/15/2015 5/29/2011 3/6/2015 12/22/2015	
5084 6293 2395 5223 4063 3475 2822 4062 4062 4703 5786	Pearce, Brinkley, Cease & Lee, P.A. (Inactive) Searcen - Beneart Architects, P.A. Becker Morgan Group, Brc. Devis Kane Architects, P.A. HH Architecture, P.A. LSD Associates (TD. Affiliated Expineers, Inc. Perkins + Will North Carolina, Inc.	C D D D D D D D D D D D D D	Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions	NC State University NC State University	10-08698-02A-1 07-07171-02A 09-08180-01A 08-09394-01A 96-05551-01A 10-08698-02A 08-07880-02A 00-05169-01A 60-98240-0438 12-09695-01A	James B. Hurt Jr. Library North Readence Hall Improvements Corporate Research (on (CR3) – Renovation of Weisiger-Brown/Case Abthic: Center/Reynolds Cherr Bulding Renovation (Enry College High Centernial Campus Zodert Housing Centernial Campus Central Wilkers Nat- Callege of Engineering Relacation to Cert. Steam Phase VIII. e.g. (Dipking)	5 4.8 4.7 4.3 4.3 4.3 4.3 4.2 4.1 4.1 4.1 4	EXCELLENT EXCELLENT EXCELLENT ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE	COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE	Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete	12/13/2012 8/8/2011 7/22/2014 9/8/2006 7/22/2013 3/30/2011 11/15/2005	8/27/2013 7/31/2012 3/16/2015 3/30/2011 1/5/2015 10/23/2015 3/30/2011 3/30/2011	10/26/2013 9/29/2012 5/15/2015 5/29/2011 3/6/2015 12/22/2015 5/29/2011 5/29/2011	
5084 6293 2395 5223 4063 3475 2822 4062 4062 4703 5786 4064	Pearce, Brinkley, Cease & Lee, P.A. (Inactive) Summon + Stewart Architects, P.A. Becker Morgan Group, Drc. Davis Kares Architects, P.A. HAr Architecture, P.A. LSIP Associates LTD. Affiliated Engineers, Drc. Perkins + Will North Caroline, Inc. BMF Engineering, Drc. Sandrof White, Drc.	C D D D D D D D D D D D D D D D D	Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions	NC State University NC State University	10-08698-02A-1 07-07171-02A 09-08180-01A 96-05551-01A 10-0898-02A 08-07880-02A 00-05169-01A 00-05169-01A 12-09695-01A 04-06441-01A	James B, Hurt Jr, Likinny North Realistics: Hall Improvements Corporta Research (one (CR1) – Renovation of Weisiger PersonyCase Athletic Contex/Reynolds Champ: Building Resources (CR1) (College High Centernial Campus Studer Housing Centernial Campus Studer Housing Centernial Campus Studer Housing Centernial Campus Central Hillies Reat Callege of Engineering Relocation to Cent. Steam Heav VIII Leg & (DipUctat) Residence Halls Renovations	5 4.8 4.7 4.3 4.3 4.3 4.2 4.1 4.1 4.1 4 3.9	EXCELLENT EXCELLENT EXCELLENT ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE	COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE	Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete	12/13/2012 8/8/2011 7/22/2014 9/8/2006 7/22/2013 3/30/2011 11/15/2005 7/23/2007	8/27/2013 7/31/2012 3/16/2015 3/30/2011 1/5/2015 10/23/2015 3/30/2011 3/30/2011 3/16/2011	10/26/2013 9/29/2012 5/15/2015 5/29/2011 3/6/2015 12/22/2015 5/29/2011 5/29/2011 5/29/2011	
5084 6293 2295 5223 4063 3475 2822 4062 4062 4703 5786 4064 5541	Pearce, Brishley, Case & Lee A. (Fractive) Season + Season Architects, PA Becker Morgan Group, Dic. Davis Kane Architects, PA. USP Auditecture, PA. USP Auditecture, PA. Millied Engineers, Inc. Peelins + Will Farth Caroline, Inc. ReP Engineering, Inc.	C D D D D D D D D D D D D D D D D D D D	Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions Educational Institutions	NC State University NC State University	10-08698-02A-1 07-07171-02A 09-08180-01A 08-0994-01A 96-05551-01A 06-05580-02A 08-07880-02A 00-075169-01A 60-98240-0438 12-09695-01A 04-06441-01A 12-09572-01A	James B. Hortz X. Ukhny Honth Residence Vall Improvements Corporate Research One (CRI) – Removation of Weisinger-Brann/Case Athletic Center/Reynolds Center balling Resolutions (Entr) - College High Centernial Campus Studer Housing Centernial Campus Studer Housing Statem Plane VIII. Leg A (Logichatt) Residence Halls Removations Residence Halls Removations	5 4.8 4.7 4.3 4.3 4.3 4.3 4.3 4.2 4.1 4.1 4 3.9 3.8	EXCELLENT EXCELLENT EXCELLENT ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE	COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE	Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete	12/13/2012 8/8/2011 7/22/2014 9/8/2006 7/22/2013 3/30/2011 11/15/2005 7/23/2007 11/12/2014	8/27/2013 7/31/2012 3/16/2015 3/30/2011 1/5/2015 3/30/2011 3/30/2011 3/30/2011 3/16/2011 10/22/2015	10/26/2013 9/29/2012 5/15/2015 5/29/2011 3/6/2015 12/22/2015 5/29/2011 5/29/2011 5/15/2011 12/21/2015	
5084 6293 2295 5223 4063 3475 2822 4062 4062 4703 5786 4064 5541 1472	Pearce, Brinkley, Case & Lee, P.A. (Inactive) Summon + Securit Architectu, P.A. Becker Morgon Group, Dr. Davis Kares Architectu, P.A. LSP Associates I/D. Hirk Architecture, P.A. LSP Associates I/D. Perkins – WII Inorth Carolina, Inc. Berk Engeneening, Inc. Bief Engeneening, Inc. Bief Engeneening, Inc.	C D D D D D D D D D D D D D D D D D D D	Educational Institutions Educational Institutions	NC State University NC State University	10-08698-02A-1 07-07171-02A 09-0818-01A 09-0818-01A 96-05551-01A 10-08698-02A 08-0788-02A 08-0788-02A 08-0788-02A 08-0789-01A 60-98240-0438 12-09695-01A 04-06441-01A	James H, Hurt X, Ukhny Inoth Residence Hall Improvements Corporte Research Cen (Ch1) – Renovation of Weisiger Homy/Case Abhetic Center/Reynolds Charry Building Resolution (Charles Haht Centernial Campus Studer Housing Centernial Campus Cental Utilities Ret Callege of Engineering Relocation to Cert. Steam Phase VIII Leg A (Ospilcate) Readering Halt Renovations Centernial Campus Utility Ret - Chiller Residence Halls Renovations	5 4.8 4.7 4.3 4.3 4.3 4.3 4.3 4.2 4.1 4.1 4.1 4 3.9 3.8 3.8 3.8	EXCELLENT EXCELLENT EXCELLENT ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE	COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE	Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete	12/13/2012 8/8/2011 7/22/2014 9/8/2006 7/22/2013 3/30/2011 11/15/2005 7/23/2007	8/27/2013 7/13/2012 3/16/2015 3/30/2011 1/5/2015 3/30/2011 3/30/2011 3/16/2011 10/22/2015 3/16/2011	10/26/2013 9/29/2012 5/15/2015 5/29/2011 3/6/2015 12/22/2015 5/29/2011 5/29/2011 5/15/2011 12/21/2015 5/15/2011	
5084 62233 22355 5223 4063 3475 2822 4062 4062 4004 5786 4064 5541 1472 4705	Parton, Brinkley, Case & Lee A. (Fractive) Sensore + Seean Arhitects, PA Becker Morgan Group, Dic. Derir Kane Antonics, PA. USP Ausointes LTD. LSP Ausointes LTD. Affilied Engineers, Jrc. Parkins + Will Parth Carolina, Inc. Berl Engineering, Dic. USP Associates LTD. Bird Engineering, Jrc.	C D D D D D D D D D D D D D D D D D D D	Educational Institutions Educational Institutions	NC State University NC State University	10-08698-02A-1 07-07171-02A 09-08180-01A 08-09394-01A 96-05551-01A 10-08698-02A 08-07880-02A 08-07880-02A 08-07880-02A 08-05240-0438 12-09695-01A 04-06441-01A 12-09572-01A 05-06700-01A	James B. Hortz X. Ukhray Honth Residence Vall Improvements Corporate Research One (CRIV) – Renovation Valiargan-Remover. Les Abhits: Centerle Renolds Centernal Campus Buhter: Nouang Centernal Campus Sudiet: Nouang Centernal Campus Cental Utilities Tart Callege of Engineering Relacions to Cent. Steam Pitaev VIII. Las (Capitalian) Residence Halls Renovations Centernal Campus Utility Rant – Chiler Residence Halls Renovations	5 4.8 4.7 4.3 4.3 4.3 4.3 4.3 4.2 4.1 4.1 4.1 4 3.9 3.8 3.8 3.8 3.6	EXCELLENT EXCELLENT EXCELLENT ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE	COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE	Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete	12/13/2012 8/8/2011 7/22/2014 9/8/2006 7/22/2013 3/30/2011 11/15/2005 7/23/2007 11/12/2014	6/27/2013 7/03/2012 3/36/2015 3/30/2011 1/5/2015 3/30/2011 3/30/2011 3/30/2011 3/16/2011 10/22/2015 3/16/2011 3/16/2011	10/26/2013 9/29/2012 5/15/2015 5/29/2011 3/6/2015 5/29/2011 5/29/2011 5/15/2011 12/21/2015 5/15/2011 5/15/2011 5/15/2012	
5084 6293 2395 5223 4063 3475 2822 4062	Pearce, Brinkley, Case & Lee, P.A. (Inactive) Summon + Securit Architectu, P.A. Becker Morgon Group, Dr. Davis Kares Architectu, P.A. LSP Associates I/D. Hirk Architecture, P.A. LSP Associates I/D. Perkins – WII Inorth Carolina, Inc. Berk Engeneening, Inc. Bief Engeneening, Inc. Bief Engeneening, Inc.	C D D D D D D D D D D D D D D D D D D D	Educational Institutions Educational Institutions	NC State University NC State University	10-08698-02A-1 07-07171-02A 09-0818-01A 09-0818-01A 96-05551-01A 10-08698-02A 08-0788-02A 08-0788-02A 08-0788-02A 08-0789-01A 60-98240-0438 12-09695-01A 04-06441-01A	James H, Hurt X, Ukhny Inoth Residence Hall Improvements Corporte Research Cen (Ch1) – Renovation of Weisiger Homy/Case Abhetic Center/Reynolds Charry Building Resolution (Charles Haht Centernial Campus Studer Housing Centernial Campus Cental Utilities Ret Callege of Engineering Relocation to Cert. Steam Phase VIII Leg A (Ospilcate) Readering Halt Renovations Centernial Campus Utility Ret - Chiller Residence Halls Renovations	5 4.8 4.7 4.3 4.3 4.3 4.3 4.3 4.2 4.1 4.1 4.1 4 3.9 3.8 3.8 3.8	EXCELLENT EXCELLENT EXCELLENT ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE ACCEPTABLE	COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE COMPLETE	Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete Complete	12/13/2012 8/8/2011 7/22/2014 9/8/2006 7/22/2013 3/30/2011 11/15/2005 7/23/2007 11/12/2014	8/27/2013 7/13/2012 3/16/2015 3/30/2011 1/5/2015 3/30/2011 3/30/2011 3/16/2011 10/22/2015 3/16/2011	10/26/2013 9/29/2012 5/15/2015 5/29/2011 3/6/2015 12/22/2015 5/29/2011 5/29/2011 5/15/2011 12/21/2015 5/15/2011	

# 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:

InterSCOPE :: State Of North Carolina - State Construction Office							
🕯 Home 🚽	📗 Companies 🏾 🎾 New 🛛 🔍 FCAP	, <b>\$</b> Autho	rizations 📲 Pi	rograms 🗧 Funds Chang	je Request 🛛 🚨 I		
Program #	: 12339 - State Construction Office - New	v NC Legislatu	ire Complex (syster	m example)			
_Project #	: 12757 - State Construction Office - New	/ NC Legislatu	re Building - (samp	le project)			
/							
Design a	#: 16-12757-01 - SCO Designer						
	-	e Buildina - (	sample project)	]			
Packag	ge: 16-12757-01A - New NC Legislature				Week		
	-			on Contracts Monthly Pro	gress Weekt		
Packag	ge: 16-12757-01A - New NC Legislature			on Contracts Monthly Pro	ogress Week		
Packag	ge: 16-12757-01A - New NC Legislature			DEPARTMENT	ogress Week		
Packag	ge: 16-12757-01A - New NC Legislature SCHEDULE - Planned and Actual	Plan Review	s Constructio		-		
Packag Detail EVALUATION #	Ge: 16-12757-01A - New NC Legislature SCHEDULE - Planned and Actual	Plan Review	s Constructio	DEPARTMENT	gress Week State Cons State Cons		

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.

		InterSCOPE :	: State Of Nor	th Carolina - S	State Construction Offi	ce			USER:
🟠 Home	e I	Companies	s 🏂 New	SCAP	"\$ Authorizations	🖫 Programs	😅 Funds Change Request	<mark>.®≣</mark> My Account	۳
Eval	uatior								
-Instru	ction	s							
1.	Instr	ictions for co	mpletion of th	nis form are o	outlined in the <u>State E</u>	uilding Commiss	sion Designer and Contractor I	Evaluation Procedu	<u>ires.</u> T
2.	Gen	erate and Dow	nload the Eva	aluation Form	(MS Excel) for this pro	oject			
3.	Oper	the download	led workshee	et in Microsof	t Excel and complete	the evaluation.			
4.	Uplo	ad the Comple	eted Evaluatio	n Form (MS E	xcel)				
	<u> </u>	Interscope							
				-	ainst the SCO ID# for	und on the form.			
					reater than 0.				
						the overall Rating	is calculated and shown in th	e Summary section	n.
	(	The uploade	ed form is the	n converted	from Excel to PDF fo	rmat, stored and	available in the Report section	n.	
		The evaluat	ion is recalcu	ulated each t	ime a form is uploade	ed.			
		NOTE: The	upload buttor	n is not availa	ble if the evaluation I	has been comple	ted.		
5.	Com	plete the "Rep	ort" Section						
6.	Use	Action-> Save	to record the	evaluation					
7.	Inclu	de any additio	nal comment	ts or Support	ing documentation b	elow as appropria	ate		
		-			_				

# 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.

	InterSCOPE :: State Of North Carolina - State Construction Office U	SER:
🟠 Home	🧂 Companies 🏂 New 🔍 FCAP 💲 Authorizations 💭 Programs 😅 Funds Change Request 🔉 🕮 My Account	٩ı
Evaluat	tion	
Instructi	ions	
1. In:	structions for completion of this form are outlined in the State Building Commission Designer and Contractor Evaluation Procedure	<u>es.</u> T
2. G	Senerate and Download the Evaluation Form (MS Excel) for this project	
9. 0	pen the downloaded worksheet in Microsoft Excel and complete the evaluation.	
4. U	Ipload the Completed Evaluation Form (MS Excel)	
	Interscope will automatically load the form.	
	<ul> <li>The Package SCO ID# is validated against the SCO ID# found on the form.</li> </ul>	
	• TOTAL SCORE on the form must be greater than 0.	
	• The TOTAL SCORE is recorded in the Report section and the overall Rating is calculated and shown in the Summary section.	
	• The uploaded form is then converted from Excel to PDF format, stored and available in the Report section.	
	<ul> <li>The evaluation is recalculated each time a form is uploaded.</li> </ul>	
	<ul> <li>NOTE: The upload button is not available if the evaluation has been completed.</li> </ul>	
5. C	omplete the "Report" Section	
6. Us	se Action-> Save to record the evaluation	
7. In	clude any additional comments or Supporting documentation below as appropriate	

The generated evaluation Excel file will appear at the bottom of your screen depending upon the browser that is used:

#### Google Chrome download:

	08-07847-036_Desigxlsx			<u> </u>	ihow all downloads	<u>s</u> ×
I	nternet Explorer download:					
	Do you want to open or save 08-07847-038_DesignerEvaluation.xlsx (18.5 KB) from 149.168.1.150?	Open	Save	•	Cancel	×

Open the file for editing.

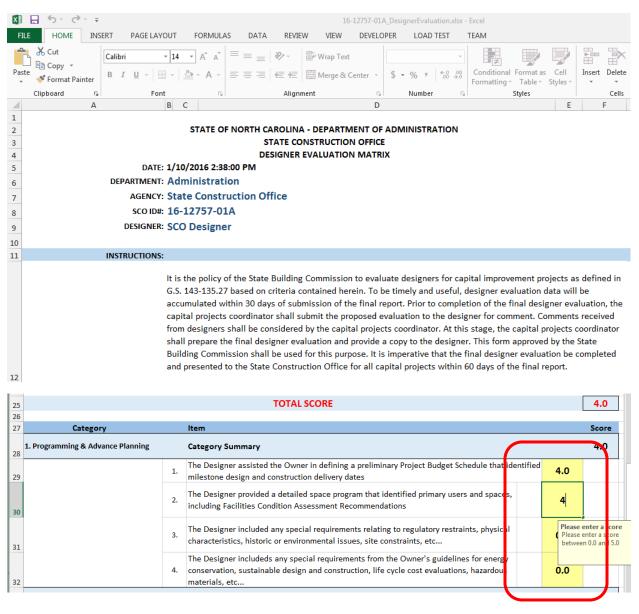
- F. Completing the Evaluation Form
  - 1. Designer Evaluations

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.



## 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.

FILE HOM	マーマ IE INSERT PAGE LAYOUT FORMULAS DATA	REVIEW VI		)1A-1_Cont VELOPER	ractorEvaluation.xlsx - Excel		? 📧 - Gioielli, I
Paste Cipboard A	Painter $\begin{bmatrix} Calibri & * & 16 & * \\ B & I & \underline{U} & * & \underline{B} & * & \underline{A}^* & A^* \\ & & Font & & \underline{B} & & \underline{B} & \underline{A}^* & \underline{A}^* \\ & & & & & & & \underline{B} & \underline$	≫ → E Wra		т. \$ т.	% ୬ <sup>€</sup> 00 <sup>0</sup> 00 Number <sup>1</sup> <sup>2</sup> Styles F	ole - Styles	∑ AutoSum ▼ A Fill ▼ Sort & Find & Clear ▼ Filter ➤ Select ▼ Editing H
1		STATE OF NOR	TH CAROLI	ΝΔ - ΠΕΡΔΙ	RTMENT OF ADMINISTRATION		
A 1 2 3 4 5 DA		STATE OF NOR	STATE C	CONSTRUC	TION OFFICE		
4 5 DA	ATE: 1/10/2016 2:38:00 PM		CONTRACT	OR EVALU	ATION MATRIX		
	NT: Administration						
	ICY: State Construction Office						
	D#: 16-12757-01A-1						
10	on see contractor						
11 INSTRUCTIO							
14	1. COMPLETE ALL SECTIONS HIGHLIGHTED IN YELLOW					CORE RANGES	
15	2. ENTER the TOTAL SCORE on LINE 11 on the INTERSCO	OPE EVALUATION	FORM		UNACCEPTABL	E: 0-150	
16	3. RATE EACH CATEGORY USING THE EVALUATION CRIT	ERIA FOUND IN 0	1 NCAC 30E		POOR PERFORMANCE	E: 151-190	
17	USE THE FOLLOWING NUMERICAL SCALE:				SATISFACTORY PERFORMANCE	E: 191-275	
18	3 = EXCELLENT PERFORMANCE				EXCELLENT PERFORMANCE	E: 276-300	
19 20	2 = SATISFACTORY PERFORMANCE 1 = POOR PERFORMANCE						
21 22	0 - NON PERFORMANCE						
23	3. UPLOAD THIS COMPLETED FORM FOR REVIEW						
	TOTAL SCORE			0		UNACCEPTABLE	
25				-			
Question	Evaluation Category	Relative	RATING	SCORE	Administrative Code	Construction Contract	Comments
27	Evaluation category	Importance	NATING.	Please er	Requirement	Reference	comments
	Did the contractor submit the documentation required b	y		score bet			
	Contractor Evaluation (1-2012) (+)			0 and 3.	: (		
	USE THE FOLLOWING NUMERICAL SCALE:				SATISFACTORY PERFORMANCE:		
	3 = EXCELLENT PERFORMANCE 2 = SATISFACTORY PERFORMANCE				EXCELLENT PERFORMANCE:	276-300	
	1 = POOR PERFORMANCE						
	0 - NON PERFORMANCE						
	3. UPLOAD THIS COMPLETED FORM FOR REVIEW						
	TOTAL SCORE			30		UNACCEPTABLE	
Question	Evaluation Category	Relative	RATING	SCORE	Administrative Code	Construction Contract	Comments
		Importance			Requirement "Documents required for award,	Reference	
	Did the contractor submit the documentation required by the contract in order to award and execute the				including Minority Business	Instructions to Bidders, Section 7	
1	construction contract for the project in a timely and	5	3	15	Enterprise (MBE) data, bonds, insurance documentation, and the	General Statute 143-129.b	My Comments here
	complete manner in accordance with GS 143-129.b?				executed contract documents."		
	Did the contractor manage the submittal process for all					Instructions to Bidders, Section	
		5					
2	submittals required by the project specifications in a timely and effective manner?	5	3	15	"Shop drawing processing."	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.

evaluation.	
File Uploader	<b></b> )
n the Choose File No file chosen	Upload
verall ;	) Cancel
, stor ) To Upload Files:	<u>ouno</u>
been 1 - [Browse] and select file 2 - [Add File to List] 3 - [Upload File(s)] when ready to transmit files	
v as a Description	
Uploaded on 1/9/2016 Upload File(s) Close	
	GREENSB

Click on the "Choose File" button to browse, find and select your completed evaluation spreadsheet file.

🗐 Recent Places	13-10403-01A-1_ContractorEvaluation.xlsx	1/9/2016 11:20 AM	Microsoft Excel W	16 KB
퉬 Interscope DotNet Development	08-07847-03B_DesignerEvaluation (2).xlsx	1/9/2016 11:04 AM	Microsoft Excel W	18 KB
🌗 Interscope Java Codebase	00-04409-01A_DesignerEvaluation.pdf	1/8/2016 12:20 PM	Adobe Acrobat D	82 KB
퉬 interscope	00-04409-01A_DesignerEvaluation.xlsx	1/8/2016 12:20 PM	Microsoft Excel W	18 KB
🗼 Downloads (2)	14-11315-01A-1_ContractorEvaluation.xlsx	1/8/2016 9:56 AM	Microsoft Excel W	16 KB
	14-11315-014 DesignerEvaluation visv	1/8/2016 9-55 AM	Microsoft Excel W	18 KB

Click on the "Upload File(s)" button to begin the uploading process.

evalua	ation.		
ſ	File Uploader	×	
1 the	Choose File No file chosen	Upload	
verall		Cancel	
, stor	<ul> <li>13-10403-01A-1_ContractorEvaluation.xlsx - application/vnd.openxmlformats- officedocument.spreadsheetml.sheet (15443bytes)</li> </ul>		
been	, <u>Remove file(s) from List</u> To Upload Files:		
v as a	1 - [Browse] and select file 2 - [Add File to List] 3 - [Upload File(s)] when ready to transmit files		
	Description Uploaded on 1/9/2016 Upload File(s) Close		1 Corp 9424
grade			BORO, Ohmk
arades	contact(s).	Peter Opt	enurch

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.

alculated <u>and shown i</u>	in the Summary section.	
lable in t Please wa	ait	
Processing	your evaluation form	
	Contractor	
		Firm:

Once the form is successfully processed, a message is displayed detailing the results of the upload.

	Inter SCOPE :: Stat	te Of North C	arolina - State	Construction Office			USER: sconcsu		VIEW:	NC State University			
Home	/ Companies	🎾 New	S FCAP	S Authorizations	🛄 Programs	🖁 Funds Change Request	S My Account	Reports	🥺 Help 💡				
							ully. Uploaded ev ing is: EXCELLEN in updated succe	т	is: 279				
Evaluat	ion											Action	. (
				outlined in the <u>State</u>	Building Comm	nission Designer and Contract	or Evaluation Proc	edures, These p	procedures sh	nould be reviewed prior to co	mpleting this evaluatio	n. Additional help	is also a

2. [Generate and Download the Evaluation Form (MS Fixel) for this project

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.

	Inter SCOPE :: Stat	e Of North Ca	arolina - State	Construction Office					NEW: Administration
🟠 Home	/ Companies	🎾 New	S FCAP	S Authorizations	Programs	<b>8</b> F	nds Change Request 🛛 💴 My Account	Reports 🥺 He	
							1 alerts created for users: sc Evaluation updated succes		
Evaluati	on								
									🖾 Action

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	Carolin	a State Construction Office - InterSco	pe System Alert
Date:	1/10/2016	;	
То:		elli@doa.nc.gov T DESIGNER igner	
	310 N. Wi Raleigh, N Telephon	olina State Construction Office Ilmington St., Suite 450 North Carolina 27601 e: (919) 807-4100 Fax: (919) 807-4110 Web: <u>ww</u> g an alert concerning the following document in	
DES	GNER	EVALUATION:	
Depa	rtment:	Administration	
Agen	cy:	State Construction Office	
Packa	age Title:	New NC Legislature Building - (sample project)	
User:		scomisc	
Click h	iere to logo	on 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.

		:: State Of North C					USER: so			VIEW: Admin
Hon	ne 🧂 Comp	anies 🏾 🎾 New	S FCAP	Solutions	Programs	🖁 Funds Change Re	quest 🔉 🚨 My	Account	Reports 🧕 🥺	Help .
Pro	gram #: 12339 -	State Construction	Office - New	NC Legislature Compl	ex (system example	)				
_Pr	oject #: 12757 -	State Construction	Office - New I	NC Legislature Building	g - (sample project)					
Proj	ject Cost E	timate Proje	ct Type	Funds Assigned	Financial Workshe	et Contracts	P6 Link Cl	oseout Project	Evaluatio	ns
Clos	e out Design /	Construction								
	e out Design /	Construction—								
	, in the second s	Construction			Contract For	Status	Contract Closed	Ralings Present?	HUB Data	Ready for Projec
	Contracts:				Contract For	Status	Contract Closed Out?	Ratings Present?	HUB Data Finalized?	Ready for Projec Closeout
	Contracts:				Contract For Design	Status Active		Ratings Present?		
	Contracts: Contract	CounterParty						-	Finalized?	

# 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 N	omination									
• C • Y	Certificate of M You must attac	erit nom h a nomi ckbox wi	inations a nation let Il only app	re reviewed by th	he State Cons tion under th EXCELLENT	e Supporting Document	State Building (		-	ommission. esented at the annual Construction Conference.
11	InterSCOPE :: State	e Of North C	arolina - State (	Construction Office			USER: sconcsu		VIEV	W- NC State University
🟠 Home	/ Companies	🞾 New	S FCAP	S Authorizations	Programs	B Funds Change Request	🚨 My Account	Reports	🥝 Help	
							ated for users: so n updated succes			
Evaluati	ion									

### North Carolina State Construction Office - InterScope System Alert

Date:	1/10/2016	i	
To:	interscope	e@doa.nc.gov	
	InterScop	e Administrator	
	Administr	ation/State Construction Office	
From:	North Car	olina State Construction Office	
	310 N. Wi	Ilmington St., Suite 450	
	Raleigh, N	lorth Carolina 27601	
	Telephon	e: (919) 807-4100 Fax: (919) 807-4110 Web: <u>ww</u>	w.nc-sco.com
You ar	e receivin	g an alert concerning the following document in	InterScope :
DES	IGNER	EVALUATION:	
Depa	rtment:	Administration	
Agen	icy:	State Construction Office	
Packa	age Title:	New NC Legislature Building - (sample project)	
Packa User:	-	New NC Legislature Building - (sample project) scomisc	
	-		
	-		

# X. Creating Owner Contracts on Full Oversight projects

1. Step 1 – Select the Project and access the "Contracts" tak	o:
---------------------------------------------------------------	----

int int	terSCOPE :: State Of North Caro	lina - State Construction Office		US	ER: sconcsu	VIEW: NC State Un	niversity		Logout
🕻 Home 🛛 🗂	Companies 🎾 New 🔍	FCAP SAuthorizations	Programs	🕒 Funds Change Request 🛛 🚨 M	Account 中Reports	🦁 Help			
Program #: 1	11535 - NC State University - [4	1224-320] - 2012 Repairs and	Renovations						
_Project #: 10	0317 - NC State University - Ce	entennial Campus Substation E	xpansion						
Project	Cost Estimate Project T	ype Funds Assigned	Financial Worksh	eet Contracts P6 Link	Milestones Close	out Project Evaluations			
🚖								😡 Action	。 🔞 Close
Project Inform	mation - Basic				Project Informa	tion - Advanced			
	* P	rogram: 11535 - [41224-320]	2012 Repairs and	Renovations		Project Type	: U1 - UNC Project > \$2M		
	* Dep	artment: Educational Institutio	ns (Universities)				<ul> <li>Standard Project</li> <li>Performance Contract</li> </ul>		
		Agency: NC State University	· · · · · ·			* Special Project Designation	Foundation Project		
		oject ID: 10317					Non-Code-Item Project		
		* Title: Centennial Campus	Substation Expansio	20					
	Deer		Substation Expansio	л		Fiscal Year Funded	: 2011 - 2012		
	Desc	cription:				Financial Controls	: Off		
						Bypass Financial Controls?	? Off		
	Agency Project	t Code: 201320005							
		Status: Active							
					Estimated Cost				
						Estimated Project Cost	t:		\$4,167,861.60
						- Total Amount Assigned	k		\$4,167,862.00
						= Estimated Need	k		(\$0.40)

# 2. Step 2 – Click on the "Add Owner Contract" button to add an owner

	contract:									
Inter SCO	PE :: State Of North Carolina - State Construction Office			USER: sconcsu	VIEW: NC State U	Iniversity				Logout
Home 🚪 Comp	oanies 🏂 New 🥰 FCAP 📲 🕏 Authorization	s 🔍 Programs 🔂	Funds Change Reque	st 📲 My Account 🕒 Reports 🧝 He	alp _					
Program #: 11535 -	NC State University - [41224-320] - 2012 Repairs and	Renovations								
<u> </u>	NC State University - Centennial Campus Substation		Contract. C	6 Link, Milestones, Closeout Projec	t Evaluations					
Project / Cost E	stimate_/Project_type_/Punds_Assigned	- Financial Worksneet	Contracts P	b_LINKMilestonesCloseout Projec	t / Evaluations				(	Olose
SCO ID#	FIRM	STATUS	PHASE	TYPE	PLAN REVIEW	CONTRACT DATE	SORIG CONTRACT	SCUR CONTRACT	SCUR COMMET	
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	\$1.40,000.00	2010	
ound								Add	Owner Contract	Ex of
Uploads Comm	nents Project Managers									
Delete? D	ATE 😴 TYPE	FILE NAME		DESCRIPTION				UPLOADED BY		
ound									Upl	load File
/2/2015 11:45:48 AM		InterscopePlus Integra	tion Copyright © 2015	- State of North Carolina : Department of Adm	inistration : State Const	ruction Office			Report	a Problem



Name:       Like ▼       (999-999-9999)         Email:       Like ▼       (999-999-9999)         Status:       ■       Nebsite URL:       Like ▼         Status:       ■       Nebsite URL:       Like ▼         Contact Person:       Like ▼       Nebsite URL:       Like ▼         Line 1:       Like ▼       Nebsite URL:       Like ▼         Line 2:       Like ▼       Nebsite URL:       Nebsite URL:         Like ▼       Nebsite URL:       Like ▼       Nebsite URL:         City:       Like ▼       Nebsite URL:       Nebsite URL:       Nebsite URL:         State:       Like ▼       Nebsite URL:       Nebsite URL:       Nebsite URL:       Nebsite URL:         Zip:       Like ▼       Nebsite URL:       Nebsite URL:	License #:	Like 🔻			Voice#:	Like 🔻	(	999-999-9999)
Status:       =       Active       Year Established:       =       -         Contact Person:       Like        Parent:       Like       -         Line 1:       Like        Parent:       Like       -       -         Line 2:       Like       Parent:       =       -       Select - ▼       -       -         City:       Like       -       -       Select - ▼       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -       -	Name:	Like 🔻			Fax#:	Like 🔻	(	999-999-9999)
Contact Person:       Like          Line 1:       Like       Parent         Line 2:       Like       Parent Branch:         City:       Like       Parent Branch:         State:       Like       Like         Zip:       Like       Like         Zip:       Like       Last Update:	Email:	Like 🔻			Website URL:	Like 🔻		
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Line +     Parent Branch: = ▼     - Select - ▼       Line 2: Like ▼     Former Name: Like ▼       City: Like ▼     ID: Like ▼       State: Like ▼     Last Update: ▼					Depent			
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				Search Do	ne Reset			

4. 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.

InterSCOPE :: State Of North Carolina - State Construction Office	USER: sconcsu		IEW: NC State University		Logo
• • • • •	Programs 🕒 Funds Change Request 🕮 My Account 🕀 Repo	rts 🥺 Help 💡			
Program #: 11535 - NC State University - [41224-320] - 2012 Repairs and Project #: 10317 - NC State University - Centennial Campus Substation					
NEW DESIGN:	kpansion				
Detail					
				Action	🛛 🔞 Clo
ontract# (Auto)	Dates		Contract Fees and Funds		
* Contract ID: (Auto)	Selection: / /				
SCO Oversight: F - Full SCO Oversight	RFP Letter: / /		ORIGINAL OWNER CONTRACT:		
* SCO Plan Review: Not Applicable	Agreement: 10/06/2015				
	Signed By Designer: 10/12/2015				
	Signed By Agency: 10/13/2015		Contract Fee:	10,0	000 🔞
Owner Contract Type: Owner - Commissioning Owner - Commissioning	T				
Contract Status: Owner - Materials Testing			CURRENT OWNER CONTRACT:		
Owner - Special Inspections Owner - Geotechnical					
Owner - Open End Owner - Other					
	Financial Worksheet Summary		Contract Fee:		\$0 🕜
ntract Firm	Estimated:				
Name: SCO Designer 📷	Assigned Funds:	\$4,167,862	Proposed Commitment Amt \$:		\$0
Address: 301 N. Wilmington Street	Estimated Cost:	\$4,167,862			
Suite 450	Estimated Surplus (Need):	\$0			
Raleigh, NC 27601	Actual:				
License#: 123456789	Assigned Funds:	\$4,167,862			
HUB Firm: Not a HUB	Total Committed:	\$4,107,002 \$832,211			
Change Designer	Available to Commit:	\$3,335,651			
		60,000,001			
	Worksheet Detail				
2015 11:47:00 AM	InterscopePlus Integration Copyright © 2015 - State of North Carolina : Depart	ment of Administration	1 : State Construction Office	Re	port a Prol

5. Step 5 – Use Action->Save to create the contract. Notice that only a subset of the tabs are displayed for owner contracts.

InterSCOPE :: State Of North Carolina - State Construction Office	USER: sconcsu	VIEW: NC State University	.ogout
🟠 Home 📲 Companies 🥬 New , 🤇 FCAP 🛸 🕏 Authorizations 💭 Programs 💭 Fun	ds Change Request 🧏 My Account 🕀 Reports 🥬 Help	a	
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			
*		🖾 Action 💡 🔞 C	Close
Contract# 2	Dates	Contract Fees and Funds	
* Contract ID: 12-10317-02	Selection: 0		
SCO Oversight: F - Full SCO Oversight	RFP Letter:	ORIGINAL OWNER CONTRACT:	
* SCO Plan Review: Not Applicable	Agreement: 2015-10-06 @		
	Signed By Designer: 2015-10-12 @		
	Signed By Agency: 2015-10-13	Contract Fee: \$10,000 @	j –
Owner Contract Type: Owner - Commissioning			
Contract Status: Active		CURRENT OWNER CONTRACT:	
	Financial Worksheet Summary	Contract Fee: \$10,000 @	

NOTE: For Open End Design Contracts, the "Packages" tab is also displayed to allow users to add construction contracts under the associated package.

	InterSCOPE :: State Of North Carolina - State Construction Office	USER: sconcsu		VIEW: NC State University	Logo
Home	📲 Companies 🔊 New 🔍 FCAP 🛸 🕏 Authorizations , 🖽 Programs 🛛 😂 Fur	ds Change Request 🔋 My Account 🕒 Reports	0 Help	3	
		DesignContract updated successfully.			
Program	#: 11535 - NC State University - [41224-320] - 2012 Repairs and Renovations				
_Project	t #: 10317 - NC State University - Centennial Campus Substation Expansion				
_Desig	n #: 12-10317-02 - SCO Designer				
Detail	Amendments Consultants Packages				
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Contract	<b>t#</b> 2	Dates		Contract Fees and Funds	
	* Contract ID: 12-10317-02	Selection:	0		
	SCO Oversight: F - Full SCO Oversight	RFP Letter:	0	ORIGINAL OWNER CONTRACT:	
	* SCO Plan Review: Not Applicable	Agreement: 2015-10-06	0		
		Signed By Designer: 2015-10-12	0		
		Signed By Agency: 2015-10-13	0	Contract Fee:	\$10,000 😡
	Owner Contract Type: Owner - Open End	-			
				CURRENT OWNER CONTRACT:	
	Contract Status: Active				
		Financial Worksheet Summary		Contract Fee:	\$10,000 @
Contract	t Firm	Estimated:			
	Nerrer 800 Desires Br	Assigned Funder		Actual Commitment Amt \$:	\$10,000

### Step 6 -The contract will now appear under the Project's "Contracts" tab.

-	Inter SCO	PE :: State Of North Carolina - State Construction Office			USER: sconcsu	VIEW: NC State U	niversity				Logout
۵н	ome 🍶 Comj	oanies 🤊 New 🔍 FCAP 📲 Authorization	is 🔍 Programs 😫	Funds Change Requ	est 📲 My Account 🕒 Reports 🥮 H	lelp "					
Р	rogram #: 11535 -	NC State University - [41224-320] - 2012 Repairs and	Renovations								
1	Project #: 10317 -	NC State University - Centennial Campus Substation	Expansion								
P	roject Cost E	stimate Project Type Funds Assigned	Financial Worksheet	Contracts	P6 Link Milestones Closeout Proje	ct Evaluations					
										Q	Close
	SCO ID#	FIRM	STATUS	PHASE	Түре	PLAN REVIEW	CONTRACT DATE	\$ORIG CONTRACT	\$CUR CONTRACT	\$CUR COMMIT	Close
1	SCO ID#	FIRM Jacobs Engineering Group, Inc.	STATUS	PHASE	TYPE Standard Design Contract (Fully Funded)	PLAN REVIEW Full Oversight	CONTRACT DATE 2014-01-09	\$ORIG CONTRACT \$348,800.00	\$CUR CONTRACT \$400,150.00		Close
1										\$CUR COMMIT	Close
1 2 3	12-10317-01	Jacobs Engineering Group, Inc.	Active	Design	Standard Design Contract (Fully Funded)			\$348,800.00	\$400,150.00	\$CUR COMMIT \$400,150.00	Close
1 2 3 4	<u>12-10317-01</u> <u>12-10317-01A-2</u>	Jacobs Engineering Group, Inc. PowerSecure, Inc.	Active Approved for Award	Design Construction	Standard Design Contract (Fully Funded) Electrical Contract			\$348,800.00 \$3,247,645.00	\$400,150.00 \$3,247,645.00	\$CUR COMMIT \$400,150.00 \$0.00	Close

# XI. Primavera (P6) Linking to Interscope

### A. Overview

6.

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.1

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 Interscene.

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 <u>Imnoth@northcarolina.edu</u>.)

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:

1	Rich	test				0				
E 🔶	Baselines	April 200	02			0				
• 🔶	Bond	Bond Pi	rojects			0				
= 🔶 Te	emplates	Templa	tes			73				_
1	40000-401	Performanc	e Contracting			0				
8	40000-204	CM at Risk	Template Spli	t Construction		0				
13	40000-101	Primavera T	emplate (Sing	ile Prime)		73				
6	40000-201	Primavera T	emplate (CM	at Risk)		0				
# 🔶 N	С	State A	gencies			0				
± 🔶 P	6 Training	g Prc P6 Traii	ning Proj	ects		0				
<							>	<		
	Notebook Pla	anning Resources		Spending Plan	Budget Summar	Dates	_	ding	Codes	

The templates contain the custom columns that enable the integration of the two systems:

al st	At Completion Total Cost	Latest iPlus Update	UNC Milestones	^
:0	\$0			
30	\$0			
6	\$0			
30	\$0		DESADVPRJ	
30	\$0			
30	\$0			
30	\$0			
30	\$0		DESSELDC	
<b>0</b>	\$0			

#### **UNC** Milestone

 $\circ~$  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.

 $\circ~$  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.

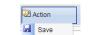
Program #: 11679 - East Carolina University - [41136-306] - New Student Union & Health Sciences Studen Project #: 5283 - East Carolina University - Main Campus Student Union & Parking Deck Project / Cost Estimate / Project Type / Funds Assigned / Financial Worksheet / Cost		ators
		🖾 Action 💡 🔞 Close
P6 Linking	P6 Auto	mapping and Synchronization
Link to P6 Schedule?:  P6 Project: Refresh P6 Project List	Auto	National - Automapping milestones uniquely matches interscope milestones with P6 activity codes having the same milestone code.
Last Linked on:	Synch	- Synchronization branders interscope actual dates to P6 and P6 planned dates to interscope.     Changes should be committed in Primavera before synchronizing.
Last Synchronized on:		
P6 Budgeted Total Cost: \$0.00	View P	- Displays a PDF report of the most recent Automapping operation.
P6 Baseline Total Cost: \$0.00		
P6 Actual Total Cost: \$0.00		
Uploads Comments Project Managers		
Delete? Date _ Type File Name	Description	Uploaded By
2014-12-02 14:21:24 PROJECT CT-11-09263-02A.pdf	Pre-Con CMR	bmurchison v
found		Delete Selected Files Upload Files
J/17/2016 10:46:27 AM	InterscopePlus 2.2_20161012 Copyright © 2016 - State of North Carolin	a : Department of Administration : State Construction Office Report a Problem

#### 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

			1	~	
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	1150.					
	University - [41136-306] - New Student Union & Health Sciences Student Service Building					
_Project #: 9263 - East Carolina U	Iniversity - Main Campus Student Union & Parking Deck					
Project Cost Estimate F	Project Type Funds Assigned Financial Worksheet Contracts P6 Link Prima	avera Link Closeout Project	Evaluations			
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6 Linking			DC Automotion	and Synchronization	ACCON	
6 Linking			P6 Automapping	and synchronization		
Link to P6 Schedule?:	8		Auto-Map	Automapping milestones uniquely matches interscope milestones with P6 activity codes having the same milestone code		
P6 Project:	Select a Primvera Project       Select a Primvera Project     + - Wroht Circle Mill and Repaye	•	Synchronize	Synchronization transfers Interscope actual dates to P6 and P6 planned dates to Interscope.		
Last Linked on:	+ - winght Circle - Mill and Repave 1094-1 - Brody Building High Rise Code Study			Changes should be committed in Primavera before synchronizing.		
Last Synchronized on:	14-12104-01 - Dowdy Ficklen Stadium Press Box Renovation (RB)		Mew Report			
P6 Budgeted Total Cost:	16-1094-01 - Brody Building High Rise Code Study (RB)			Displays a PDF report of the most recent Automapping operation.		
P6 Baseline Total Cost:	2016 Bond - Life Sciences and Biotechnology Building (BC) 2016 Bond-1 - Life Sciences and Biotechnology Building					
	2016 Bond-2 Trainer - Life Sciences and Biotechnology Building					
Iploads Comments Proje	40000-10 - Guaranteed Energy Savings Performance Contracting					
lete? Date 🛫	40000-22 - Service Learning Center - CSLC #10 (Single Prime) (BC) 40000-29 - Brody - GE-99 (Single Prime)-(GG)	Description		Uploaded By		
2014-12-02 14:21:24 F	ROJ 40000-43 - Service Learning Center - CSLC #9 (Single Prime) (BC)			bmurchison		
	40000-45 - Service Learning Center - CSLC #10 (Single Prime)	_				
	40000-46 - Service Learning Center - CSLC #9 (Single Prime)			Delete Se	lected Files	Upload File
7/2016 10:46:27 AM	40000-47 - Guaranteed Energy Savings Performance Contracting 40136-2 - Craft Lab-(RB)	ht @ 2016 - State of N	orth Carolina : Depart	tent of Administration : State Construction Office	R	eport a Proble
	40436-3 - Coastal Studies Revised Site (CM at Risk) COPS					
	40436-307 - Coastal Studies Revised Site (CM at Risk) COPS-(GS)					
	40436-4 - Coastal Studies Revised Site (CM at Risk) COPS					
	40483-2 - Eastern Carolina Cardiovascular Institute-(RB)	-				

Select the Auto-Map Milestones to have the program match as many milestones as possible without user intervention.



Then

. Mapping individual Milestones.

Deserver #: 44670 . East Oant	in the sector sector sector	in a line to an an an an an an an an an	-	
		nion & Health Sciences Student Service Buildin	9	
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				🛂 Action 💡 🚫 Clo
P6 Linking				P6 Automapping and Synchronization
Link to P6 Schedule?:	2			Auto-Map - Automapping milestones uniquely matches interscope milestones with P6 activity codes having the same milestone code.
P6 Project:	14-12104-01 - Dowdy Ficklen Star	dium Press Box Renovation (RB)	٣	
	Refresh P6 Project List			Synchronization transfers Interscope actual dates to P6 and P6 planned dates to Interscope. Changes should be committed in Primavera before synchronizing.
Last Linked on:	10/17/2016 11:02:00 AM			
Last Synchronized on:				Mew Report - Displays a PDF report of the most recent Automapping operation,
P6 Budgeted Total Cost:	\$0.00			
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Uploads Comments P	Project Managers			
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bund				Delete Selected Files Upload Fil
/17/2016 11:02:53 AM		Interscope	Plus 2.2_20161012 Copyright © 2016 - Stat	e of North Carolina : Department of Administration : State Construction Office Report a Probl

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 precon contract milestone to the pre-con contract.

			Automap finished	
		23 P6 act At	nilestones were previously mapped. 0 new milestones were mapped. divities with milestones were not mapped. utomap report has been generated. Click on "View Report" for details.	
Program #: 11679 - East Carolina L	Iniversity - [41136-306] - New Student Union & Health	Sciences Student Service Building		
_Project #: 9263 - East Carolina Ur	iversity - Main Campus Student Union & Parking Deck			
Project Cost Estimate P	roject Type Funds Assigned Financial Wo	rksheet Contracts P6 Link Primavera Link	Closeout Project Evaluations	
				🛂 Action 💡 🚫 Close
P6 Linking			P6 Automapping and 9	iynchronization
Link to P6 Schedule?:	2		Auto-Map - Auto	napping milestones uniquely matches Interscope milestones with PG activity codes having the same milestone code.
P6 Project:	14-12104-01 - Dowdy Ficklen Stadium Press E Refresh P6 Project List	Sox Renovation (RB)		tronization transfers interscope actual dates to F6 and F9 planned dates to interscope. Las should be committed in Primavera before sinchronizing.
Last Linked on:	10/17/2016 11:02:00 AM			ge creat as comment in this concernment,
Last Synchronized on:			View Report - Displ	ays a PDF report of the most recent Automapping operation.
P6 Budgeted Total Cost:	\$0.00			
P6 Baseline Total Cost:	\$0.00			
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0/17/2016 11:02:53 AM		InterscopePlus 2.2_20161012 Copyright @	© 2016 - State of North Carolina : Department o	f Administration : State Construction Office Report a Problem

#### This is a project after linking to P6

Program #: 11446 - UNC Chapel Hill - [41223-315] - Hill Ha	Il Renovations & Addition					
_Project #: 10105 - UNC Chapel Hill - Hill Hall Renovation						
Project Cost Estimate Project Type Funds	Assigned Financial Worksheet Contracts P	rimavera Link Milestones Closeout Project Evaluar	lions			
						Action 🐘 🔞 Close
	Milestones E	or: Project#: 10105 - UNC Chapel Hill - Hill Hall Renovation	Drimawara	Project: 10105 - Hill Hall Renovation	CID 502	
	Project State			nization: 10/17/2016 12:45:00 PM	CIP DOZ	
				Show Primavera De	tail: 📄	
	PHASE	MILESTONE NAME	PLANNED	ACTUAL		
	ADVERTISEMENT	Date of FIRST advertisement for designer	5/20/2013	/ / 🔳		
		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 indicat	es a milestone required for P6 Integration.				
		Synchronize Dates with Primavera Export	All Milestones			
Uploads Comments Project Managers						
Delete? DATE - TYPE	FILE NAME	DESCRIPTION			UPLOADED BY	
2016-06-16 13:05:36 PROJECT	Proj502TransRpt06.14.16.xlsx	Project Reconciliation	bmuganda			
1 lound						Delete Selected Files Upload Files
10/17/2016 12:45:59 PM	Interscope	Plus 2.1.A_20160830 Copyright @ 2016 - State of North Carolina : E	epartment of Administration :	State Construction Office		Report a Problem

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.

Designer Search           License #:         Like •         (999-999-999)           Name:         Like •         (999-999-999)           Fax#         Like •         (999-999-999)           Status:         =         -           Contact Person:         Like •         (999-999-999)           Like *         -         999-999-999)           Status:         =         -           Contact Person:         Like •         -           Like *         -         -           Contact Person:         Like •         -           Chip:         Like •         -           Chip:         Like •         -           City:         Like •         -           Zip:         Like •         -           County:         =         -	Home 🖳 System 🦽 U	Jsers 📲 Compani	ies 🏂 New 🔍	FCAP 🔍 Design Revi	ew SAuthorizations	Programs	Funds Change Request	y Account	🗐 Report	s 🛄 Forms	🥺 Help 💡	
Name:	Designer Search											
	Name Email Status Contact Person Line 1 Line 2 City State Zip	Like         V           Like         V					Fax#: Website URL: Year Established: Parent Parent Branch: Former Name: ID:	Like = Like = Like Like		(999-999		
	017 10 05 18 54			Internet Dive 2.2.0.0	Search	Done Reset	Add Designer	an : Clate (	Construction (			Report a

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	951952640	In-House Design by Appalachian State University
2	951952455	In-House Design by DENR - Forest Resources (INACTIVE)
3	951952715	In-House Design by DENR - Museum of Natural Sciences
4	951952665	In-House Design by Department of Administration
5	951952533	In-House Design by Department of Administration - Facility
6	951952378	In-House Design by Department of Agriculture & Consumer Services
7	951952819	In-House Design by Department of Boards & Commissions
8	951952751	In-House Design by Department of Commerce
9	951952821	In-House Design by Department of E & NR
10	951952771	In-House Design by Department of E&NR - Marine Fisheries

For In-House Project Coordinator profiles, prefix the name with "*In-House Project Coordination by*" before the agency name.

Examples:

	ID	DESIGNER
1	951953091	In-House Project Coordination by Montgomery CC (TEST)
2	951953090	In-House Project Coordination by Randolph CC

Select the **Save** option on the **Action** menu to complete the new designer profile record.

EN DE SKORER Sile  Sile  Sile	La Save X Delete
	Le Save X Delete
Name: In-House Project Coordinator for Montgomery CC (TEST)     License #: License#	Le Save X Delete
Status:     Active •     License Lookup: NQ:Board of Architecture.INQBARCH)       * Email:     Interscope@doa.nc.gov     NC:Board of Engineers and Land Surveyors (NCEELS)       * Contact Person:     Interscope Administrator     NC:Board of Engineers and Land Surveyors (NCEELS)       * Line 1:     116 West Jones Street     Website URL:       Line 2:	
* Email: Interscope@doa.nc.gov NCEELS) * Contact Person: Interscope@doa.nc.gov NCEELS) * Contact Person: Interscope@doa.nc.gov * Line 1: 116 West Jones Street Line 2: * City: Rateigh * State: INC *	inveyors (NCBELS)
* Line 1:     110 West Jones Street       Line 2:     Year Established:       * Cloy:     Parent:       * Cloy:     Parent Granch?:       * State:     No Y	
* Line 1:         [116 West Jones Street]         Year Established:           Line 2:         Paretil Fanch?:         Paretil Fanch?:           * City:         Raleigh         Paretil Fanch?:         Unknown v           * State:         No v         Extreme Name:         Fance State	
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* State: NC V	
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## B. Assigning Profiles to Agencies

Click on the " In-House Agencies " tab

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	t Coordinator for Montgomery CC (TEST)				
file					Da
					Action 000
* Name:	In-House Project Coordinator for Montgomery CC (TEST)		License #:		
Status:	Active •			NC Board of Architecture (NCBARCH)	
	interscope@doa.nc.gov			NC Board of Examiners for Engineers and Land Surveyors (NCBELS)	
	Interscope Administrator			NC Board of Landscape Architects (NCBOLA)	
			Website URL:		
* Line 1:	116 West Jones Street		Year Established:		
Line 2:			Parent:		
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* State:			Former Name:		
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SCO ID#	PROJECT DEPARTMENT	AGENCY	STATOS	TYPE SOUR CONTRACT SOUR DESIGN	
(a): [1]					

Click on the "Add Agency to InHouse Designer" button to display a pick list of Agencies.

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* Name:	In-House Project Coordinator for Montgomery CC (TEST)		License #:	
Status:	Active V	1100	ense Lookup: NC Board of Architecture (NCBARCH)	
	Interscope@doa.nc.gov	Lice	NC Board of Examiners for Engineers and Land Surveyor	(NCBELS)
* Contact Person:	Interscope Administrator		NC Board of Landscape Architects (NCBOLA)	
		v	Vebsite URL:	
* Line 1:	116 West Jones Street	Year	Established:	
	Raleigh		Parent:	
* State:		Pan	ent Branch?: Unknown •	
	27603	Fe	ormer Name:	
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lemove?	DEPARTMENT	AGENCY	ROLE	1
page(s): [1]				
bund			Add Agency to	Inhouse Designer Remove Selected 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.

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A message will be displayed indicating successful assignment of the profile to the agency.

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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.

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gn Contracts / Cons e? Community Colleges	DEPARTMENT Comments Mortgom	Uploads Evaluations In-House AGENCY rry Community College	Agencies Project Coordinat	ROLE	

Confirm that the correct Role has been assigned for the agency for this profile.

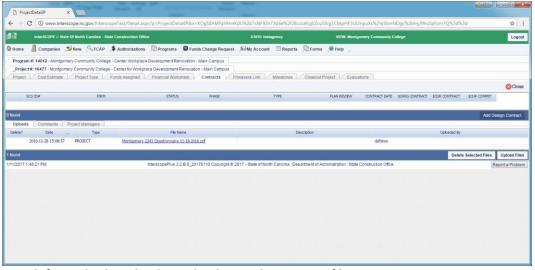
### C. Creating Contracts using in-house designer profiles

Design contracts can be created using In-House designer profiles under 2 scenarios:

Design contracts where a licensed architect is required by <u>General Statute 133.1.1</u>
 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.

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					Total Commit	ted:		50						

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.

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Project #: 16477 - Montgomery Community College - Center for Workplace Development Renovation -	- Main Campus				
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	Estimated Cost:	\$200,000	Proposed Commitment Amt \$:		
Raleigh, NC 27603	Estimated Surplus (Need):	5200,000			
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	Total Committed:	\$0			
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his contract complies with the provisions of NC General Statute 133.1.1	Worksheet Detail				
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### 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 <u>NC General Statute 133.1.1</u>.

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.

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Project #: 16477 - Montgomery Community College - Center for Workplace Development F	lenovation - Main Campus			
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The user logon and date of verification of compliance is then recorded at the time the contract is created.

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Hitem Companies SHew <u>G</u> ECAP & Authorizations DiPrograms D Funds Change Program F. 14012 - Mantgomery Community College - Center Viologiace Development Renovation - Main Ca 	Contract added successfully. Contract Mode is In-House Coordination, npus	ms 🤑 Hel	9 al	
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				Action OCk
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	spyright @ 2017 - State of North Carolina : Department o	d Administrati	on State Construction Office	Report a Prot

### 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

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* Password:		Departr	nent: Community Colleges					
* Name: Test Agency Account		Age	ancy: Montgomery Communit	/ College				
Initials:								
* Email: Interscope@doa.nc.gov								
Phone: Extension:								
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# 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:

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# InterscopePlus User Manual

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Before entering data, familiarize yourself with the Instructions and Example tabs to avoid any unnecessary data import errors.

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### 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:

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16177	Educational Institutions (Universities)	East Carolina University	Student Recreation Center - Locker Room Improvements	Active	10/3/2016	US	\$295,000.00	\$12,000.00	\$27
16178	Educational Institutions (Universities)	East Carolina University	POD Electric Meters 1 and 2	Active	10/3/2016	US	\$100,000.00		
16179	Educational Institutions (Universities)	UNC Chapel Hill	Ambulatory Care Center Renovations	Active	10/3/2016	US	\$46,557.00		
16180	Educational Institutions (Universities)	East Carolina University	Messick and Jenkins Art - Replace Transformers	Active	10/4/2016	U5	\$110,000.00		
16181	Educational Institutions (Universities)	East Carolina University	Greenville Centre - Elevator Modernization	Active	10/4/2016	US	\$150,000.00		
16182	Educational Institutions (Universities)	East Carolina University	Warehouse District - Fiber Optic	Active	10/4/2016	U5	\$300,000.00		
16183	Educational Institutions (Universities)	UNC Hospitals	MRI Prep/Recovery Bays	Active	10/4/2016	H2	\$135,000.00		\$13
16184	Educational Institutions (Universities)	East Carolina University	Health Science Campus - Replace Electrical Panel	Active	10/4/2016	US	\$280,000.00		
16185	Educational Institutions (Universities)	East Carolina University	Health Science Campus - CUP Chiller Plant Roof	Active	10/4/2016	U5	\$282,000.00		
16186	Educational Institutions (Universities)	East Carolina University	Pedestrian Pathway from Brody to HSC Student Services	Active	10/4/2016	US	\$300,000.00		
16189	Educational Institutions (Universities)	NC A & T State University	Corbett Sports Center Control Room AC	Active	10/5/2016	US	\$1.00		
16190	Public Safety	Division of Adult Correction	Lumberton CI - Bldg. D & E FACP Replacement	Active	10/5/2016	A4	\$55,000.00		\$5
16191	Agriculture and Consumer Services	NC Forest Service	DuPont State Recreational Forest - Hooker Falls Restroom	Active	10/5/2016	A3	\$490,000.00	\$40,550.00	\$42
16193	Community Colleges	Randolph Community College	HUB 20162 Photo Phase II	Design /	10/5/2016	C1	\$84,584.00	\$10,500.00	\$74
5 16194	Environmental Quality	EQ General	IT Glass Wall and door	Active	10/5/2016	A3	\$22,754.00		\$2:
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Step 2 – Select options for the following:

- Projects Linked to P6
- Department
- Agency

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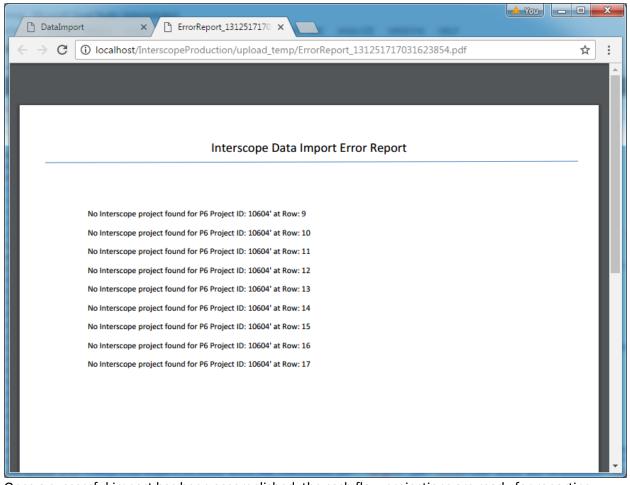
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The System will display the following pop-up during the importing process.

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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.

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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.

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### Managing Data Import files

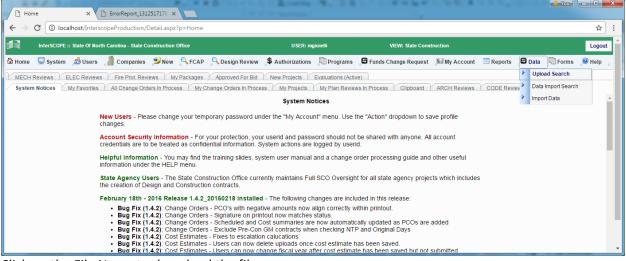
To **view** or **replace** cash flow information that has been uploaded for any given period, select "Data Import Search" under "Data" on the Main Menu bar:

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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.