

INTERSCOPE + TRAINING

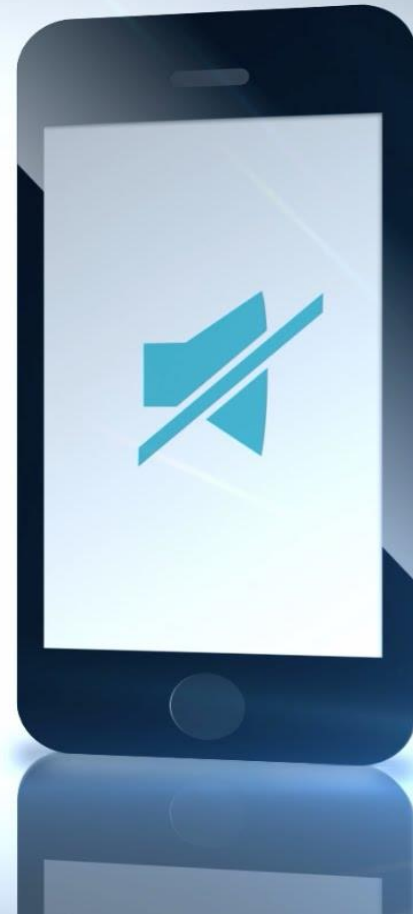
STATE CONSTRUCTION OFFICE

LEANNE HAHNEL



**AS A COURTESY TO OTHERS,
PLEASE
SILENCE
YOUR PHONE**

**AND MOBILE
DEVICES**



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

CONTACT INFORMATION

eVP

**888-211-7440 option
2**

vendor@nc.gov

IPS

919-807-4500

doa.pchelpdesk@doa.nc.gov

HUB

919-807-2330

Huboffice.doa@doa.nc.gov

INTERSCOPE

919-807-4109




interscope@doa.nc.gov

EVP RESOURCES

http://eprocurement.nc.gov/Training/Vendor_Training.html

[Buyer](#) [Vendor](#) [User Training](#) [Contact Us](#)

[NC E-Procurement Home](#)  [Buyer Login](#)  [Vendor Login](#)  [Vendor eQuote Login](#) 

User Training

Training Materials

[Buyer Job Aids](#)
[Buyer Web-Based Training](#)
[Vendor Training](#)
[eQuote Training Manual](#)
[Archive Job Aids](#)

Frequently Asked Questions

Training Sites

[NC E-Procurement](#)
[eQuote](#)

Instructor Led Training

Public Vendor Search



State Term Contract Catalog Search

State Term Contracts Listing

News & Events

Quick Links

[Division of Purchase & Contract](#)
[Office for Historically Underutilized Businesses](#)
[State IT Procurement Office](#)
[Office of the State Controller](#)
[IPS - Vendor Link](#)

 **Get ADOBE® READER®** 

Training Materials

NC E-Procurement offers a variety of training options. These materials will be updated periodically; be sure to check back for the latest information.

Web-Based Training Courses

The web-based training courses are provided below in Adobe Flash format. Click on the training course title to open the course. Please note the following:

- You will need Adobe Flash Player 10 or higher to view the training courses. Please allow the download if prompted.
- These training courses are best viewed in either Internet Explorer or Mozilla Firefox. Google Chrome is not recommended for viewing.

Course	Description
NC electronic Vendor Portal (eVP) Registration	This training is designed to show vendors how to register for the electronic Vendor Portal (eVP). At the completion of the training, vendors will understand the steps required to complete the registration process.
Managing Contacts	This training course will provide details about Contacts and their roles. Users will learn how to manage contacts within the NC eVP application.
NC E-Procurement Billing Information	At completion of the training, users will become familiar with the NC E-Procurement billing process. The training will discuss how to review the Billing Information page, as well as how to view and download past invoices.
Searching for Registered Vendors	At completion of this training course, users will familiarize themselves with the public vendor search page. The training will discuss how to use the search fields and filters to search for registered vendors.
Updating electronic Vendor Portal (eVP) Account	At completion of this training, users will understand how to update eVP account information. Users will learn how to update profile information and security questions, change account password, and update the company name.

Job Aids

The job aids are provided below in PDF Format. Click on the job aid title to open the file.

Course	Description
A Guide to NC electronic Vendor Portal Registration	This job aid is designed to show Vendors how to register for the NC electronic Vendor Portal (eVP). After reviewing this job aid, Vendors will understand the steps required to complete the registration process.

[Site Map](#) | [Contact Us](#) | [Privacy Policy](#) | [Operating Schedule](#)

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WHAT IS IPS



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- Interactive Purchasing System

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

WHY INTERSCOPE+ WAS CREATED



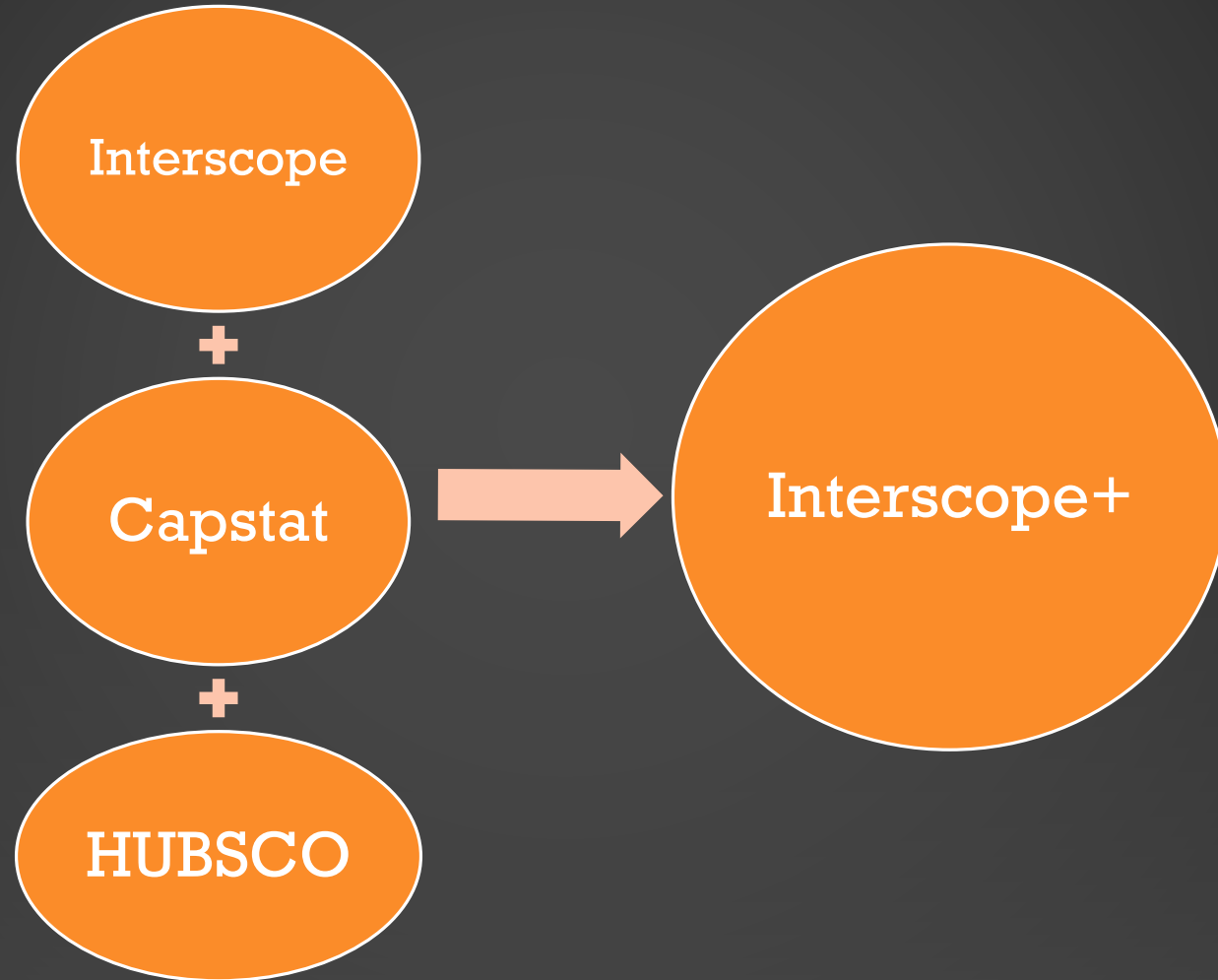
**Interscope was
originally
created in 1999
for the State
Construction
Office to
internally track
Capital Projects**

WHY INTERSCOPE+ WAS CREATED

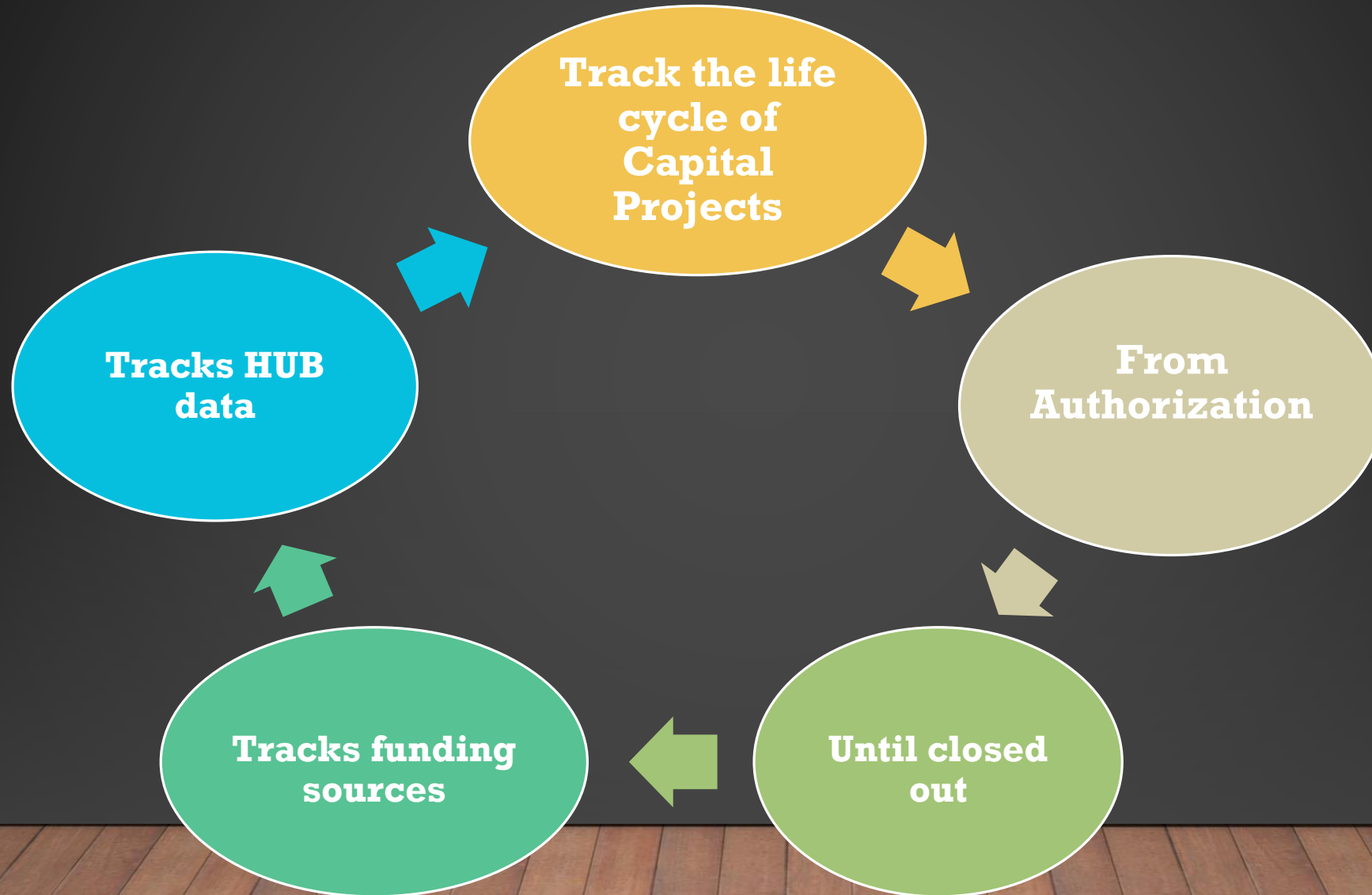
In 2012, the decision was made to create a state-wide Capital Project System that would be used by the

Community College System, the University System, and all State Agencies.

WHY INTERSCOPE+ WAS CREATED



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?

Provides a
single
Capital
Projects
Management
System for
the

State
Construction
Office

Universities

Community
Colleges

State
Agencies

Provides
MBE (HUB)
data
integration.

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

HOW THE SYSTEM FUNCTIONS TYPICAL CAPITAL PROJECT FLOW

Authorization

- Allocate Funds

Program

- Assign Funds

Project

- Commit Funds

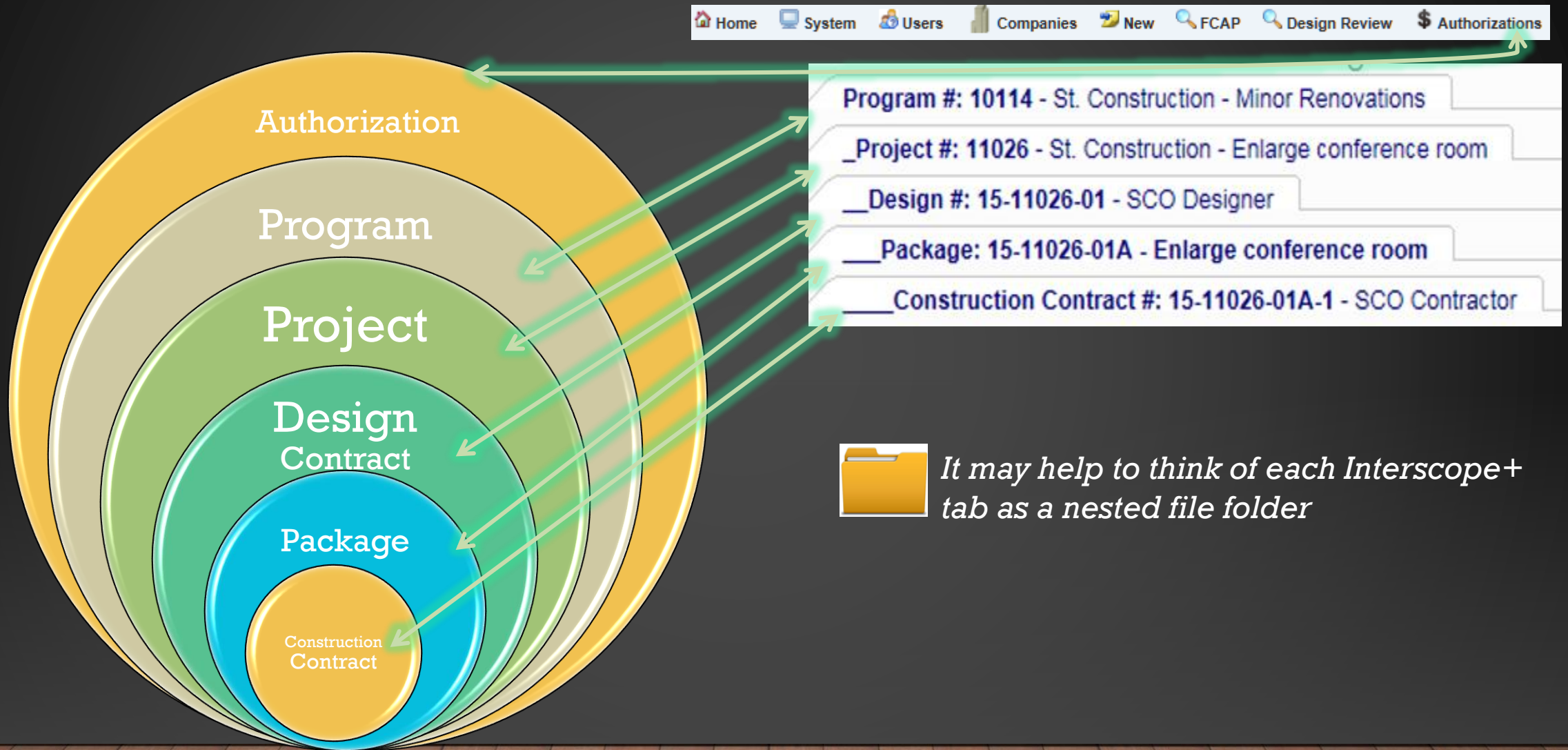
Design Contract

Interscope Package



HOW THE SYSTEM FUNCTIONS

TYPICAL CAPITAL PROJECT



INTERSCOPE “SCO” ID NUMBER

The “full” ID number is gradually created

16

Project Year

- Calendar year project was created

02222

Project “Sequence” Number

- Unique number assigned by Interscope

02

Design Contract Number

- Project’s may have multiple contracts

A

Package ID

- Process container for Design and Construction

INTERSCOPE "SCO" ID NUMBER

16-02222-02-A

Project Year

Project "Sequence"
Number

Package ID

Design
Contract
Number

Project Year is the calendar year that the project was created

Project "Sequence" Number is assigned by Interscope and is a unique number for the project

Design Contract Number designates which design contract is selected. A project may have multiple design contracts

Package ID is the indicator letter for the selected Interscope package, the process container for Design and Construction as well as the State

Construction Office. **Only one milestone schedule is available per package*

INTERSCOPE “SCO” ID NUMBER

**Please be sure
you include the
full SCO ID
Number on your
all of your
documents.**

For example:
submittals, plans,
correspondence
and any
documents

INTERSCOPE LOGON'S



Welcome to Inter Scope+

Version: 2.2.B.4_20170210

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

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State of North Carolina :: State Construction Office

Download logon request for Agencies

Download logon request for Universities

Download logon request for Community Colleges

Designer and Contractor logon requests

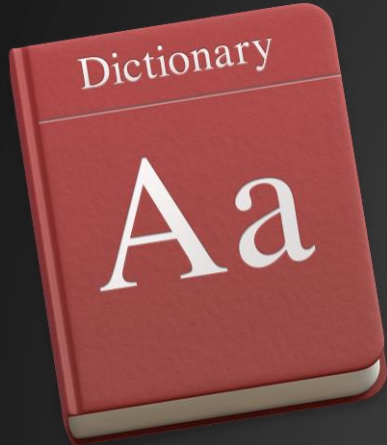
Forgot user name or password

DEFINITIONS AND TERMINOLOGY



What does that even mean?

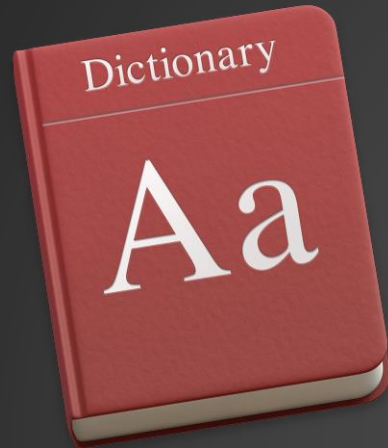
DEFINITIONS AND TERMINOLOGY



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.

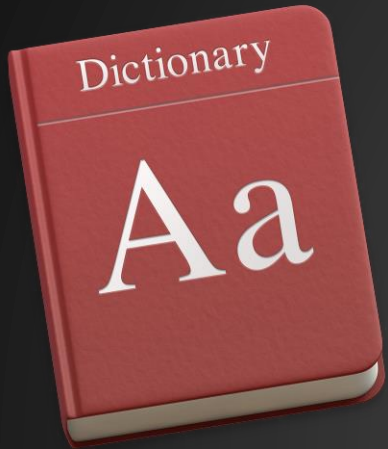
DEFINITIONS AND TERMINOLOGY



Amendment

**A
change
to a
design
contract.**

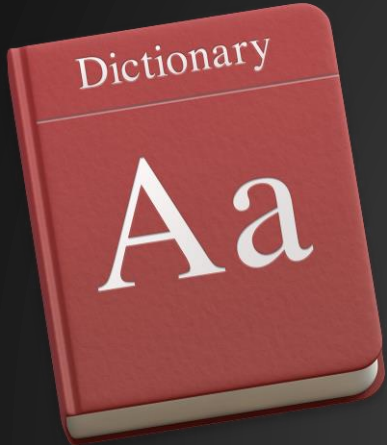
DEFINITIONS AND TERMINOLOGY



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.

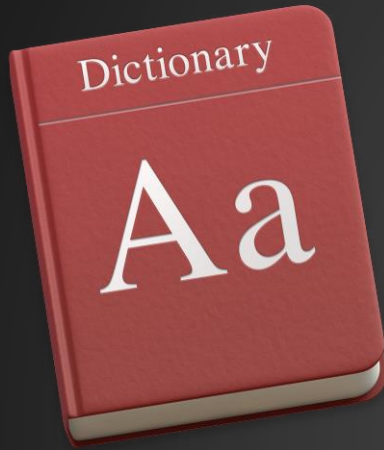
DEFINITIONS AND TERMINOLOGY



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.

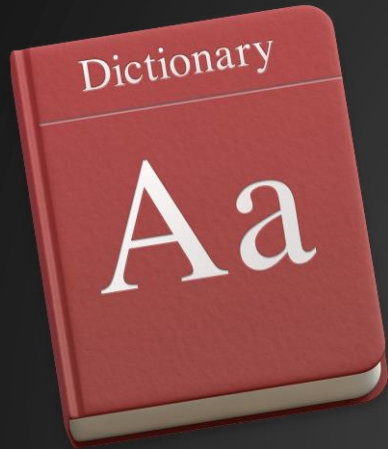
DEFINITIONS AND TERMINOLOGY



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

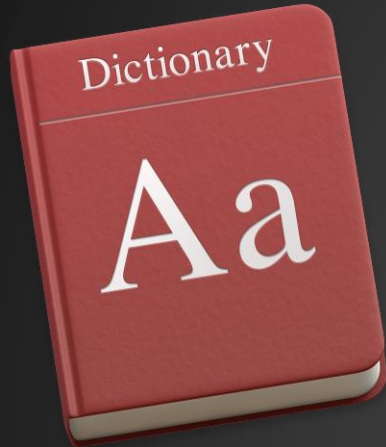


Code

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.

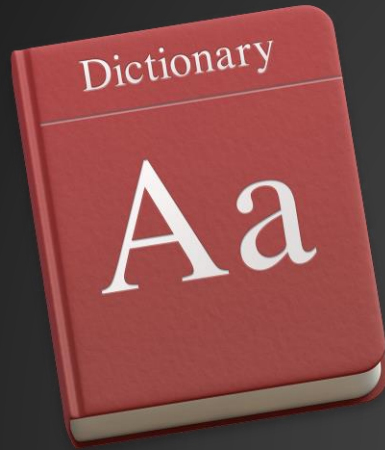
DEFINITIONS AND TERMINOLOGY



Construction

Represents the estimated cost of all construction contracts

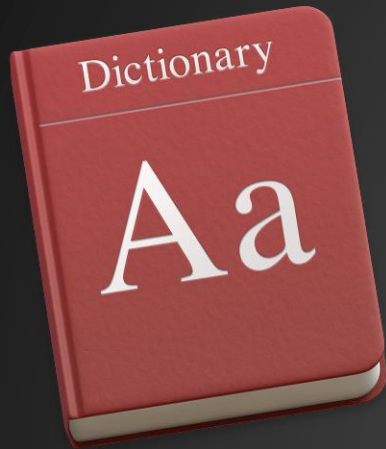
DEFINITIONS AND TERMINOLOGY



Contingency

**Represents the estimated
cost of construction
contingency**

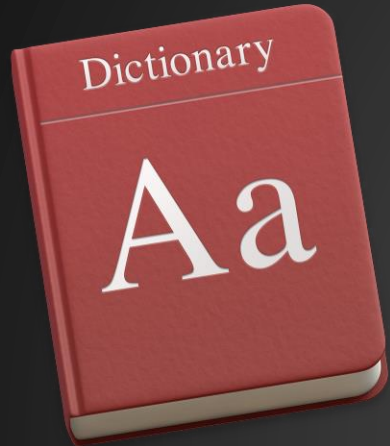
DEFINITIONS AND TERMINOLOGY



Commitment

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

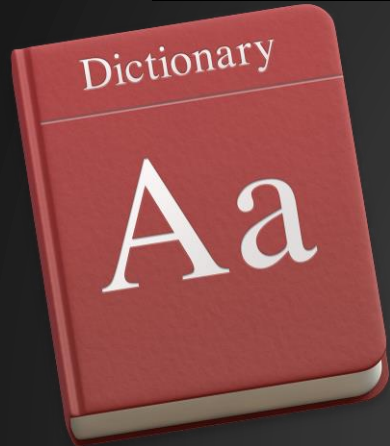
DEFINITIONS AND TERMINOLOGY



Design

**Represents the
estimated cost of
the design contract**

DEFINITIONS AND TERMINOLOGY

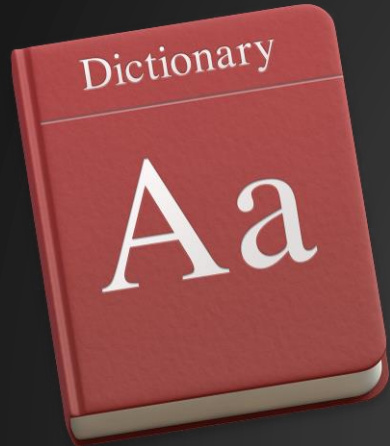


COPS



Certification of Participation State Debt

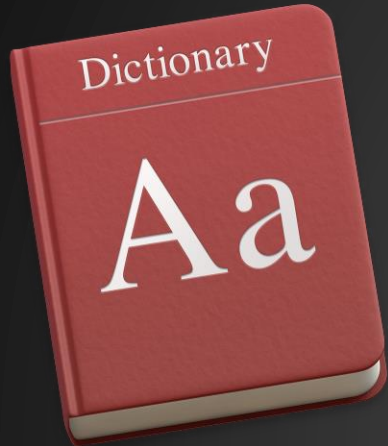
DEFINITIONS AND TERMINOLOGY



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.**

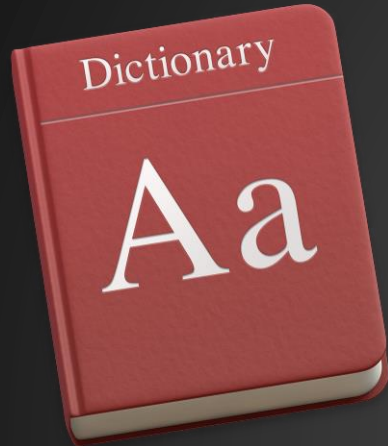
DEFINITIONS AND TERMINOLOGY



Expenditure

A dollar amount
that has actually
been paid.

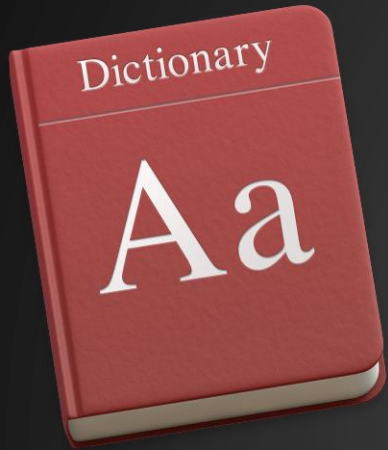
DEFINITIONS AND TERMINOLOGY



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.

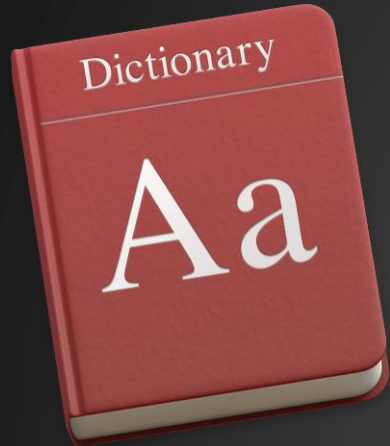
DEFINITIONS AND TERMINOLOGY



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.

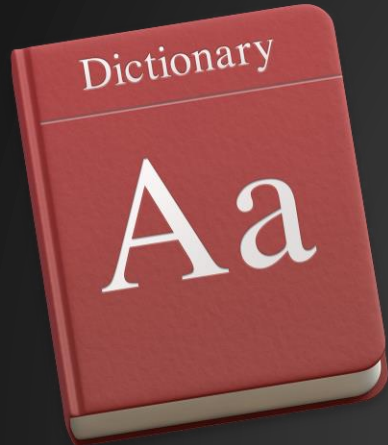
DEFINITIONS AND TERMINOLOGY



Milestone

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

DEFINITIONS AND TERMINOLOGY



Non-Code-Item (HUB Only)

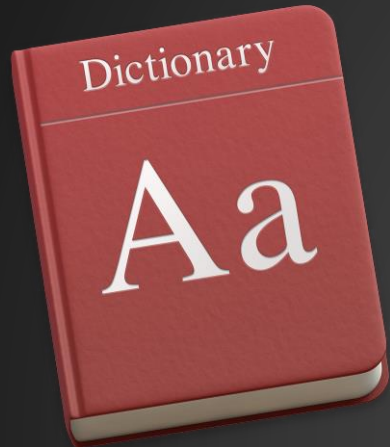


A type of project within Interscope+. When the HUB Only checkbox is used, the project will be created "without" a design contract. Think of HUB Only as Construction without a design agreement. This selection is used to report HUB data on small projects where a design agreement is not required that doesn't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



Example: A painting project

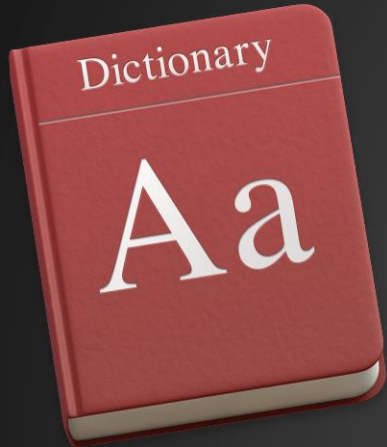
DEFINITIONS AND TERMINOLOGY



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.

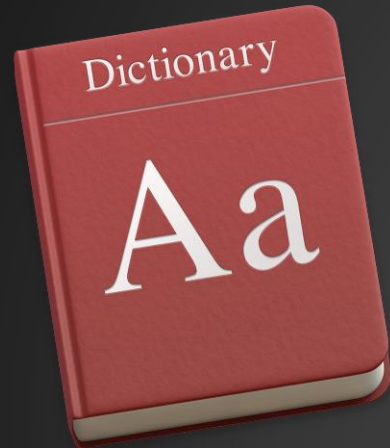
DEFINITIONS AND TERMINOLOGY



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

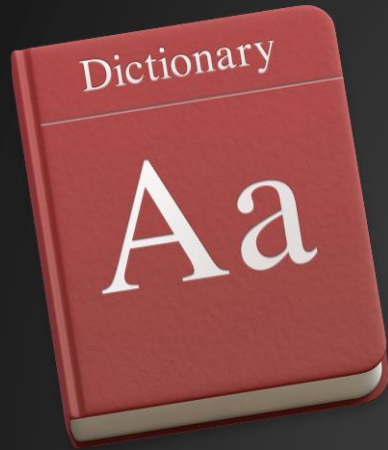


Package



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.

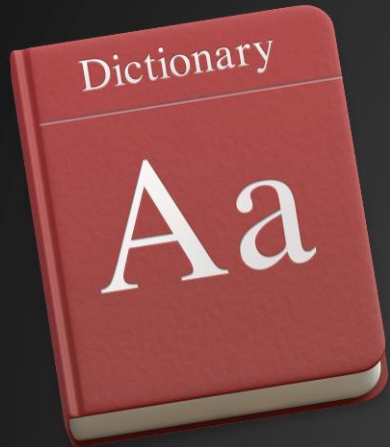
DEFINITIONS AND TERMINOLOGY



Primavera P6

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

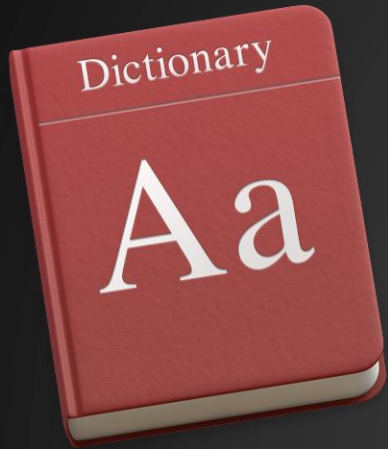
DEFINITIONS AND TERMINOLOGY



Program

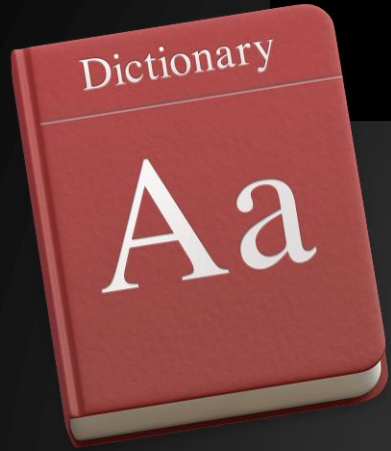
A collection of one or more projects closely related by initial authorization, by the related nature of their execution, and/or having multiple funding sources for a single project. The program serves as a “bucket” for funds from different authorizations that can then be assigned to projects as needed.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



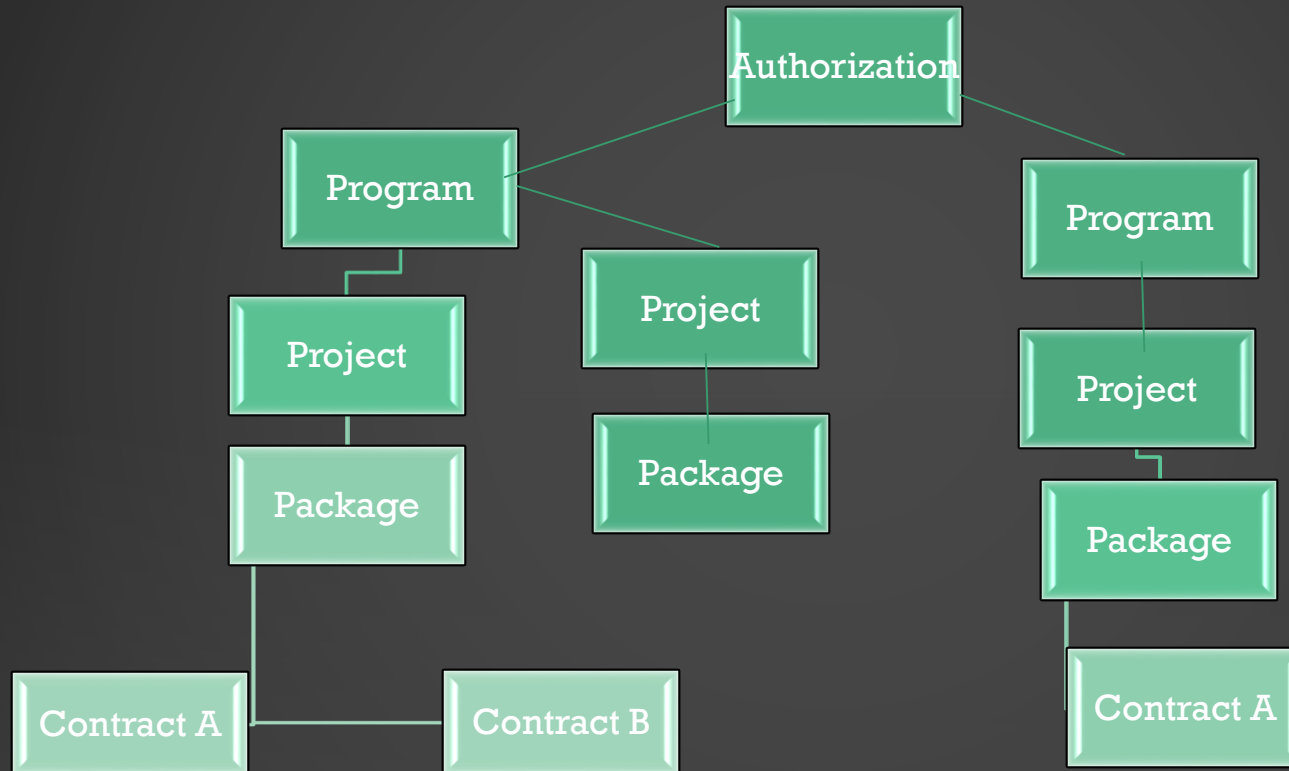
DEFINITIONS AND TERMINOLOGY

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.

INFORMATION HIERARCHY



FUND SOURCE TYPES

There are 6 different sources of funds within Interscope+ system.

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: Debt issued by the institutions, county, or entity other than the State of North Carolina

R&R: Funding for R&R from appropriations

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

Project Types

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

Performance Contract - Applies to Guaranteed Energy Savings Performance Contracts

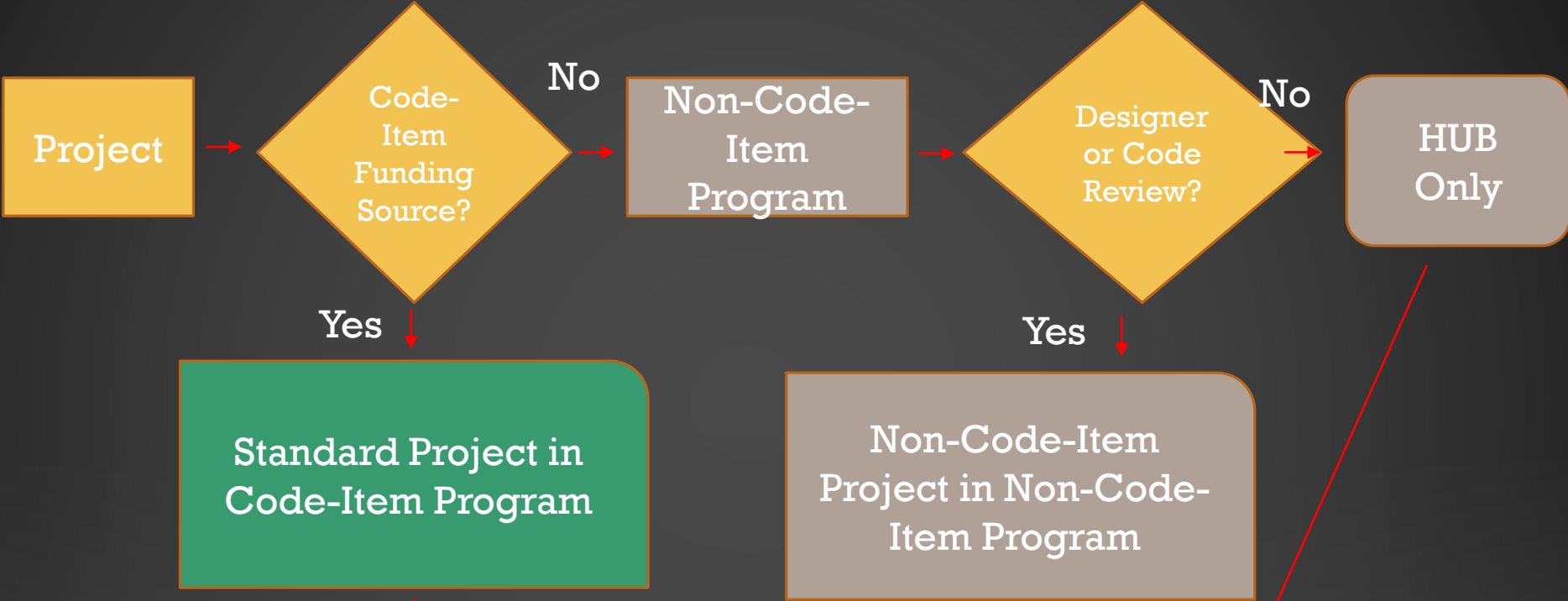
Foundation Projects - Applies primarily to UNC System projects that are designed/constructed by a foundation but must be reviewed by SCO

NON-CODE-ITEM PROJECT TYPES

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



Project Type:

- Standard Project
- Performance Contract
- Foundation Project
- Non-Code-Item Project

* Special Project Designation:

Project Type:

- Standard Project
- Performance Contract
- Foundation Project
- Non-Code-Item Project
- HUB Only

* Special Project Designation:

Project Type:

- Standard Project
- Performance Contract
- Foundation Project
- Non-Code-Item Project
- HUB Only

* Special Project Designation:

HUB ONLY PROJECT TYPE

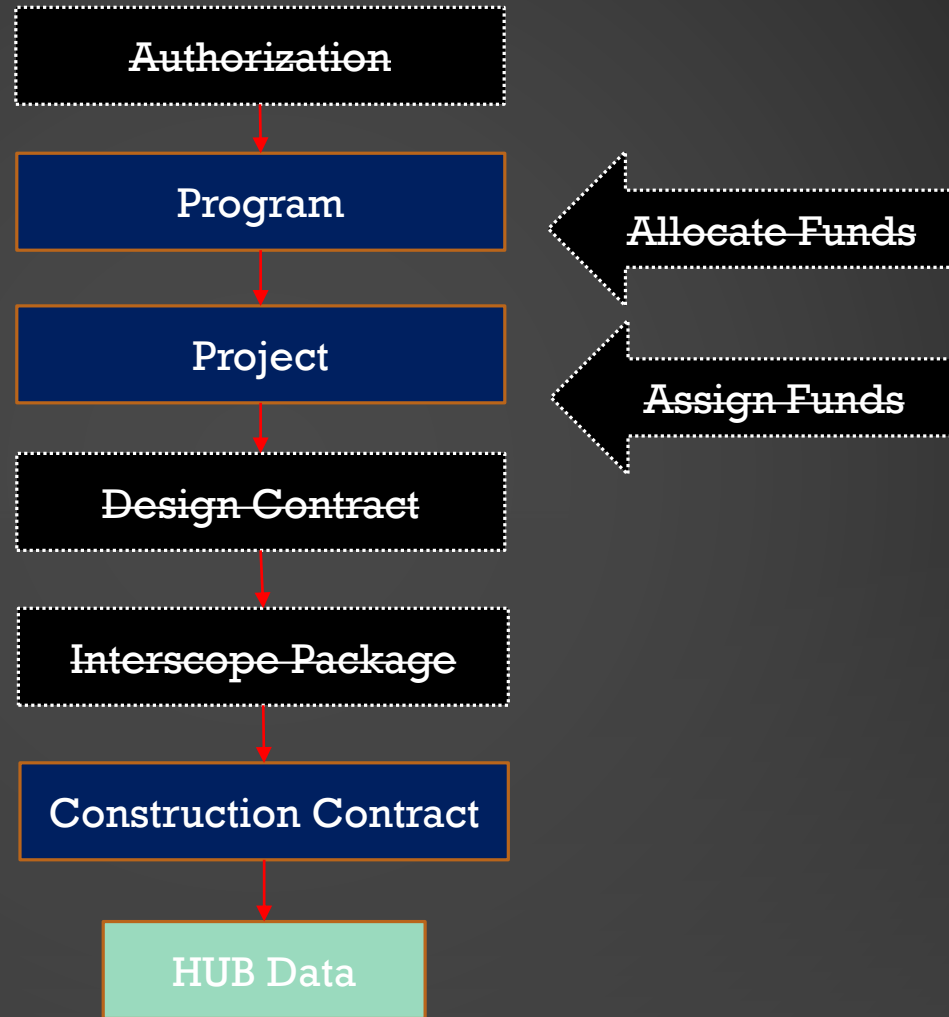
HUB Only projects are inherently Non-Code-Item projects.

There are no fund assignments or financial controls.

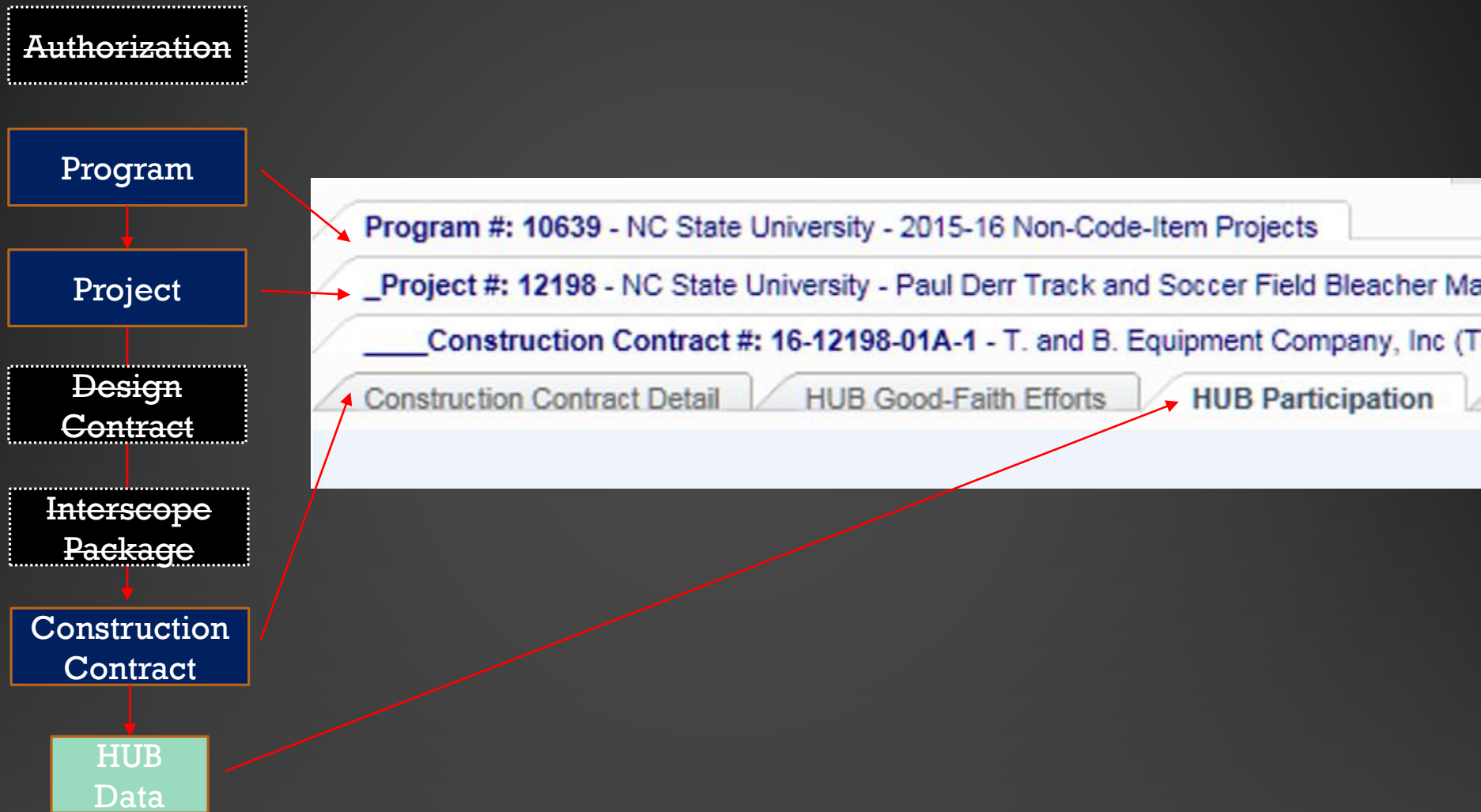
HUB Only projects do not have a design contract or Interscope package.

HUB Only Construction contracts may not exceed \$300,000

HUB ONLY PROJECT TYPE



HUB ONLY PROJECT TYPE



CONTACT INFORMATION



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INTERSCOPE@DOA.NC.GOV

<https://ncadmin.nc.gov/businesses/construction>

BEGIN HANDS ON TRAINING...



Interscope Support is available by emailing:
interscope@doa.nc.gov or by calling SCO at 919-807-4100.



INTERSCOPE + TRAINING

STATE CONSTRUCTION OFFICE

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