



for the North Carolina Community College System
Interscope+ Training



Welcome to Interscope+ Training

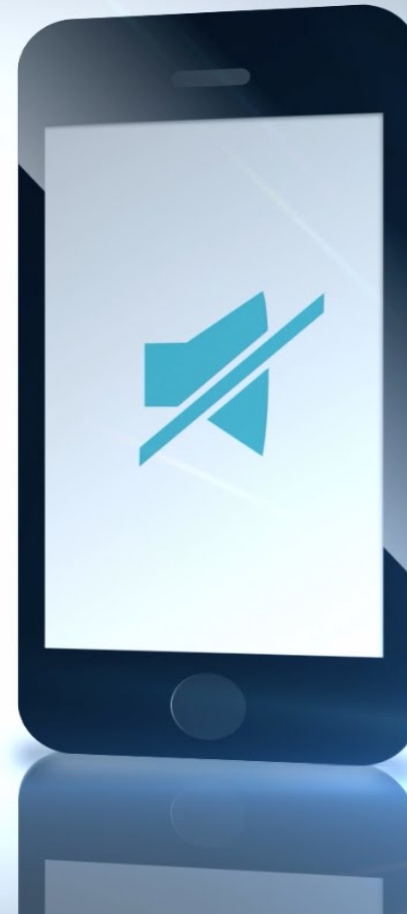


Today's Training Schedule

9 a.m. – 4 p.m.

- **Morning Break** (10 min)
around 10 a.m.
- **Lunch at 11:30 a.m.** (1 Hour)
resume at 1 p.m.
- **Afternoon Break** (10 min)
around 3 p.m.
- **Training concludes** at 4 p.m.

AS A COURTESY TO OTHERS,
**PLEASE
SILENCE
YOUR PHONE**
AND MOBILE DEVICES



Welcome to Interscope+ Training



Covered Topics

- Overview Presentation
- Hands On Walkthrough
- Authorizations
- Programs
- Financial Worksheet and Expenditures
- Creating Projects
- Design Contracts
- Interscope Packages
- Construction Contracts
- Entering HUB Participation Data
- Entering Evaluations
- Project Closeout
- *Non-Code-Item Project Type*
- *None-Code-Item HUB Only*
- Questions



What is Interscope+?



Interscope was originally created in 1999 for the State Construction Office for internal use to track Capital Projects.

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

What is Interscope+?



Interscope+ 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.

- Budgets
- Contracts
- Milestones (P6 Linking Forthcoming)
- HUB Information
- Optional detailed expenditure tracking is available. Not linked to NCAS.

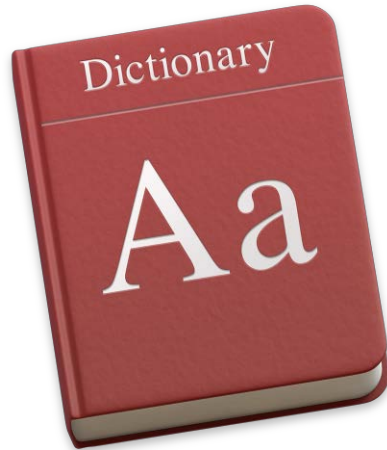
What can Interscope+ do?



Provides a single Capital Projects Management System for the State Construction Office, Universities, Community Colleges and State Agencies. Provides MBE (HUB) data integration.

- Track funding sources and budgets
- Track commitments
- Reduce conflicting data
- Provide consistent reporting
- Replace HUBSCO for reporting HUB data
- Integrate Primavera P6 schedule data

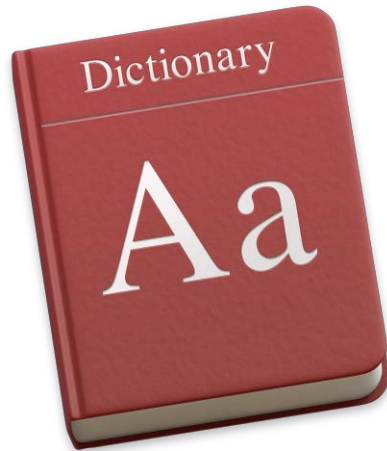
Definitions and Terminology



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.**

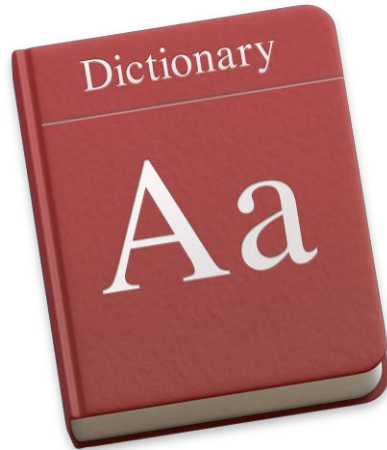
Definitions and Terminology



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.

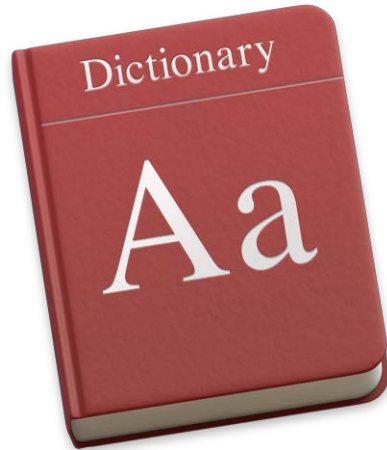
Definitions and Terminology



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.

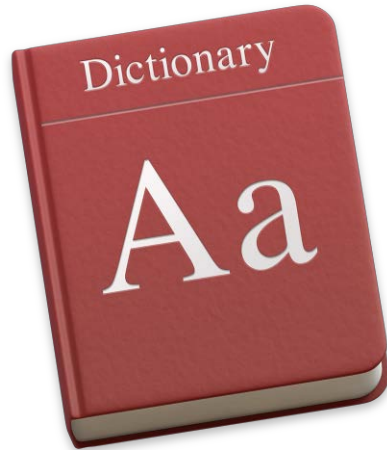
Definitions and Terminology



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.

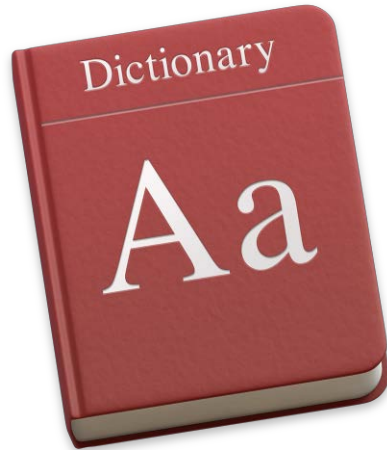
Definitions and Terminology



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

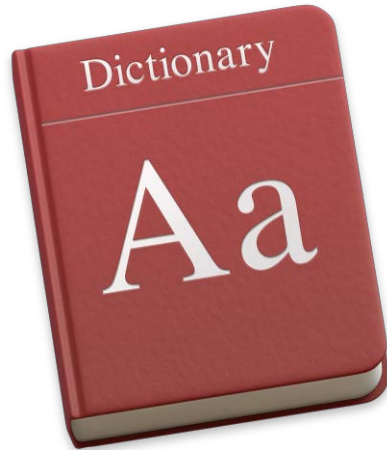


Code

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.

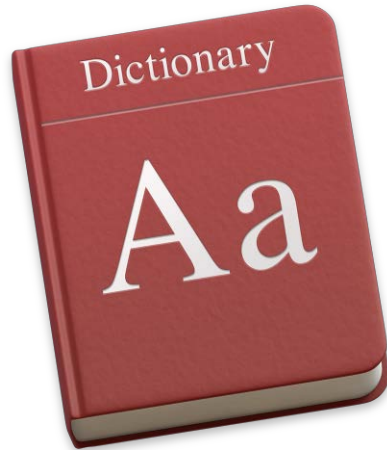
Definitions and Terminology



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.

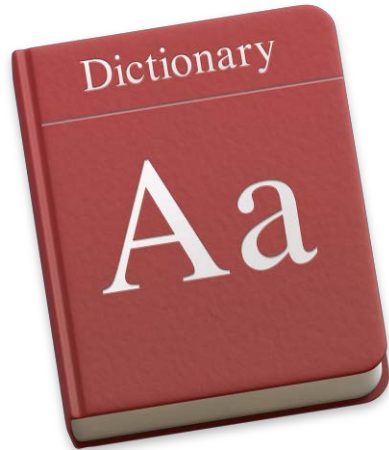
Definitions and Terminology



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.

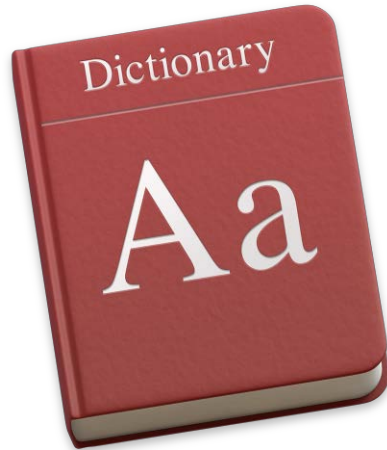
Definitions and Terminology



Expenditure

A dollar amount that has actually been paid.

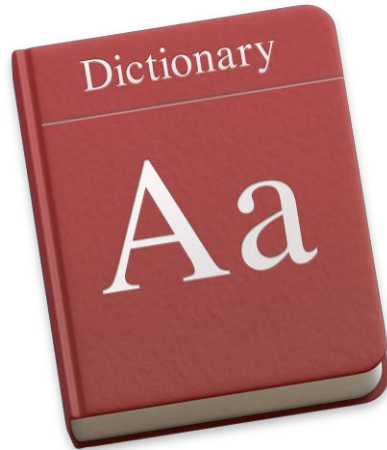
Definitions and Terminology



Commitment

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

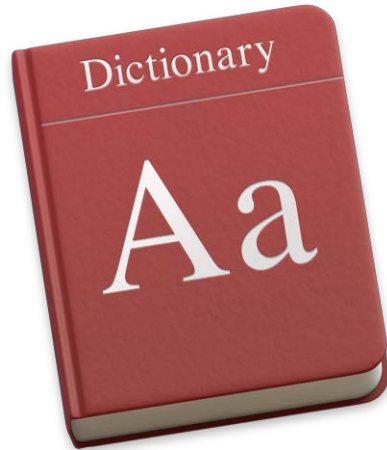
Definitions and Terminology



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

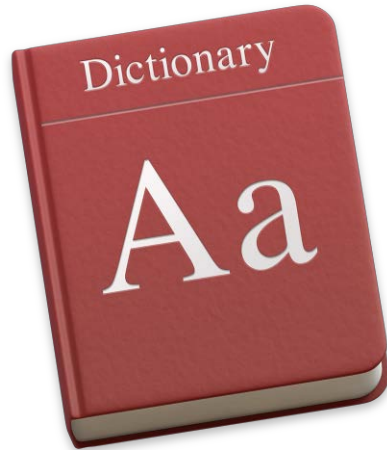


Project Type

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.

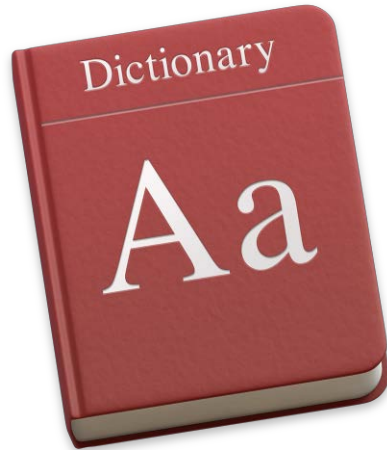
Definitions and Terminology



Amendment

A change to a design contract.

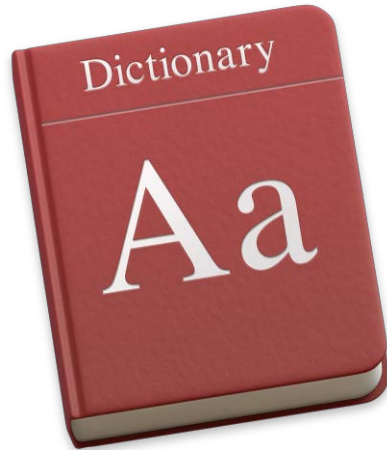
Definitions and Terminology



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.

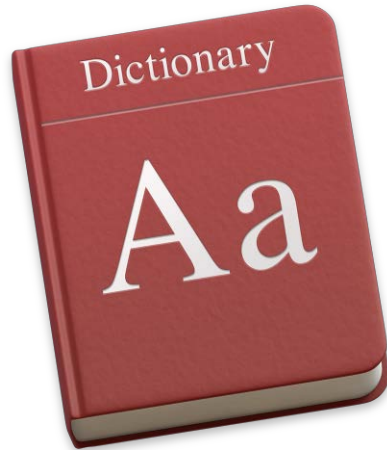
Definitions and Terminology



Change Order

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

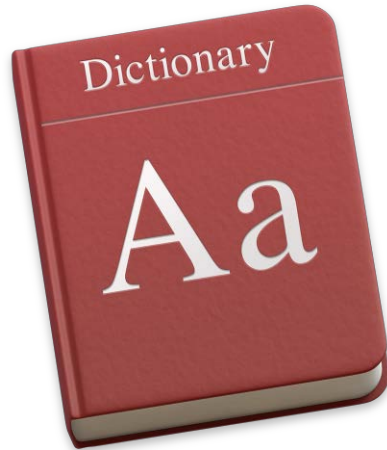
Definitions and Terminology



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

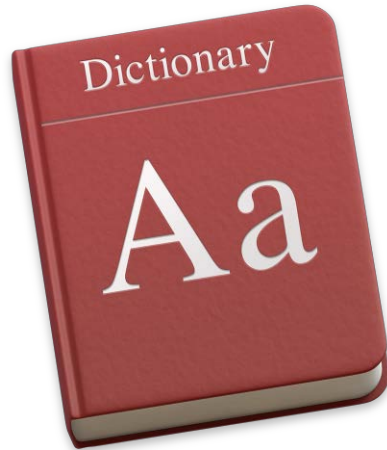


Non-Code-Item (HUB Only)

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

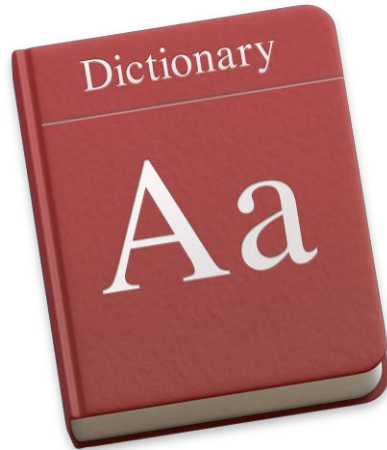
Definitions and Terminology



Primavera P6

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

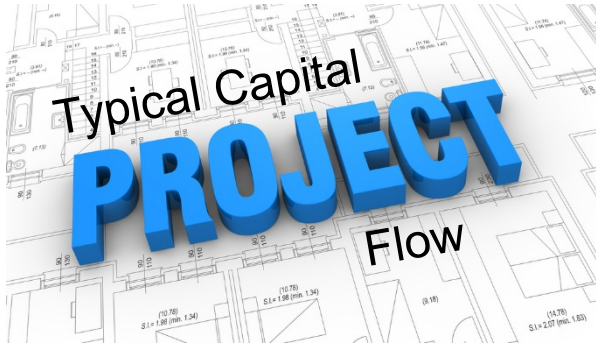
Definitions and Terminology



Milestone

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

Typical Capital Project



Authorization

Program

Project

Design Contract

Interscope Package

Construction Contract

HUB Data

Allocate Funds

Assign Funds

Commit Funds

Typical Capital Project



Authorization



Program



Project



Design Contract



Package



Construction Contract

Home System Users Companies New FCAP Design Review Authorizations

Program #: 10114 - St. Construction - Minor Renovations

_Project #: 11026 - St. Construction - Enlarge conference room

__Design #: 15-11026-01 - SCO Designer

___Package: 15-11026-01A - Enlarge conference room

____Construction Contract #: 15-11026-01A-1 - SCO Contractor

Construction Contract Detail

Bid Items

HUB Good-Faith Efforts

HUB Participation

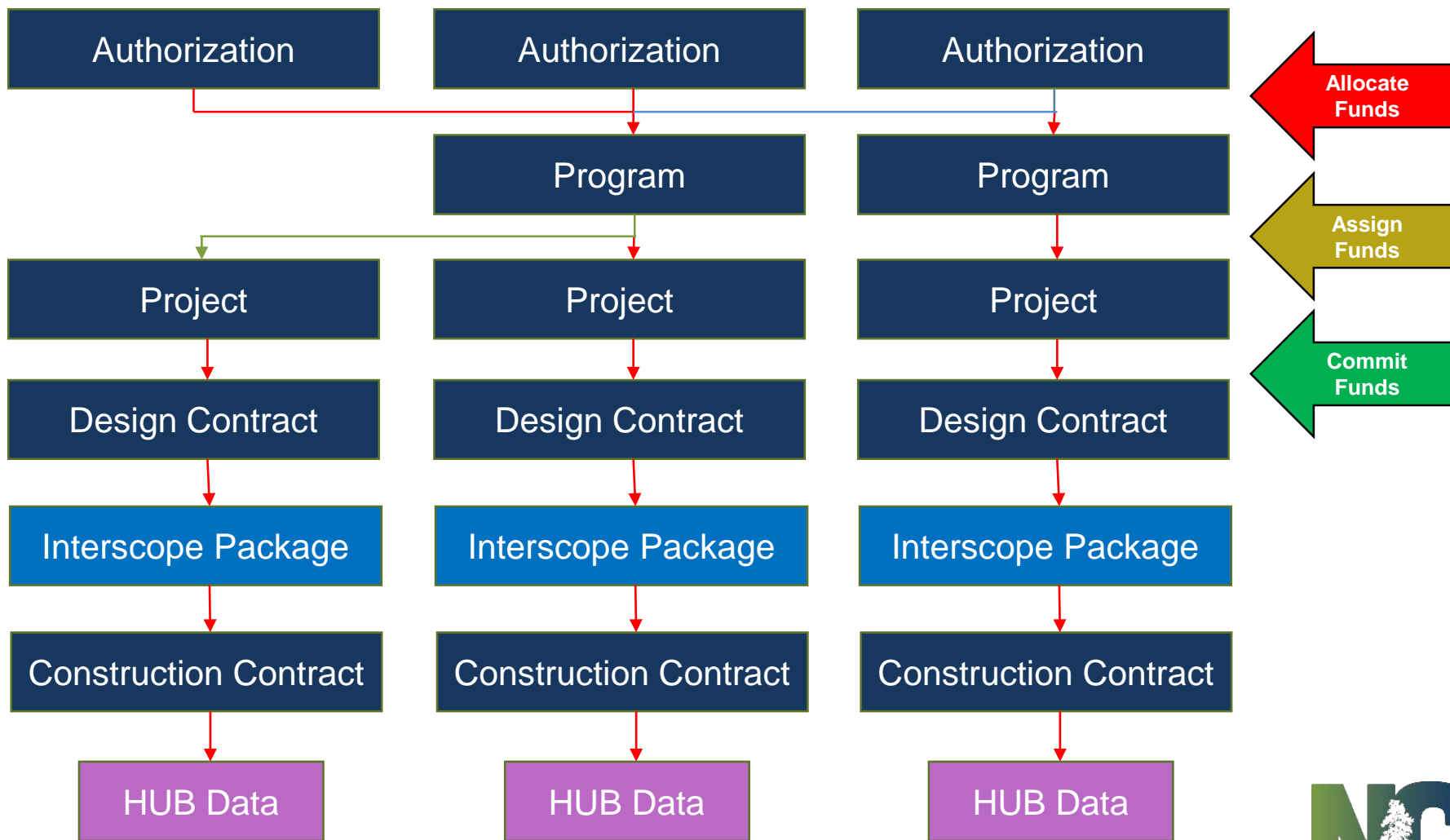
Left to Right Tabs are sub folders of the currently open Master tab. Above, is an example of an open construction contract.



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



Variations



Fund Source Types



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

1. **General Fund:** Appropriated funds
2. **Non-General Fund:** Receipts, grants, gifts, cash, County appropriated funds, etc.
3. **State Debt:** State Bonds, COPS, or Special Indebtedness
4. **Non-State Debt:** Debt issued by the institutions, county, or entity other than the State of North Carolina
5. **R&R:** Funding for R&R from appropriations
6. **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.

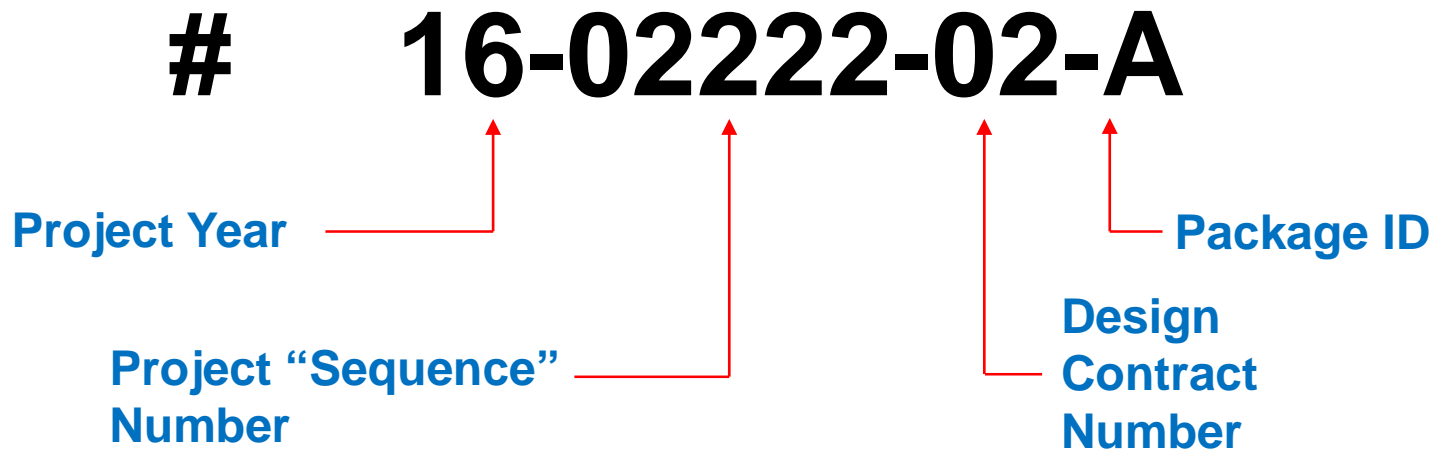
Performance Contract - Applies to Guaranteed Energy Savings Performance Contracts

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

Non-Code-Item 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

Interscope “SCO” ID Number

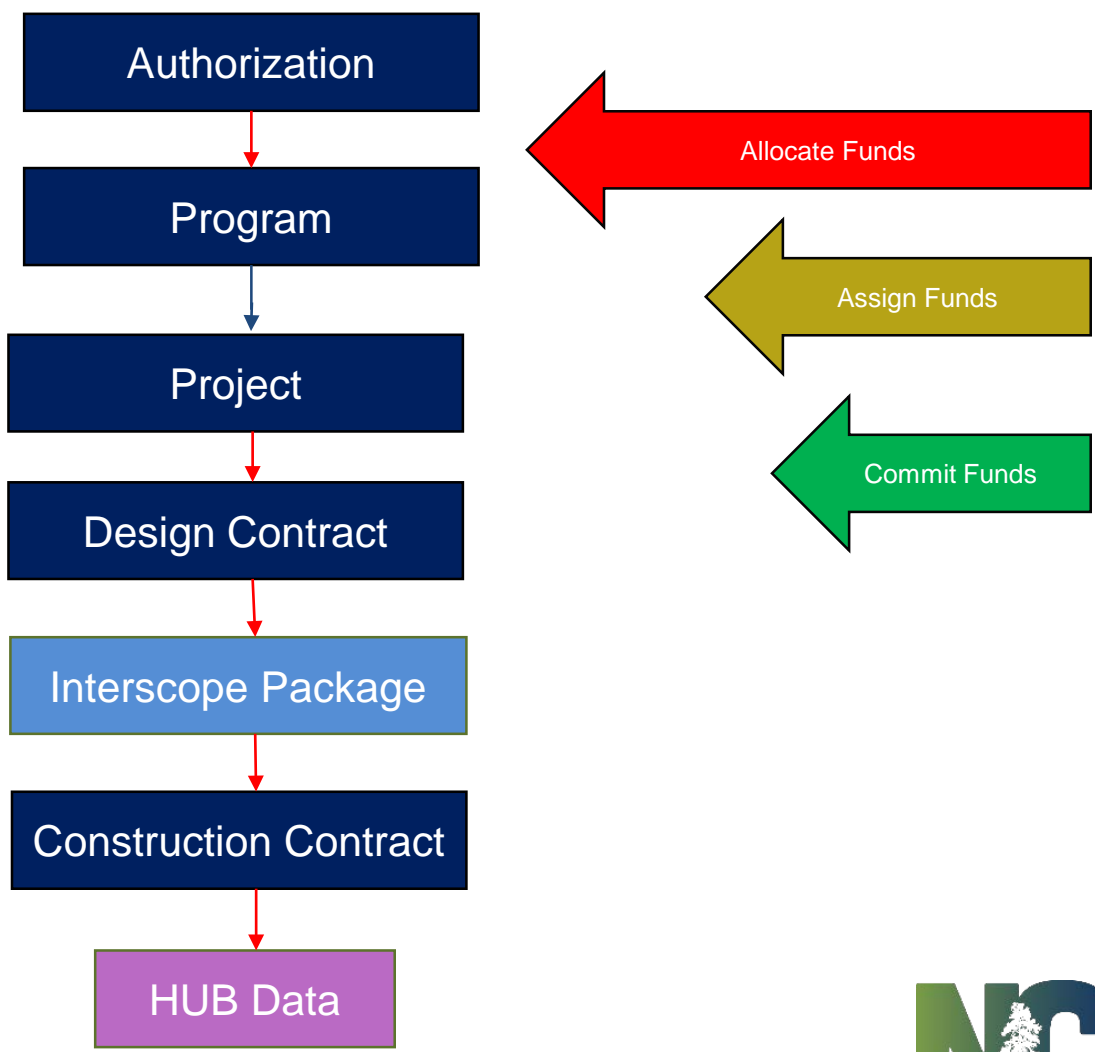


All submittals, correspondence, filing and project identification is dependent upon this number. The “full” ID number is gradually created during project creation.

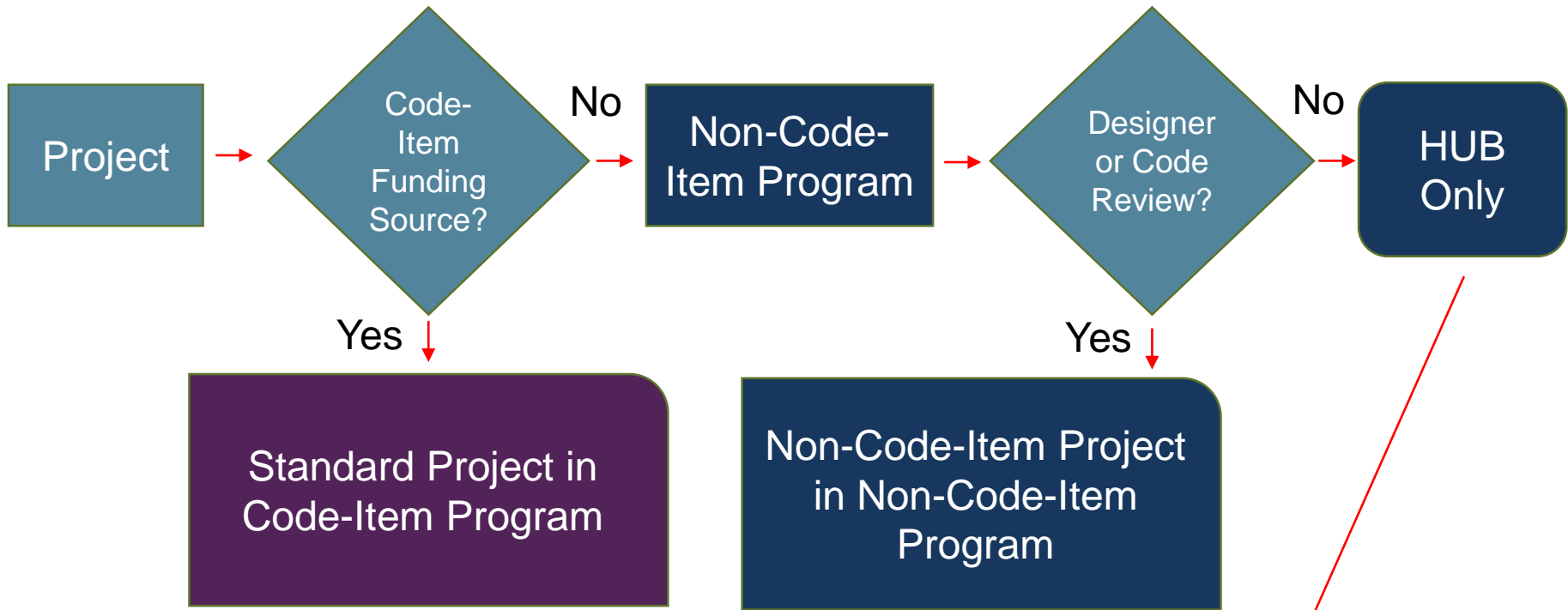
- **Project Year** is the calendar year that the project was created.
- **Project “Sequence” Number** is assigned by Interscope and is a unique number for the project.
- **Design Contract Number** designates which design contract is selected. A project may have multiple design contracts.
- **Package 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.*



R&R (Repair and Renovation)



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:**

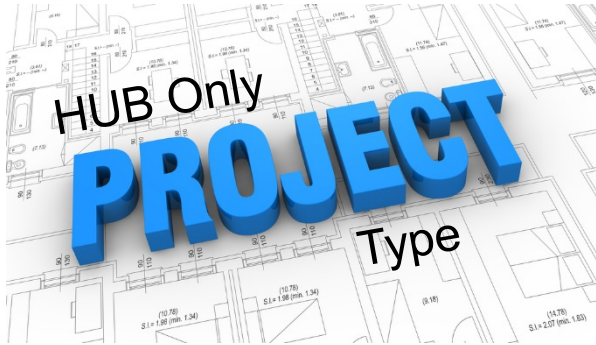
Project Type:

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

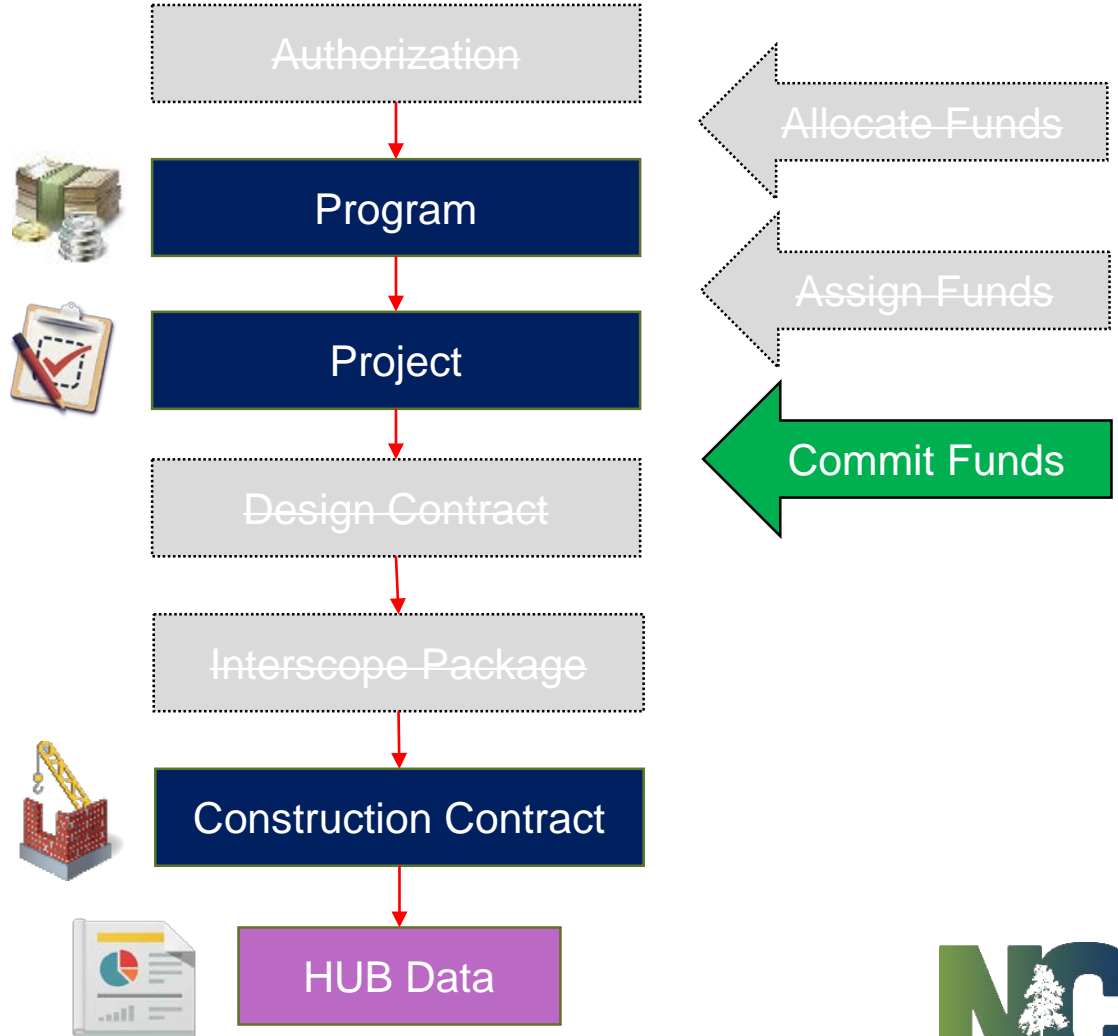
*** Special Project Designation:**



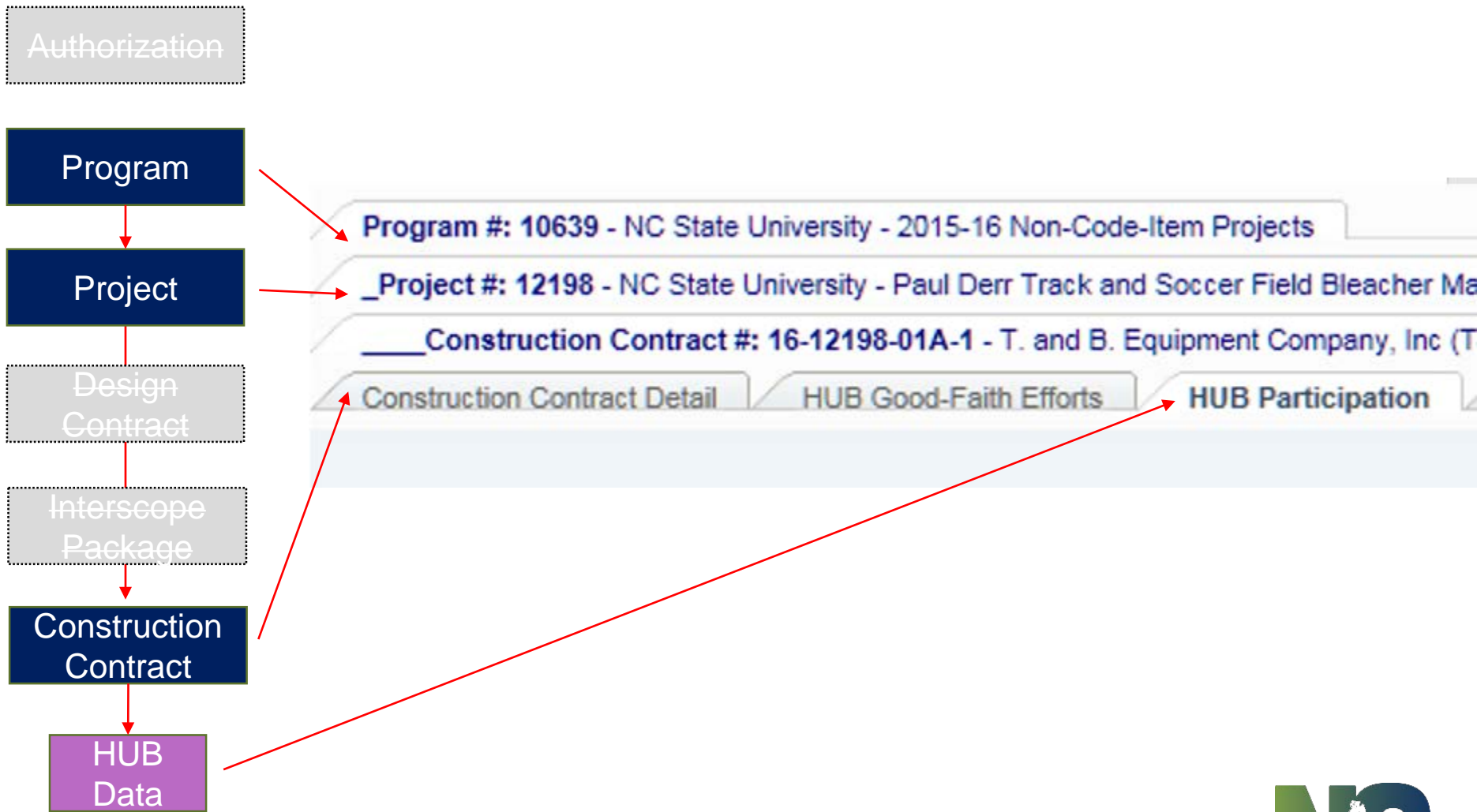
HUB Only Project Type



- HUB Only projects are inherently Non-Code-Item projects. Therefore, there are no fund assignments or financial controls.
- HUB Only projects do not have a design contract or Interscope package.



HUB Only Project Type



Begin Hands On Training...



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

