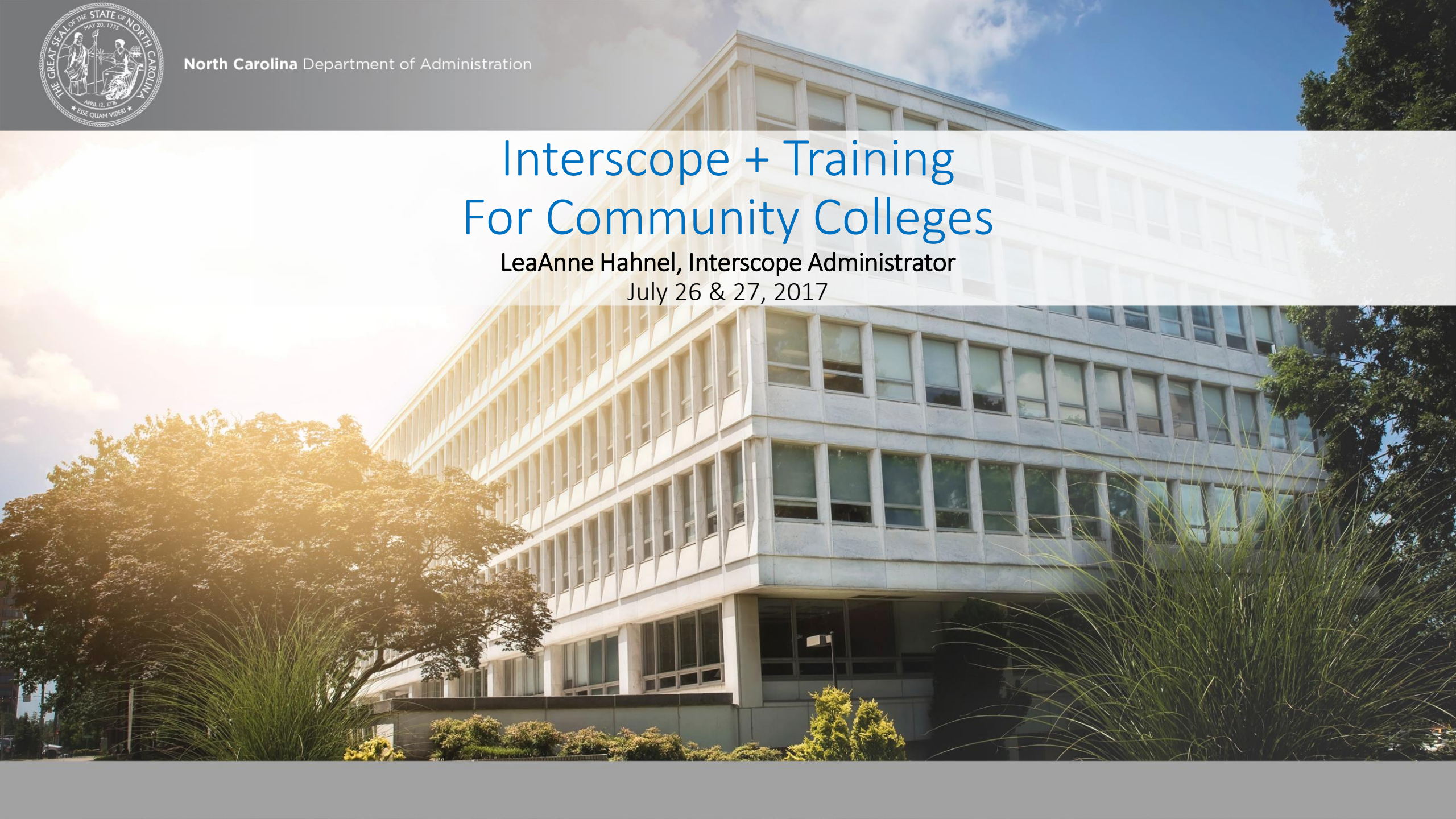


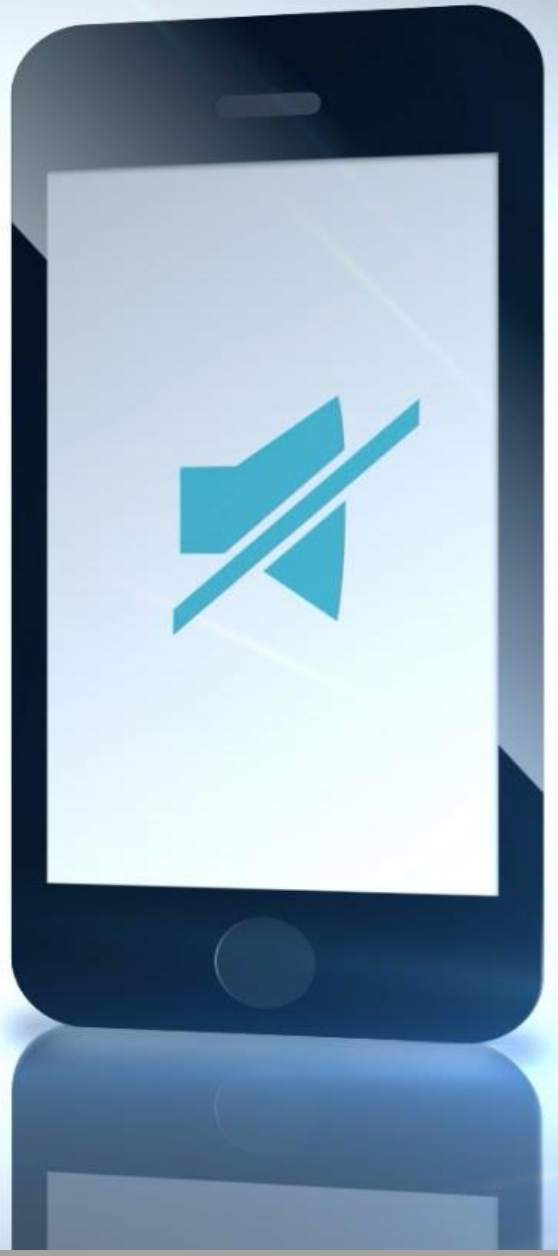
North Carolina Department of Administration

Interscope + Training For Community Colleges

LeaAnne Hahnel, Interscope Administrator

July 26 & 27, 2017

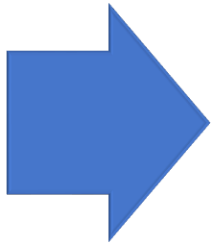
PLEASE SILENCE YOUR PHONE



eVP Electronic Vendor Portal

eVP Electronic Vendor Portal

Where vendors register to do business with the State of North Carolina



Consolidation of IPS and E-Procurement

What is IPS

IPS

- Interactive Purchasing System

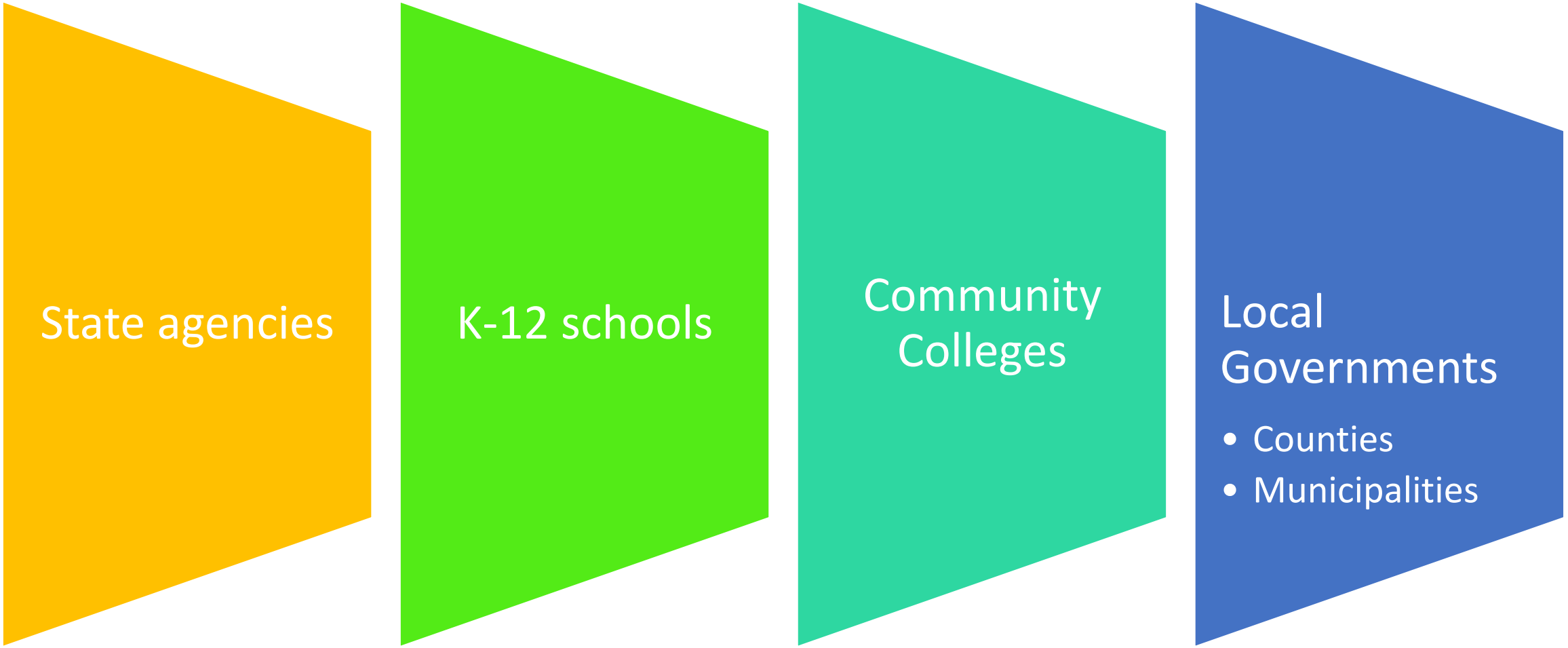
Must be registered in IPS to be in Interscope

Free email notifications for bidding opportunities

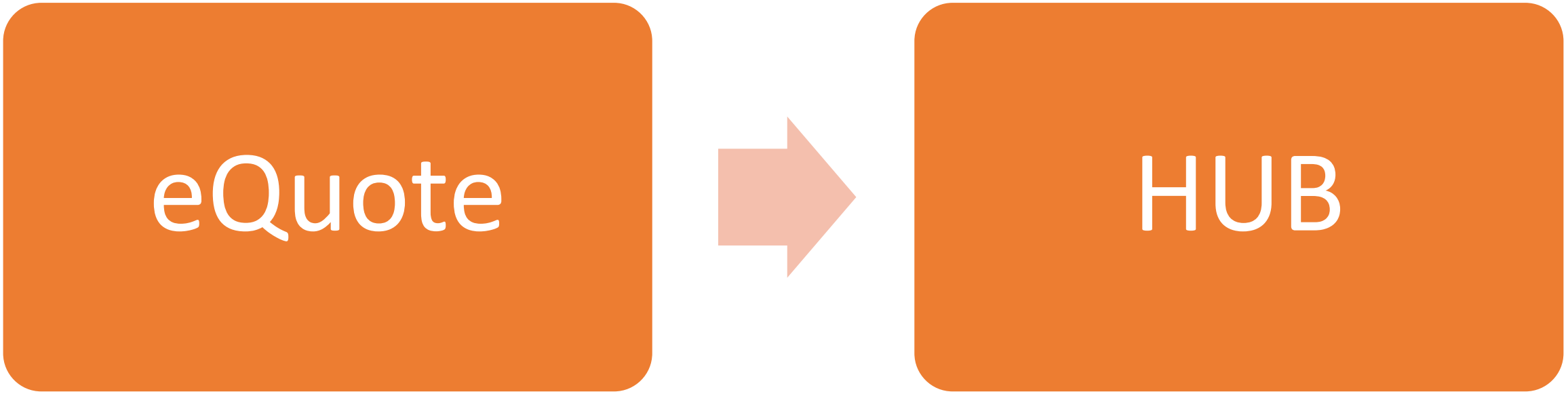
IPS advertises solicitations from

- all state agencies
- Community colleges
- Universities
- Public schools
- Some local governments

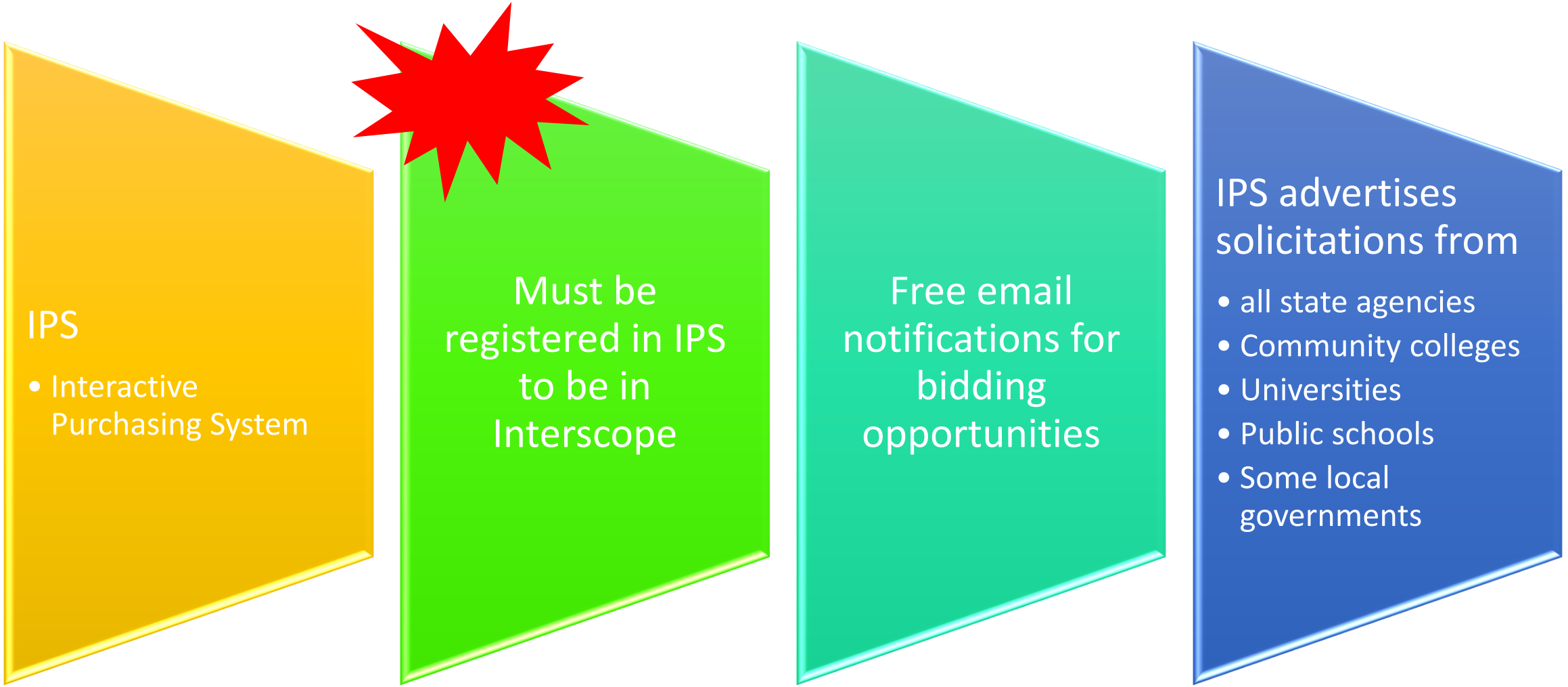
Who Participates in E-Procurement



What else is in eVP



What is IPS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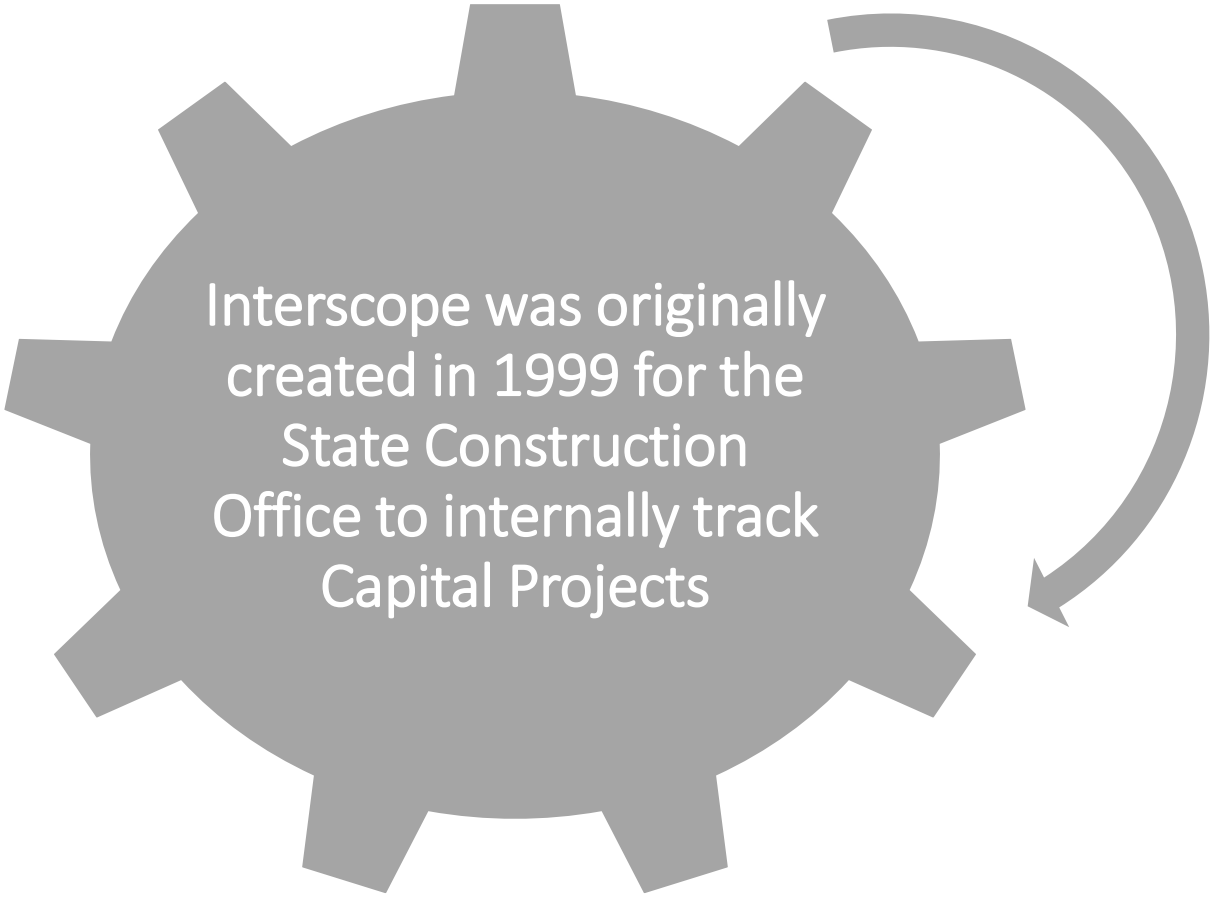
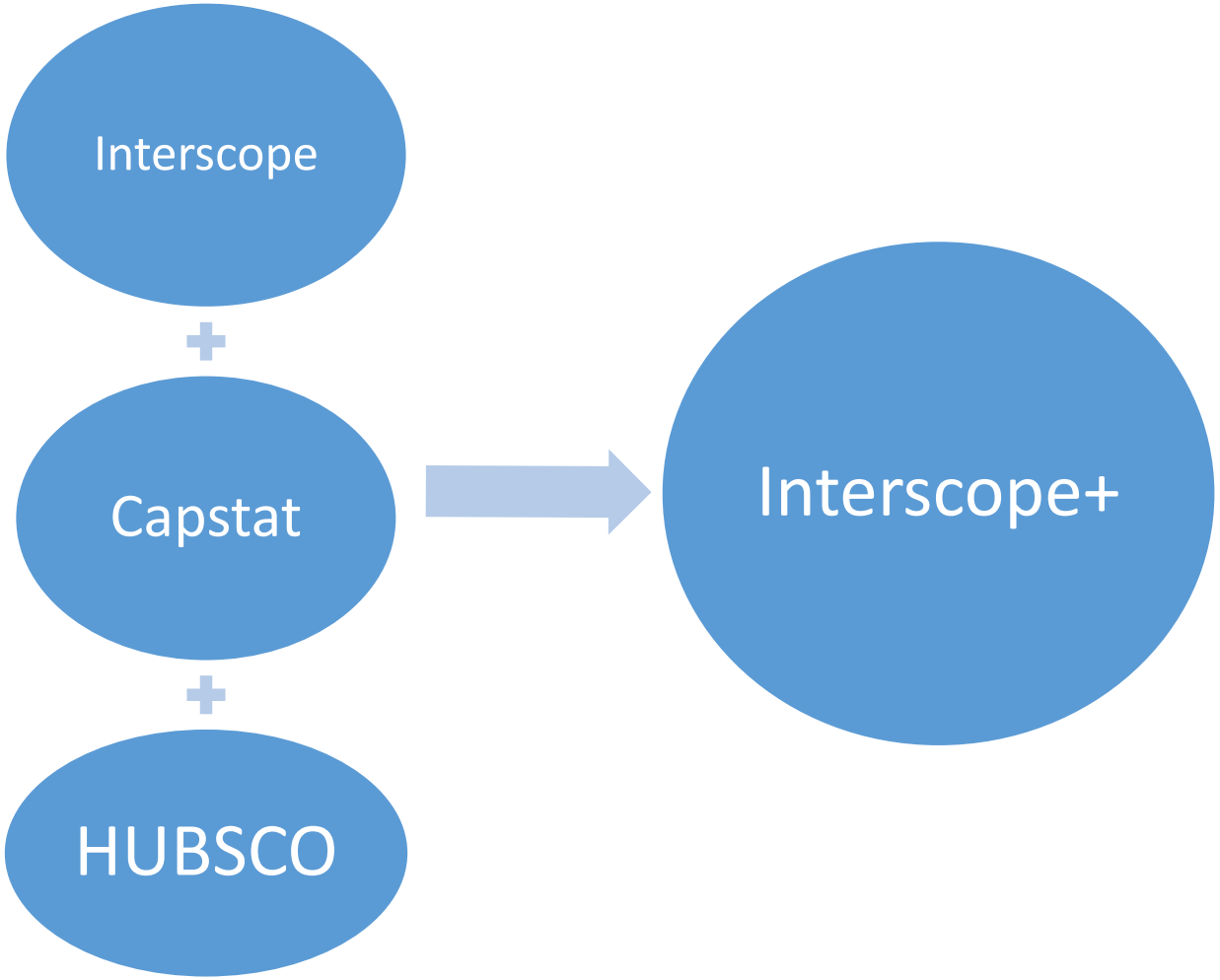
Why Interscope+ was created

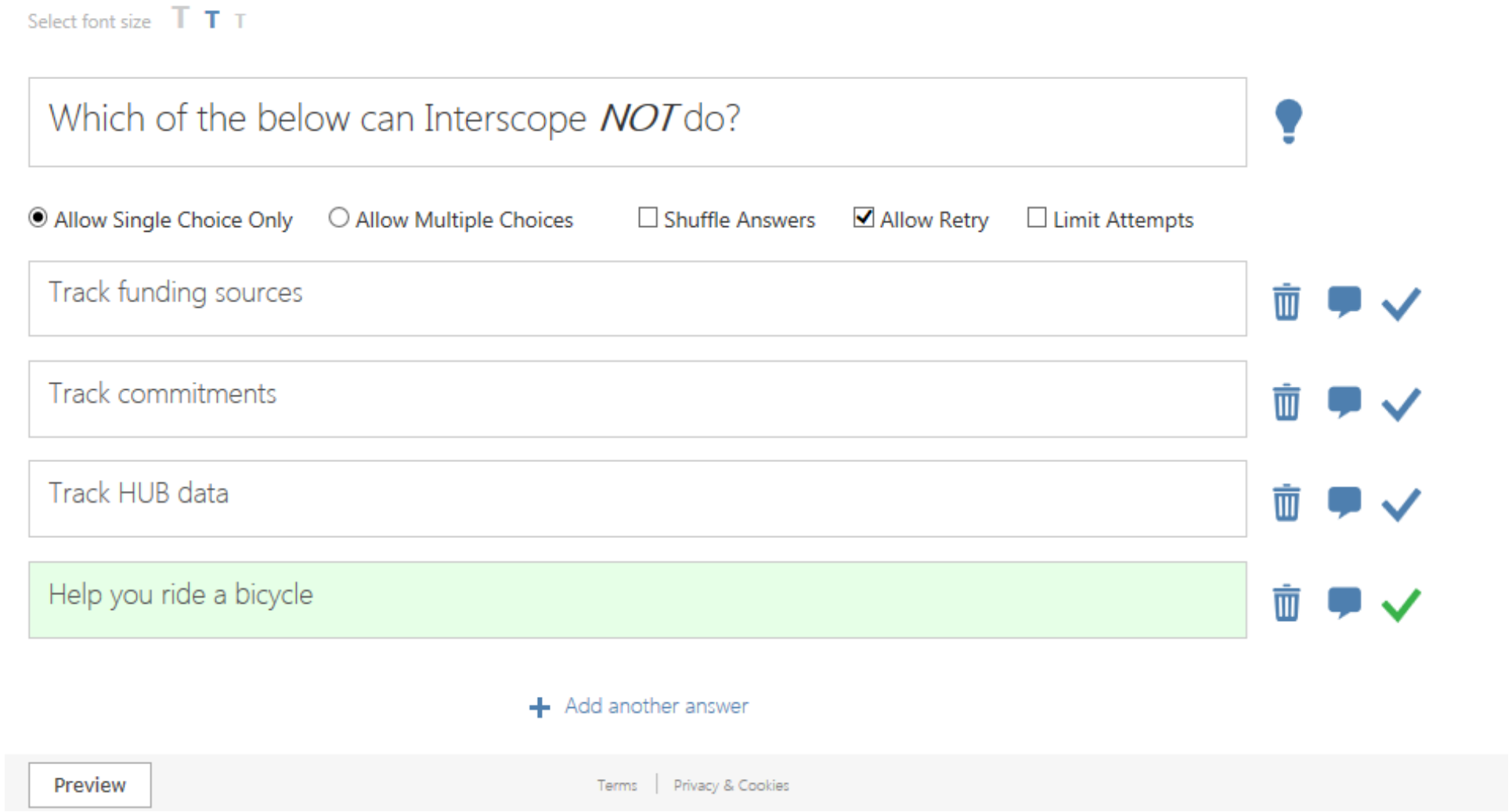


Why Interscope+ Was Created

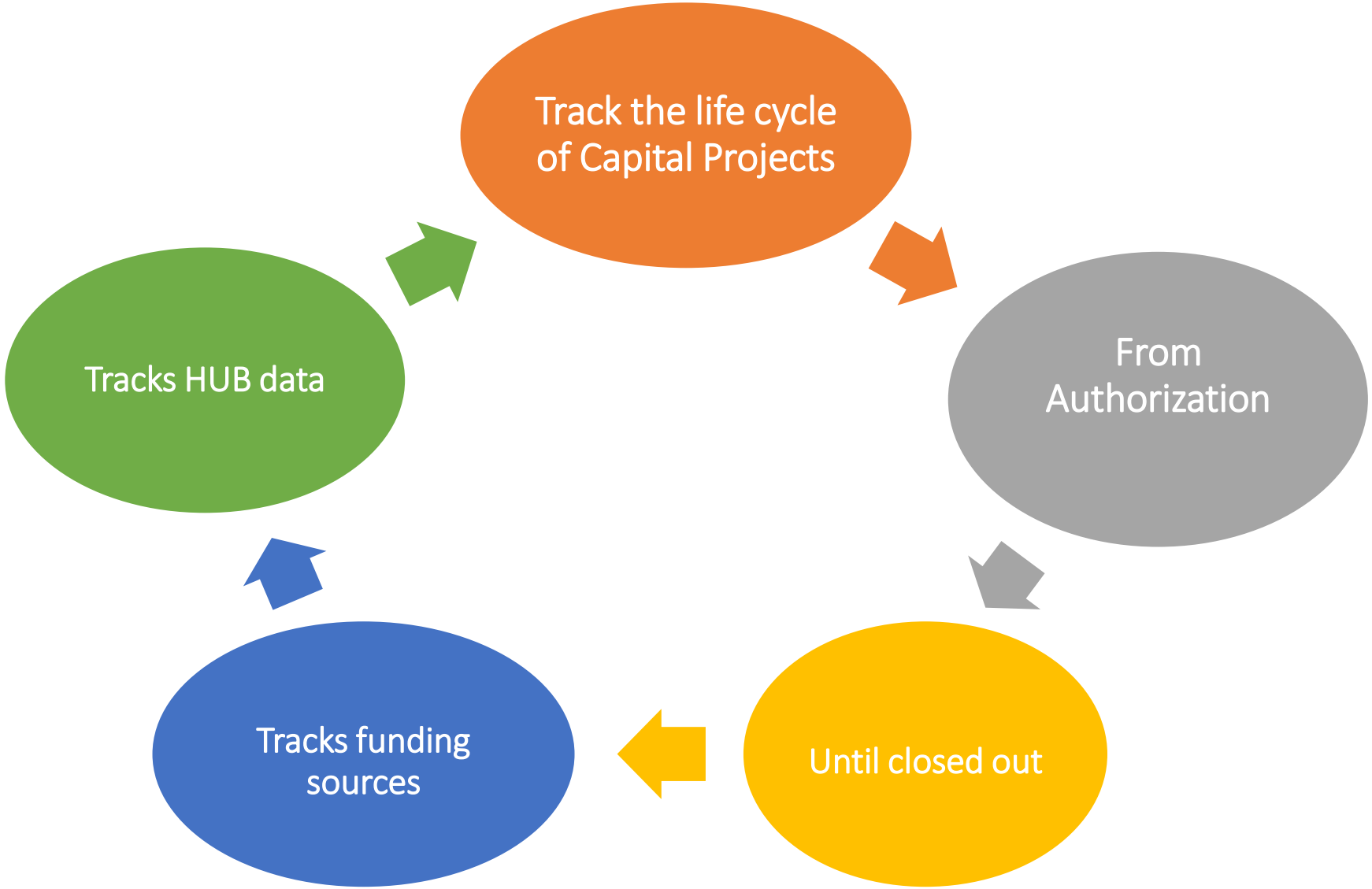
In 2012, the decision was made to create a state-wide Capital Project System that would be used by the Community College System, the University System, and all State Agencies.

Why Interscope+ Was Created




Select font size T T T
Which of the below can Interscope NOT do?
Allow Single Choice Only
Allow Multiple Choices
Shuffle Answers
Allow Retry
Limit Attempts
Track funding sources
Track commitments
Track HUB data
Help you ride a bicycle
Add another answer
Preview
Terms
Privacy & Cookies

How we use Interscope+



How We Use Interscope+

It is not intended to be an accounting system.

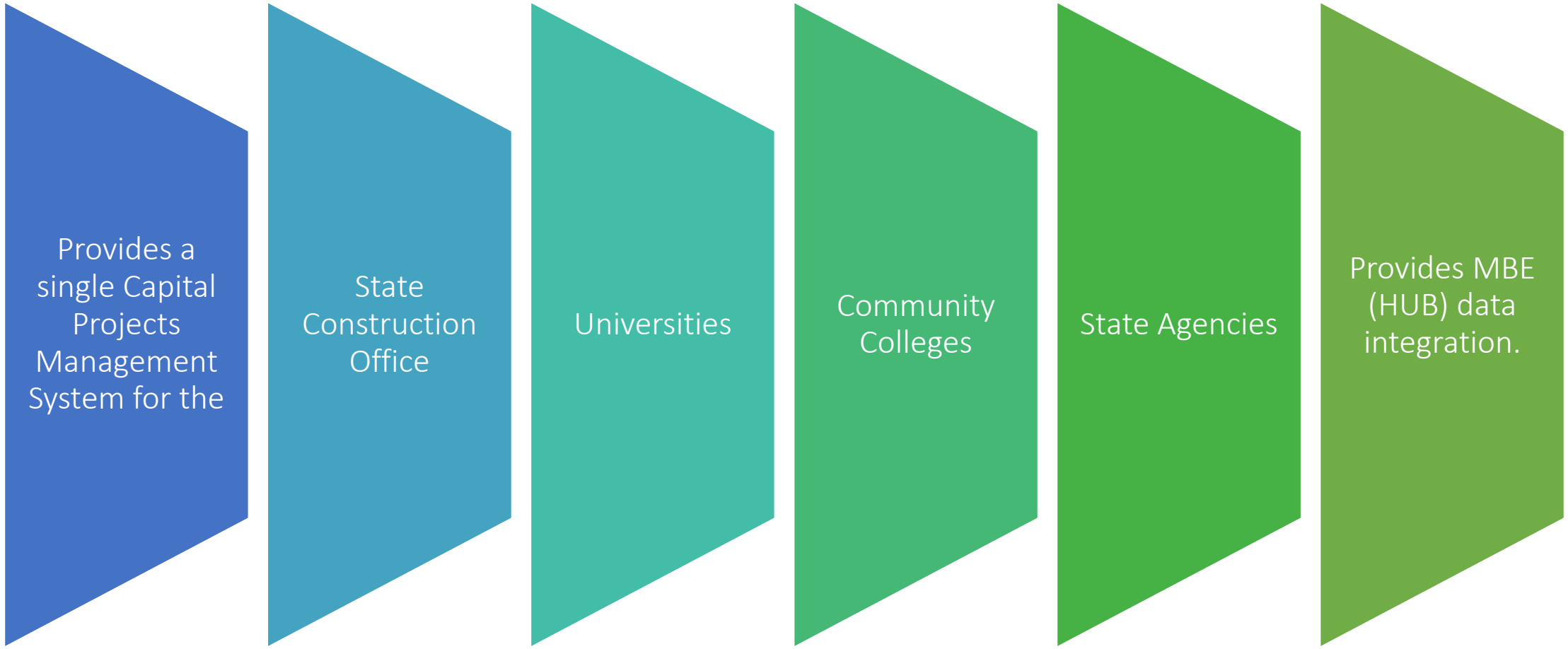
BUT- Has these features

Code and Item Numbers

Budgets

- Contracts
- P6 Milestones linking
- HUB Information
- Optional detailed expenditure tracking is available.
- **But not linked to NCAS*.

What Can Interscope+ Do?



What Can Interscope+ Do?

Track funding sources and budgets

Track commitments

Reduce conflicting data

Provide consistent reporting

Replace HUBSCO for reporting HUB data

Integrates Primavera P6 schedule data

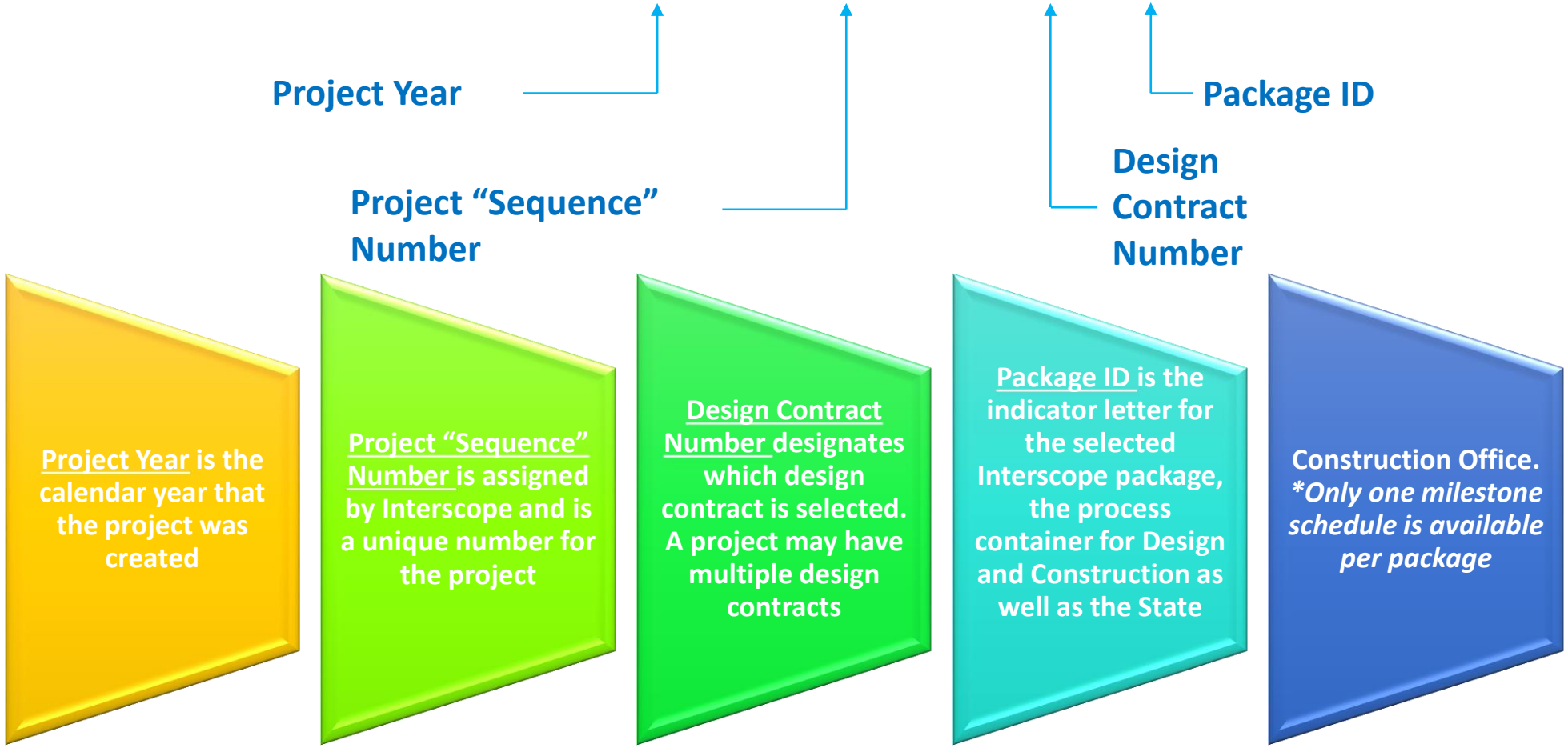
Interscope “SCO” ID Number

The “full” ID number is gradually created

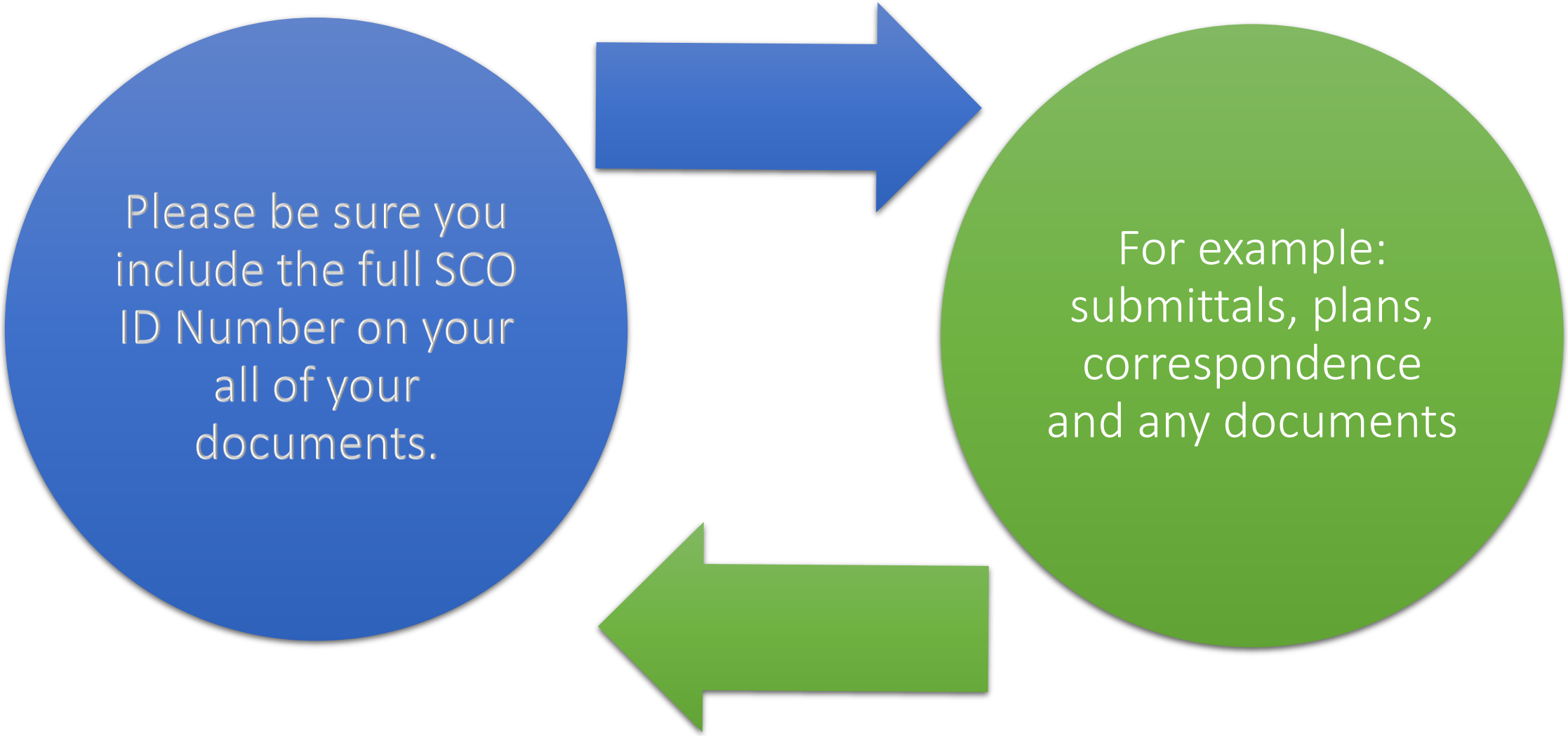
16	02222	02	A
Project Year • Calendar year project was created	**Project “Sequence” Number** • Unique number assigned by Interscope	**Design Contract Number** • Project’s may have multiple contracts	**Package ID** • Process container for Design and Construction

Interscope “SCO” ID Number

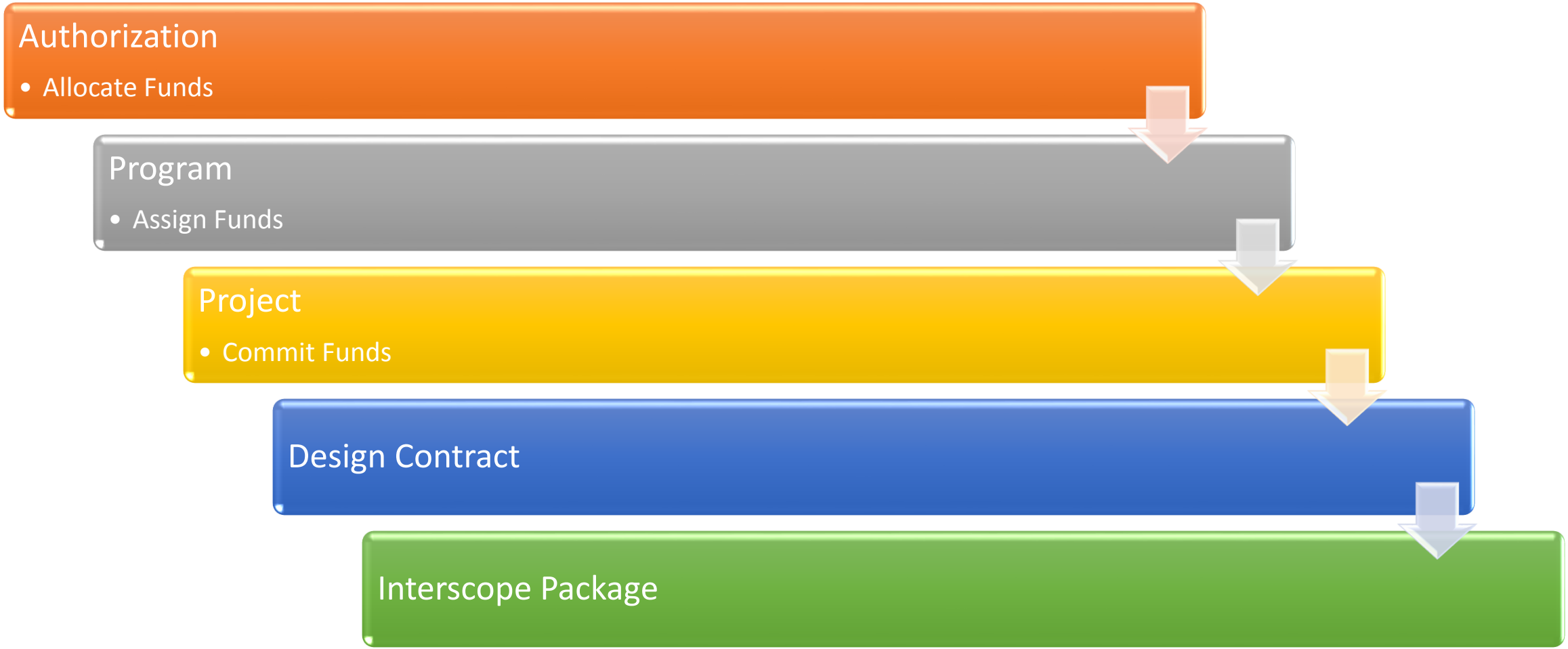
16-02222-02-A



Interscope “SCO” ID Number



How the System Functions
Typical Capital Project Flow



Fund Source Types

Project Types

Standard Project - Default project type that will apply to most Capital projects.

Performance Contract - Applies to Guaranteed Energy Savings Performance Contracts

Foundation Projects - Applies primarily to UNC System projects that are designed/constructed by a foundation but must be reviewed by SCO

More about Project Type

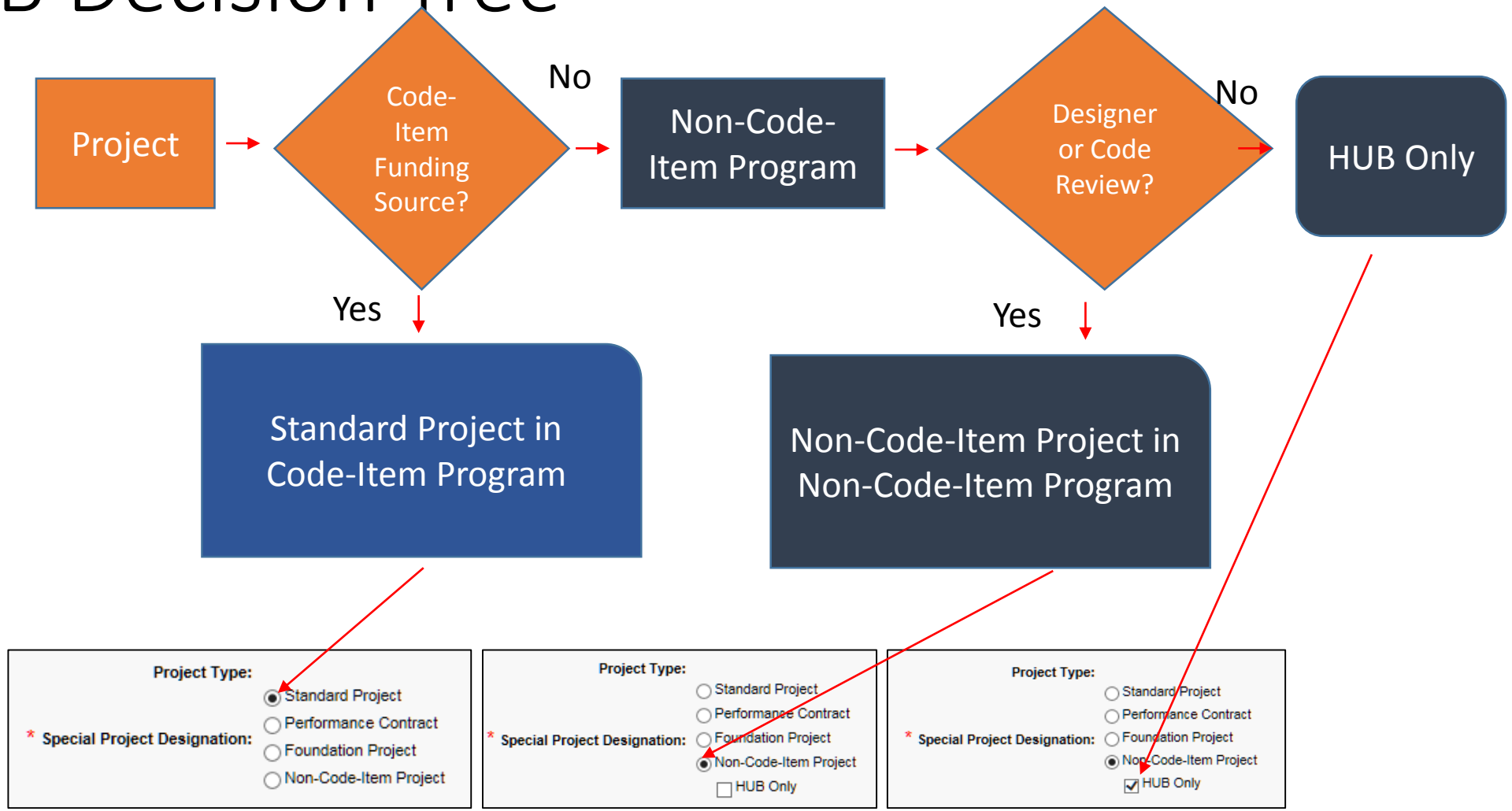
Standard Projects have financial controls, which require funds be assigned to the project and commitments cannot exceed funds assigned. Non-Code-Item Projects do not have financial controls and funds cannot be assigned to them.

NOTE: ONCE YOUR PROJECT TYPE IS SELECTED AND SAVED IT CANNOT BE CHANGED.

Non-Code-Item Projects - 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. May have code review. An Estimated Project Completion date, Funding Source, and Fiscal Year Funded must be entered. These fields appear for entry only when the Non-Code-Item type is selected. Example: Electrical

Non-Code-Item (HUB Only) – Small Non-Code-Item projects that do not require a design contract, package or code review. Example: Painting

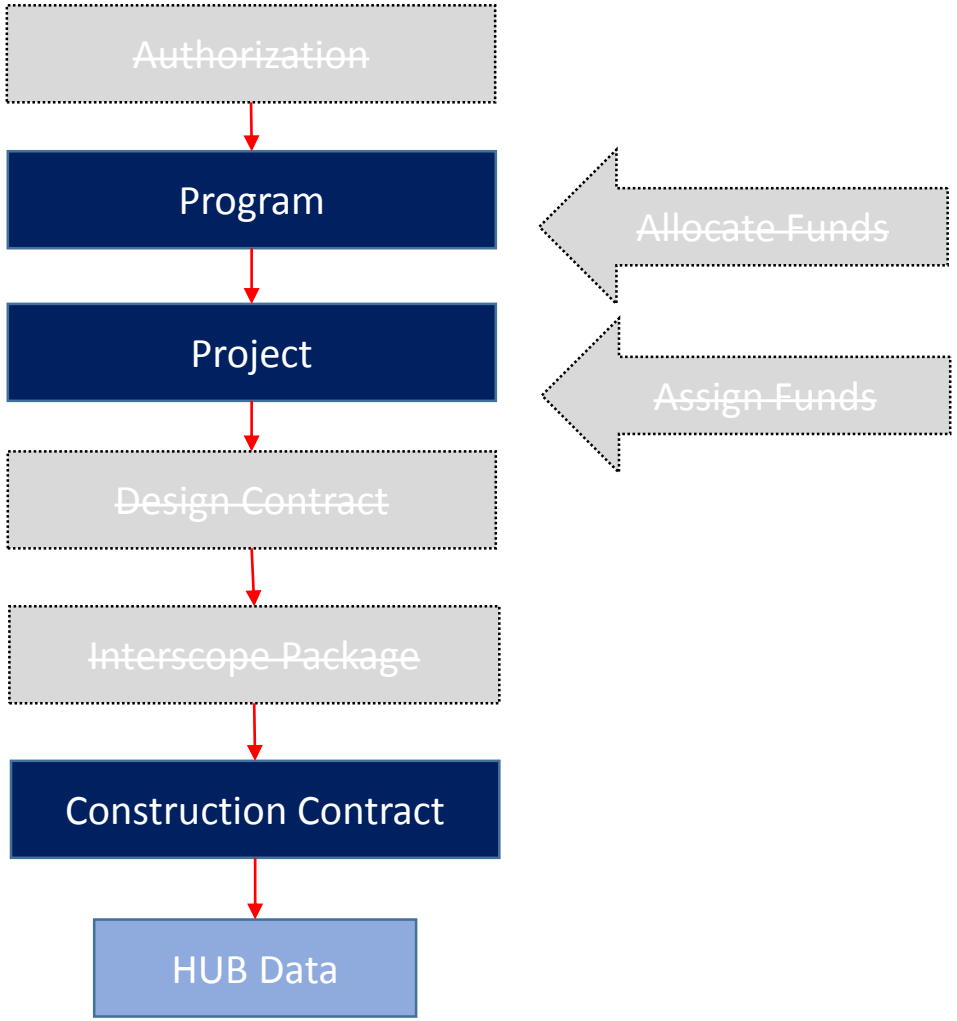
HUB Decision Tree



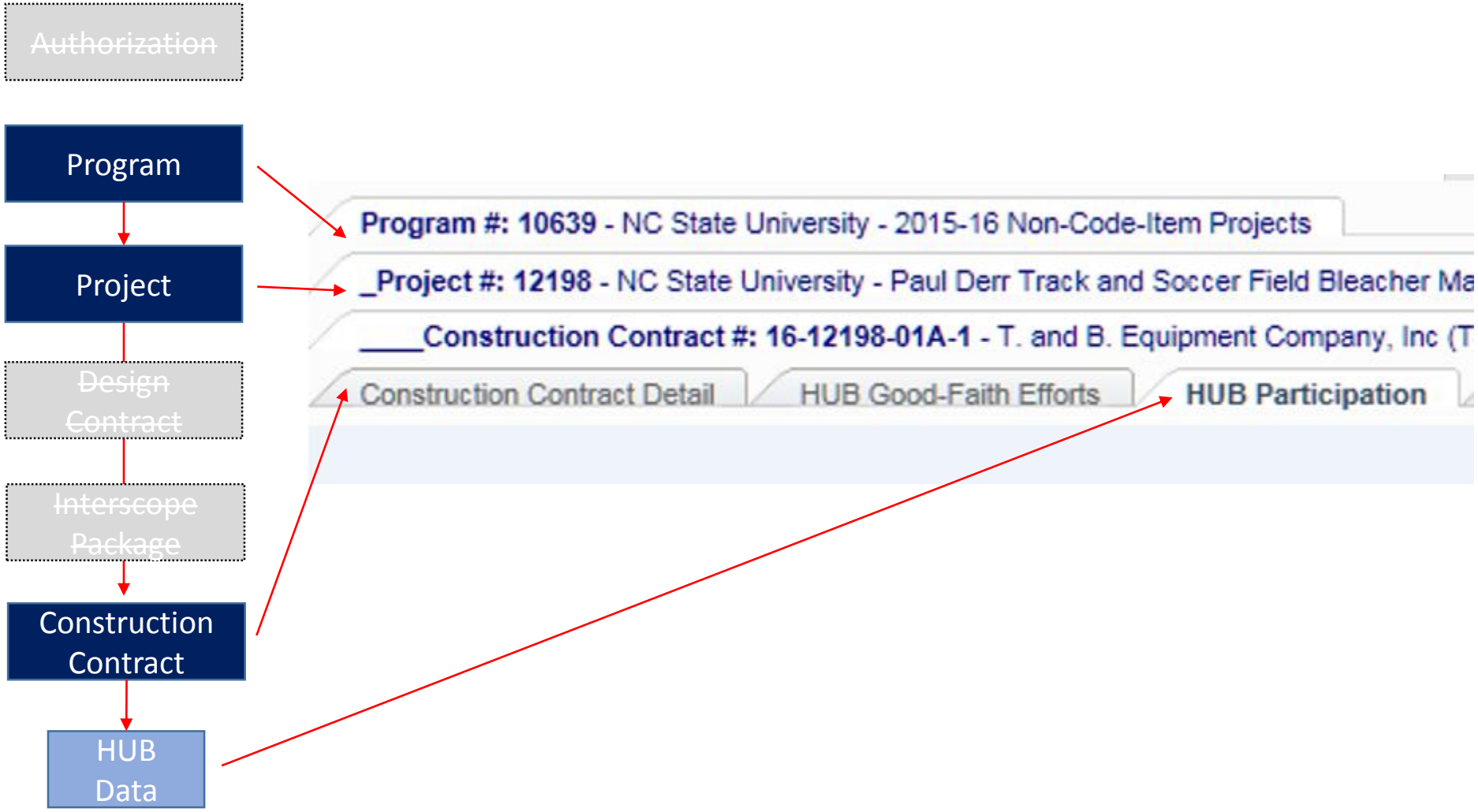
Hub only project type

- HUB Only projects are inherently Non-Code-Item projects.
- There are no fund assignments or financial controls.
- HUB Only projects do not have a design contract or Interscope package.
- HUB Only Construction contracts may not exceed $300,000

HUB Only Project Type



HUB Only Project Type



Authorizations will typically be entered by a senior level person within:

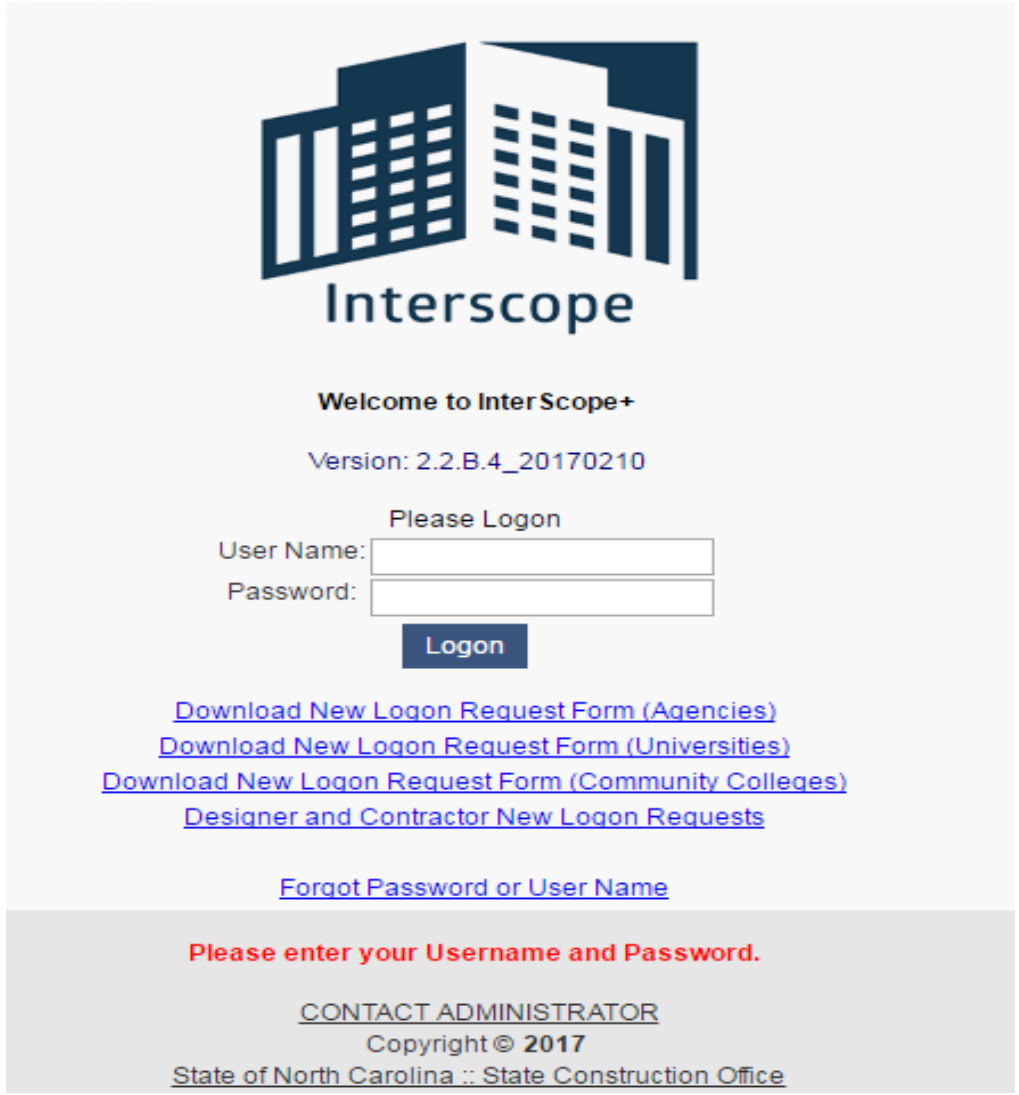
- State Agency/ Department
- System Office for Community Colleges
- UNC General Administration for Universities
- Your user profile, based on your login information, should autofill the Department.

Authorization

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

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

Interscope Logon’s

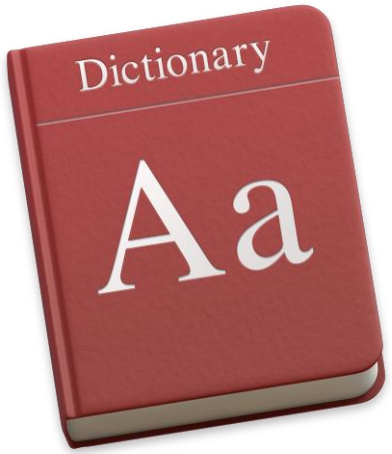


- Download logon request for Agencies
- Download logon request for Universities
- Download logon request for Community Colleges
- Designer and Contractor logon requests
- Forgot user name or password

Questions

Definitions and Terminology

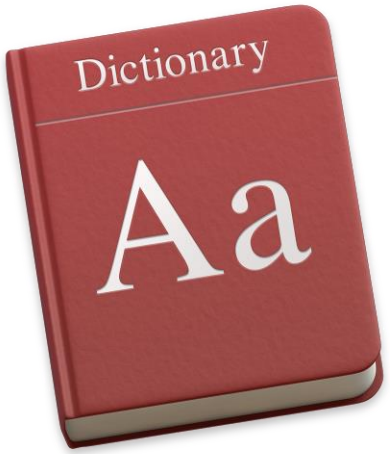
Definitions and Terminology



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.

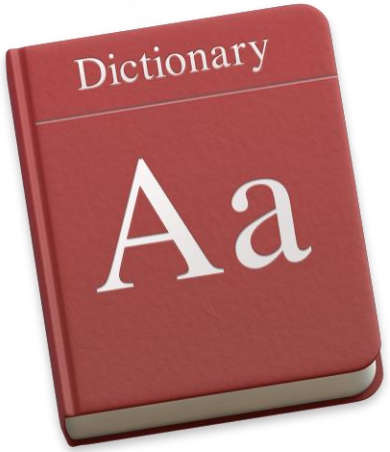
Definitions and Terminology



Amendment

A change to a design contract.

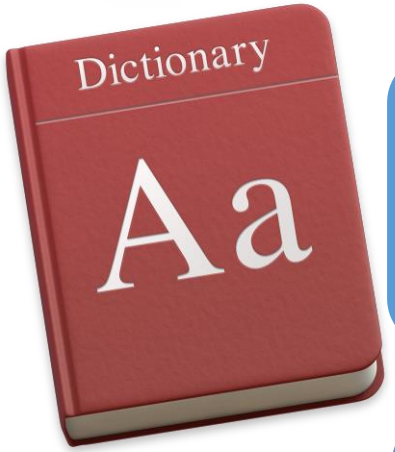
Definitions and Terminology



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.

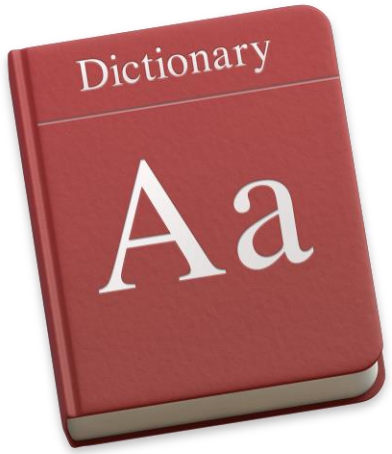
Definitions and Terminology



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.

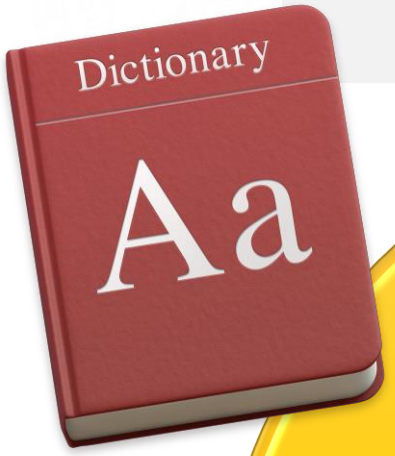
Definitions and Terminology



Change Order

A change to a construction contract, either to the dollar amount, duration or both. Electronic change orders are initiated by the Designer.

Definitions and Terminology

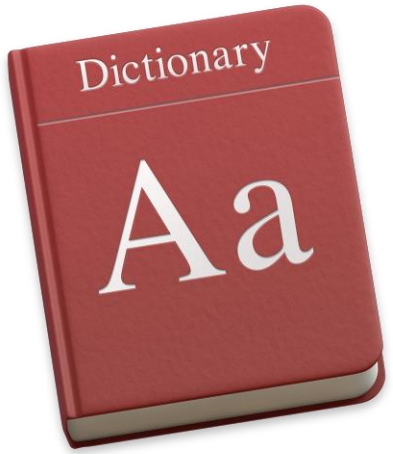


Code

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 authorized fiscal year. The last two digits indicate the state agency or UNC institution.

Community Colleges that are authorized funding by the County, a 5 digit number that does not start with 4 will be used.

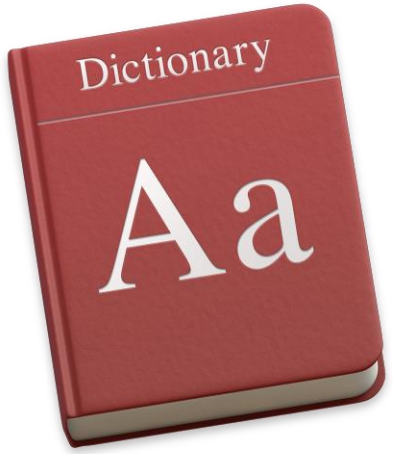
Definitions and Terminology



Construction

Represents the estimated cost of all construction contracts

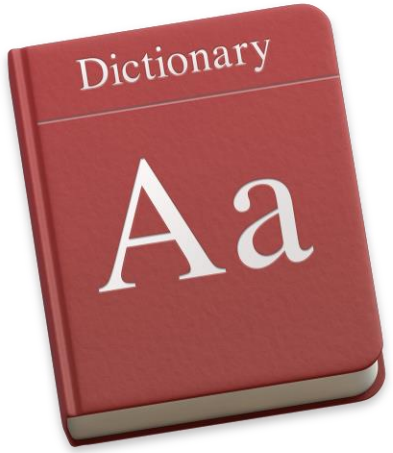
Definitions and Terminology



Contingency

Represents the estimated cost of construction contingency

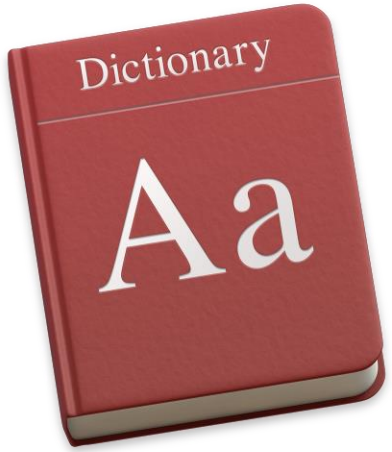
Definitions and Terminology



Commitment

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

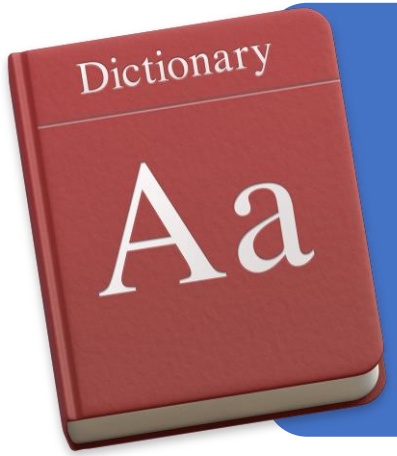
Definitions and Terminology



Design

Represents the estimated cost of the design contract

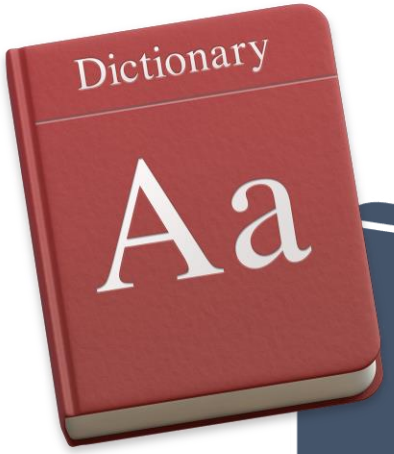
Definitions and Terminology



Estimated Cost

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

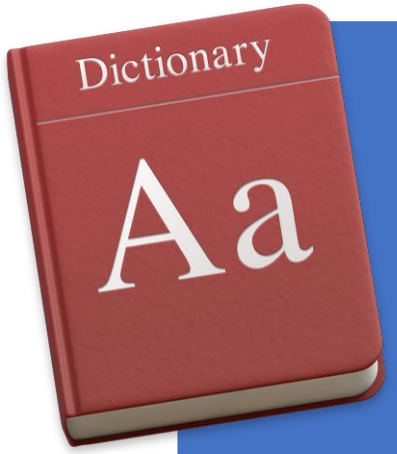
Definitions and Terminology



Expenditure

A dollar amount that has actually been paid.

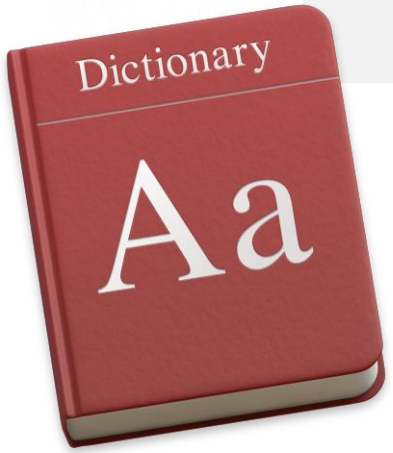
Definitions and Terminology



Interscope Package

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

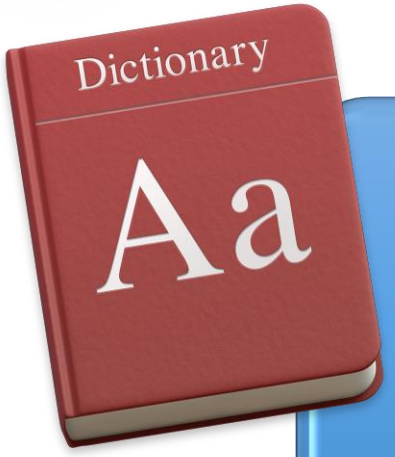
Definitions and Terminology



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.

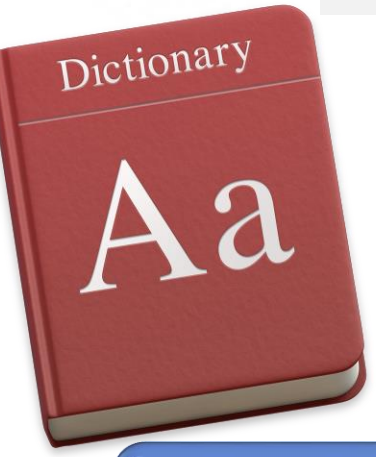
Definitions and Terminology



Milestone

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

Definitions and Terminology

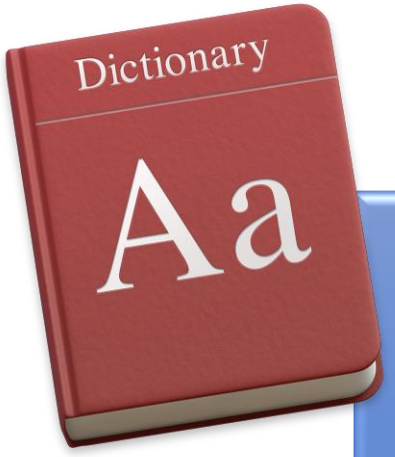


Non-Code-Item (HUB Only)

A type of project within Interscope+. When the HUB Only checkbox is used, the project will be created "without" a design contract. Think of HUB Only as Construction without a design agreement. This selection is used to report HUB data on small projects where a design agreement is not required that doesn't have code review.

Example: A painting project

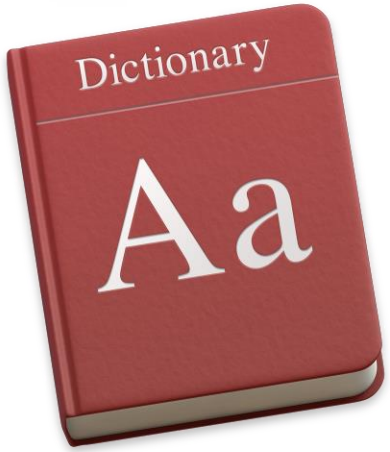
Definitions and Terminology



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.

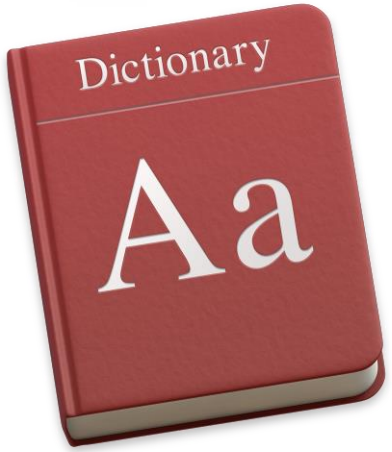
Definitions and Terminology



Non-Code-Item Project

A project that does not have, nor require, a capital code-item. These are typically small informal projects that are accomplished with local or operating funds, but recording HUB participation is required.

Definitions and Terminology



Package

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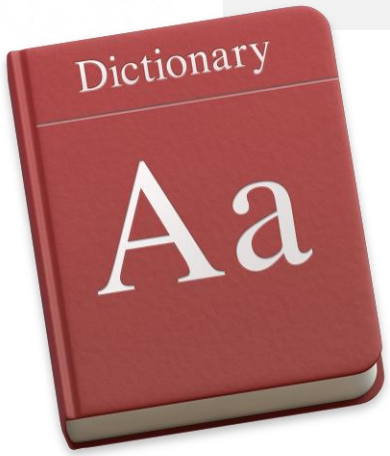
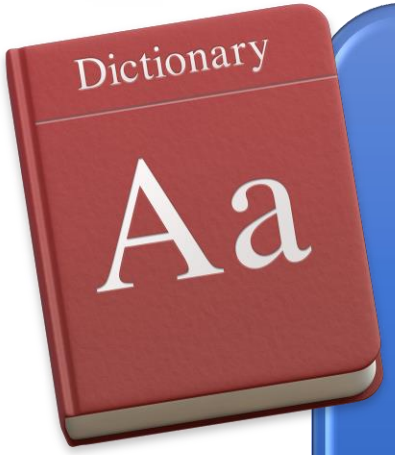


Primavera P6

Statewide project scheduling system. Schedules are required for projects with estimated costs over $500,000, based on Project Type.

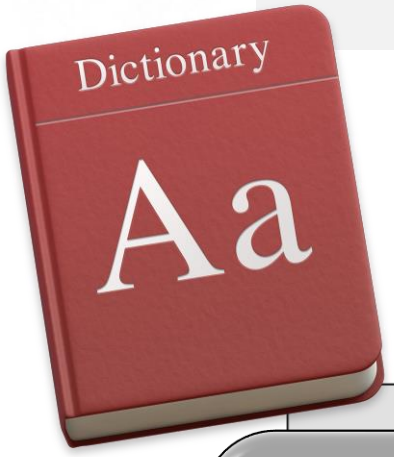
Definitions and Terminology



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 Interscope+ system.

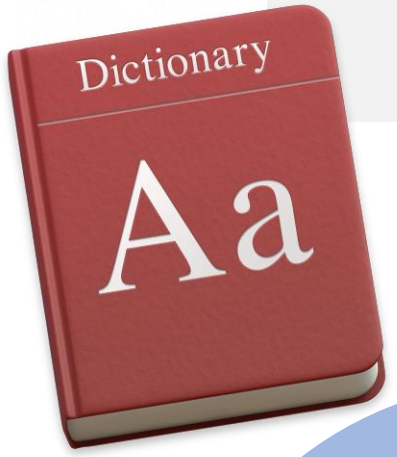
Definitions and Terminology



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.

Definitions and Terminology



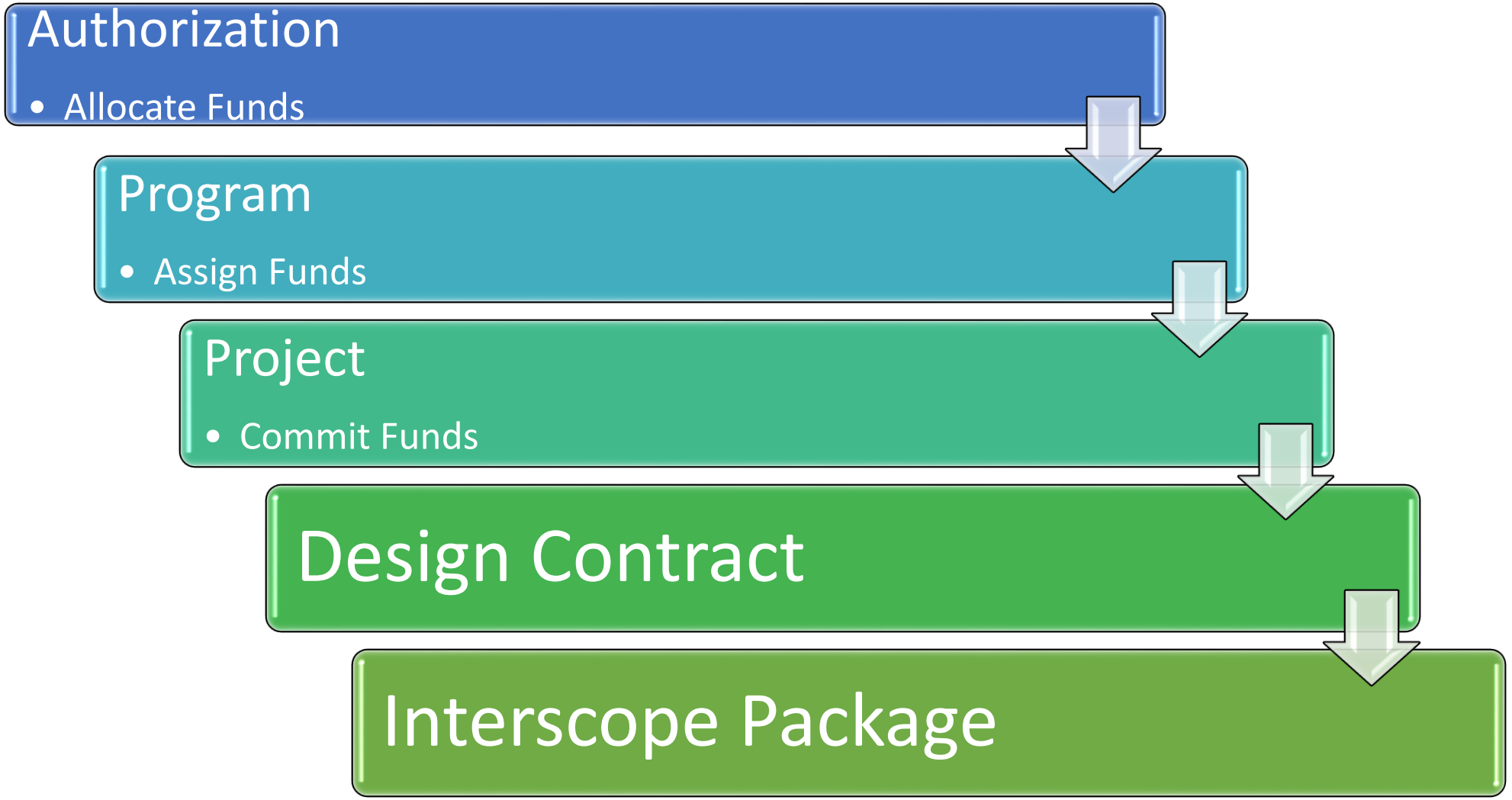
Project Type

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.

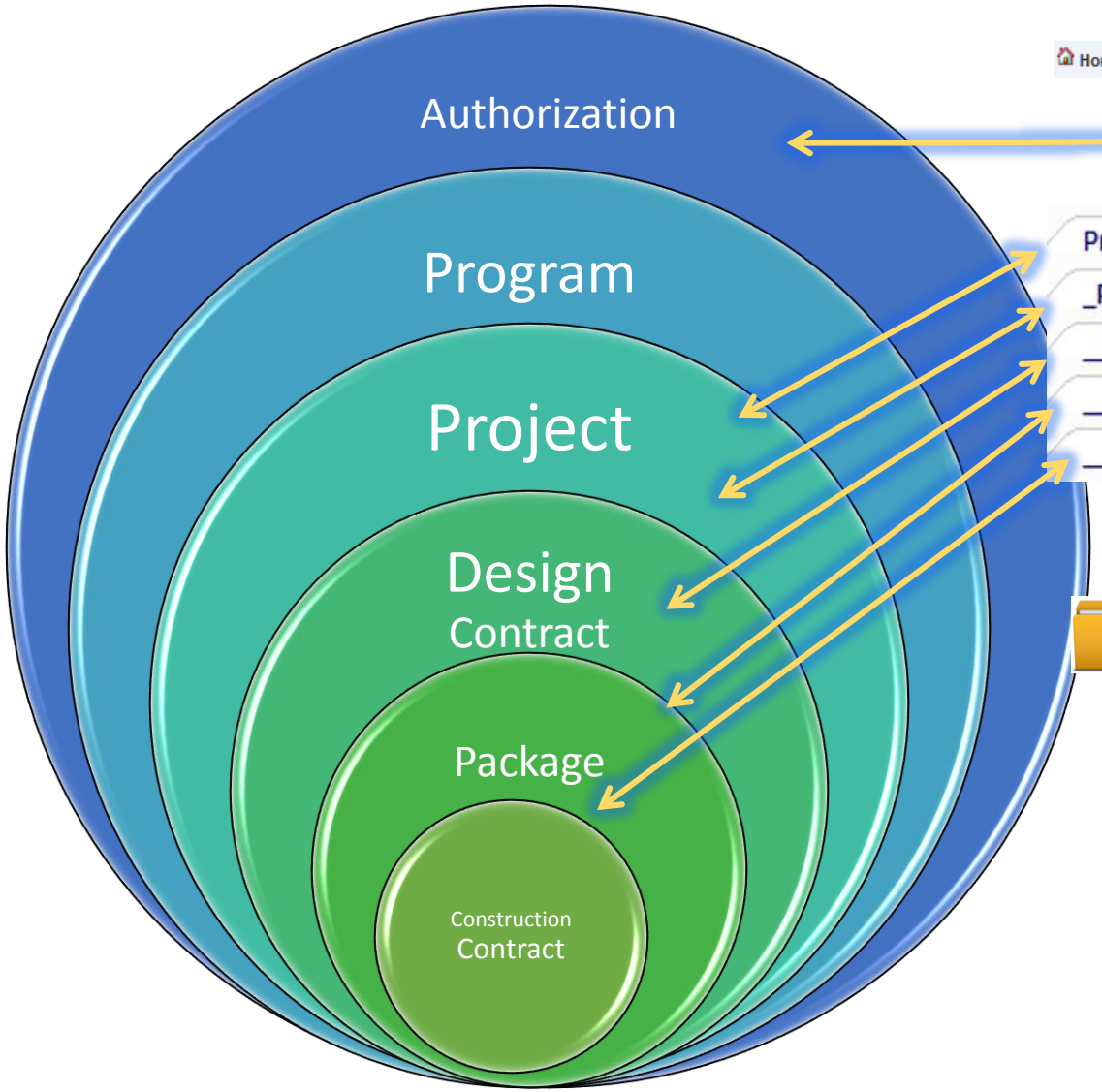
There are different project types based on the department/agency, authorization, and dollar amount of the project.

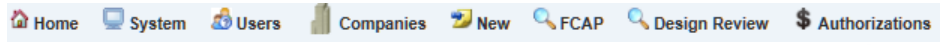
Questions

Typical Capital Project Flow



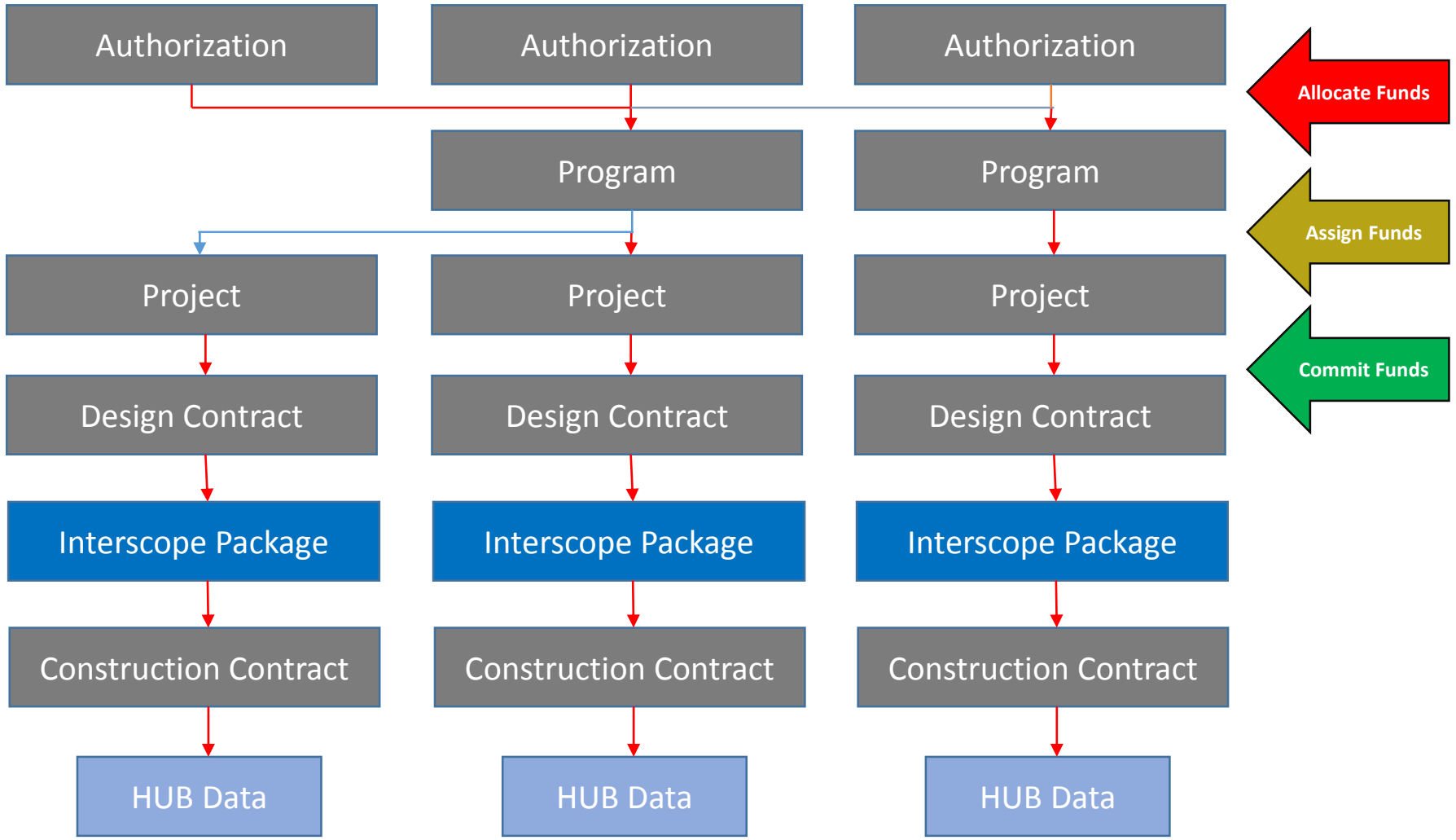
Typical Capital Project





It may help to think of each Interscope+ tab as a nested file folder

Variations


Authorization
Authorization
Authorization
Program
Program
Project
Project
Project
Design Contract
Design Contract
Design Contract
Interscope Package
Interscope Package
Interscope Package
Construction Contract
Construction Contract
Construction Contract
HUB Data
HUB Data
HUB Data
Allocate Funds
Assign Funds
Commit Funds

Contact Information

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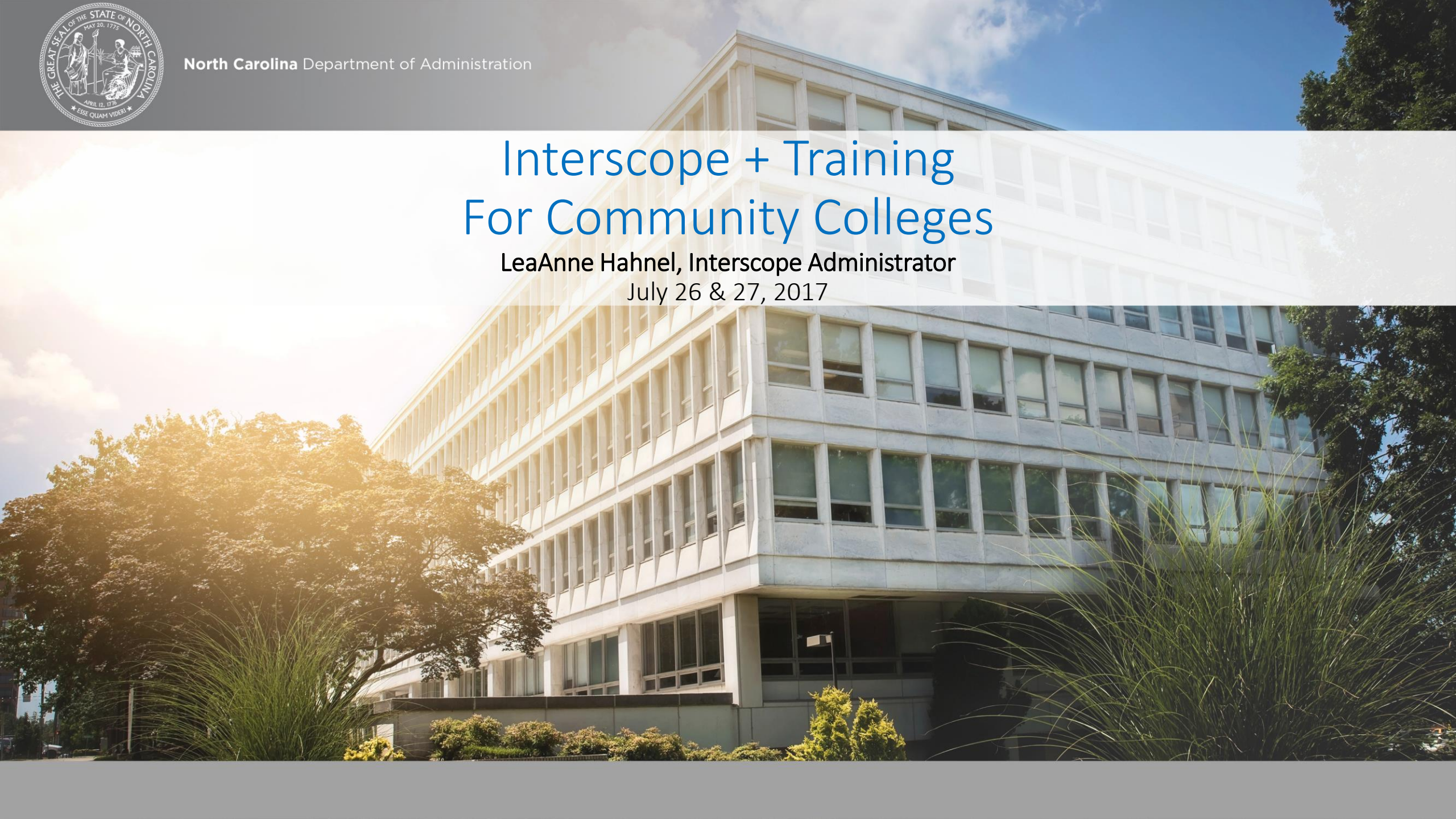

North Carolina Department of Administration

Interscope + Training For Community Colleges

LeaAnne Hahnel, Interscope Administrator

July 26 & 27, 2017