Nothing Compares
NORTH CAROLINA

State Construction Office

Interscope+ Users, Roles and Permissions Training Module 1

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Interscope BSA

Agenda

- Interscope Plus Overview
- Definitions and Terminology
- Users, Roles and Permissions
- New Account Instructions for Designers
- New Account Instructions for Contractors
- New Account Instructions for Owner Agencies

Interscope +

Overview

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. Interscope+ is now that system.

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. [1]

[1] Interscope+ User Manual

- **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.
- **Amendment**: A change to a design contract.
- **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.
- **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.

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Definitions and Terminology-continued

- **Category**: Project cost estimates are delineated by 4 categories: Design, Construction, Contingency, and Other.
- **Design** represents the estimated cost of the design contract
- **Construction** represents the estimated cost of all construction contracts
- **Contingency** represents the estimated cost of construction contingency
- **Other** represents the estimated cost of project related or owner costs, such as soils exploration, advertising, fixed furnishings and equipment (FF&E), etc.
- **Change Order**: A change to a construction contract, either to the dollar amount, duration or both.
- **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 fiscal year that the project is authorized (14 = 2014). The last two digits indicate the state agency or UNC institution. For Community Colleges that are authorized funding by the County a 5 digit number that does not start with 4 will be used.

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Definitions and Terminology-continued

- **Commitment**: A signed contract or Purchase Order for which the State or County is obligated to pay the stated amount.
- **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.
- **Expenditure**: A dollar amount that has actually been paid.
- **Fund Source**: There are 6 different sources of funds defined:
- **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**: Bonds issued by Institutions, county, or self-liquidating funds
- **R&R**: Funding for R&R from appropriations
- **R&R Debt**: Funding for R&R from State Debt, such as Special Indebtedness or COPS.

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Definitions and Terminology-continued

- **HUB**: Historically Underutilized Businesses, and commonly used to refer to Minority Participation or Minority Business Enterprises (MBE).
- **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.
- **Milestone**: Key date that is used to measure progress of a contract or project.
- **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.
- **Non-Code-Item Project**: A project that does not have, nor require, a capital code-item (<$300,000). These are typically small informal projects that are accomplished with local or operating funds, but recording HUB participation is required.

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Definitions and Terminology-continued

- **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.
- **Primavera (P6):** Statewide project scheduling system. Schedules are required for projects with estimated costs over $500,000, based on Project Type.
- **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 system.

- **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.
- **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.
- **Special Project Designation:** Classification of certain projects that are not given an OSBM code-item and do not follow the typical financial controls. These include Guaranteed Energy Savings Performance Contracts, Foundation Projects, Non-Code-Item Projects, and HUB only.

Users, Roles and Permissions

Users, Roles and Permissions

- Every user must have a username and password.
- If you do not have one, refer to the State Construction Office Website

  http://www.interscope.nc.gov/Interscope/Logon.aspx
- Download the appropriate form – Agencies; Universities; Designer/Contractors, for requesting a logon.

New Account Instructions for Designers

Interscope+ Logon Screen

Interscope

Welcome to InterScope+

Version: 2.1.A_20160830

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

State of North Carolina :: State Construction Office

New Account Instructions for Designers

1 – Select **Designer** in the **User Type** field. This will display the entry form.

2 –Complete the form for the fields indicated.

Note: It is important that the email address entered for the Firm be one that represents the firm directly and is not necessarily defined for a particular individual since all communication from Interscope+ for this account will be sent to the email address on file.

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.

Note: A user account cannot be established for any firm that does not have prior or current approved and active construction projects setup in Interscope+.

New Account Instructions for Designers

Home Reports Request a Logon Help

All fields in red are required

~ INTERSCOPE NEW USER LOGON REQUEST ~

User Logon Request

Organization

* User Type: DESIGNER
* Designer Name: Required
* Designer Address: Required
* Designer City & State: Required
* Designer Zip: Required
* Designer Phone #: ___-___-____
* Designer License Type: NCBA NCBELS NCBOLA Other
* Designer License #: Required

IMPORTANT: Each logon allows access to the projects contracted from one office.
If your company has multiple locations, please request a separate logon for each location.

Office/Location:

User Profile

* Username: Required
* User Full Name: Required
* User Email: Required
* User Phone#: ___-___-____
* Password: Required
* Confirm Password: Required

Comments:

Submit Cancel

Instructions For Designers

Designer Users are those Companies that have engaged the State of North Carolina under contract for building projects.

Designers will only be allowed to access the data available for their company.

To create a Designer Logon:

1. Select User Type of ***Designer***
2. Fill in all fields for your Designer.
3. Your must specify a valid Designer License from one of the following:
   (To obtain your Designer License #, go to the appropriate link below.)
   - NC Board of Architecture
   - NC Board of Engineers and Land Surveyors
   - NC Board of Landscape Architects
4. Fill in the remaining fields
5. Press the ***Submit*** button

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Report a Problem

New Account Instructions for Contractors

New Account Instructions for Contractors

Note: Any Contractor requesting to use Interscope+ must first be registered with Vendor Link, the Interactive Purchasing System. Interscope+ uses Vendor Link to obtain verifiable name and address information.

To register with Vendor Link, access the following URL and complete the Vendor Registration process: https://www.ips.state.nc.us/Vendor/VendorPubMain.aspx

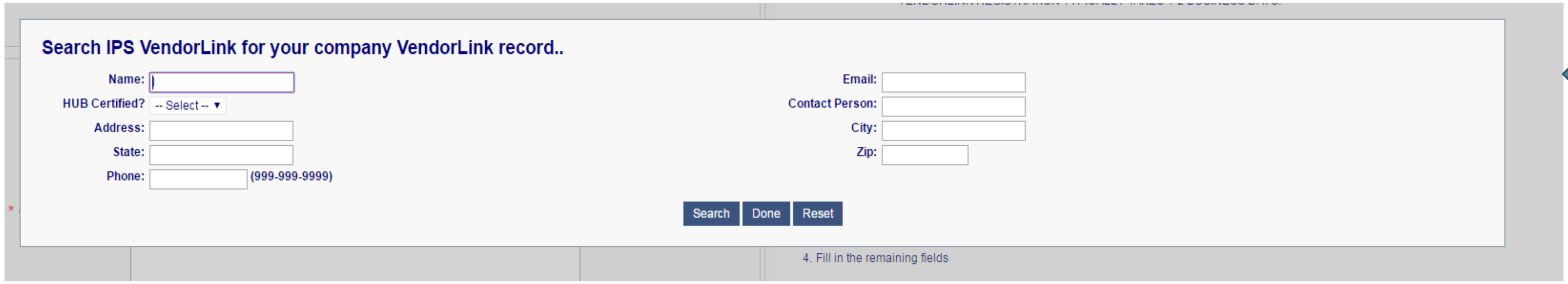
New Account Instructions for Contractors

Once you have received notification that your Vendor Link registration has been completed, you may request a logon for Interscope+.

Follow these steps for creating a new Contractor user account:

1 – Select **Contractor** in the **User Type** field. This will display the entry form.

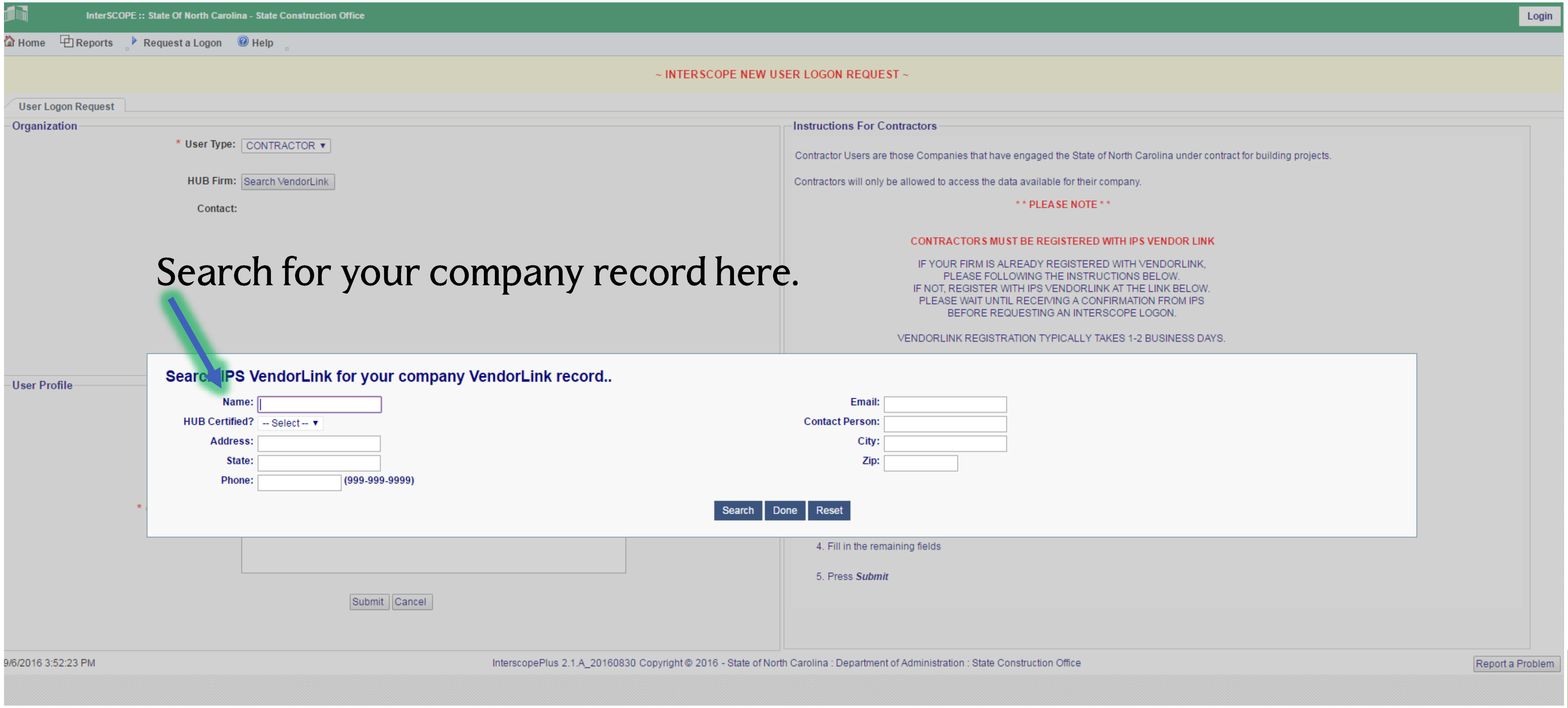
2 – Click on the **Search** VendorLink button. This will display the search page.



This will pop up in your screen

New Account Instructions for Contractors

3 – Enter the first 3 letters of your company name and press **Search**. This will display search results.



New Account Instructions for Contractors

4 – Find your company listing in the search results and press **Select**. This will fill in your company information and return you to the account request form.

Search IPS VendorLink for your company VendorLink record..

Name: sam

HUB Certified? -- Select --

Address:

State:

Phone: (999-999-9999)

Email:

Contact Person:

City:

Zip:

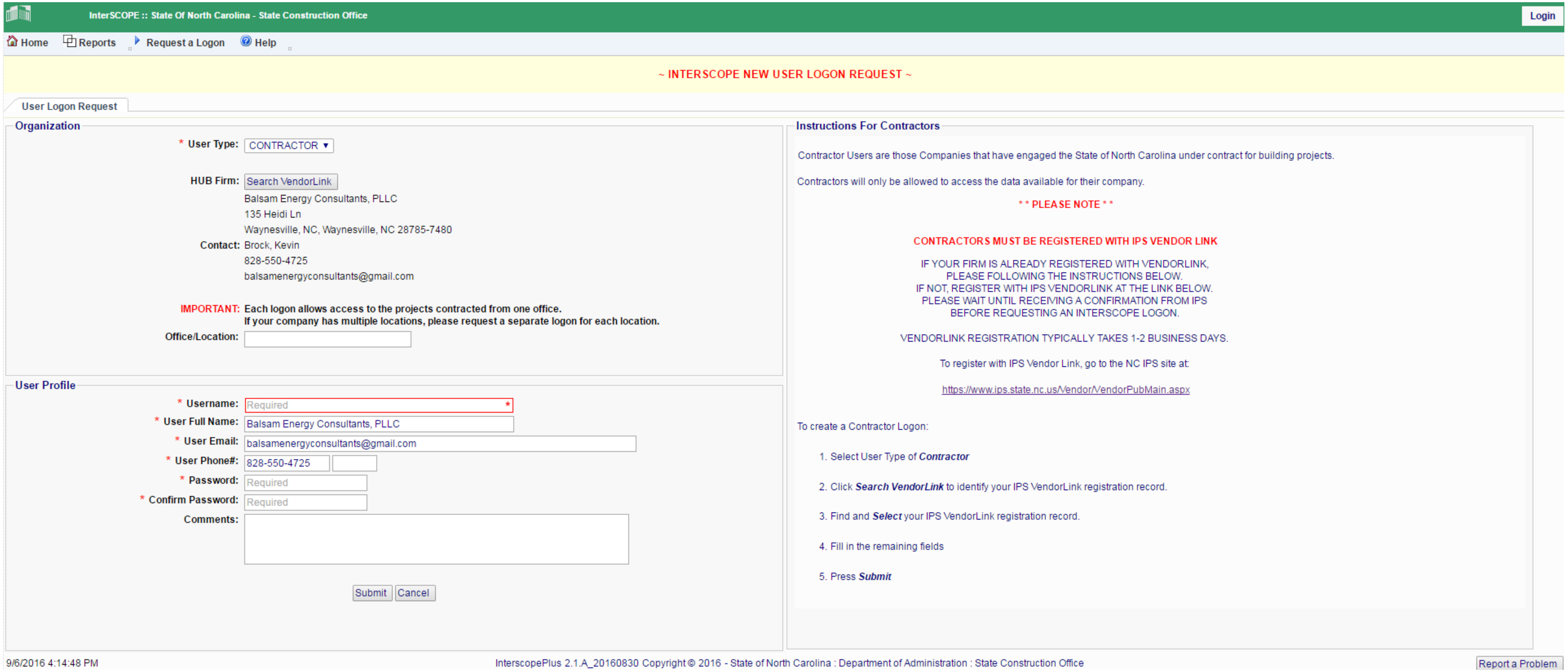
Search | Done | Reset

	Company	City, State	Voice	Contact	Email	HUB Type
SELECT	Balsam Energy Consultants, PLLC	Waynesville, NC	828-550-4725	Brock, Kevin	balsamenergyconsultants@gmail.com	Not a HUB
SELECT	Big Sam's Carpet and Upholstery Service	Raleigh, NC	(919)798-9128	Samuel, Darryl	bigsamscarpet@gmail.com	B (Not Certified)
SELECT	EJDR Sampson's Enterprises, Inc.	Pembroke, NC	(910)521-1389	Sampson, Judy	judyosampson@aol.com	I (Certified)
SELECT	Linebarger Goggan Blair & Sampson, LLP	Austin, TX	(512)447-6675	Franco, Michelle	biddinglists@lgbs.com	Not a HUB
SELECT	Marketing Flotsam	Wilmington, NC	(910)541-1626	Neu, Melissa	cmneu@marketingflotsam.com	Not a HUB
SELECT	Sam Dillard Brands, Inc.	Chapel Hill, NC	(919)942-9430	Stapleton, Kenneth	kstape1@cs.com	B (Not Certified)
SELECT	Sam Eddings Drywall	Little River, SC	(843)399-5068	Eddings, Sam	sameddings@yahoo.com	I (Not Certified)
SELECT	Sam Heilig	hendersonville, TN	615-824-8453	heilig, sam	wally@houseofwally.com	Not a HUB

4 page(s): [1] 2 3 4

New Account Instructions for Contractors

5 – Complete the remaining fields on the form and press **Submit**.



InterSCOPE :: State Of North Carolina - State Construction Office

Login

Home | Reports | Request a Logon | Help

~ INTERSCOPE NEW USER LOGON REQUEST ~

User Logon Request

Organization

* User Type: CONTRACTOR

HUB Firm: Search VendorLink

Balsam Energy Consultants, PLLC
135 Heidi Ln
Waynesville, NC, Waynesville, NC 28785-7480

Contact: Brock, Kevin
828-550-4725
balsamenergyconsultants@gmail.com

IMPORTANT: **Each logon allows access to the projects contracted from one office.**
If your company has multiple locations, please request a separate logon for each location.

Office/Location:

User Profile

* Username: Required

* User Full Name: Balsam Energy Consultants, PLLC

* User Email: balsamenergyconsultants@gmail.com

* User Phone#: 828-550-4725

* Password: Required

* Confirm Password: Required

Comments:

Submit | Cancel

Instructions For Contractors

Contractor Users are those Companies that have engaged the State of North Carolina under contract for building projects.

Contractors will only be allowed to access the data available for their company.

* * PLEASE NOTE * *

CONTRACTORS MUST BE REGISTERED WITH IPS VENDOR LINK

IF YOUR FIRM IS ALREADY REGISTERED WITH VENDORLINK,
PLEASE FOLLOWING THE INSTRUCTIONS BELOW.
IF NOT, REGISTER WITH IPS VENDORLINK AT THE LINK BELOW.
PLEASE WAIT UNTIL RECEIVING A CONFIRMATION FROM IPS
BEFORE REQUESTING AN INTERSCOPE LOGON.

VENDORLINK REGISTRATION TYPICALLY TAKES 1-2 BUSINESS DAYS.

To register with IPS Vendor Link, go to the NC IPS site at:

https://www.ips.state.nc.us/Vendor/VendorPubMain.aspx

To create a Contractor Logon:

1. Select User Type of ***Contractor***
2. Click ***Search VendorLink*** to identify your IPS VendorLink registration record.
3. Find and ***Select*** your IPS VendorLink registration record.
4. Fill in the remaining fields
5. Press ***Submit***

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Report a Problem

New Account Instructions for Contractors

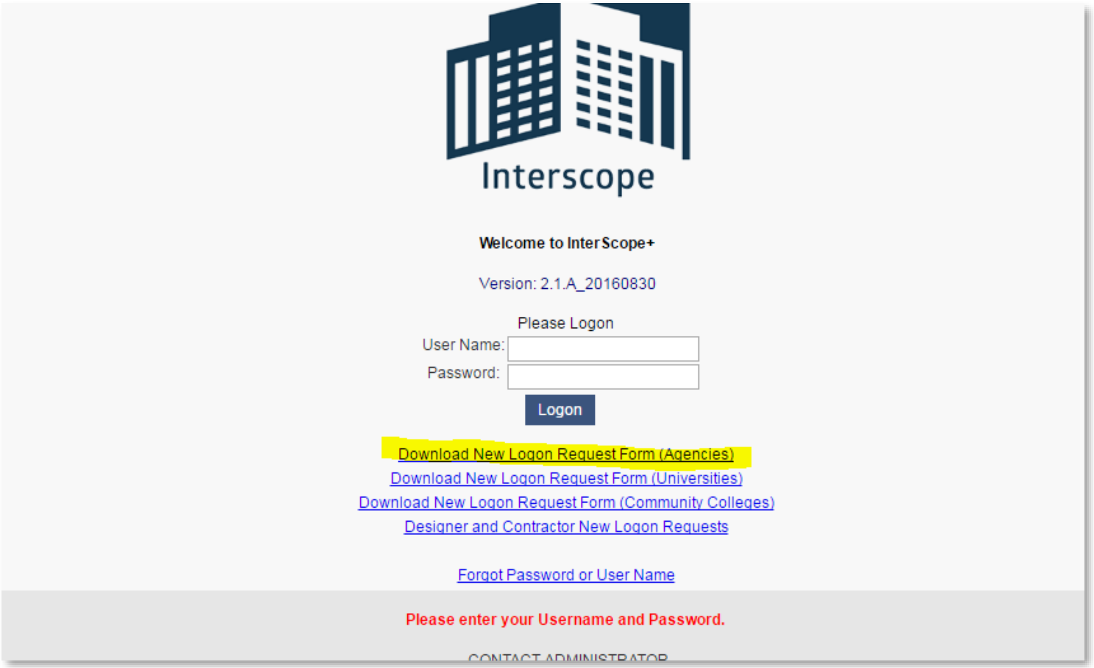
Note: It is important that the email address entered for the Firm be one that represents the firm directly and is not necessarily defined for a particular individual since all communication from Interscope+ for this account will be sent to the email address on file.

6 - 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.

Note: A user account cannot be established for any contractor that does not have prior or current approved and active construction projects setup in Interscope+.

New Account Instructions for Owner Agencies

New Account Instructions for Owner Agencies



Follow these steps for creating a new Agency, Community College or University user account:

1 – At the logon screen, download the appropriate request form and completely fill it out.

2 – Each Agency and/or Department should have one person designated to review and approve the requested roles/permissions.

3 – Once the completed form has been approved, submit to the System Administrator at Interscope@doa.nc.gov.

4 – The administrator will notify the requestor when the user has been set up

New Account Instructions for Owner Agencies

When the Interscope+ system administrator creates an SCO or Owner-Agency user, the user is assigned one or more roles such as Project Manager, or Capital Project Coordinator (CPC), or Financial Manager. Each role allows the user to access specific information and perform specific actions within the system. The Menu options shown on the page header may vary based on the Role or Roles assigned to the user. As an example, a Project Manager may be able to view information only for projects within their agency or institution.

Permissions are part of roles, and determine whether the Role can add, change, delete, or only view the data on a given screen. The Project Manager role can allow the user to view the funding sources for a project but not be able to change them, but the user can change Milestone dates.

A user can have more than one Role, depending on their job requirements, and Roles can be added or deleted as job requirements change. The System Administrator must make those changes, based on requests from the appropriate management level.

This training does not attempt to identify role requirements for each type of interaction.

State Construction Office

Interscope+ Users, Roles and Permissions
Training Module 1

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Interscope BSA
Information comes from the
Interscope + User Manual