InterscopePlus User Manual

(Designer and Contractor Evaluations - Release 1.4)

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I.   InterscopePlus

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. Screen representations shown throughout this manual currently reflect the Interscope system label, but will be subsequently modified to reflect the new name.

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.   Overview

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

III.   Evaluations Overview

InterscopePlus automatically creates an evaluation record whenever a design and construction contract is created. However, designer evaluations are <u>not</u> 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 "*Schedule – PLANNED and ACTUAL*" 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:

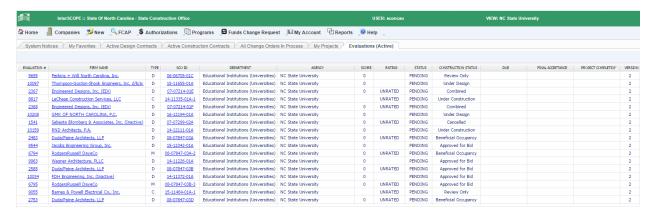| Evaluation	Raw Score	Rating
Designer	0	UNRATED
	0 < 3.5	UNACCEPTABLE
	3.5 < 5.0	ACCEPTABLE
	5.0	EXCELLENT
Contractor	0	UNRATED
	0 < 151	UNACCEPTABLE
	150 < 191	POOR
	190 < 276	ACCEPTABLE
	>275	EXCELLENT

IV. 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.

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".*
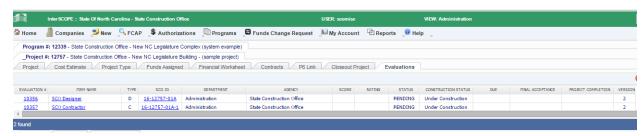
Note - "Completed" evaluations will not be listed under the "Active Evaluations" tab.

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.
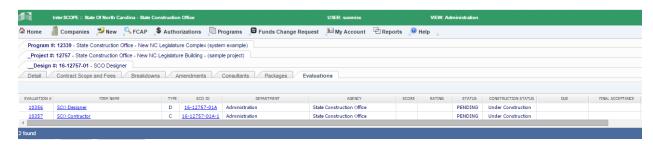

Project Detail – "Evaluations" tab

All designer and contractor evaluations for all contracts under the project are listed under this tab.
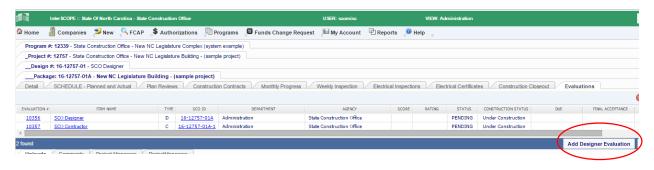
Design Contract Detail – "Evaluations" tab

The designer evaluation and all evaluations for contractors under all packages under this design contract are listed under this tab.

Package Detail – "Evaluations" tab

The designer evaluation and all evaluations for contractors for this package under this design contract are listed under this tab.
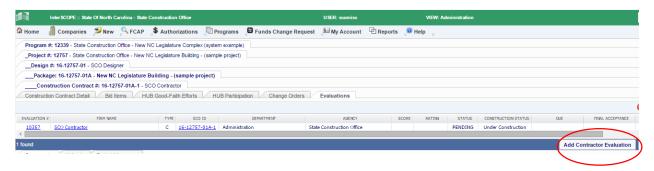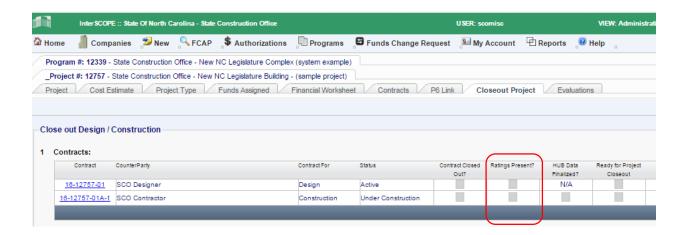
The designer evaluation can be added from this tab.

Construction Contract Detail – "Evaluations" tab

The evaluation for the contractor on this contract is listed under this tab.

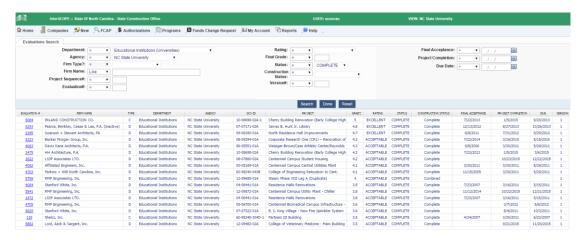The contractor evaluation can be added from this tab.

Project Design and Construction Closeout
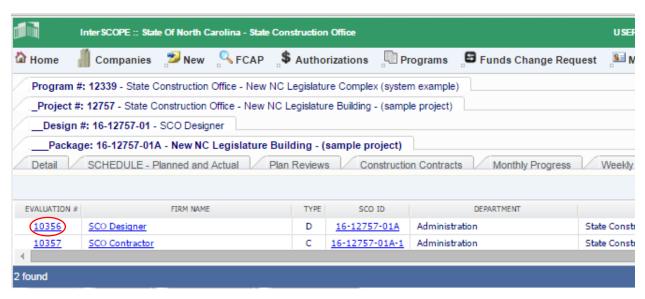

Evaluation Search Page

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

V.   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:

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.

A. Generating the Evaluation Form

The first step is to generate a downloadable evaluation form to be completed and uploaded.

Clicking on the "Generate and Download…" button will cause Interscope to create a pre-filled evaluation Excel file specific to this firm and project.

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

Google Chrome download:

Internet Explorer download

Open the file for editing.

B. Completing the Evaluation Form

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.

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.

C.   Uploading the Evaluation Form

Review, save and exit Excel to complete the data entry of the evaluation.

Return to Interscope, and click on [Upload the Completed Evaluation Form (MS Excel)] the button to begin the upload process.

The file uploader pop-up window will then appear.

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

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

Interscope will then upload, validate and process the evaluation information, verifying the correct SCO ID # and recording the Total Score and Rating from the form.

In addition, a PDF version of the Excel file will be created and stored with the evaluation and available for printing and download from the "Print" option under the "Action" menu.

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

The Summary and Report sections of the evaluation will display the Rating and Raw Score from the uploaded evaluation.

D. 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.

At time point, the Upload the Completed Evaluation Form (MS Excel) button is disabled to prevent the completed evaluation from being changed.

To change the evaluation, simply uncheck the "Mark Report Complete?" box, save the change and the upload button will now be active.

E. Alert Notifications

Designer and Contractor users that are registered in Interscope are notified via the Interscope alerting system that their evaluation has been completed.

They receive an email with an alert which contains a link to the evaluation. Clicking on this link will bring them to the Logon screen and after logon, to the evaluation record for their review and comments.

Firms can record their responses to the evaluation in the Firm Comments section of the evaluation.

F.   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.

G. Certificate of Merit Recommendations

If a firm receives and Excellent rating, recommendation for a Certificate of Merit award can be made by checking the "Recommend Firm for Certificate of Merit Award?" checkbox.

Saving this change will initiate an alert via email to the State Construction Office for Merit Award consideration.

Merit Nomination
- If the firm's performance rating on this project is EXCELLENT, an award nomination can be made to the State Building Commission.
- Certificate of Merit nominations are reviewed by the State Construction Office and the State Building Commission and presented at the annual Construction Conference.
- You must attach a nomination letter to this evaluation under the Supporting Documentations tab.
- NOTE: The checkbox will only appear if there is an EXCELLENT rating.

Recommend Firm for Certificate of Merit Award?: ☑

InterSCOPE :: State Of North Carolina - State Construction Office   USER: sooncsu   VIEW: NC State University

🏠 Home   📄 Companies   🔍 New   🔍 FCAP $ Authorizations   📋 Programs   🗄 Funds Change Request   📇 My Account   🗂 Reports   ❓ Help

1 alerts created for users: scoadmin
Evaluation updated successfully.

Evaluation

North Carolina State Construction Office - *InterScope* System Alert

Date:	1/10/2016

To:	interscope@doa.nc.gov
	InterScope Administrator
	Administration/State Construction Office

From:	North Carolina State Construction Office
	310 N. Willmington St., Suite 450
	Raleigh, North Carolina 27601
	Telephone: (919) 807-4100 Fax: (919) 807-4110 Web: www.nc-sco.com

You are receiving an alert concerning the following document in InterScope :

DESIGNER EVALUATION:

Department:	Administration
Agency:	State Construction Office
Package Title:	New NC Legislature Building - (sample project)
User:	scomisc

Click here to logon to InterScope and view it.