

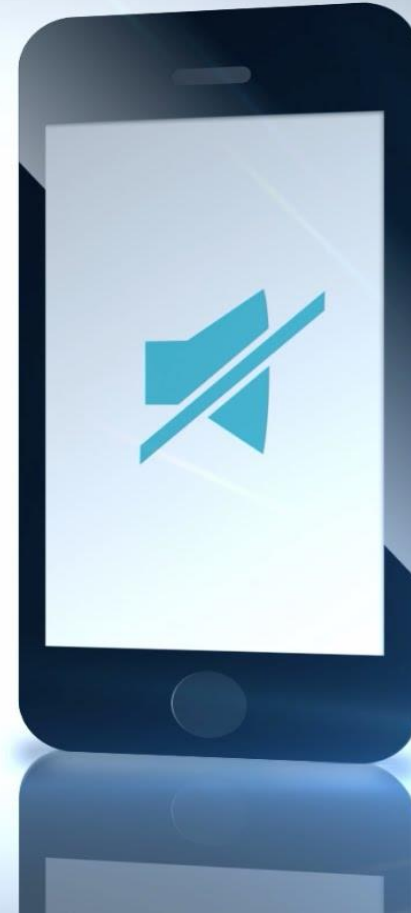
# Interscope + Training

State Construction Office

LeaAnne 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



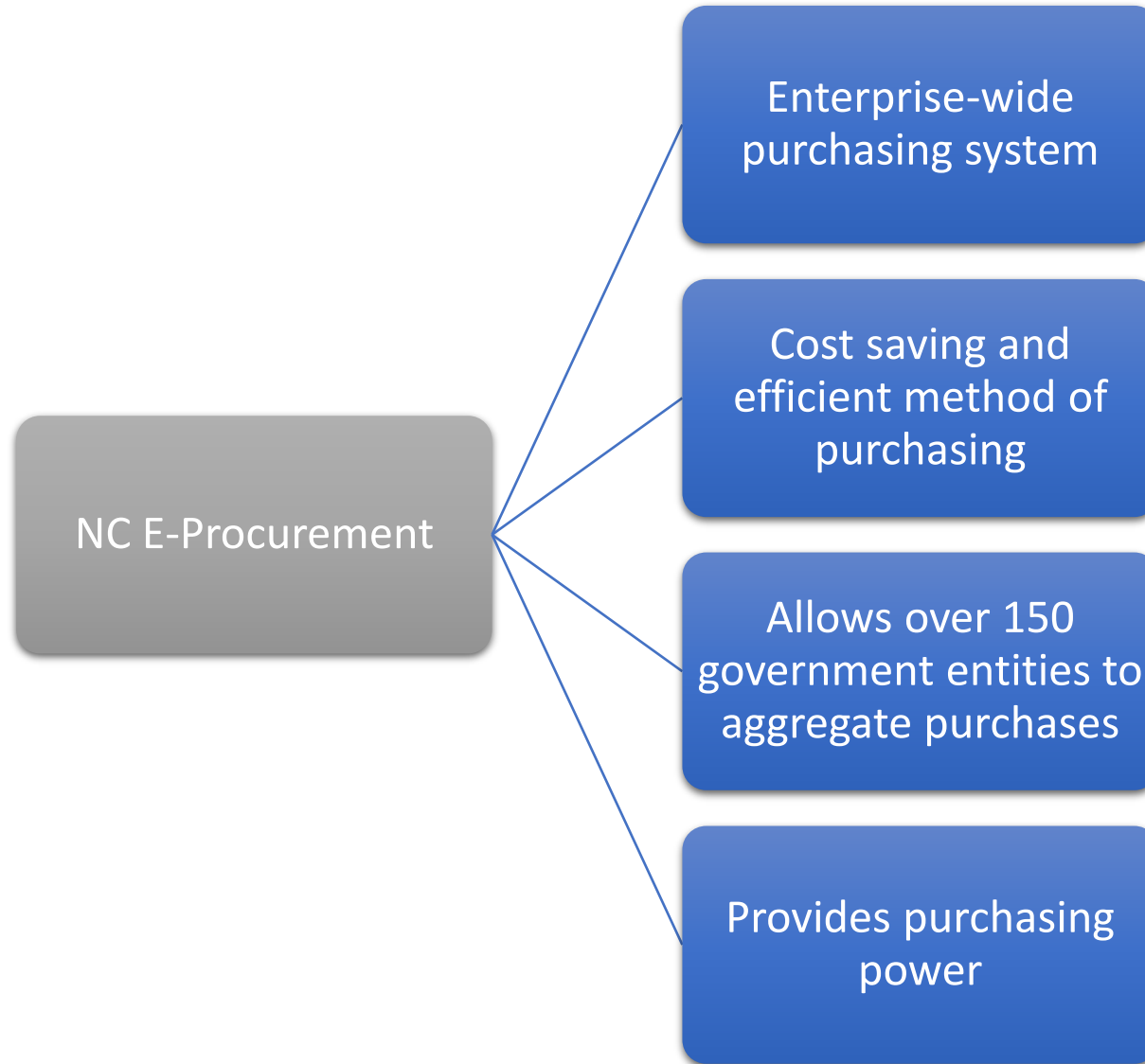
Must be registered in IPS to be in Interscope

Free email notifications for bidding opportunities

IPS advertises solicitations from

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

# What is E-Procurement



# Who Participates in E-Procurement

State agencies

K-12 schools

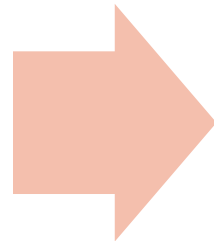
Community  
Colleges

Local  
Governments

- Counties
- Municipalities

# What else is in eVP

eQuote



HUB



# What is IPS

## IPS

- Interactive Purchasing System



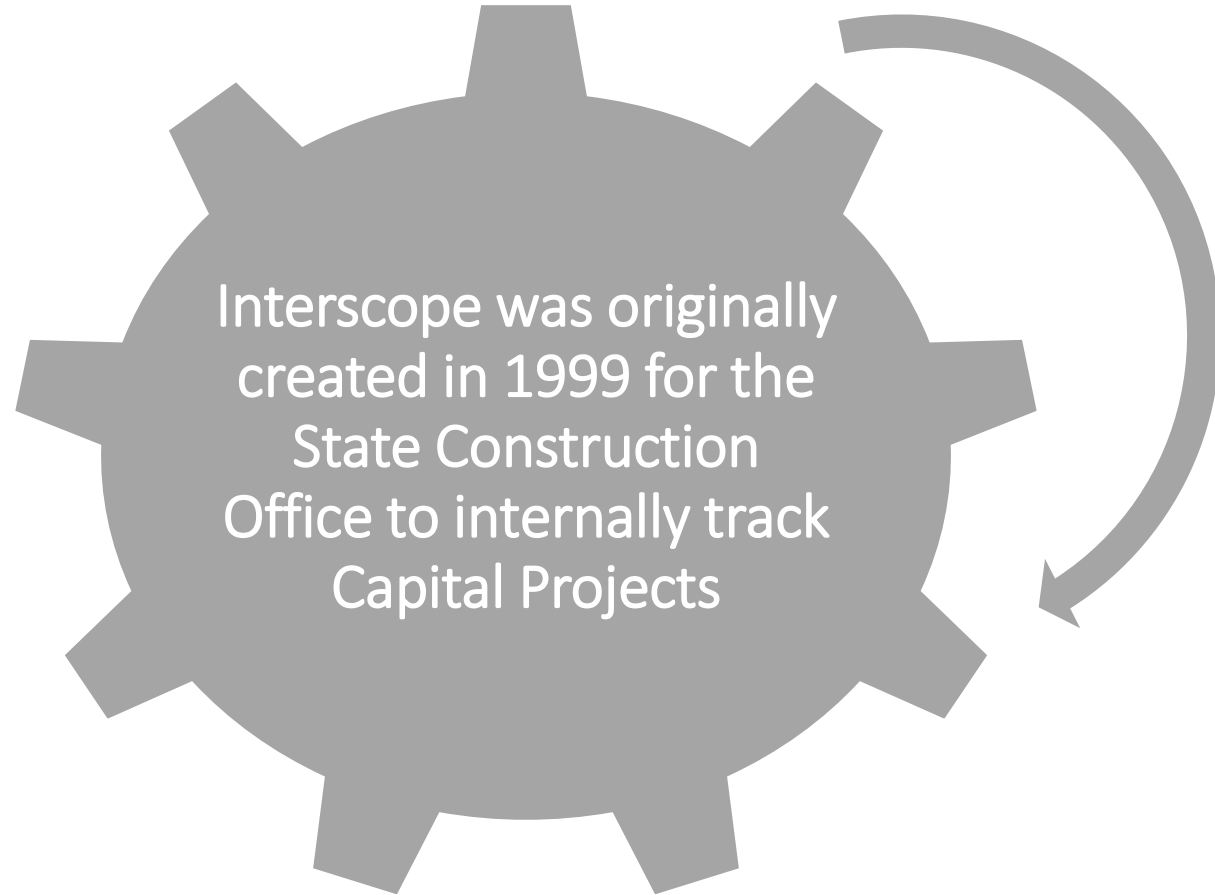
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- Some local governments

# Why Interscope+ was created

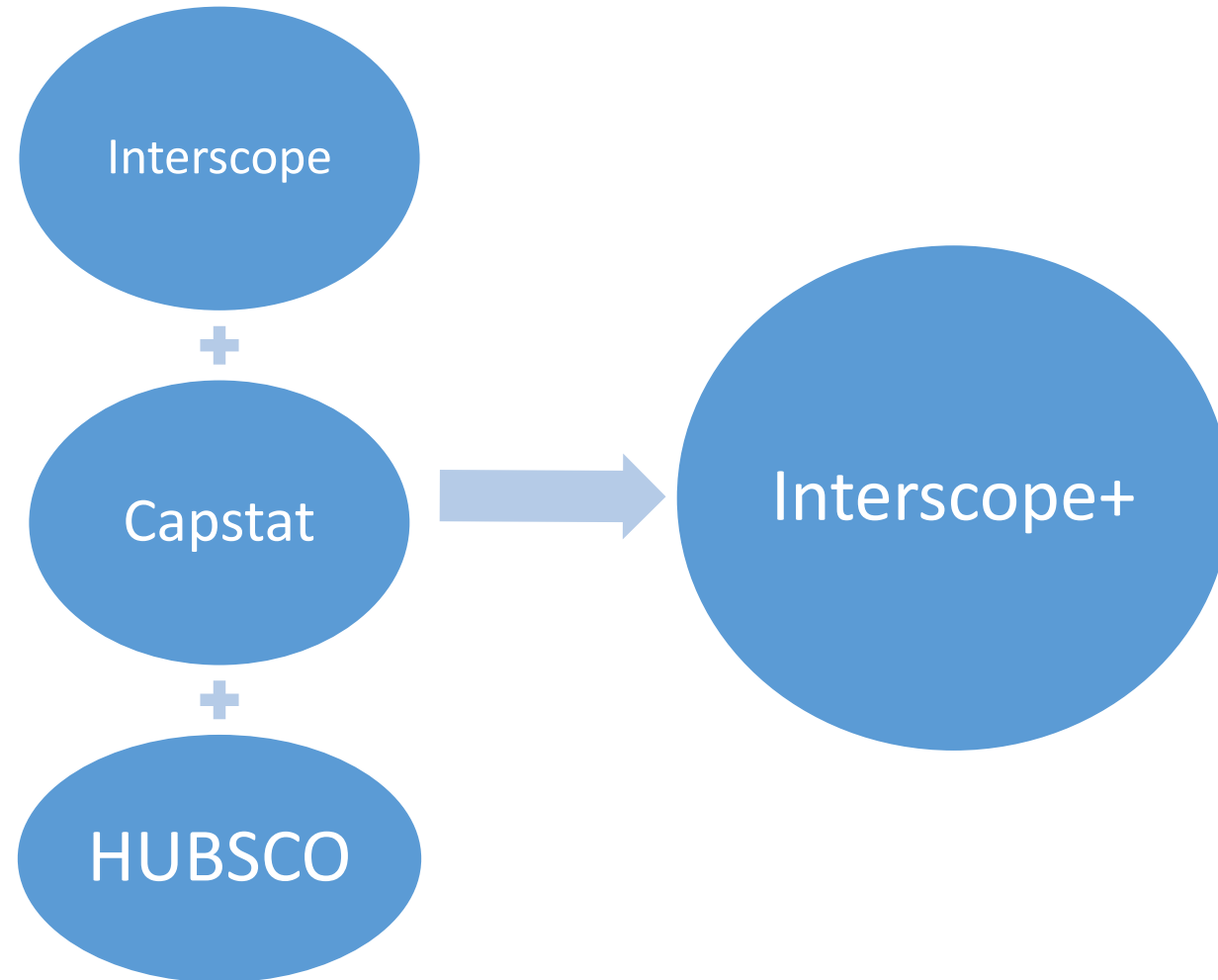


# Why Interscope+ Was Created

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

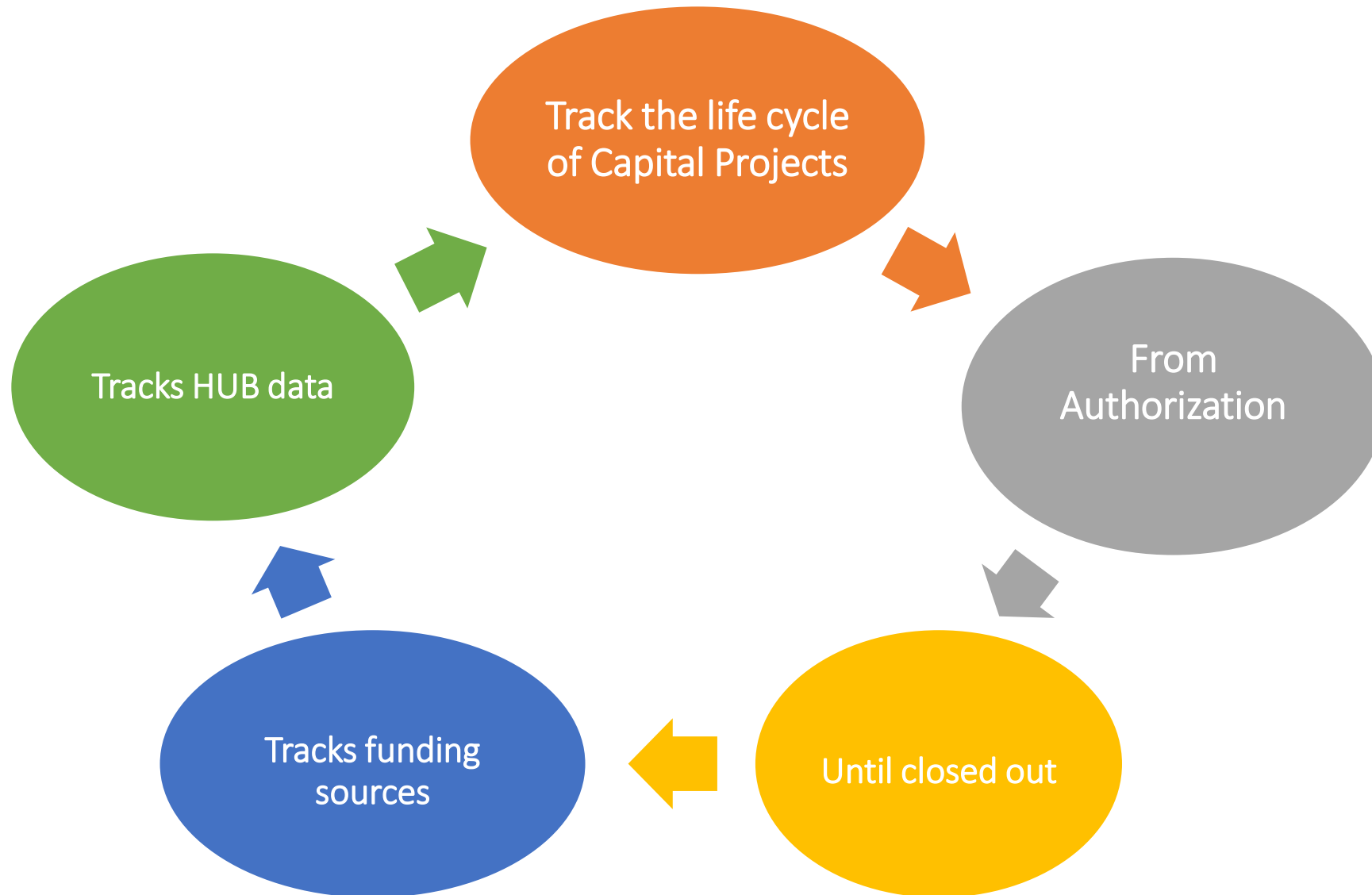


[+ Add another answer](#)

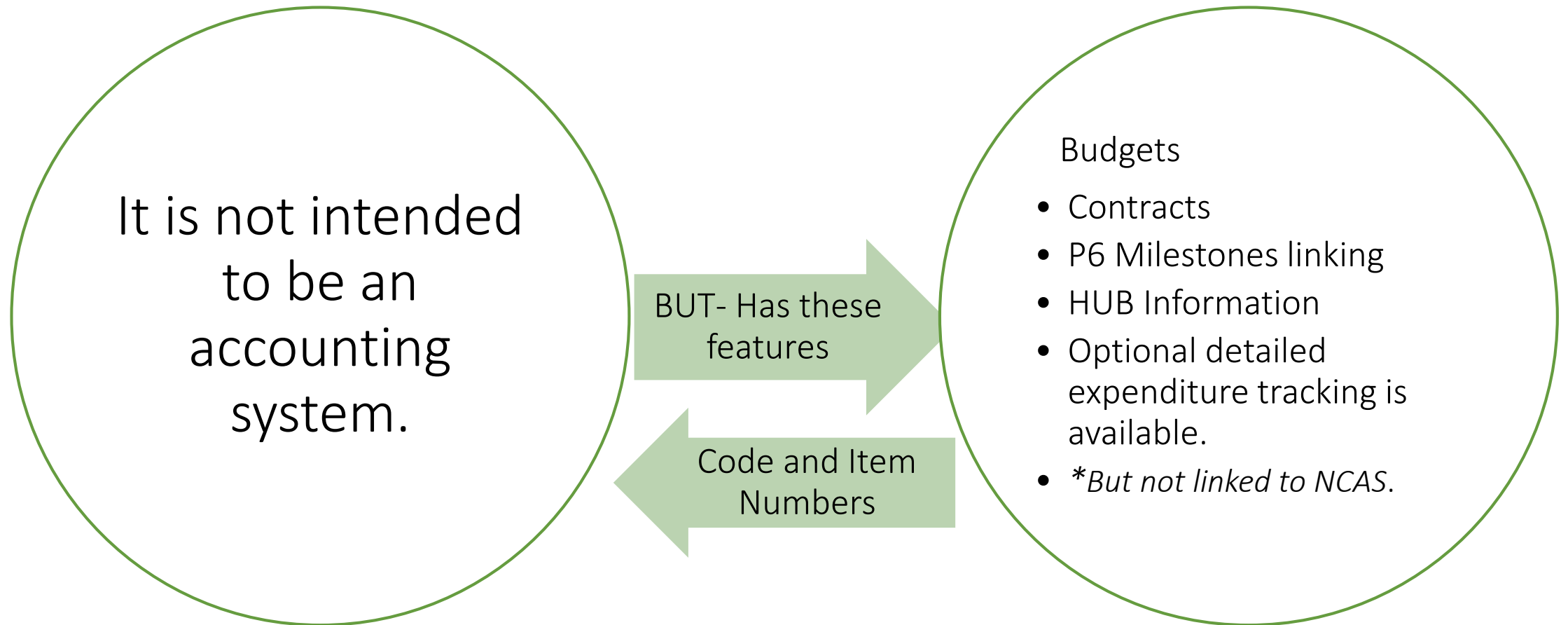
Preview

[Terms](#) | [Privacy & Cookies](#)

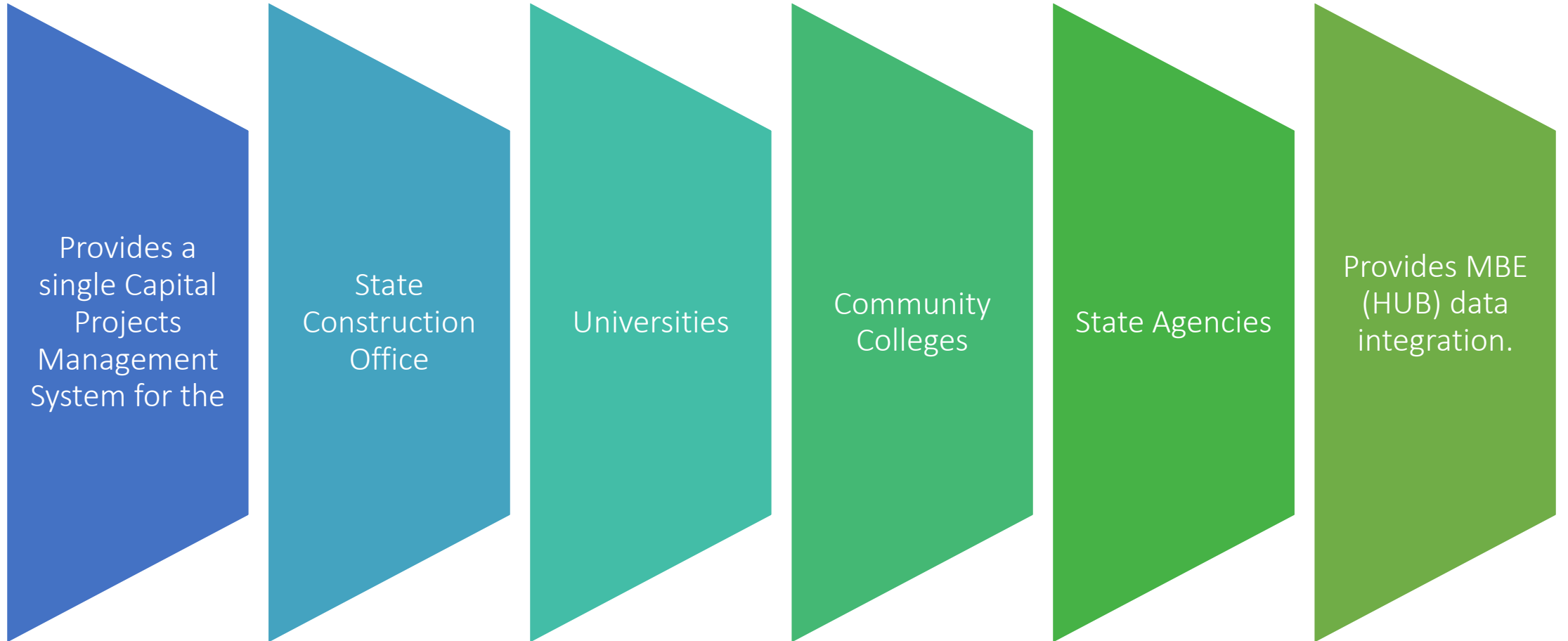
# How we use Interscope+



# How We Use Interscope+



# 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

## 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

Design  
Contract  
Number

Package ID

Project Year is the calendar year that the project was created

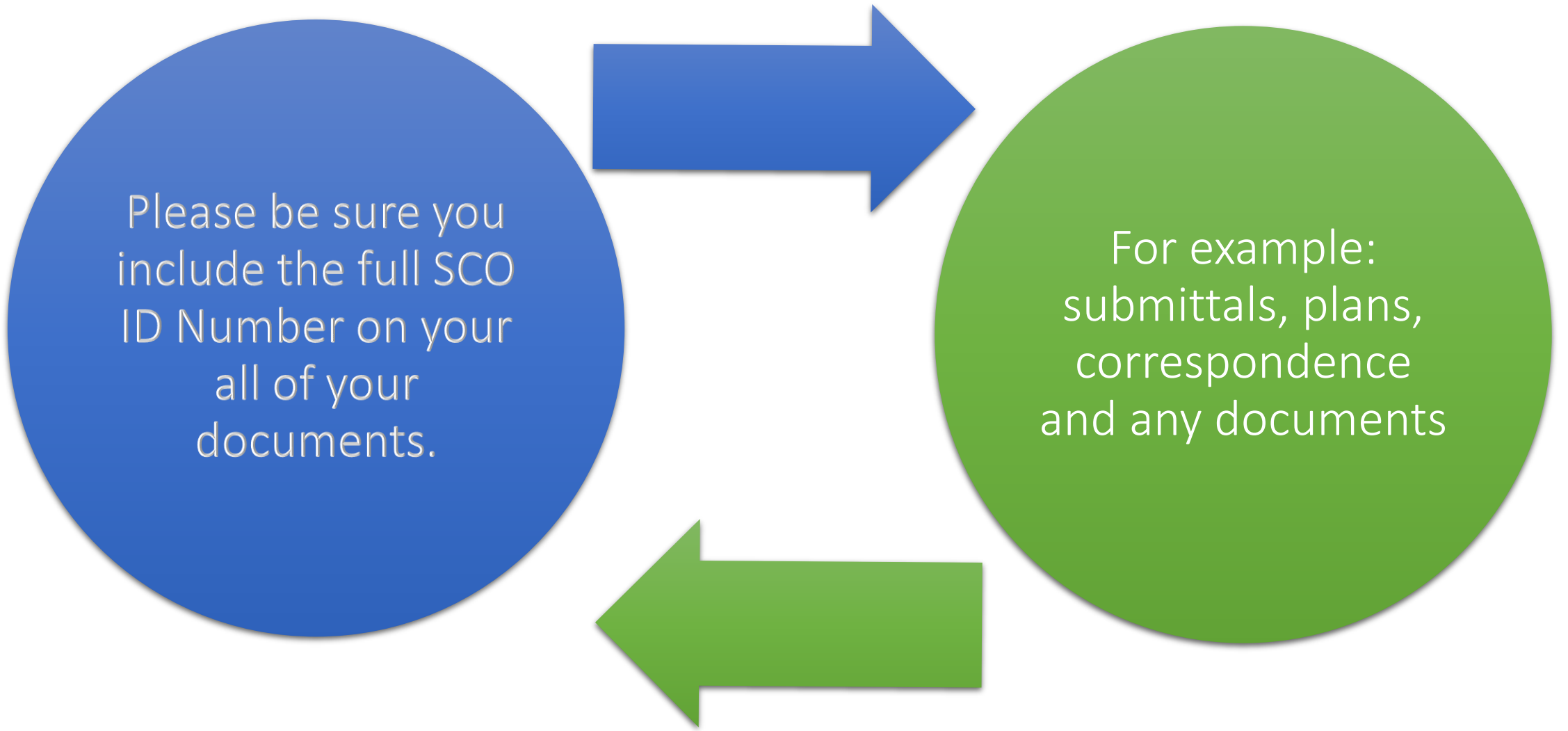
Project “Sequence” Number is assigned by Interscope and is a unique number for the project

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

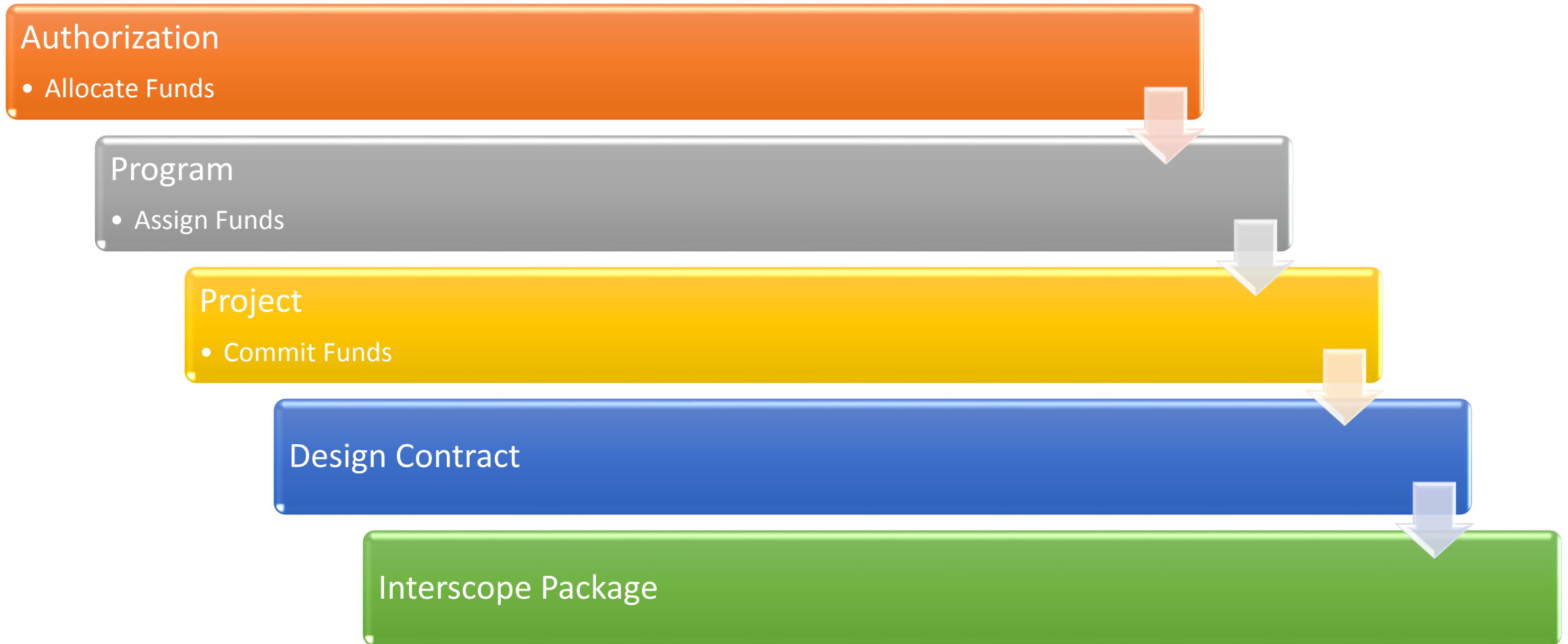


Please be sure you include the full SCO ID Number on your all of your documents.

For example:  
submittals, plans,  
correspondence  
and any documents

# How the System Functions

## Typical Capital Project Flow





# 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



# More about Project Type

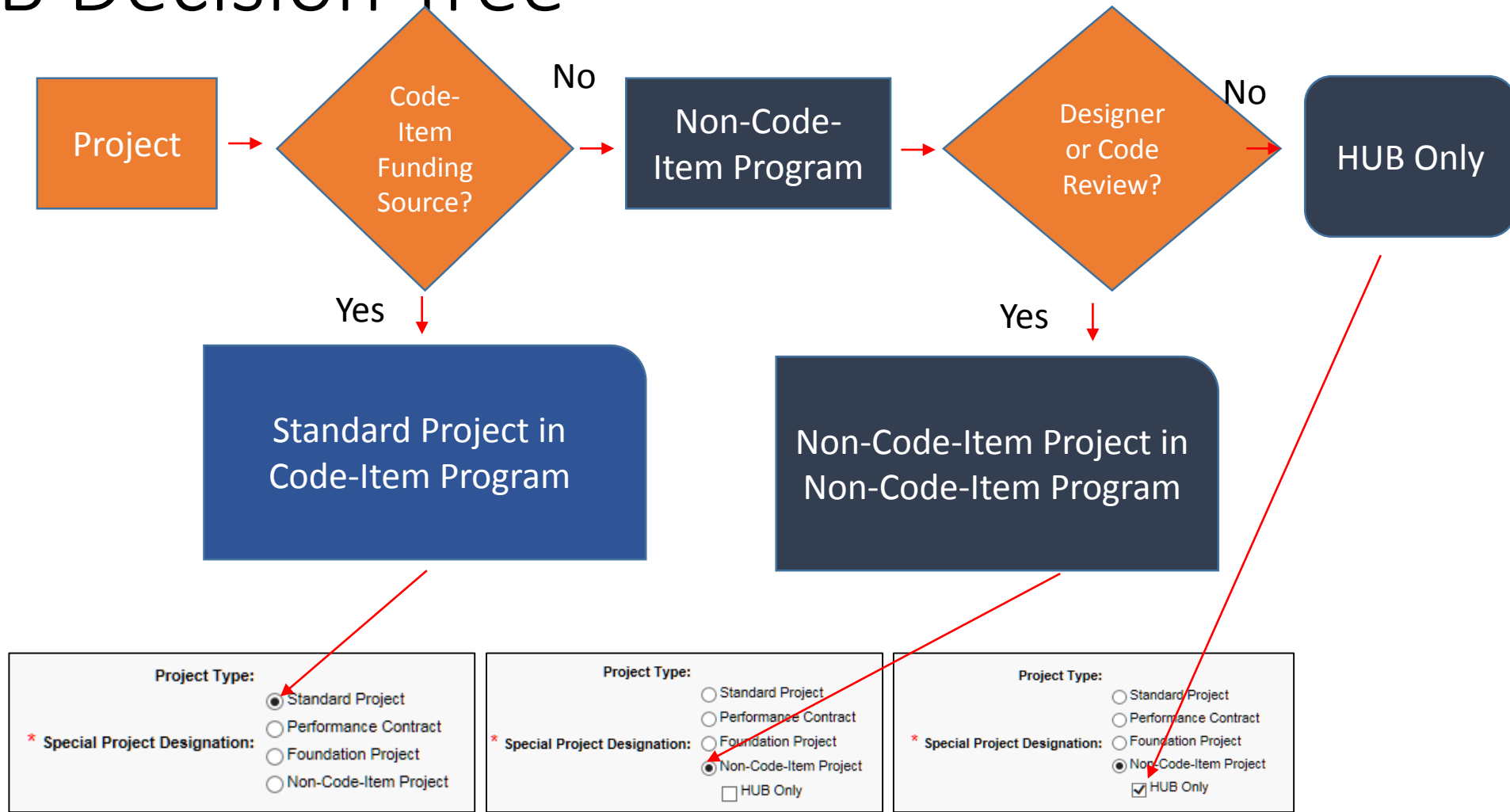
Standard Projects have financial controls, which require funds be assigned to the project and commitments cannot exceed funds assigned. Non-Code-Item Projects do not have financial controls and funds cannot be assigned to them.

**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



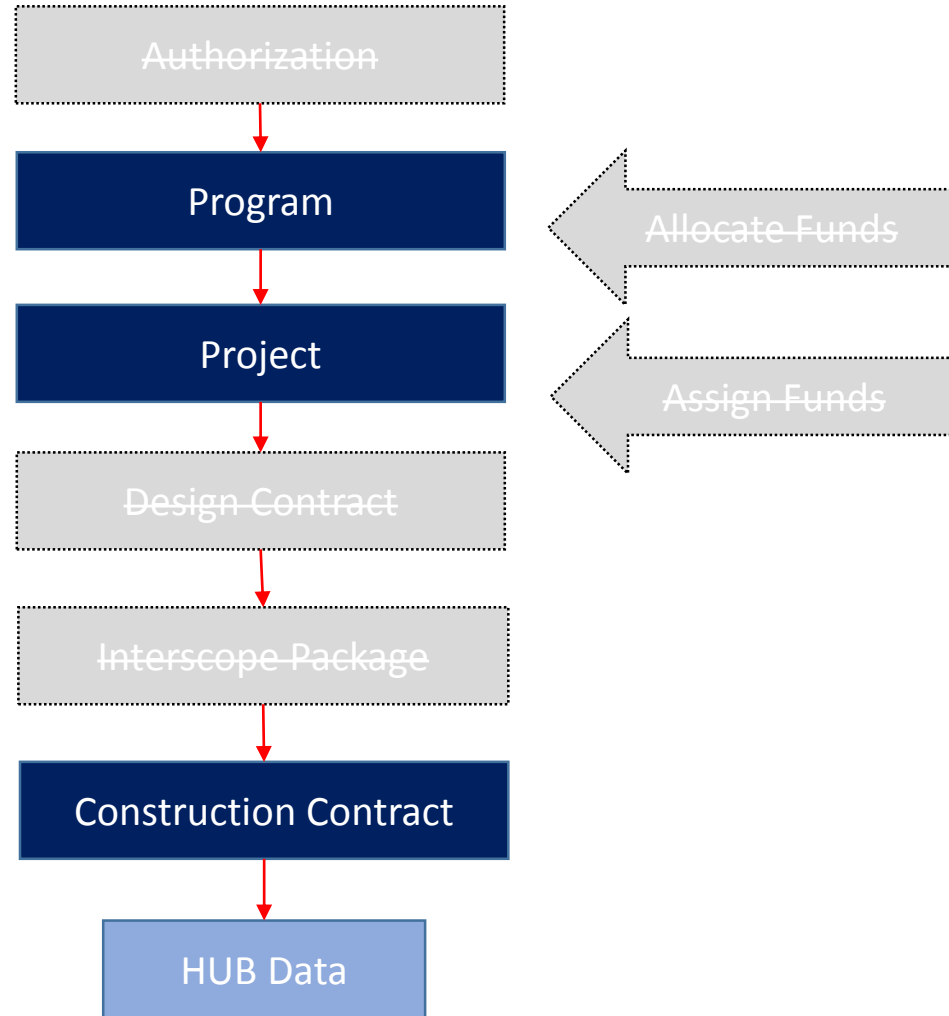
HUB Only projects are inherently Non-Code-Item projects.

There are no fund assignments or financial controls.

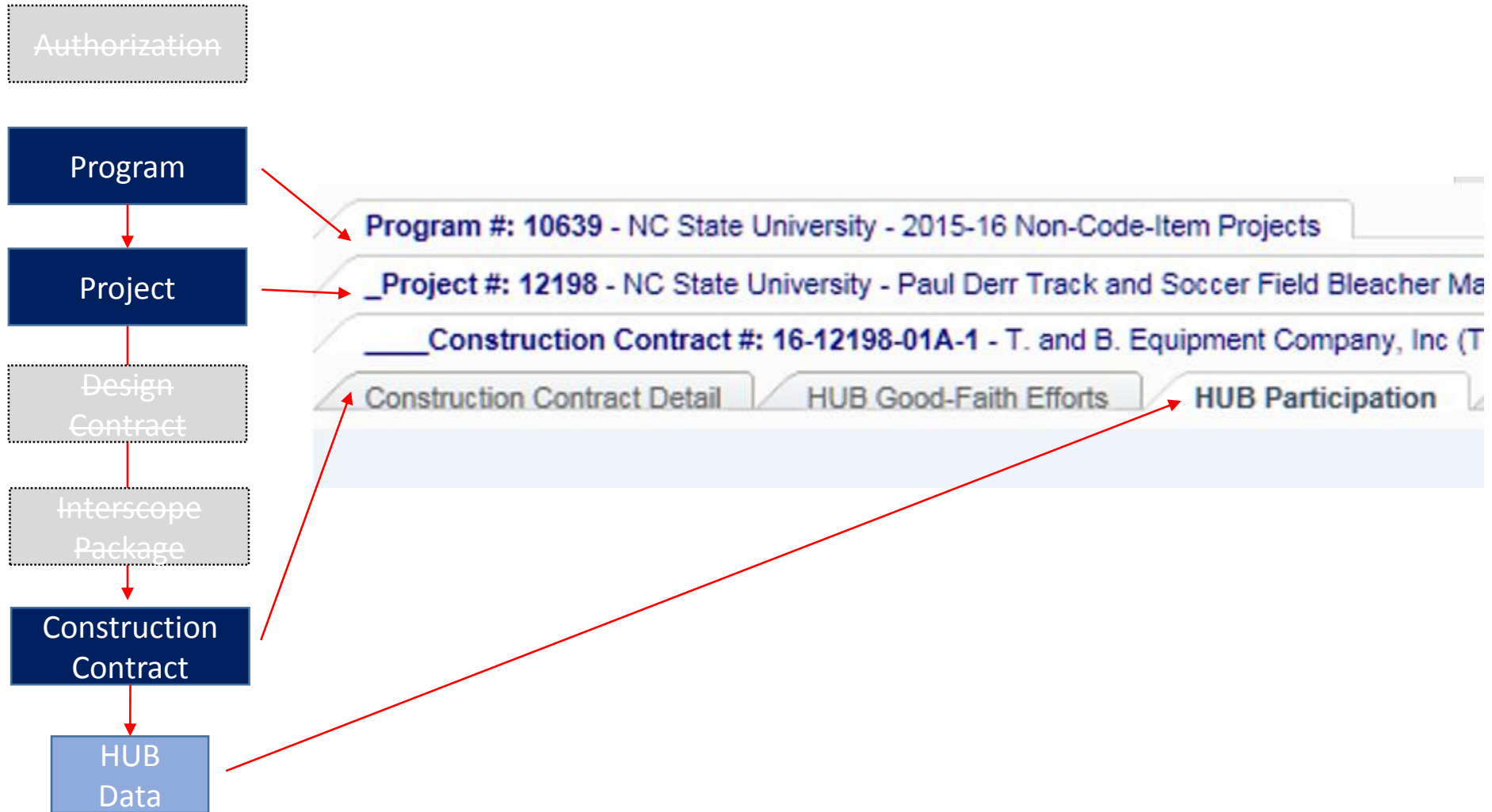
HUB Only projects do not have a design contract or Interscope package.

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



**Interscope**

**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.**

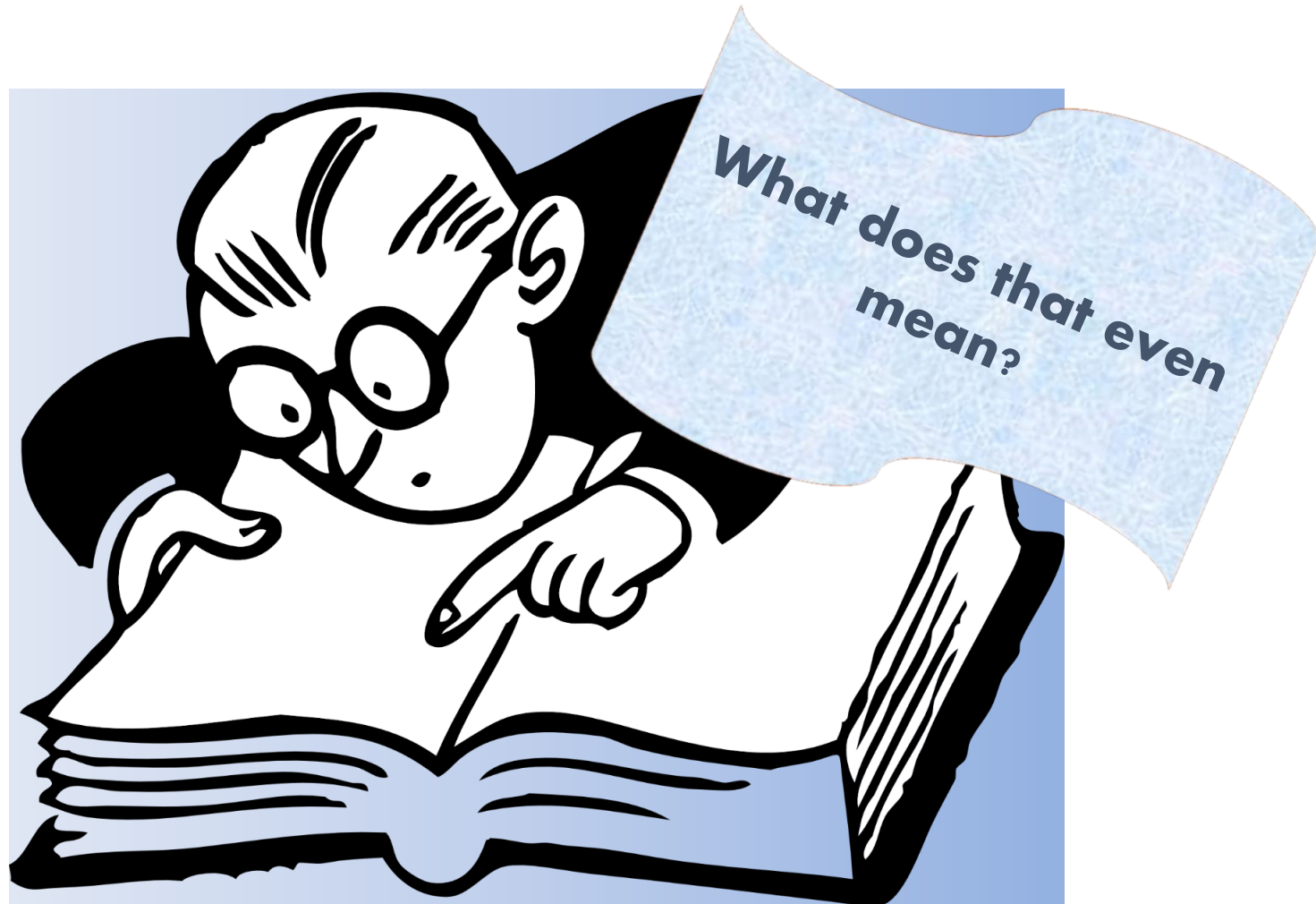
CONTACT ADMINISTRATOR  
Copyright © 2017  
State of North Carolina :: State Construction Office

- 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

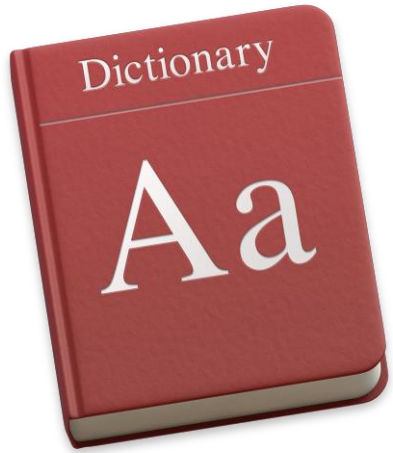
# Questions



# Definitions and Terminology



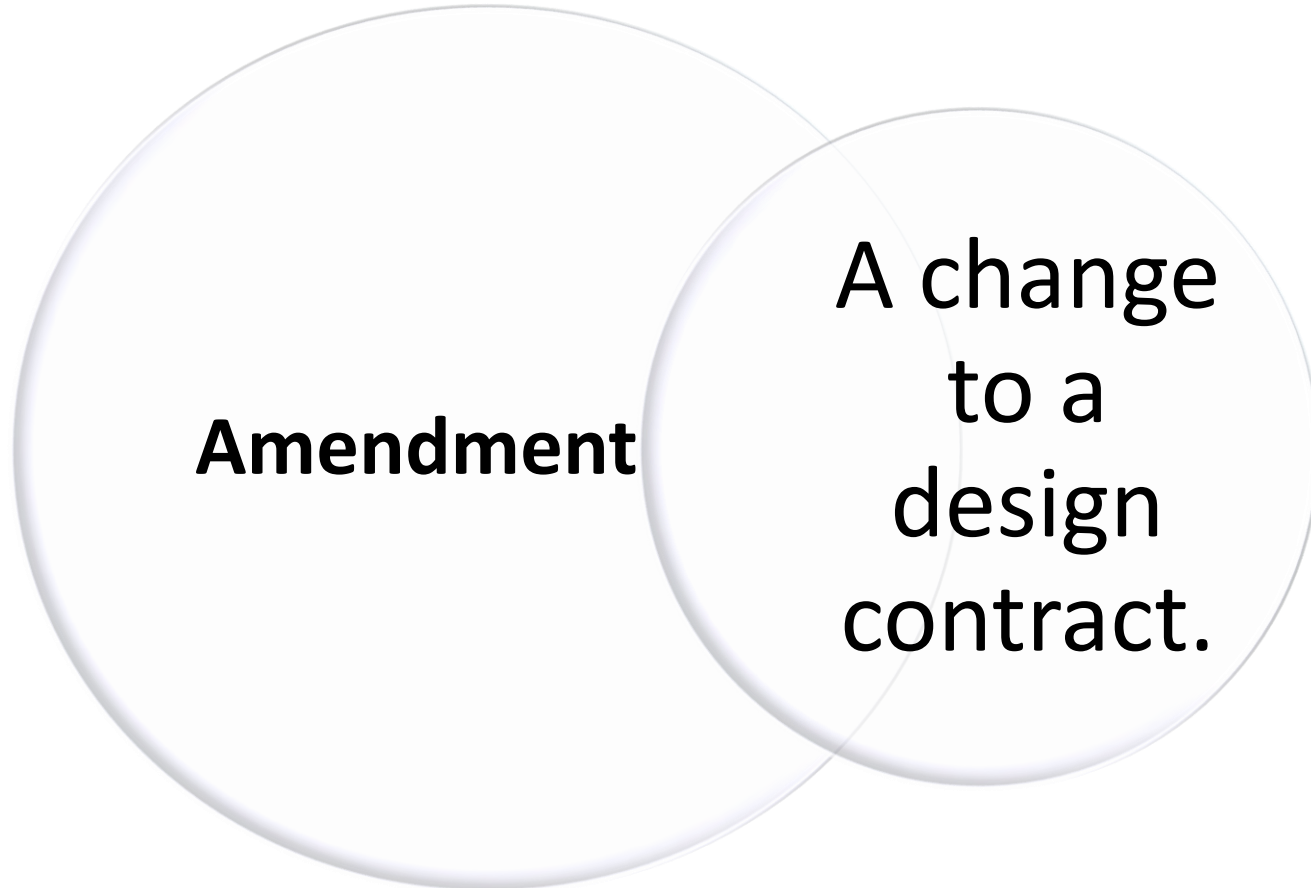
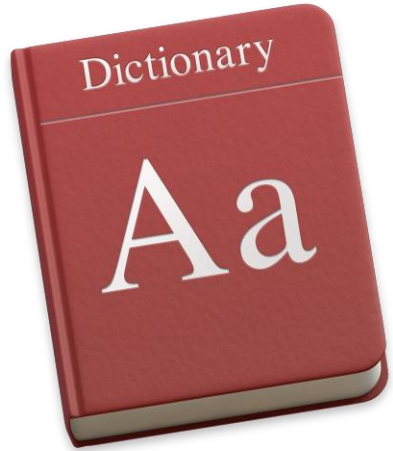
# Definitions and Terminology



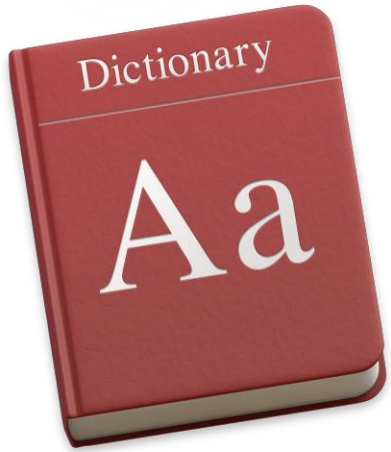
## **Allocate**

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



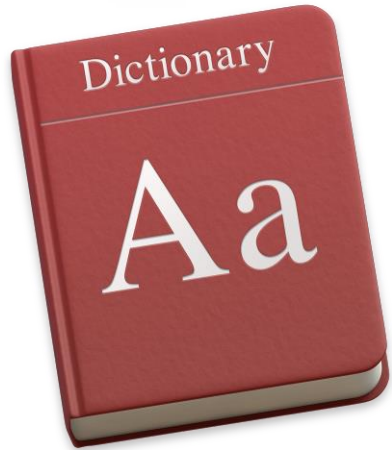
# Definitions and Terminology



## 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.

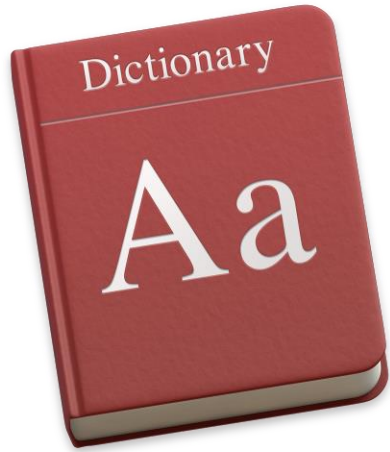
# Definitions and Terminology



## 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

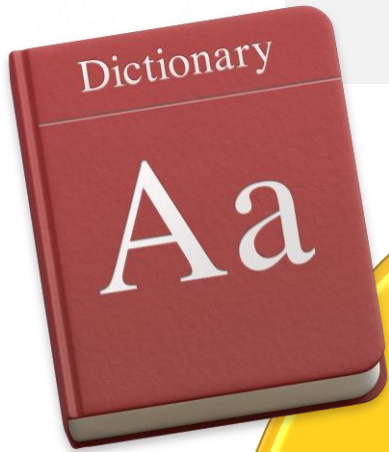


## Change Order

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

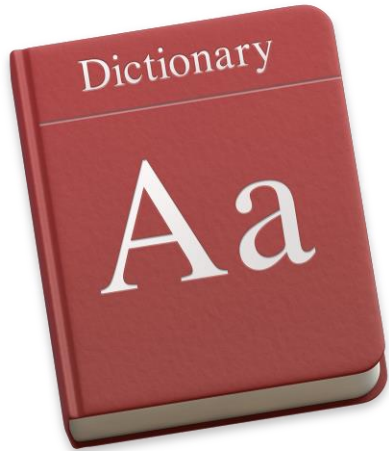


## Code

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.**

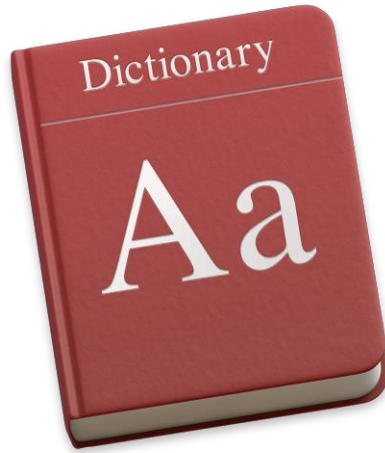
# Definitions and Terminology



## Construction

Represents the estimated cost of all construction contracts

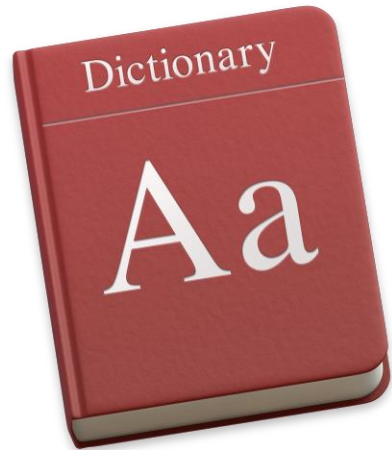
# Definitions and Terminology



## Contingency

Represents the estimated cost of construction contingency

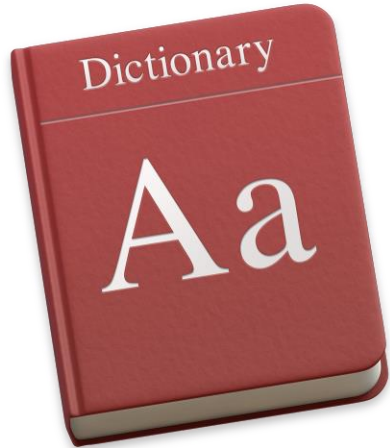
# Definitions and Terminology



## Commitment

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

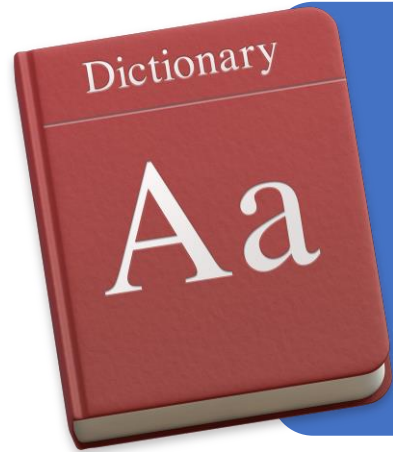
# Definitions and Terminology



## **Design**

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

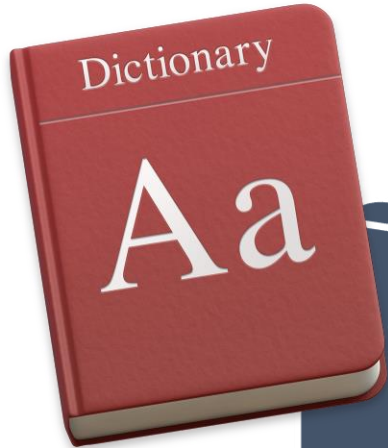
# Definitions and Terminology



## 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.**

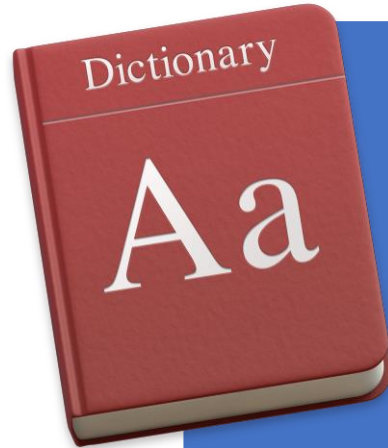
# Definitions and Terminology



**Expenditure**

A dollar amount that has actually been paid.

# Definitions and Terminology

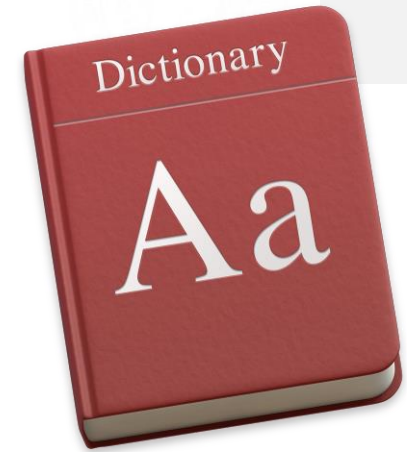


## Interscope Package

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.



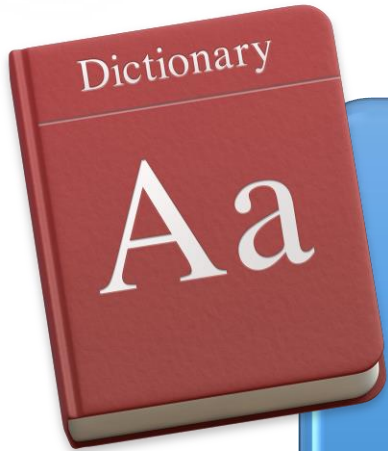
# Definitions and Terminology



## 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.

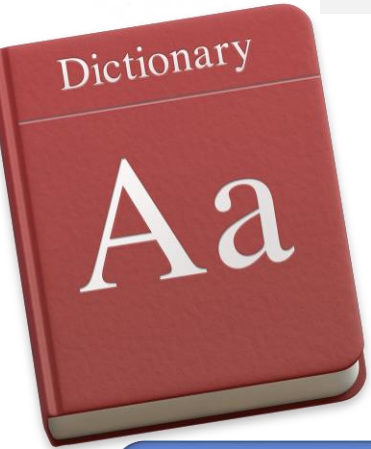
# Definitions and Terminology



## Milestone

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

# Definitions and Terminology



**Non-Code-Item  
(HUB Only)**

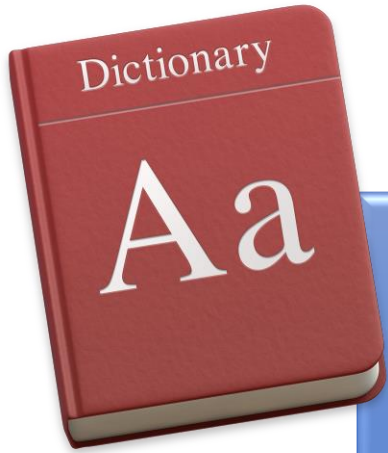


A type of project within Interscope+. When the HUB Only checkbox is used, the project will be created “without” a design contract. Think of HUB Only as Construction without a design agreement. This selection is used to report HUB data on small projects where a design agreement is not required that doesn't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



Example: A painting project

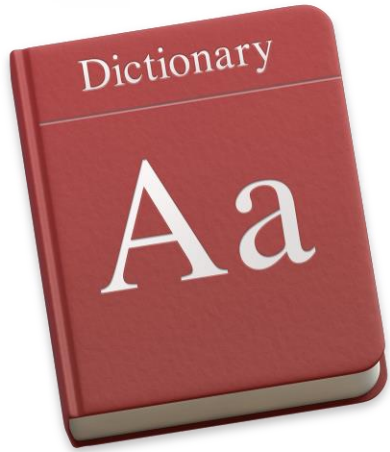
# Definitions and Terminology



## 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.

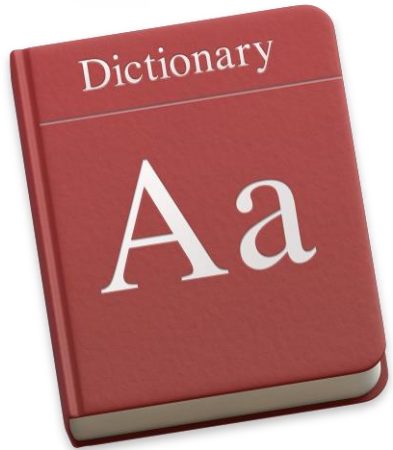
# Definitions and Terminology



## 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

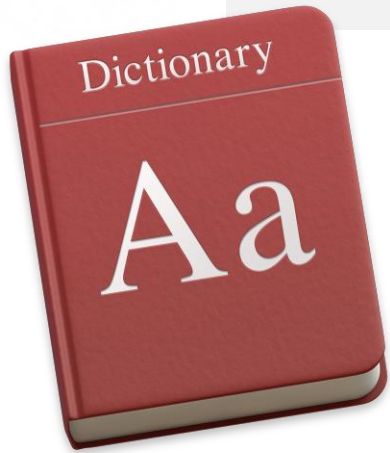


**Package**



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.

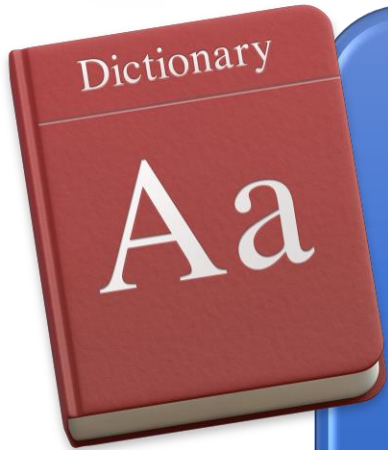
# Definitions and Terminology



**Primavera P6**

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

# Definitions and Terminology

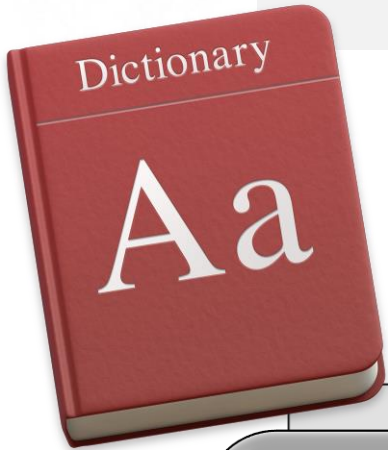


## Program

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.



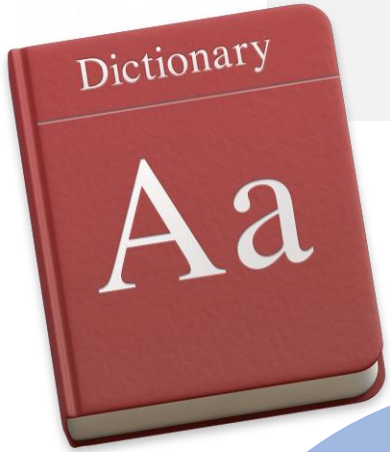
# Definitions and Terminology



## 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.

# Questions

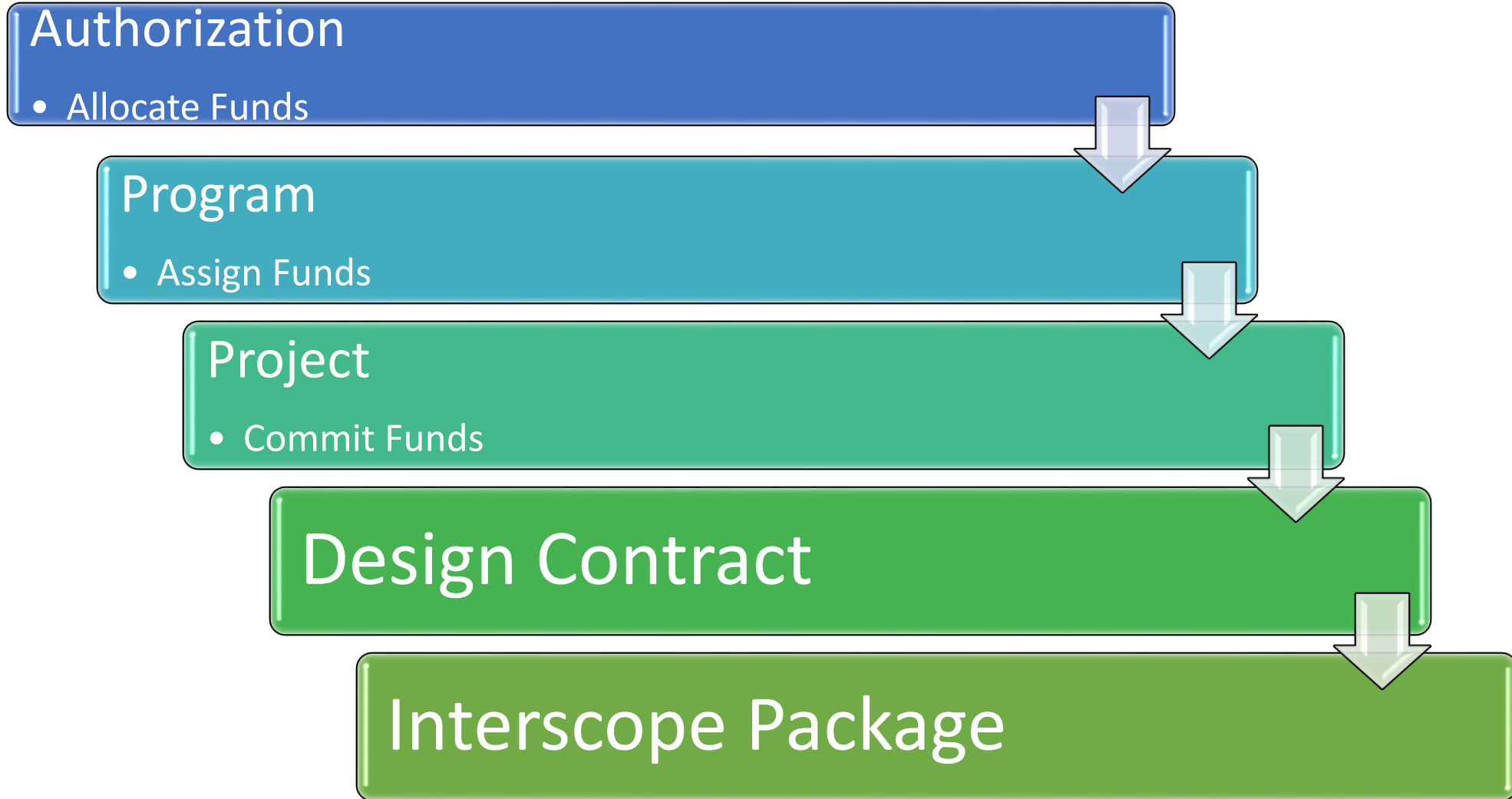




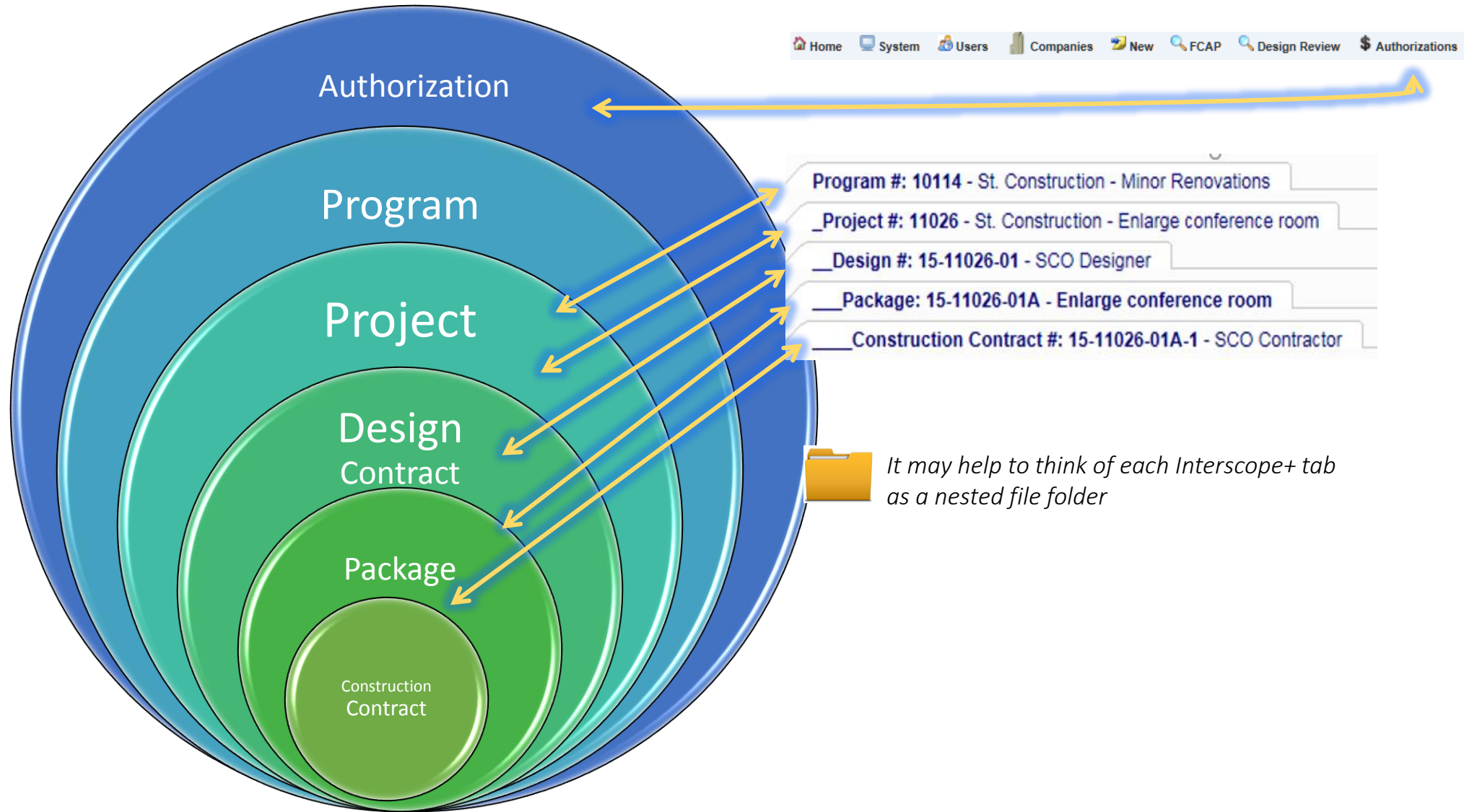
# Questions



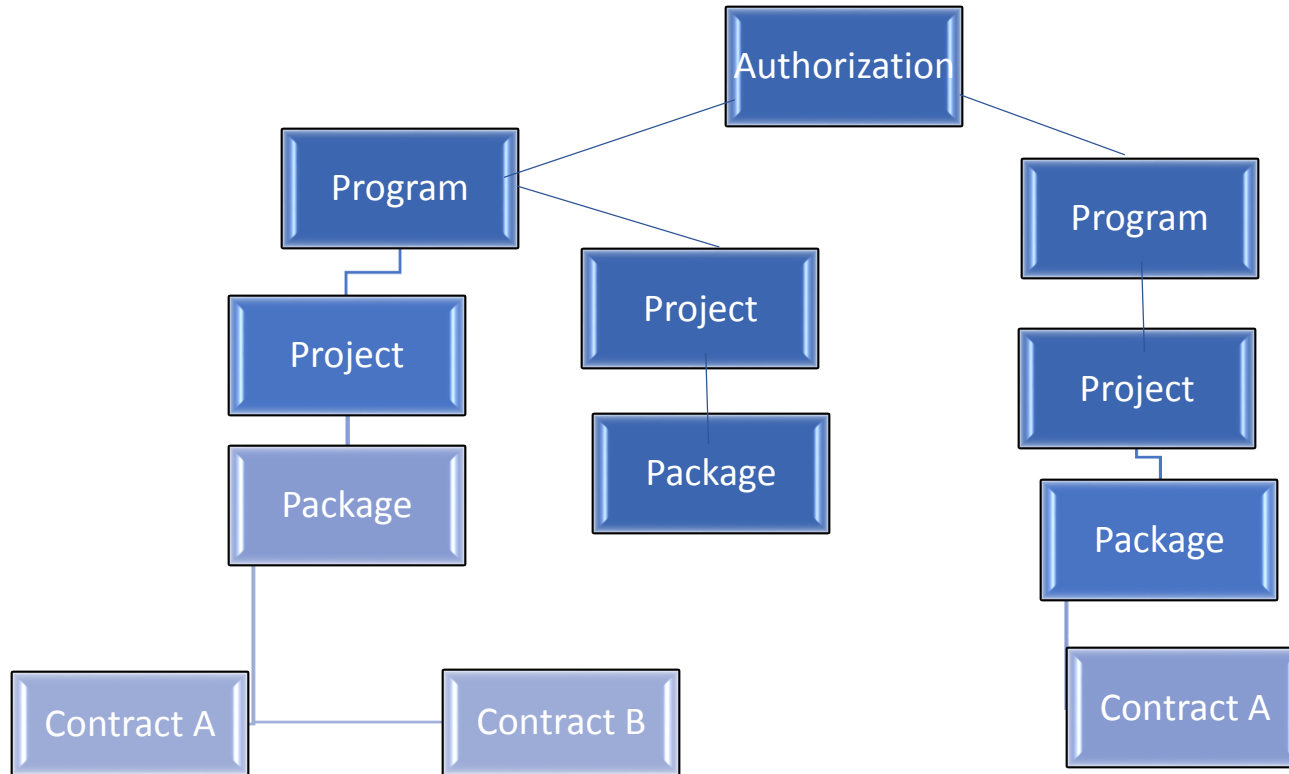
# Typical Capital Project Flow



# Typical Capital Project

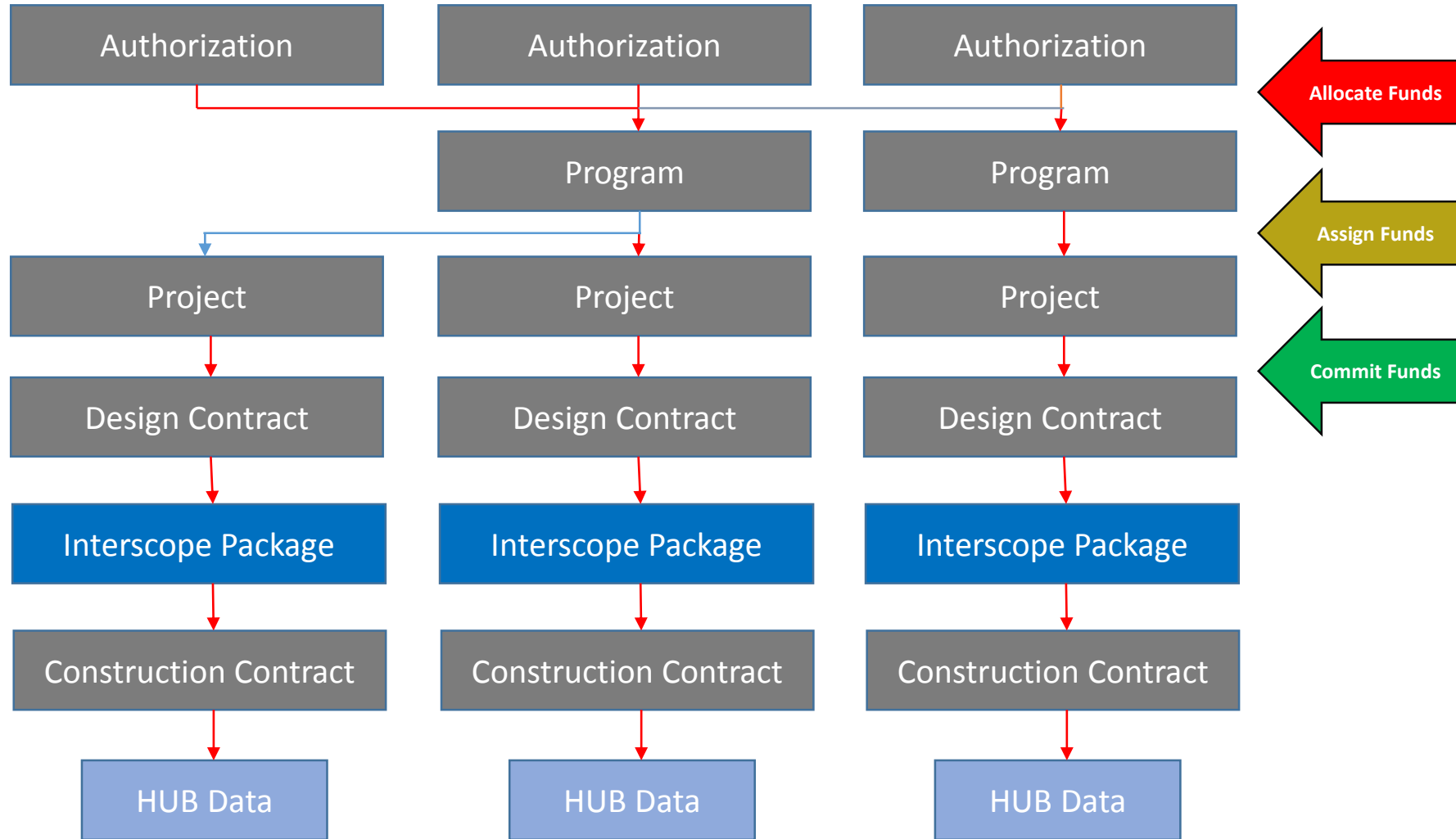


# Information Hierarchy





# Variations



# Contact Information

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# Interscope + Training

State Construction Office

LeaAnne Hahnel

