InterScope Release 6.5

Electronic Cost Estimate Processing

Abstract

This manual describes the process of electronic Cost Estimate processing in InterScope Release 6.5

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Overview

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

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

This manual deals only with the processing of electronic Cost Estimates. Comparable documents are available for Change Orders and Evaluations.

Audience

This manual is intended for use by Owner agencies and State Construction Office staff.

Workflow Automation

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

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

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

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

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

Email Alerts

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

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

Cost Estimate Workflow

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

State Construction Office - Interscope Cost Estimate Processing

	WORKFLOW STEP	AGENCY	SCO/FCAP	INTERSCOPE
1	Agency creates OC-25	(1a) - Creates OC-25	(1c) Receives Alert	(1b) Sends Email Alert to: SCO/FCAP
2	Agency submits OC-25 for review	(2a) - Submits OC-25	(2c) Receives Alert	(2b) Sends Email Alert to: SCO/FCAP
3	SCO FCAP Reviews and Approves	(3c) Receives Alert		(3b) Sends Email Alert to: Agency

Figure 1

Getting Started

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

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

http://interscope2.doa.state.nc.us:8080/interscope/logon.action?

New Account Instructions for Owner Agencies

Follow these steps for creating a new Agency user account:

1 – Select State Employee in the User Type field. This will display the entry form in Figure 7.

2 – Select your Department and Agency from the drop down lists and complete the remaining fields as indicated.

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

InterSCOPE :: State Construction	I Office - Project Environment
	New User Logon
User Type:	⊙ State Employee ○ Designer ○ Contractor
Department / Agency:	Administration
	St. Construction
Username:	newuser
Full Name:	SCO General Account
Email:	sco@doa.nc.gov
Phone:	(919) 807-4100 Example: (919) 807-4100
Password:	•••••
Confirm Password:	•••••
Submit	Cancel Help First Time Users Please see Help
	Contact Administrator
	Release: 6.5.1-20100226 Copyright © 2009, 2010
	State of North Carolina :: State Construction Office

Figure 2

Accessing InterScope

Once your account has been established, you may access InterScope to work on Cost Estimates.

Access the following URL to logon to InterScope Release 6.5 -

http://interscope2.doa.state.nc.us:8080/interscope/logon.action?

The following screen will appear.

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2 InterScope - State Construction Office	e - Page ::		🛃 Page \star 🎯 T <u>o</u> ols 🔸
State	Construction Office - Project Er		
* 51	CI.I.		
	Welcome to InterScope User Login		
	ername:assword:		
E	Forgot Password Request Logo	on	
-	Contact Administrator Release: 6.5.0-20100215 Copyright @ 200	9, 2010.	

Figure 3

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

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

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

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

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

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

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

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🚖 🏟 🏉 Int	erScope - State Construction Office - Page ::	🚹 🔹 🔝 👻 🖶 T 🔂 Page 🕶 🎯 Tools	• "
Inter SC	COP2 :: State Of North Carolina - State Constru	tion Office user: SCO TEST AGENCY view: UNC Chapel Hill Logout	
🟠 HOME 📔 📍	Alerts 🔧 New 🔻 🔎 Find 🔻	🧮 Preferences 🔻 🙆 Help 🔻	
Interscope H	ome Page		
Date	Торіс	News	1
2010-02-19 12:00	Interscope Release 6.5	A new release of interscope has been installed. This release contains support for Electronic Change Orders and Evaluations. New Feature - Expanded documentation and guides. New FAQ, tips and manuals for Change Order and Evaluation processing can now be found under Help on the Menu bar. New Feature - Alerts. You are now alerted on events of interest to you. To find your active Alerts, click ! Alerts in the Menu bar.	
2010-02-19 12:00	Annual Construction Conference	The 2010 State Construction Conference is set for March 23rd. Registration is closed. No Walk-Ins will be Accepted.	
2010-02-23 09:30	Error using Biennium End on Cost Estimate Query	Please note the current limitation in using the Biennium query field for Cost Estimates: Only use the '=' and '!=' operators. Use of the 'Like' operator wil generate a query error. This problem will be resolved in the next update.	
Export option	s: 12 <u>CSV</u> X Excel 12 XML		

Figure 4

Entering Cost Estimates

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

Step 1 – Entering the Cost Estimate information

To create a new OC-25, select *Cost Estimate* from the *New* Menu (See Figure 4). The following screen is displayed.

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47	6 InterS	icope - Sta	te Construction Of	fice - Page :: OC 2							â • 🖻 ·	° 🖶 ▼ 📴 E	age 🔻 🍈 T <u>o</u> ols
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Ba	ick				OC	25 COST ESTI	MATE					🔯 Docume	nt 🔻 🚫 Close
:0	ST ESTIMAT	E DETAIL											
			Biennium End:						OC-25#:				
	C	Departme		Educational Institutions (Universities) UNC Chapel Hill					Status:	Creating			
			*Project Title:						Submitted:	By: On:			
		*0	ity or Location:					Ap	proved By:	By: On:			
		Cost	Estimate Class	New Facilities 🗸					Returned:				
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	*Desc	ription ar	d Justification:	(Attach additional data as necessary to in Verify if compliance with GS 143-135.35 -									
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								~					
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	SUBMIT APPROVE		WNER SCO	UNC Chapel Hill St. Construction	scounc								
				COST* (breakdowns)									🗙 🕂 🔒 🚺
	ON	MATED	DNSTRUCTION	DESCRIPTION			QU	ANTITY	UNIT OF	MEASURE	COST PER UNIT		OTAL
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	Site		Site Demolition	1				0		~		0	\$0
	Site		Site Work					0		~		0	\$(
	Construc	tion	Utility Services					0		~		0	\$(
	Construc	tion	Building Demo	lition				0		~		0	\$0
	Construc	tion	Building Const	ruction				0		~		0	\$0
	Construc	tion	Building Plumb	ing				0		~		0	\$(
	Construc	tion	Building HVAC					0		~		0	\$0
	Construc	tion	Building Electr	ical				0		~		0	\$0
	Construc	tion	Asbestos					0		~		0	\$0
	Construc	tion	Computer Wiri	ng				0		~		0	\$0
	Construc	tion	Elevator					0		*		0	\$0
	Construc	tion	Food Services					0		~		0	\$0
	-	tion	Landscaping					0		~		0	\$0
	Construc	lion											
	Construc Construc		Roofing					0		~		0	\$0

Figure 5

Enter data in the required data entry fields appearing in red (**Project Title**, **City/Location**, **Description/ Justification**). Notice that the current **Biennuim End** and **Department and Division** are pre-filled.

Select the desired Cost Estimate Class, Package Type from the drop down lists.

In the **WORKFLOW ACTIVITY** section, the first **Workflow Step** is highlighted and a *Comments* field is provided for entering workflow notes.

Step 2 – Entering Standard Cost Estimate Breakdowns

To begin entering Cost Estimate amounts, go to the **CURRENT ESTIMATED CONSTRUCTION COSTS(breakdowns)** section of the page.

A standard set of breakdowns is presented in this section.

Select the appropriate **Section** and **Description** for the breakdown to be entered and complete the following fields: **Quantity, Unit of Measure, Cost Per Unit**. The **Total** column is calculated automatically as data is entered

As this information is provided, the figures in the **ESTIMATED CONSTRUCTION COSTS** section will be updated.

Repeat the preceding steps for each breakdown.

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* 4	@ InterS	cope - State Construction C	office - Page :: OC 2							🟠 • 🔊 ·	🖶 • 🖪	Page - 🎯 Tools -	»
	*Desc	ription and Justification	: (Attach additional data as necessary to										^
			Verify if compliance with GS 143-135.3	5 - 143-135.40, Sust	ainable, Ene	rgy Efficie	nt Buildings, is requ	uired.)					
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Step 1	Action CREATE	Role	Organization	User	Complet	ted On	Alerted On	Disposi	tion	Comm	ients		
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SECTI			DESCRIPTION			Q	UANTITY	UNIT OF MEA		COST PER UNIT		TOTAL	
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в. В.	Site	Site Demoinin Site Work	11				0		*		0	\$0 \$0	
C.	Construc		e				0		~		0	\$0	
C.	Construc						0		~		0	\$0	
C.	Construc	-					1	Lump Sum	~	2300	-	\$23,000	
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C.	Construc	5	•				0		~		0	\$0	
C.	Construc	tion Building Elect	rical				0		~		0	\$0	
C.	Construc	tion Asbestos					0		~		0	\$0	
C.	Construc	tion Computer Wi	ing				0		~		0	\$0	
C.	Construc	tion Elevator					0		~		0	\$0	
C.	Construc	tion Food Services	3				0		~		0	\$0	
C.	Construc	1.0					0		~		0	\$0	
C.	Construc						0		~		0	\$0	
C.	Construc						0		~		0	\$0	
C. C.	Construc						0		~		0	\$0	
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D.	Equipme		iont				0		~		0	\$0	
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FIXED	OWNER CO	IST:										\$0	~

Figure 6

Step 3 – Entering Custom Cost Estimate Breakdowns

Additional breakdown items can be added to the standard set available.

To add a custom breakdown:

1 – Move the mouse over the breakdown sheet and click to select the insert position. The selected line will be highlighted in grey.

2 – Select the + button in the upper right corner of the breakdown sheet.

3 – A new line will be inserted below the highlighted line.

4 – Select the appropriate **Section** from the drop down list (ie. Land, Site, Construction, Equipment, Other)

	+ Shttp://inter	scope2.doa.state.nc	.us:8080/interscope/costEstimate.acti	on?uid=13270&source=jsp	_			Google	
Edi		Tools Help							1
<u>L</u> u	1							☆・ ◎ ♣	• 🔂 Page • 🎯 T <u>o</u> o
-94	E InterScope - St		ice - Page :: OC 2						· Esterade • State
	Departm	Biennium End:	2011 Educational Institutions (Universit	ioo)	-		OC-25#: 20116050 Status: Pending	0212	
	Departi		UNC Chapel Hill				Status, renuing		
		*Project Title:	Test OC-25 for new User Manu	al 📃		1	Submitted: By: On:		
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	Site Site	Site Demolition Site Work	1			0	*	0	
	Construction	Utility Services				0	~	0	
	Construction	Building Demo				0	*	0	
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	Construction	Building Electr				0	×	0	
	Construction	Asbestos				0	*	0	
	Construction	Computer Wiri	ng			0	~	0	
	Construction	Elevator				0	×	0	
	Construction	Food Services				0	v	0	
	Construction	Landscaping				0	~	0	
	Construction	Roofing				0	~	0	
	Construction	Sprinkler				0	×	0	
	Construction	Special				0	*	0	
	Construction	Telecommunic	ations			0	*	0	
	Construction	Other				0	~	0	
	Equipment Equipment	Fixed Equipme				0	~	0	
		Movable Equip	ment			0	v	0	

Figure 7

Step 4 – Completing the Estimated Construction Costs Sections

For ESTIMATED CONSTRUCTION COSTS, there are five options:

- 1. Contingencies
- 2. Design Fee
- 3. Commissioning Fee
- 4. Advance Planning
- 5. Fixed Owner Cost

A percentage or exact amount can be entered for each estimated costs. Select either **Percentage** or **Total** for before the value is entered. The system will calculate the corresponding percentage (if total is selected) or total (if percentage is selected.

A mix of percentages and totals may be entered toggling back and forth between the percentage and total options before each line is entered. For example, a percentage may be entered for Contingencies, but then a total for the Design Fee.

Completing the ESTIMATED CONSTRUCTION COSTS section yields a figure for ESTIMATED COSTS.

The final option is to enter an Escalation % as a percentage of the Estimated Costs.

Enter the number of months to the mid-point of construction, then elect the correct percentage that corresponds with the number of months used.

Equipment	Fixed Eq	uipment		0	¥	0	\$0
Equipment	Movable	Equipment		0	*	0	\$0
STIMATED CONSTR	UCTION COSTS:		[Calculate using: O Percentage 💿 Total]				\$128,000
ONTINGENCIES:		4%	(Percentage of Estimated Construction Costs [3% New of 5	% R&R])			5120
ESIGN FEE:		3%	(Percentage of Estimated Construction Costs + Contingence	ies)		1.1	4000
OMMISSIONING FE		0.5%	(0.5% simple; 1.0% moderate, 1.5% complex)			1.1	665
DVANCE PLANNING		0%	(Includes programming, feasibility, analysis)			1	0
IXED OWNER COST	1					1	\$0
STIMATED COSTS:	(Esti	nated Construction	on Costs + Contingencies + Design Fee + Commissioning Fe	e + Advance Planning)			\$137,785
From Est. Date to mi	d-point of construc	tion) =	12 months General 12-18 months> 0.00 v %				
SCALATION COST	NCREASE (Total (f Estimated Cons	struction Costs X Escalation %)				\$0
OTAL ESTIMATED F	ROJECT COSTS:	(Estimated Cost	ts + Escalation Cost Increase)			- E	\$138,000
		nate, include des s, walks, parking,	cription, quantities, units, special features, similar cost on rec	ent projects, etc.			

Figure 8

Step 4 – Attaching supporting documentation

Supporting document can be uploaded using the Attachments Section. To attach a document, enter a **Description** and select the upload file by pressing the **Browse** button. A window will be displayed for selecting a local file on your computer to upload. Selecting the file with return to the input page.

To complete the upload, press the *yellow* **Attach** button. Once the file is successfully uploaded, it will appear in the list. Attach as many files are necessary to complete the supporting documentation for the OC-25. Each file provided will be accessible online by reviewers.

Step 5 – Saving the new Cost Estimate

To save the new Cost Estimate information, select **Save** from the **Document** menu.

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Ø	InterSCOPE :: S	tate Of North Carol	ina - State Construction Office		user: SCO TEST AGENC	Y			v	iew: UNC C	hapel Hill Lo	gout
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		*Project Title:	Test OC-25 for User Manual				Submitted: E			-		
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Step 1 2	Action CREATE SUBMIT	Role OWNER OWNER	Test OC-25 for User Manual v step is highlighted Organization UNC Chapel Hill UNC Chapel Hill	User	tainable, Energy Efficient t	Buildings, is requ	uired.)	sition	Cor	nments		
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1 2 3 CU	Action CREATE SUBMIT APPROVE JRRENT ESTIMATED	Role OWNER OWNER SCO D CONSTRUCTION (Test OC-25 for User Manual v step /s highlighted Organization UNC Chapel Hill UNC Chapel Hill St. Construction COST* (breakdowns) DESCRIPTION	User scounc	tainable, Energy Efficient &	Buildings, is requ	uired.)		Cor COST PER UNIT	nments	TOTAL	
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Figure 9

InterScope will display Submitting Update. Please wait.. as it creates the Cost Estimate.

Step 6 – Editing the Cost Estimate

Once the Cost Estimate is created, the following page is displayed. Notice that the Workflow has advanced to the next step (2) and information for the preceding step has been created.

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

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Figure 10

The User may continue to make changes to the Cost Estimate using the **Save** option on the **Document** menu up until the time that the Cost Estimate is submitted.

The User may choose to abandon or delete the Cost Estimate using the *Delete* option from the *Document* menu. However, once it is submitted, no changes or deletions are allowed

Step 8 – Submitting the Submitting the Cost Estimate for review

To complete this workflow step, the User must submit the Cost Estimate to initiate it's review and approval by the SCO FCAP Section.

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

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Figure 11

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Figure 12

InterScope updates the Cost Estimate workflow and processes any Alerts that are defined for this step.

The system is configured to send Alerts to the SCO FCAP Section.

InterScope then displays the Cost Estimate screen and alert information. The Submit step has been updated with workflow information and the Workflow advances to the next step – SCO Approval.

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Figure 13

Reviewing and Approving Cost Estimates

The following steps are completed for the SCO FCAP Section in reviewing and approving a submitted Cost Estimate.

Step 1 – Receiving and responding to the Alert

The FCAP Administrator will receive an alert via email concerning actions for each Cost Estimate.

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Fro To: Cc:	n:	StateConstructionOffice@doa.nc.gov Sent: Thu 3/18/2010 5:4 Gioielli, Mike Sent: Thu 3/18/2010 5:4	47 PM					
	ject:	Alert - OC 25 COST ESTIMATE#:201160500212 is Submitted						
	North C	Carolina State Construction Office - InterScope System Alert						
	Date:	Thu Mar 18 17:47:02 EDT 2010						
	To:	<u>Mike Gioielli@doa.nc.qov</u>	_					
	From:	North Carolina State Construction Office	-					
	310 N. Willmington St., Suite 450 Raleigh, North Carolina 27601							
	Telephone: (919) 807-4100 Fax: (919) 807-4110 Web: www.nc-sco.com							
	You are receiving an alert concerning the following document in InterScope :							
	Alert - OC 25 COST ESTIMATE# 201160500212 for AGENCY: UNC Chapel Hill TITLE: Test OC-25 for new User Manual TOTAL ESTIMATE:\$123,000 Workflow Step - 2 of 3 - ACTION: Submitted - OWNER: UNC Chapel Hill USER: scounc							
\langle	Click here to logon to InterScope and view it.							
			•					

Figure 14

To access the Cost Estimate, simply click on the link at the bottom of the Alert Email.

You will prompted to Logon and are the directed immediately to the Cost Estimate page.

Step 2 – Approving or Rejecting the Cost Estimate

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

Approving the Cost completes the Workflow.

Rejecting the Cost Estimate at any step in the Workflow causes the Cost Estimate to be returned to Step 2 where the originator (Agency) 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.

Alerts are sent to the originating user (See **Submitted by**) as a notification that the Cost Estimate has been officially approved.

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Figure 15