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

- How to Login to HUBSCO+
- Navigating through HUBSCO+
- Add a **Formal** Project(s)
- Run Quarterly Reports

NOTE: Use Chrome to gain access to all functions in HUBSCO+
HUBSCO+ Login

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.

---

**Formal 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>1-973300074</td>
<td>MONROE HIGH SCHOOL-HAC RENOVATION</td>
<td>10/15/2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-973450018</td>
<td>PORTER RIDGE MIDDLE-ROOF REPLACEMENT</td>
<td>10/15/2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-973460008</td>
<td>PIEDMONT HIGH SCHOOL-ATHLETICS IMPROVEMENTS</td>
<td>10/15/2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-97000012</td>
<td>FH1 &amp; FH2 WASTEWATER SYSTEMS UPGRADE</td>
<td>7/18/2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-97000016A</td>
<td>ANTIQUE &amp; KENSINGTON CHILLER REPLACEMENTS 2-97000016</td>
<td>7/18/2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-972460037</td>
<td>PARKWOOD MIDDLE SCHOOL-ROOF REPLACEMENT</td>
<td>10/15/2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-97340011</td>
<td>PIEDMONT HIGH SCHOOL-ROOF REPLACEMENT</td>
<td>10/15/2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-97360009</td>
<td>CATA-ATHLETICS RENOVATION</td>
<td>6/30/2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-97360016</td>
<td>CATA-ROOF REPLACEMENT 1.24</td>
<td>1/7/2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-97360014</td>
<td>WESTERN UNION-HAC RENOVATIONS</td>
<td>7/18/2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9-970000022</td>
<td>TRANSPORTATION CENTER</td>
<td>7/18/2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Test</td>
<td>Test</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Test</td>
<td>HUBSCO+ Testing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Test</td>
<td>HUBSCO+ Testing</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Seeing All Projects For Your Individual Log in

Click on “Show Inbox for (your name)”

<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>1-97295092</td>
<td>TECHNOLOGY-ROOF REPLACEMENT</td>
<td>1/6/2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-97316090</td>
<td>FOREST HILLS HIGH SCHOOL-ROOF REPLACEMENT</td>
<td>1/6/2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-97318073</td>
<td>HEMBY BRIDGE ELEM HVAC RENOVATION</td>
<td>10/6/2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-97336018</td>
<td>MONROE HIGH SCHOOL-MEDIA SKYLIGHT</td>
<td>10/6/2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-97318027</td>
<td>HEMBY BRIDGE ELEMENTARY-KITCHEN WASTE</td>
<td>10/6/2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Package 34</td>
<td>Fairview &amp; East Elementary School's Storm Drainage</td>
<td>4/7/2004</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SV Tech</td>
<td>Sun Valley High School Technology Update</td>
<td>4/7/2004</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SV/PD MS Cooler</td>
<td>Sun Valley/Piedmont Middle School Freezer/Cooler Replacement</td>
<td>4/7/2004</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Hover over tabs:
- Administration
- Projects
- Report

Users can search or add public entity and send email

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

- Report – Annual/Quarterly Totals
- Report – Total Construction Dollars Per Construction Method
- Report – Total Construction Dollars Per Type of Work
System Administrator Screens

- Hover over "Administration" on home screen:
  - Select Public Entity
  - 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
- 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**
Adding Formal Projects
Inbox – Add Formal or Informal

Primary Designer screen

Construction Contract screen

Construction Contract Contacted Directly screen

Construction Contractor screen (Contractor and Subcontractor)

Project View

Finalize Project

NOTE: Follow this order when adding projects.
HUBSCO+ Main Menu

- Main Menu view will display all projects in your Entity.
- View all projects (Informal and Formal).
How to Add a Formal Project

- In the **Project Inbox**, select Add Formal.
How to Add a Formal Project

- Project Type: FORMAL.

- Use the drop-down menu to select Construction Method Used and Location of Project.

Required fields include: Project Number, Project Name, Location of Project, Total Square Footage, Original Project Value and State Funds option.
## How to Add a Formal Project

### SUCCESS!!

After saving the project, the next page will allow Designer Search, Contracts, Project View and Finalize Project.

Next step: Search and or add Designer.

### NOTE: Edits to project information can be made on this page.
Searching and Adding Designer to Formal Projects
How to Search/Add Designer to Formal Projects

Click the **Designers** tab.

After clicking the **Designers** tab, a new window will appear.
How to Search/Add Designer to Formal Projects

Select Add New Prime Designer.

NOTE: Do not add any Prime Designers when the Construction Method Used is 'Design Build'.

After selecting Add New Prime Designer, a new window will appear.

To search or add new designer, after completing the form click Search or Add Designer.

NOTE: If any criteria do not apply, leave that item blank.
How to Search/Add Designer to Formal Projects

If the Designer is in HUBSCO+, the designer’s information will automatically populate.

Note: If any criteria do not apply, simply leave item blank.

Click Search.

If No Designer Found, select Add New Designer.
How to Search/Add Designer to Formal Projects

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

Discipline
- Acoustical Sound
- Architectural
- Asbestos Consultant
- Civil Engineer
- Construction Manager
- Cost Consultant
- Electrical Engineer
- Food Service
- Landscaping
- Mechanical Engineer
- Parking/Deck
- Plumbing
- Programming/Design
- Radio Tower
- Security
- Site Concepts
- Special Services
- Sprinkler Consultant
- Structural Consultant
- Theater
- Track Layout Services
- Traffic Engineer

Method of Solicitation
- Both Verbal and Written
- Verbal
- Written (Including Fax, E-Mail, and Letter)
- Other Design-Related Service

Note: Original Contract Value is a required field.

Prime Designer Name: Sarah Smith

Type of Service: Construction Manager Agent

Discipline: Construction Manager

Ownership Category: Non-Minority

Source of Ownership: Not Applicable

Method of Solicitation: Both Verbal and Written

Original Contract Value: $100,000

Final Contract Value: $100,000

Click Save.
How to Search/Add Designer to Formal Projects

SUCCESS!!

After clicking Save, this screen will appear to indicate the Designer was added.

<table>
<thead>
<tr>
<th>Contract Type</th>
<th>Name</th>
<th>Type of Service</th>
<th>Discipline</th>
<th>Ownership Category</th>
<th>Source of Ownership Category</th>
<th>Method of Solicitation</th>
<th>Contract Dates</th>
<th>Contract Value</th>
<th>Action</th>
</tr>
</thead>
</table>
| Designer      | Sarah Smith| Construction Manager Agent | Construction Manager | Non-Minority | Not Applicable          | Both Verbal and Written | Number: 
Start Date: | Orig: $100,000 | Edit
Delete
Add Consultant |
Searching and Adding Construction Contracts to Formal Projects
1. Click **Contracts** tab.

2. New window will open: **Add New Construction Contract**
How to Search/Add Contracts to Formal Projects

Required Fields

- Contract Description
- Contract Method of Advertisement
- Contract Date

After completing the form, click Save.
How to Search/Add Contracts to Formal Projects

SUCCESS!!

After clicking Save, this screen will appear to indicate the Contract was added.

The Action column allows you to:
- edit contracts
- go to contractors solicited directly
- go to contractors used
- delete contracts
How to Add Construction Contractors Solicited Directly

1. Select **Contracts** from projects tab.

2. Select **Go To Contractors Solicited Directly** from actions tab.

3. Click **Add New Contractor Solicited Directly**.
How to Search Contractors Solicited Directly

1. Enter your search criteria in the form below and click the “Search” button.

2. If no contractor solicited is found, select “Add New Contractor Solicited” from the search page under Construction Contractor Solicited Directly option..

Note: If criteria does not apply, leave blank.
Adding Construction Contractors Solicited Directly

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)
Adding Construction Contractors Solicited Directly

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
Prime Construction Contractor Options

After adding Contractor to the project, in the Action column, the options are to Edit Contractor and Add Subcontractor.

Click Add Subcontractor.
Adding Subcontractors

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.
SUCCESS!!

After clicking Save, this screen will appear to indicate the Subcontractor was added.

Adding Subcontractors

Project No.: Test
Project Type: Formal

Project Name: HUBSCO+ Testing

<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 for Formal Projects
After Adding Project, Adding Designer and Contract, next topic Project View.
The **Project View** screen displays all the information entered in the system. If there are any corrections after reviewing the **Project View** page, click the corresponding tab that needs updating. Remember to Save all edits.
Finalizing Formal Projects
Note: If there are any error(s), including missing information, the system will display an alert with the error(s). The error(s) will need to be corrected before finalizing the project. The error screen will display where the error(s) occur, the field with the error(s), field value (if applicable) and the exact error(s). Simply click on the noted error and the system will go directly to the error.

### Noted Errors

<table>
<thead>
<tr>
<th>Error Page</th>
<th>Field</th>
<th>Field Value</th>
<th>Error</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Project Page</td>
<td>Final Construction Value</td>
<td>$0</td>
<td>This field must be greater than $0 for Project Finalization</td>
</tr>
<tr>
<td>Construction Contracts: HUBSCO+ Testing</td>
<td>Bid Opening Date</td>
<td></td>
<td>This field is required for Project Finalization</td>
</tr>
<tr>
<td></td>
<td>Notice to Proceed / Contract Start Date</td>
<td></td>
<td>This field is required for Project Finalization</td>
</tr>
<tr>
<td>Construction Contracts: HUBSCO+ Testing</td>
<td>Contract Completion Date</td>
<td></td>
<td>This field is required for Project Finalization</td>
</tr>
<tr>
<td>Construction Contractors for Contract: HUBSCO+ Testing</td>
<td>N/A</td>
<td></td>
<td>The Primary Construction Contractor must be entered for each Construction Contract</td>
</tr>
<tr>
<td>Construction Contracts: HUBSCO+TESTING</td>
<td>Bid Opening Date</td>
<td>N/A</td>
<td>This field is required for Project Finalization</td>
</tr>
<tr>
<td></td>
<td>Notice to Proceed / Contract Start Date</td>
<td></td>
<td>This field is required for Project Finalization</td>
</tr>
<tr>
<td>Construction Contracts: HUBSCO+TESTING</td>
<td>Contract Completion Date</td>
<td>N/A</td>
<td>This field is required for Project Finalization</td>
</tr>
<tr>
<td>Construction Contractors for Contract: HUBSCO+TESTING</td>
<td>N/A</td>
<td></td>
<td>The Primary Construction Contractor must be entered for each Construction Contract</td>
</tr>
</tbody>
</table>
Finalizing Formal Projects

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 Formal Projects

On the Finalize Project page, review all information.

After reviewing information, Click Finalize Project.

Note: After selecting Finalize Project, there is no option to return to edit the project.
Congratulations! Formal Project was successfully submitted.

SUCCESS!!

Note: Take a screenshot or snippet of the submission screen for your records.

Documentation of the public entity’s efforts to comply with G.S. 143-131(b), recruitment of minority business participation must be maintained at your site and made readily available to HUB for auditing and compliance reviews for a minimum period of 3 years and shall include, but is not limited to the following:

A. Copies of solicitations and/or telephone logs used to solicit quotes to minority business firms available on State, local government, or other organization maintained lists. Each solicitation shall contain a specific description of the work to be performed, location where bid documents or specifications can be reviewed, representative of the public entity (Owner) to contact, and location, date and time when quotes must be received.
B. Copies of quotes or responses received from each firm responding to the solicitation.
C. A telephone log of follow-up calls to each firm sent a solicitation, if applicable.
D. Documentation of any contacts or correspondence to minority business, community, or contractor organizations in an attempt to solicit minority business firms.
E. Any additional documentation which supports efforts to comply with G.S. 143-131(b).
Reporting
If no projects were finalized in a quarter, use the **No Quarterly Projects Submittal**:  
1. Select Projects  
2. Select **No Quarterly Projects Submittal**  
   
This window will pop up.  

Click “**No Project This Fiscal Quarter**”.
From the **Reports** tab, there are three options:

- Annual/Quarterly Totals
- Total Construction Dollars Per Construction Method
- Total Construction Dollars Per Type of Work
Reporting in HUBSCO+

Annual Quarterly Totals:
• Quarter Select: All
• Fiscal Year:
• Contract Type: Select between Construction or Design
• Type of Project: Formal

After completing the form: click Create.
Reporting in HUBSCO+

View of Annual Quarterly Report for Construction and Design

Construction Quarterly Report

Design Quarterly Report

Note: This window allows the creation of an Excel Spreadsheet.
### Total Construction Dollars Per Construction Method

**HUBSCO PLUS Train**

**Inbox**

**Report - Annual/Quarterly Totals**

**Report - Total Construction Dollars Per Construction Method**

**Report - Total Construction Dollars Per Type of Work**

<table>
<thead>
<tr>
<th>Informal Projects</th>
<th>Add Informal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Number</strong></td>
<td><strong>Project Name</strong></td>
</tr>
<tr>
<td>0000001</td>
<td>HUBSCO+ Project 2</td>
</tr>
<tr>
<td>1-97285092</td>
<td>TECHNOLOGY-ROOF REPLACEMENT</td>
</tr>
<tr>
<td>1-97316090</td>
<td>FOREST HILLS HIGH SCHOOL-ROOF REPLACEMENT</td>
</tr>
<tr>
<td>1-97318073</td>
<td>HEMBY BRIDGE ELEM HVAC RENOVATION</td>
</tr>
<tr>
<td>1-97336018</td>
<td>MONROE HIGH SCHOOL-MEDIA SKYLIGHT</td>
</tr>
<tr>
<td>2-97318027</td>
<td>HEMBY BRIDGE ELEMENTARY-KITCHEN WASTE</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Formal Projects</th>
<th>Add Formal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Number</strong></td>
<td><strong>Project Name</strong></td>
</tr>
<tr>
<td>1-97336074</td>
<td>MONROE HIGH SCHOOL-HVAC RENOVATION</td>
</tr>
<tr>
<td>1-97343089</td>
<td>PORTER RIDGE MIDD I-ROOF REPLACEMENT</td>
</tr>
</tbody>
</table>
Total Construction Dollars Per Construction Method

- Select Project Type: **Both**
- Enter dates desired
- Leave the Date fields empty if you want to see ALL data regardless of fiscal year

Click **Create**.

The Report window will open.
Reporting in HUBSCO+

Total Construction Dollars Per Type of Work
Reporting in HUBSCO+

Total Construction Dollars Per Type of Work

- Select Project Type: Both
- Enter dates desired,
- Leave the Date fields empty if you want to see ALL data regardless of fiscal year

Click Create.

The report window will open.
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