HUBSCO+
Informal Project Training
What will I learn from this training?

- How to Login to HUBSCO+
- Navigating through HUBSCO+
- Add an Informal Project(s)
- Run Quarterly Reports

NOTE: Use Chrome to gain access to all functions in HUBSCO+
Note for previous users:
Your first login to HUBSCO+ will use your previous HUBSCO User ID both as user ID and password.

Once logged in, your password must be changed.
**HUBSCO+ Inbox**

- **Main Menu** view displays all projects in your inbox – both informal and formal.

- Inbox can show all projects for an entity or just the person who logged in.

### Informal Projects

<table>
<thead>
<tr>
<th>Project Number</th>
<th>Project Name</th>
<th>Created Date</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-572092</td>
<td>TECHNOLOGY-ROOF REPLACEMENT</td>
<td>1/6/2022</td>
<td></td>
<td></td>
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<tr>
<td>1-57314000</td>
<td>FOREST HILLS HIGH SCHOOL-ROOF REPLACEMENT</td>
<td>10/8/2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-57318073</td>
<td>HEMBY BRIDGE ELEM HVAC RENOVATION</td>
<td>10/6/2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-57336018</td>
<td>MONROE HIGH SCHOOL MEDIA SKYLIGHT</td>
<td>10/6/2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-57318027</td>
<td>HEMBY BRIDGE ELEMENTARY-KITCHEN WASTE</td>
<td>10/6/2022</td>
<td></td>
<td></td>
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</table>

### Formal Projects

<table>
<thead>
<tr>
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<th>Project Name</th>
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<th>Edit</th>
<th>Delete</th>
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</thead>
<tbody>
<tr>
<td>1-57330074</td>
<td>MONROE HIGH SCHOOL-HVAC RENOVATION</td>
<td>10/6/2021</td>
<td></td>
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<tr>
<td>1-57343089</td>
<td>PORTER RIDGE MIDDLE-ROOF REPLACEMENT</td>
<td>10/8/2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-57348008</td>
<td>PIEDMONT HIGH SCHOOL ATHLETICS IMPROVEMENTS</td>
<td>10/6/2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-57000012</td>
<td>FHH &amp; PRO WASTEWATER SYSTEMS UPGRADE</td>
<td>7/8/2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-57000010A</td>
<td>ANTIQUO &amp; KENSINGTON CHILLER REPLACEMENTS 2-57000018</td>
<td>7/8/2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-57346037</td>
<td>PARKWOOD MIDDLE SCHOOL-HVAC REPLACEMENT</td>
<td>10/6/2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-57348011</td>
<td>PIEDMONT HIGH SCHOOL-ROOF REPLACEMENT</td>
<td>10/8/2021</td>
<td></td>
<td></td>
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<tr>
<td>2-57366039</td>
<td>CATA-ATHLETICS RENOVATION</td>
<td>6/30/2022</td>
<td></td>
<td></td>
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<tr>
<td>2-57366015</td>
<td>CATA-ROOF REPLACEMENT 1.24</td>
<td>1/7/2022</td>
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<tr>
<td>2-57384040</td>
<td>WESTERN UNION-HVAC RENOVATIONS</td>
<td>7/8/2022</td>
<td></td>
<td></td>
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<tr>
<td>9-57096022</td>
<td>TRANSPORTATION CENTER</td>
<td>7/10/2019</td>
<td></td>
<td></td>
</tr>
<tr>
<td>test</td>
<td>test</td>
<td>4/17/2023</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Seeing All Projects For Your Individual Log in

Click on “Show Inbox for (your name)”

On this screen you can edit or delete any of the projects shown.
HUBSCO+ Navigation

Hover over tabs:
- Administration
- Projects
- Report

- System Administrators have additional options:
  - System Administration
  - No Quarterly Projects Submittal

- Users can search or add public entity and send email

- Administration Tab

- Projects
  - Main Page
  - Project Inbox
  - Search for Projects
  - Informal Project - Add New
  - Formal Project - Add New
  - No Quarterly Projects Submittal

- Reports
  - Report - Annual/Quarterly Totals
  - Report - Total Construction Dollars Per Construction Method
  - Report - Total Construction Dollars Per Type of Work
HUBSCO+ Administration
System Administrator Screens

• Hover over "Administration" on home screen:
  • Select Public Entity for basic entity information and contacts.
  • Security will allow changes to be made to who has access to HUBSCO+ for your public entity.
Editing Public Entity Information

- Change basic information about public entity
- Update primary contact
- Update responsible official

**Required Fields**
- Public Entity Name
- Type of Public Entity
- Address
- City, State
- Main Phone Number
- Primary Contact Name
- Primary Contact Title
- Primary Contact Title
- Phone Number
- Email
- Official Contact Title
Editing Public Entity Information

Minority Business Outreach Plan and Verifiable Percent Goal Information

Note: Information under the Verifiable Percent Goal by Category sub-category is not required.

Note: A new Microsoft Form for Public Entity information will soon be available for entities that do not ALREADY have an account.
Click Security for List of Users

- Can **Add** new users
- Can **Edit** Existing Users
- Can **Delete** Existing Users

- Edit and Add screens are the same, Add is just blank.

- Password is **not** visible.

- Security: Choose between **Public Entity User** and **Public Entity System Administrator**
No Projects to Report?

• When a Public Entity does not have any completed projects within a particular quarter, the Entity needs to submit a “No Quarterly Projects Submittal” form in the system.

• Only accessible by users with “Public Entity System Administrator” security access.

• Hover over the "Projects" tab and select "No Projects Quarterly Submittal".

• In the No Quarterly Projects Submittal page click the **No Projects This Fiscal Quarter** button at the bottom of the page.

  - Submittal will identify which Fiscal Quarter does not have ANY projects completed.

  - You cannot change the Quarter.

  - Be careful of when you submit No Projects.
HUBSCO+ Flow When Adding Projects

NOTE: Follow this order when adding projects.

Inbox – Add Formal or Informal

Project Main data entry screen

Primary Designer screen

Construction Contract screen

Construction Contract Contacted Directly screen

Construction Contractor screen (Contractor and Subcontractor)

Project View

Finalize Project
Adding Informal Projects
How to Add an Informal Project

• Hover over the "Projects" tab and select "Project Inbox".
• If you click the wrong type of project you can switch project types, but it is best to select the right option from the start.
Project Main Data Entry Screen

Before project details are entered.

After project details are entered and saved.
Project Main Data Entry Screen

**Required Fields:**
- Project Number
- Project Name
- Location of Project
- Total Square Footage
- Original Project Value
- State Funds

**Options:** Save Project, Reset, Cancel, or Change Project Type.

**Construction Method Used Options include:**
- Construction Manager At Risk
- Separate Prime
- Single Prime
- Other
- Alternate Contacting Method
- Design-build Bridging
- Public-private Partnership

![Project Main Data Entry Screen](image_url)
Project Main View

Project "Tabs"
- Project Main
- Designers
- Contracts
- Project View
- Finalize Project

Project Main
- Review Main Project Data
- Edit Project Main Data

Edit Project Here
Designers “Tab”

1. Select "Designer" from the Project tab.

2. Select "Add a New Prime Designer" under the "Designers" tab.

Note: No Prime Designers for Design Build.
**Add Prime Designer Screen**

### Required Fields:
- Prime Designer Name
- Type of Service
- Discipline
- Method of Solicitation
- Original Contract

### Type of Service:
- Architectural
- Construction Manager Agent
- Engineering
- Other Design-Related Service

### Discipline Options:
- Acoustical/Sound
- Architectural
- Asbestos Consultant
- Civil Engineer
- Construction Manager
- Cost Consultant
- Electrical Engineer
- Environmental Engineer
- Food Service
- Landscaping
- Mechanical Engineer
- Museum Consultant
- Parking/Deck
- Plumbing
- Programming/Design
- Radio Tower
- Security
- Site Concepts
- Special Services

![Add Prime Designer Screen](image_url)
Design-Related Services Designers/Consultants

Once Prime Designer is saved you can:

- **Edit**
- **Delete**
- **Add Consultant**

Looks the same as the Add Primary Designer Screen except that the Prime Designer is already listed.
Add a New Construction Contract

1. Select "Contracts" from the Project tab.

2. Select "Add New Construction Contract" under the "Contracts" tab.
Add a New Construction Contract

**Project No.:** 0000000  
**Project Type:** Informal

**Required:**
- Contract Description/ID
- Contract Method of Advertisement
- Contract Date
Construction Contracts Screen

**Actions:**
- Edit Contract
- Go to Contractors Solicited Directly
- Go to Contractors Used
- Delete Contract
How to Add Construction Contactor Solicited Directly

- Select **Contracts** from your projects tab.
- Select **Go To Contractors Solicited Directly** from your actions tab.
- Click Add New Contractor Solicited Directly.
How To Search for Designers/Contractors

Enter your search criteria in the form below and click the "Search" button.

**Note:** If criteria does not apply, leave blank.
How To Add New Contractor Solicited

Select “Add New Contractor Solicited” from the search page under Construction Contractor Solicited Directly option.

Required fields:
- Firm Name
- Address Line 1
- City
- State
- Zip Code
- Primary Type of Work
- Date Contacted
- Was a Quote Received (Option will default to No)

Optional for Formal Projects but encouraged. Required for Informal Projects.
Return to Contracts Tab and select "Go to Contractors Used".

Select "Add New Contractor". You will be returned to the search menu for Designers/Contractors.

Option: Provide at least one option to complete search and click "search" or select "Add New Contractor."

Required fields:
- Firm Name
- City
- State
- Original Contract Value
Construction Contractor Screen

Reason for Out-of-State Selection Options:

---Select---
Better Quality Workmanship
Lowest Bid
Lowest Bid Disqualified
Not Applicable
Other

Primary Type of Work Performed Options:

---Select---
Concrete
Conveying Systems
Doors and Windows
Electrical
Equipment
Finishes
Furnishings
General Construction
Masonry
Mechanical
Metals
Plumbing
Site Construction
Special Construction

Specialties

Thermal and Moisture Protection
Wood and Plastics
# Prime Construction Contractor Options

**Actions:**
- Edit Contractor
- Add Subcontractor

<table>
<thead>
<tr>
<th>Tier</th>
<th>Firm Name</th>
<th>Location and County or Reason for Out-of-State</th>
<th>Primary Type of Work</th>
<th>Ownership Category</th>
<th>Source of Ownership</th>
<th>Contract Dates</th>
<th>Contract Value</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Test Contractor 2</td>
<td>Raleigh, NC Wake Lowest Bid</td>
<td>General Construction</td>
<td>Non-Minority</td>
<td>Not Applicable</td>
<td>Contract: 4/3/2023</td>
<td>Orig: $17,000</td>
<td>Edit Contractor</td>
</tr>
</tbody>
</table>

Add Subcontractor
Add Subcontractor

Required fields:
- Firm Name
- City
- State
- Original Contract Value
- Contract Date

Prime Contractor and Contract Description added by HUBSCO+.

Additional fields very similar to Prime Contractor

Good faith efforts not required for Sub-Contractors.
Multiple **Sub-Contractors** are possible.

**It is possible** to have Subs to Sub-Contractors.

<table>
<thead>
<tr>
<th>Tier</th>
<th>Firm Name</th>
<th>Location and County or Reason for Out-of-State</th>
<th>Primary Type of Work</th>
<th>Ownership Category</th>
<th>Source of Ownership</th>
<th>Contract Dates</th>
<th>Contract Value</th>
<th>Action</th>
</tr>
</thead>
</table>
## Project View – Shows All Data Entered

### Main Project Data

- **Project Number:** 0000000
- **Project Name:** HUBSCO+
- **Project Created By:** Penny Helms
- **Project Created On:** 4/24/2023 4:14:56 PM
- **Notice to Proceed/Project Start Date:** 04/03/2023
- **Project Completion Date:** 04/24/2023
- **Duration of Project:** 21 days
- **Construction Method Used:** Test
- **Location of Project:** Wake
- **Total Square Footage:** 0 sq. ft.
- **Total Linear Footage:** 2000 LF
- **Original Project Value:** $25,000
- **Final Design-Related Services Value:** $0
- **Final Construction Value:** $0
- **Miscellaneous Costs:** $0
- **Final Project Value:** $0
- **Project Includes State Appropriation or State Grant Funds:** No
- **Verifiable Percentage Goal:** 10%

### Design-Related Services Used Data

<table>
<thead>
<tr>
<th>Contract Description/ID</th>
<th>Contract Method of Advertisement</th>
<th>Contract Dates</th>
</tr>
</thead>
</table>
| HUB Office              | Both Published and Electronic    | Contract: 4/3/2023  
                          |                                  | Proceed: 4/5/2023  
                          |                                  | Complete: 4/24/2023 |

### Construction Contract Specific Data

<table>
<thead>
<tr>
<th>Firm Name</th>
<th>Address/Telephone</th>
<th>Ownership Category</th>
<th>Source of Ownership</th>
<th>Primary Type of Work</th>
<th>Date Contacted &amp; Method of Contact</th>
<th>Response Specifications Provided</th>
<th>Amount of Bid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Contractor</td>
<td>123 Contractor Ln</td>
<td>Non-Minority</td>
<td>Not applicable</td>
<td>General Construction</td>
<td>4/3/2023 (Including Fax, E-Mail, and Letter)</td>
<td>Written (Including Fax, E-Mail, and Letter)</td>
<td>$20,000</td>
</tr>
</tbody>
</table>

### Total Number of Construction Contractors Solicited Directly

- 1
### Project View – Shows All Data Entered

#### Construction Contractors Used

<table>
<thead>
<tr>
<th>Tier</th>
<th>Firm Name</th>
<th>Location and County or State</th>
<th>Primary Type of Work</th>
<th>Ownership Category</th>
<th>Source of Ownership</th>
<th>Contract Dates</th>
<th>Contract Value</th>
<th>% Of HUB Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Test Contractor 1</td>
<td>Raleigh, NC Wake County Lowest Bid</td>
<td>General Construction</td>
<td>Non-Minority</td>
<td>Not Applicable</td>
<td>Contract: 4/3/2023</td>
<td>Orig: $17,000</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

**Total Contract HUB Participation**

|                  | $0 | 0.0% |

#### Construction Sub-Contractors Used

<table>
<thead>
<tr>
<th>Tier</th>
<th>Firm Name</th>
<th>Location and County or State</th>
<th>Primary Type of Work</th>
<th>Ownership Category</th>
<th>Source of Ownership</th>
<th>Contract Dates</th>
<th>Contract Value</th>
<th>% Of HUB Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Test Contractor 2</td>
<td>Greensboro, NC Guilford County Better Quality Workmanship</td>
<td>Electrical</td>
<td>Non-Minority</td>
<td>Not Applicable</td>
<td>Contract: 4/10/2023</td>
<td>Orig: $10,000</td>
<td>0.0%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Proceed: 4/12/2023 Complete: 4/24/2023</td>
<td>Final: $0</td>
<td></td>
</tr>
</tbody>
</table>

**Total Contract HUB Participation**

|                  | $0 | 0.0% |

#### Historically Underutilized Businesses Participation and Contract Values

<table>
<thead>
<tr>
<th></th>
<th>B</th>
<th>HA</th>
<th>AA</th>
<th>AI</th>
<th>WF</th>
<th>SE</th>
<th>D</th>
<th>Total HUB</th>
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</thead>
<tbody>
<tr>
<td>Design Related</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
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<td>Construction</td>
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<tr>
<td>Project Totals</td>
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<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>

**Total HUB**

|                                | $0  | 0.0% |

Key: B=Black HA=Hispanic AA=Asian American AI=American Indian WF=White Female SE=Socially and Economically Disadvantaged D=Disabled
Any **errors** detected will be displayed with:

- Page where error was found
- Field where the error was found
- What the error was

These fields will be **required** to finalize the project.

Final Project Value Calculated by HUBSCO+.

Errors **must be corrected before** being able to finalize the project (this may include filling out non-required fields)
Finalizing the Project

To finalize project, select "Finalize Project" from the project tab associated with the project selected from your Inbox.

A project review will appear including all previously entered data.

If information appears correct, please select the "Finalize Project" option at the bottom of the page.

NOTE: Keep your documentation for 3 years.
Finalizing the Project

### Construction Contracts Data

<table>
<thead>
<tr>
<th>Contract Description/ID</th>
<th>Contract Method of Advertisement</th>
<th>Contract Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>HUB Office</td>
<td>Both Published and Electronic</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Completed: 4/24/2023</td>
<td></td>
</tr>
</tbody>
</table>

### Construction Sub-Contractors Used

<table>
<thead>
<tr>
<th>Tier Firm Name</th>
<th>Location and County or Reason for Out-of-State</th>
<th>Primary Type of Work</th>
<th>Ownership Category</th>
<th>Source of Ownership</th>
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<tbody>
<tr>
<td>Test Contractor 1</td>
<td>Raleigh, NC Wake County Lowest Bid</td>
<td>General Construction</td>
<td>Non-Minority</td>
<td>Not Applicable</td>
<td>Completed: 4/24/2023</td>
<td>$17,000</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

**Total Contract HUB Participation**

- **Test Contractor 2**
  - Location and County or Reason for Out-of-State: Greensboro, NC Guilford County Better Quality Workmanship
  - Primary Type of Work: Electrical
  - Ownership Category: Non-Minority
  - Source of Ownership: Not Applicable
  - Contract Dates: Completed: 4/24/2023
  - Contract Value: $0
  - % Of HUB Participation: 0.0%

**Total Contract HUB Participation**

- **Test Contractor 1**
  - Location and County or Reason for Out-of-State: Raleigh, NC Wake County Lowest Bid
  - Primary Type of Work: General Construction
  - Ownership Category: Non-Minority
  - Source of Ownership: Not Applicable
  - Contract Dates: Completed: 4/24/2023
  - Contract Value: $17,000
  - % Of HUB Participation: 0.0%

### Historically Underutilized Businesses Participation and Contract Values

<table>
<thead>
<tr>
<th>Total Contracts</th>
<th>B</th>
<th>HA</th>
<th>AA</th>
<th>AI</th>
<th>WF</th>
<th>SE</th>
<th>D</th>
<th>Total Hub</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design Related</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
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<tr>
<td>Construction</td>
<td>$17,000</td>
<td>$0</td>
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<td>$0</td>
<td>$0</td>
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</tr>
<tr>
<td>Project Totals</td>
<td>$17,000</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>

Key: B = Black, HA = Hispanic, AA = Asian-American, AI = American Indian, WF = White, SE = Socially and Economically Disadvantaged, D = Disabled
Once "Finalize Project" is selected, the submission screen will read "The Project Data was successfully submitted".

Once "Finalize Project" is selected, you cannot return to the project to complete any edits.

Please remember to take a screenshot or snippet of the submission screen for your records.
Reporting
Reporting in HUBSCO+

Fiscal Year:
- Enter the ending year of the Fiscal Year for the report (For FY 22-23 enter 2023)

There are three reports that HUBSCO+ can generate:

<table>
<thead>
<tr>
<th>Report</th>
<th>Construction Methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report - Annual/Quarterly Totals</td>
<td>Official (Federal)</td>
</tr>
<tr>
<td>Report - Total Construction Dollars Per Construction Method</td>
<td>Official (State); Official (Federal)</td>
</tr>
<tr>
<td>Report - Total Construction Dollars Per Type of Work</td>
<td>Official (State); Official (Federal)</td>
</tr>
</tbody>
</table>
Reporting in HUBSCO+

Select a **Public Entity** from the drop down menu or a Project type from its drop-down menu and click "Create".

This data table will appear after selecting your criteria and clicking the **create** function.
Select a **Public Entity** from the drop-down menu or a Project Type from its drop-down menu and click "Create".

The **Prime Contractor** and additional related Contractors appear by **Tier (1, 2, 3, etc.)** after selecting your criteria and clicking the **create** function.

**Prime Contractor Data Table**

**1st Tier Sub-Contractor Data Table**
Links & Forms

HUBSCO+ Login

HUBSCO+ Access Request Form

HUB Annual and Detailed Reports
Office for Historically Underutilized Businesses

984-236-0130
doa.hub.construction@doa.nc.gov