



**aurigo**

**Aurigo Software Technologies Inc.**

**Consultant Guide**

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## 1 Getting Started

Masterworks allows to view bimonthly solicitations published to you, raise queries about the solicitations , receive appropriate clarifications for your queries, and express your interest in a solicitation by responding to Notice of Interest (NOI) questionnaire.

### 1.1 Logging on to Masterworks

1. Open a Web browser.
2. In the address bar, type <https://wisdot.masterworkslive.com/Modules/USRMGMT/Login.aspx>, and then press Enter on the keyboard.  
The **Masterworks Login** page is displayed.
3. Enter the following details:
  - Email - type the registered email address of the user.
  - Password - type the password.

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**Note:** *The password is case sensitive.*

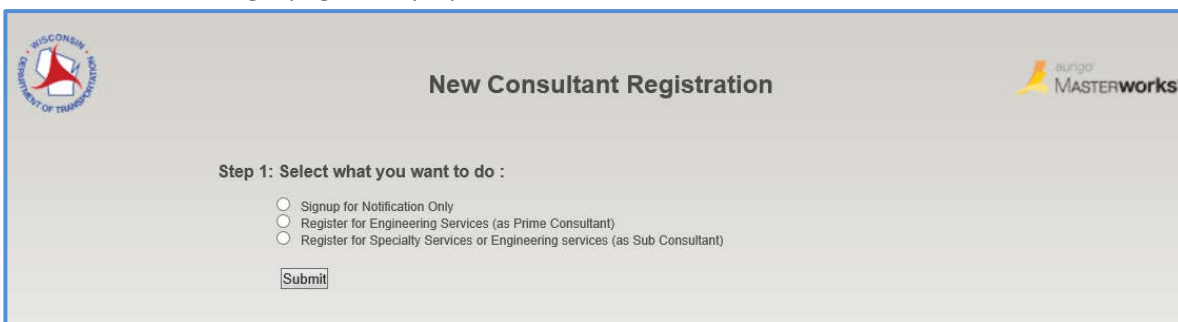
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4. Click **Login**.  
Or  
Press Enter on the keyboard.  
The Masterworks home page is displayed.

### 1.2 Registering a New Consultant Firm

If you are a new consultant firm and do not have a Masterworks account to login to the application, register yourself to request access to the Masterworks portal. The System Administrator creates a user account for you and provides you with your login details to access Masterworks.

1. Open a Web browser.
2. In the address bar, type the below URL.  
<https://wisdot.masterworkslive.com/Modules/MWISDOT/ConsultantRegistration.aspx>
3. Press **ENTER**.  
The Masterworks Login page is displayed.



4. Select one of the following options:
  - **Signup for Notification Only:** Click this to register the consultant firm to receive only Bimonthly Solicitation notifications.
  - **Register for Engineering Services (as Prime Consultant):** Click this to register as Prime Consultant firm.

- **Register for Specialty Services or Engineering services (as Sub Consultant):** Click this to register as sub consultant firm for specialized services.

Once an option is selected, step 2 is displayed.

5. Enter information in the fields displayed in step 2. The fields displayed in step 2 is based on the option selected. The fields are described below:

- When the **Signup for Notification Only** option is selected, in Step 2, in the **Firm Name** field that is displayed, enter the firm name.

Step 2 : Fill below information to receive notification :

Firm Name :  \*

Title	First Name	Last Name	Telephone	Email
No records to display.				

To add details of the firm to receive notification, perform the following steps:

- Click **Add**. A dialog box appears.

Title

First Name

Last Name

Telephone

Email

- Enter information in the required fields. The fields are described in the below table.

**Note:** All fields described in the below table are mandatory fields.

Item	Description
<b>Title</b>	Enter the title of the consultant firm.
<b>First Name</b>	Enter the first name of the consultant firm.
<b>Last Name</b>	Enter the last name of the consultant firm.
<b>Telephone</b>	Enter the telephone number of the consultant firm.
<b>Email</b>	Enter e-mail ID of the consultant firm.

- Click **Save**.

- When the **Register for Engineering Services (as Prime Consultant)** option is selected, enter information in the fields displayed in step 2. The different fields are described in the following table.

**Step 2 : Fill below information to register for Engineering Services (as Prime Consultant) :**

Firm Name :	<input type="text"/>	*
Title :	<input type="text"/>	*
First Name :	<input type="text"/>	*
Last Name :	<input type="text"/>	*
Telephone :	<input type="text"/>	*
Email:	<input type="text"/>	*
Firm Federal Identification Number :	<input type="text"/>	*
Create your Masterworks User ID :	<input type="text"/>	*

**Note:** All fields described in the below table are mandatory fields.

Item	Description
<b>Firm Name</b>	Enter the prime consultant firm name.
<b>Title</b>	Enter the title of the prime consultant firm.
<b>First Name</b>	Enter the first name of the prime consultant firm.
<b>Last Name</b>	Enter the last name of the prime consultant firm
<b>Telephone</b>	Enter the telephone number of the prime consultant firm.
<b>Email</b>	Enter e-mail ID of the prime consultant firm.
<b>Firm Federal Identification Number</b>	Enter the firm's federal identification number.
<b>Create your Masterworks User ID</b>	Enter the Masterworks User ID to be created for the prime consultant.

- When the **Register for Specialty Services or Engineering services (as Sub Consultant)** option is selected, enter information in the fields displayed in step 2. The different fields are described in the following table.

**Step 2 : Fill below information to register for Specialty Services or Engineering services (as Sub Consultant) :**

Firm Name :	<input type="text"/>	*
Title :	<input type="text"/>	*
First Name :	<input type="text"/>	*
Last Name :	<input type="text"/>	*
Telephone :	<input type="text"/>	*
Email:	<input type="text"/>	*
Firm Federal Identification Number :	<input type="text"/>	*
Create your Masterworks User ID :	<input type="text"/>	*
CFR to be submitted by your firm? :	<input type="text" value="v"/>	*

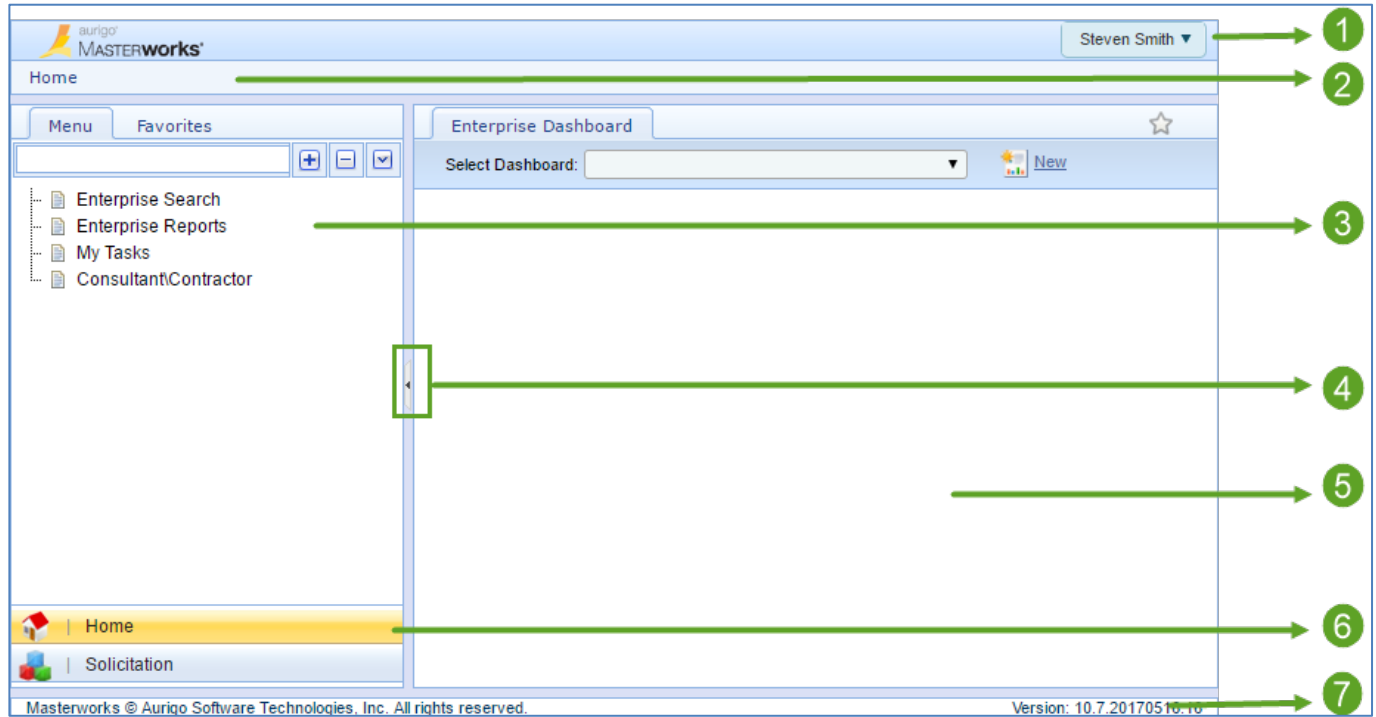
**Note:** All fields described in the below table are mandatory fields.

Item	Description
<b>Firm Name</b>	Enter the firm name of the sub-consultant firm.
<b>Title</b>	Enter the title of the sub-consultant firm.
<b>First Name</b>	Enter the first name of the sub-consultant firm.
<b>Last Name</b>	Enter the last name of the sub-consultant firm.
<b>Telephone</b>	Enter the telephone number of the sub-consultant firm.
<b>Email</b>	Enter e-mail ID of the sub-consultant firm.
<b>Firm Federal Identification Number</b>	Enter the firm's federal identification number.
<b>Create your Masterworks User ID</b>	Enter the Masterworks User ID to be created for the sub-consultant firm.
<b>CFR to be submitted by your firm?</b>	From the drop-down list, select <b>Yes</b> or <b>No</b> to indicate if the Consultant Financial Report (CFR) has to be submitted or not. The Consultant Financial Report can be created by the consultant only if the selected option in this field is <b>Yes</b> .

6. Click **Submit**.

### 1.3 Understanding the User Interface

This section describes the elements of the Masterworks user interface.



The user interface of Masterworks contains various elements that have been described below:

Item	Description
1. User Name, Profile, Help, Logout	Displays your user name. You can view your account profile, access help files, and logout from here.
2. Breadcrumbs	Displays the navigation path to your current page.
3. Left Pane	Navigation tree
4. Toggle button	Buttons to show or hide and resize the panes. Docking the left pane provides more space to view information in the right pane.
5. Right Pane	The work area to view forms and reports, and enter form information.
6. Module Menu	Buttons to access the various modules of Masterworks.
7. Status bar	Displays the copyright and version number of the application.

## 2 Bimonthly Solicitation

The system allows you to express your interest in a solicitation by responding to the Notice of Interest Questionnaire (NOI) of the solicitation associated with current bimonthly solicitation. You can also raise queries regarding the solicitations and receive appropriate answers.

The Bimonthly Solicitations can be viewed in the application or in the public portal.

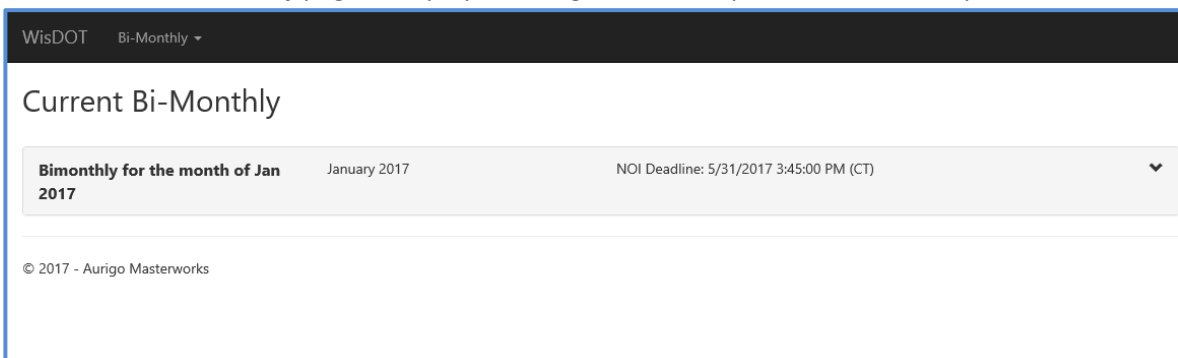
### 2.1 Viewing Bimonthly Solicitation Details on Public Portal

On the public portal, you can also view the current bimonthly solicitations. You can also view solicitations, projects, and tasks associated with the bimonthly solicitation.

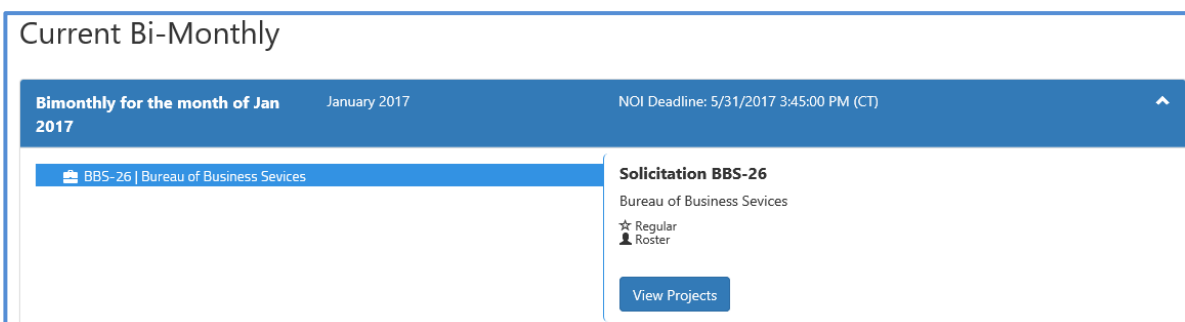
Steps:

1. Open a Web browser.
2. In the address bar, type <https://wisdotprojects.masterworkslive.com/BiMonthlySolicitations>, and then press Enter on the keyboard.

The **WisDOT Bi-Monthly** page is displayed listing the current published bimonthly solicitation.



3. Click the bimonthly solicitation record to view the solicitations associated with the bimonthly solicitation. The solicitations associated with the bimonthly solicitation is displayed.



4. Click **View Projects** to view the projects associated with the solicitation. The scope of service and projects associated with the solicitation are displayed.



**Solicitation BBS-26**  
 Bureau of Business Sevices  
 ☆ Regular  
 👤 Roster

**Scope of Service** ▼

Projects

<b>2905-Pr-01</b>	2905-Pr-01	Bureau of Business Sevices Highway: 123 CITY OF ADAMS	▼
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5. Click **Scope of Service**. The list of scope of service items associated with the solicitation is displayed.

Bureau of Business Sevices  
 ☆ Regular  
 👤 Roster

**Scope of Service** ▲

- Anticipated Construction Cost
- Anticipated Project Start Date
- Anticipated Project End Date
- Purpose And Need
- Project Description
- Basis Of Payment Notification
- Advertised Fixed Fee 25.00
- Fixed Fee Notification
- Redistribution Provision
- Field Rate
- Special Instructions
- Interview
- Interview Information
- Interview Date
- Contact Information

6. Click a project record to view the list of tasks associated with the project.

Projects

<b>2905-Pr-01</b>	2905-Pr-01	Bureau of Business Sevices Highway: 123 CITY OF ADAMS	▲
-------------------	------------	---	---

Expand All Collapse All

In Scope  If Authorized

- LandSurvey
- ENVIRONMENTAL SURVEY

7. Click **Expand All** to expand all the task folders to view individual tasks or expand only a selected task folder to view tasks of a selected container.

8. Click an individual task to enter notes, if any about the task.

The screenshot shows a software interface titled 'Projects'. At the top, there is a header bar with project information: '2905-Pr-01', '2905-Pr-01', and 'Bureau of Business Services Highway: 123 CITY OF ADAMS'. Below the header, there are controls for 'Expand All' and 'Collapse All'. A filter section includes 'In Scope' and 'If Authorized'. A tree view on the left shows a hierarchy: 'LandSurvey' (with sub-items 'Land Measurement' and 'SoilTesting'), 'Mining' (highlighted), and 'ENVIRONMENTAL SURVEY' (with sub-item 'Agricultural soil surveys indicating soil erodiability'). On the right, a 'Mining' section contains a 'Test' label and a 'Notes' text area.

## 2.2 Questions and Responses

The system allows you to submit questions against the Bimonthly solicitation. The questions have to be submitted before the expiry of the last date of question submission, which is defined in Bimonthly Solicitation Details page. WisDOT will publish relevant answers to the questions submitted.

To raise questions regarding the Bimonthly Solicitation, perform the following steps:

**Prerequisite:** The last date of question submission has not expired.

1. In the module menu, click **Solicitation**.  
The **Bimonthly Solicitation List** page is displayed.

The screenshot shows the 'Bimonthly Solicitation List' page. On the left is a navigation pane with a tree view containing items like 'Bimonthly Solicitation List', 'Negotiation', 'Negotiation Notes', 'Consultant Estimate List', 'Non Formal', 'Non Formal Estimate List', 'Local Design', 'Small Purchase', and 'Sole Source'. The main area features a toolbar with buttons for 'View', 'Status', 'History', 'Help', 'Select Actions', 'Customize List', 'Excel Import / Export', 'Manage', 'Add', 'Clear', and 'Filters'. Below the toolbar is a table with the following data:

	Bimonthly Solicitation Month and Year	Is Current	Workflow Sta
<input type="checkbox"/>	December 2057	Yes	Published
<input type="checkbox"/>	February 2021		Published
<input type="checkbox"/>	January 2021		Published

2. Select the **Bimonthly Solicitation** record, which is in 'Published' status, and then click **View**.  
The **Bimonthly Solicitation Details** page is displayed.
3. In the navigation pane, expand the selected **Bimonthly Solicitation** record, and then click **Questions and Responses**.  
The **Questions and Responses** page is displayed

	Question ID	Question	Response
<input type="checkbox"/>	QR-5		
<input type="checkbox"/>	QR-4	Can the Last Date be e	
<input type="checkbox"/>	QR-3	Is this really I am typing	yes it is you
<input type="checkbox"/>	QR-1	Can the fixed fee be re	not possible

4. Click **New**.  
The **Ask the Question** page is displayed.

Ask the Question

Save Cancel Submit

Bimonthly Solicitation : December 2057      Solicitation : \*  ...

Query By : Steven Smith      Query Date : 05/25/2017

Consultant : RMZ Group

**Projects**

Project ID	Project Description	Bimonthly Title	Solicitation ID
No records to display.			

Add Delete

Question :

Response :

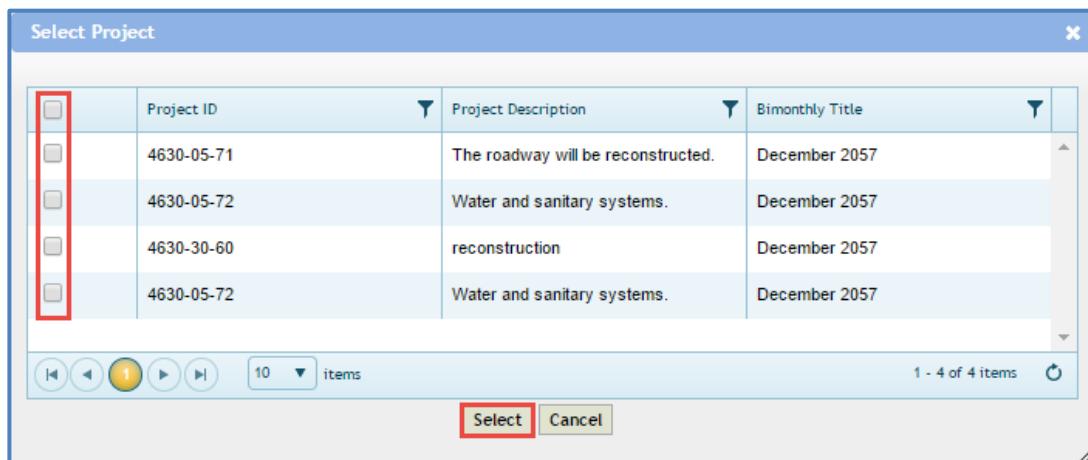
The values in the **Bimonthly Solicitation**, **Query By**, **Consultant**, **Query Date** fields are auto-populated.

5. In the **Solicitation** field, perform the following steps to select solicitations for which the question is raised:
  - a. Click .  
The **Select Solicitation** dialog box is displayed listing the solicitations that are associated with the Bimonthly Solicitation.
  - b. Select the solicitations for which the question is raised and then click **Select**.
6. In the **Projects** section, perform the following steps to add projects for which the question is raised:

- a. Click **Add**. The **Select Project** dialog box is displayed listing all the projects that are associated with the solicitation.



- b. Select the required projects, and then click **Select**.



The selected projects are added to the **Projects** grid. The values in the **Project Description**, **Bimonthly Title**, and **Solicitation ID** columns are auto-populated.

- 7. Enter information in the required fields. The fields are described in the following table.

*Note: All the fields described in the below table are non-mandatory fields.*

Field	Description
<div style="border: 1px solid gray; padding: 5px;"> <p>Question : <input style="width: 100%; height: 20px;" type="text"/></p> <p>Response : <input style="width: 100%; height: 20px;" type="text"/></p> <p>Notes : <input style="width: 100%; height: 20px;" type="text"/></p> </div>	
<b>Question</b>	Enter the question.
<b>Response</b>	The response for the question is auto-populated in this field when it is published by WisDOT.

Field	Description
<b>Notes</b>	This section will be enabled for Wisdot User. Enter any notes about the question.

8. In the **Attachments** section, upload relevant images and files. For information on form attachments, refer [Attachments](#).
9. Click **Save**. The **Questions and Responses** record is in the **Draft** workflow status.
10. Select the **Questions and Responses** record and in the **Workflow** group, click **Select Actions**.
11. Click **Submit**. The **WisDOT Masterworks Staging** dialog box is displayed. Enter required information and then click **OK**. The question is submitted to WisDOT.
12. Optionally, in the **Workflow** group click **Re-Draft** and enter required information in the dialog box that is displayed, and then click **OK** to redraft the record.

### 3 Notice of Interest (NOI) Questionnaire

The system allows you to view the solicitation details and express your interest in the solicitation by submitting the duly filled-in NOI questionnaire to WisDOT.

#### 3.1 Viewing the Solicitation Details

The system allows you to view the solicitation details such as projects associated with the solicitation, scope of service, and tasks associated with the solicitation.

The procedure to view the solicitation details is described.

1. In the module menu, click **Solicitation**.
2. In the navigation pane, click **Bimonthly Solicitation List**.  
The **Bimonthly Solicitation List** page is displayed.

	Bimonthly Solicitation Month and Year	Is Current	Workflow Status
<input type="checkbox"/>	December 2057	Yes	Published
<input type="checkbox"/>	February 2021		Published
<input type="checkbox"/>	January 2021		Published
<input type="checkbox"/>	January 2022		Published

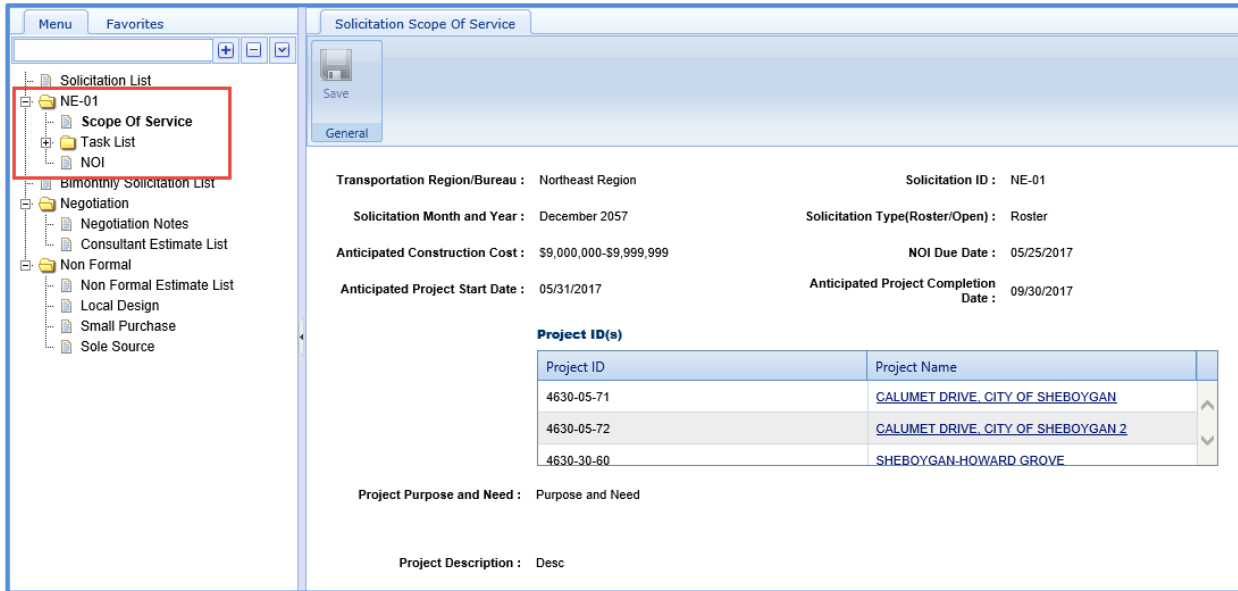
3. Select the required Bimonthly Solicitation record, and then click **View**.  
The selected **Bimonthly Solicitation Details** page is displayed.

Solicitation ID	Solicitation Type	Solicitation Month and Year	Solicitation Due Date	Region/Bureau	NOI Type	Roster/Open
NE-01	Regular	December 2057		Northeast Region	Bimonthly	Roster
NE-03	Regular	December 2057	05/17/2017	Northeast Region	Bimonthly	Roster

4. In the **Solicitation details** section, click the **Solicitation ID** link of which you want to view the solicitation details.

The **Solicitation** details page is displayed.

- In the navigation pane, expand the solicitation folder, and click **Scope of Service** to view the solicitation scope of service or click **Task List** to view the solicitation task details.



### 3.2 Submitting the Notice of Interest Questionnaire

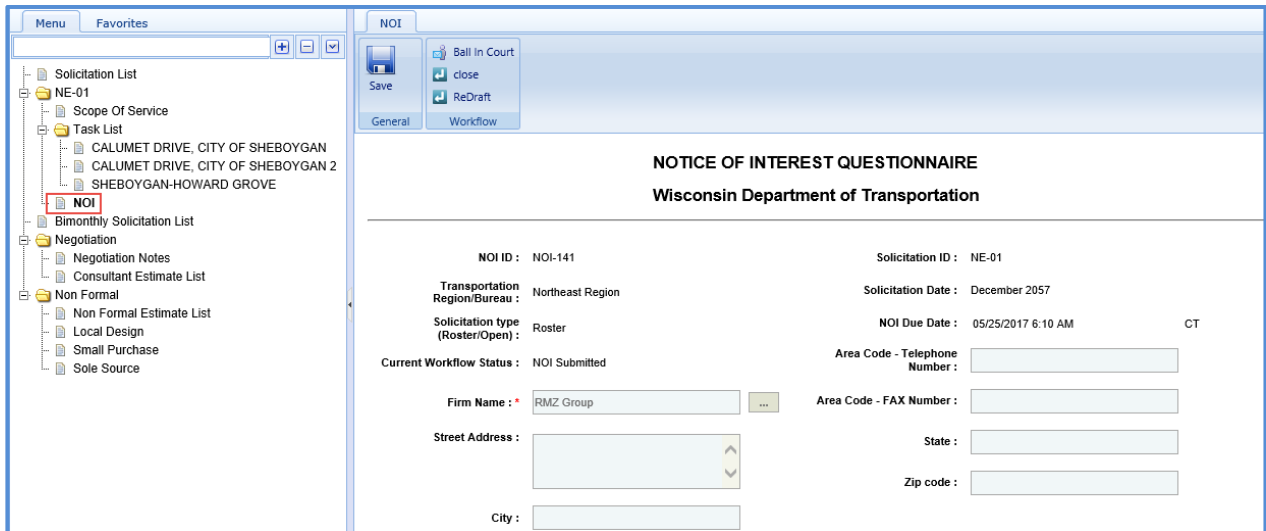
The system allows you to duly fill in the NOI questionnaire and submit to WisDOT.

- In the module menu, click **Solicitation**.  
The **Bimonthly Solicitation List** page is displayed.
- Select the required **Bimonthly Solicitation** record, which is in Marked as “Is Current”, and then click **View**.  
The selected **Bimonthly Solicitation Details** page is displayed.



- In the **Solicitation details** section, click the **Solicitation ID** link for which you want to submit the NOI. The **Solicitation** details page is displayed.

- In the navigation pane, expand the solicitation folder, and click **NOI**. The **NOI** page is displayed.



**Note:** The values in the **NOI ID**, **Solicitation ID**, **Transportation Region/Bureau**, **Solicitation Date**, **Solicitation type (Roster/Open)**, **NOI Due Date**, **Current Workflow Status**, and **Firm Name** fields are auto-populated.

- Enter information in the required fields. The fields are described in the following table.

**Note:** All the fields described in the below table are non-mandatory fields.

Field	Description
<b>Street Address</b>	Enter the street address of the consultant or click
<b>City</b>	Enter the city of the consultant.
<b>Area Code - Telephone Number</b>	Enter the telephone number with the area code of the consultant.
<b>Area Code - FAX Number</b>	Enter the fax number with the area code of the consultant.
<b>State</b>	Enter the state of the consultant.
<b>Zip code</b>	Enter the zip code of the consultant location.



6. For factor 1, perform the following steps to add key staff details:

a. Click **Add**.

1. List credentials, qualifications and years experience for the project manager and other key staff you would assign to this project in the following table. If showing more than two individuals, add tables using format provided. Key subconsultants may be listed. Be sure to clearly identify the subconsulting firm.


Key Staff	Firm	State	City	Position/Project Role	Years Experience	Education	Registration (PE, RLS, etc.)	Narrative	
No records to display.									

**Add** **Edit** **Delete**

The **New** dialog box is displayed.

b. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description										
<div style="border: 1px solid #ccc; padding: 10px;"> <div style="background-color: #e6f2ff; padding: 5px; margin-bottom: 10px;">New</div> <p><b>Key Staff *</b> <input type="text"/> <span style="float: right;">...</span></p> <p><b>Firm</b> <input type="text"/></p> <p><b>State</b> <input type="text" value="▼"/></p> <p><b>City</b> <input type="text" value="▼"/></p> <p><b>Position/Project Role *</b> <input type="text" value="▼"/></p> <p><b>Years Experience</b> <input type="text" value="0.00"/></p> <p><b>Education</b> <input type="text"/></p> <p><b>Registration (PE, RLS, etc.)</b> <input type="text"/></p> <p><b>Narrative</b> <input style="height: 40px;" type="text"/></p> <p><b>Current Commitments</b> <input style="height: 40px;" type="text"/></p> <p><b>Current Estimated Availability by Time Period</b> <input style="height: 40px;" type="text"/></p> <p><b>Attachment Attachments</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Document Name</th> <th>Title</th> <th>Uploaded By</th> <th>Uploaded Date</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td colspan="5">No Attachments available</td> </tr> </tbody> </table> <p style="text-align: center;"> <input type="button" value="Link Document"/> <input type="button" value="Upload Document"/> </p> <p style="text-align: right; margin-top: 10px;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </p> </div>			Document Name	Title	Uploaded By	Uploaded Date	Delete	No Attachments available				
Document Name	Title	Uploaded By	Uploaded Date	Delete								
No Attachments available												
<b>Key Staff</b>	Mandatory	To select key staff:										

Field	Mandatory / Non-mandatory	Description
		a. Click  . The <b>Select Key Staff</b> dialog box is displayed listing all the key staffs of the consultant firm. b. Select the required key staff, and then click <b>Select</b> . The values in the <b>Firm</b> , <b>Years Experience</b> , and <b>Education</b> fields auto-populated.
<b>Firm</b>	-	The firm to which the key staff belongs is auto-populated.
<b>State</b>	-	From the drop-down list, select the state where the key staff belongs.
<b>City</b>	-	From the drop-down list, select the city where the key staff belongs.
<b>Position/Project Role</b>	Mandatory	From the drop-down list, select the position or the project role of the key staff.
<b>Years Experience</b>	-	The years of experience of the selected key staff is auto-populated.
<b>Education</b>	-	The education details of the selected key staff is auto-populated.
<b>Registration (PE, RLS, etc.)</b>	-	Enter the registration details of the key staff.
<b>Narrative</b>	-	Enter other details about the key staff.
<b>Current Commitments</b>	-	Enter the details of the current commitments for the key staff.
<b>Current Estimated Availability by Time Period</b>	-	Enter the current estimated availability by time period details of the key staff.

- c. In the **Attachments** section, upload relevant images and files. For information on form attachments, refer [Attachments](#).
  - d. Click **Save**.
7. For factor 2, perform the following step to edit workload capacity details of the selected key staff:  
*Note: The key staff details added in the factor 1 is auto-populated in the table.*
- a. In the section, select the required key staff for whom the workload capacity details have to be edited and then click **Edit**.  
 The **Edit** dialog box is displayed.

The screenshot shows an 'Edit' dialog box with the following fields and values:

- Key Staff:** Michell Starc
- Current Commitments:** TEST
- Current Estimated Availability by Time Period:** TEST

Buttons: Save, Cancel

**Note:** The value in the **Key Staff**, **Current Commitments**, and **Current Estimated Availability by Time Period** field is auto-populated.

- b. If required edit information in the **Current Commitments** and **Current Estimated Availability by Time Period** fields.
  - c. Click **Save**.
8. For factor 3, perform the following steps to add the past project details of the key staff:
- a. Click **Add**.

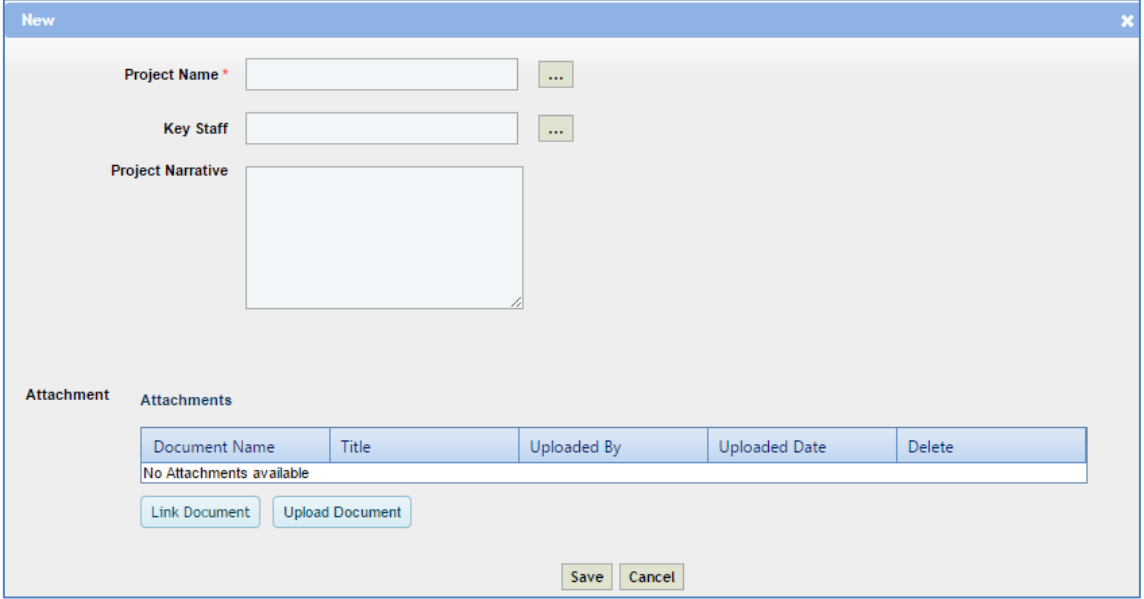


3. List recently completed or substantially completed projects for each key staff/project manager and provide contact name for each project. Only show the deliverables for which key staff/project manager were responsible on the project. If showing more than two projects, add tables using the format provided. Key subconsultants may be listed. Be sure to clearly identify the subconsulting firm.

Project Name	Begin service date	End service date	Firm's fee on Project	Key Staff	Project Narrative	
No records to display.						

Buttons: Add, Edit, Delete

The **New** dialog box is displayed.

- b. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-Mandatory	Description
		
<p><b>Project Name</b></p>	<p>Mandatory</p>	<p>To select a project:</p> <ol style="list-style-type: none"> <li>Click .</li> <li>The <b>Select Project</b> dialog box is displayed listing all the past projects of the consultant firm.</li> <li>Click the required project, and then click <b>Select</b>.</li> </ol>
<p><b>Key Staff</b></p>	<p>-</p>	<p>To select key staff:</p> <ol style="list-style-type: none"> <li>Click .</li> <li>The <b>Select Key Staff</b> dialog box is displayed listing all the key staffs of the selected project.</li> <li>Select the required key staff options, and then click <b>Select</b>.</li> </ol> <p>The selected key staff options are added.</p>
<p><b>Project Narrative</b></p>	<p>-</p>	<p>Enter the details of the selected past project.</p>

- c. In the **Attachments** section, upload relevant images and files. For information on form attachments, refer [Attachments](#).
  - d. Click **Save**.
9. For factor 4, in the **Narrative** box, enter details of the staffs’ familiarity with WisDOT processes and procedures.

4. If projects listed in question 3 are not WisDOT projects, demonstrate your familiarity with WisDOT processes and procedures.

Narrative :

10. For factor 5, perform the following steps to add DBE related details:

- a. Click **Add**.

5. List all the DBE consultants that you solicited and intend to use for subcontracting opportunities to meet the DBE goal on this solicitation. Specify the anticipated work area(s) and/or the NAICS code(s) for which the firm fulfills the desired qualifications. Indicate the percentage of work in the anticipated work area(s) you plan to subcontract to the DBE consultant(s). List only DBE consultants that have been directly contacted for this project and have made a commitment to be on your team. If you are in a mentor protégé agreement with the DBE firm, please list the type of work or NAICS code for which they are currently certified and the mentor work area you will provide if awarded this solicitation (repeat any DBE subconsultants listed in question #2)


DBE Firm Name	Anticipated Work Areas	NAICS Code	Estimated Percentage of Work Area	Comment :
No records to display.				

The **New** dialog box is displayed.

- b. Enter information in the required fields. The fields are described in the following table.

**Note:** All the fields described in the below table are non-mandatory fields.

Field	Description
<div style="border: 1px solid #ccc; padding: 10px; margin: 10px;"> <div style="background-color: #4f81bd; color: white; padding: 2px 5px; display: inline-block;">New</div> <div style="float: right; text-align: right; color: white; font-size: 12px;">✕</div> <div style="clear: both;"></div> <div style="margin-top: 10px;"> <p><b>DBE Firm Name</b> <input style="width: 80%;" type="text"/> <span style="float: right; background-color: #ccc; padding: 2px 5px;">...</span></p> <p><b>Anticipated Work Areas</b> <input style="width: 80%;" type="text"/></p> <p><b>NAICS Code</b> <input style="width: 80%;" type="text"/> <span style="float: right; background-color: #ccc; padding: 2px 5px;">...</span></p> <p><b>Estimated Percentage of Work Area</b> <input style="width: 80%; text-align: right;" type="text" value="0.00"/></p> <p><b>Comment :</b> <input style="width: 80%;" type="text"/></p> <div style="text-align: right; margin-top: 10px;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </div> </div> </div>	<p>To select a DBE firm:</p> <ul style="list-style-type: none"> <li>a. Click <span style="background-color: #ccc; padding: 2px 5px; border: 1px solid #ccc;">...</span>.</li> <li style="padding-left: 20px;">The <b>Firm Name</b> dialog box is displayed listing all the DBE firms.</li> <li>b. Select the required firm, and then click <b>Select</b>.</li> </ul>

Field	Description
<b>Anticipated Work Areas</b>	Enter the details of the expected work areas for the firm.
<b>NAICS Code</b>	To select the NAICS code: a. Click  . The <b>NAICS</b> dialog box is displayed. b. Select the required code, and then click <b>Select</b> .
<b>Estimated Percentage of Work Area</b>	Enter the percentage of work area estimated for the firm.
<b>Comment</b>	Enter any comments for the firm.

c. Click **Save**.

11. For factor 6, in the **Narrative** box, enter other related information about the firm's qualifications for the project.

6. In 100 words or less, note any other pertinent information about your firm's qualifications for the project

Narrative :









12. Click **Save**.
13. In the **Workflow** group, click **Submit**.  
 The **WisDOT Masterworks Staging** dialog box is displayed.
14. Enter required information and then click **OK**.

## 4 Viewing Responded Solicitations

The system allows you to view solicitations for which you have responded.

### Steps:

- In the module menu, click **Solicitation**.
- In the navigation pane, click **Solicitations Responded**.  
 The **Responded Solicitation** list page is displayed listing all the solicitations to which you have responded.

Responded Solicitation				
 <b>View</b>	 <b>Modify Form</b>	 <b>Excel Import / Export</b> ▾	 <b>Manage</b>	
	 <b>Customize List</b>		 <b>Add</b>	
	 <b>Expression List</b>		 <b>Clear</b>	
General	Others		Filters	
<input type="checkbox"/>	<b>Solicitation ID</b>	<b>Created By</b>	<b>Created On</b>	<b>Contract Type</b>
	<input type="text"/> Y	<input type="text"/> Y	<input type="text"/> Y	<input type="text"/> Y
<input type="checkbox"/>	SW-01	mitch	05/11/2017	Regular
<input type="checkbox"/>	SEF-01	mitch	05/11/2017	Regular

3. Select a record and click **View**. The **Solicitation** details page is displayed.

## 5 Negotiation

The system allows primary consultants to provide an estimate for the tasks assigned to them for negotiation purposes. If required, the primary consultants can sublet these tasks to other consultant firms and receive their estimation. Similarly, the sublet firms can further sublet the tasks to other consultant firms.

The primary consultant firm publishes the consultant estimate to WisDOT for negotiation purposes. If a primary consultant has sublet the tasks, then the consultant estimate can be published to WisDOT only after all the sublet firms have published their estimates to the primary consultant.

### 5.1 Viewing Consultant Estimate Scope

The system allows you to view the scope of tasks for which the consultant has to provide estimate.

1. In the module menu, click **Solicitation**.
2. In the navigation pane, in the **Negotiation** folder, click **Consultant Estimate List**. The **Consultant Estimate List** page is displayed.

	Consultant Estimate ID	Selected Consultant	Selection Type
<input type="checkbox"/>	CE-BBS-22-284	Nagarjuna Constructions	Solicitation
<input type="checkbox"/>	CE-SEF-03-280	Mana Projects	Solicitation
<input type="checkbox"/>	CE-BOA-01-279	Mana Projects	Solicitation

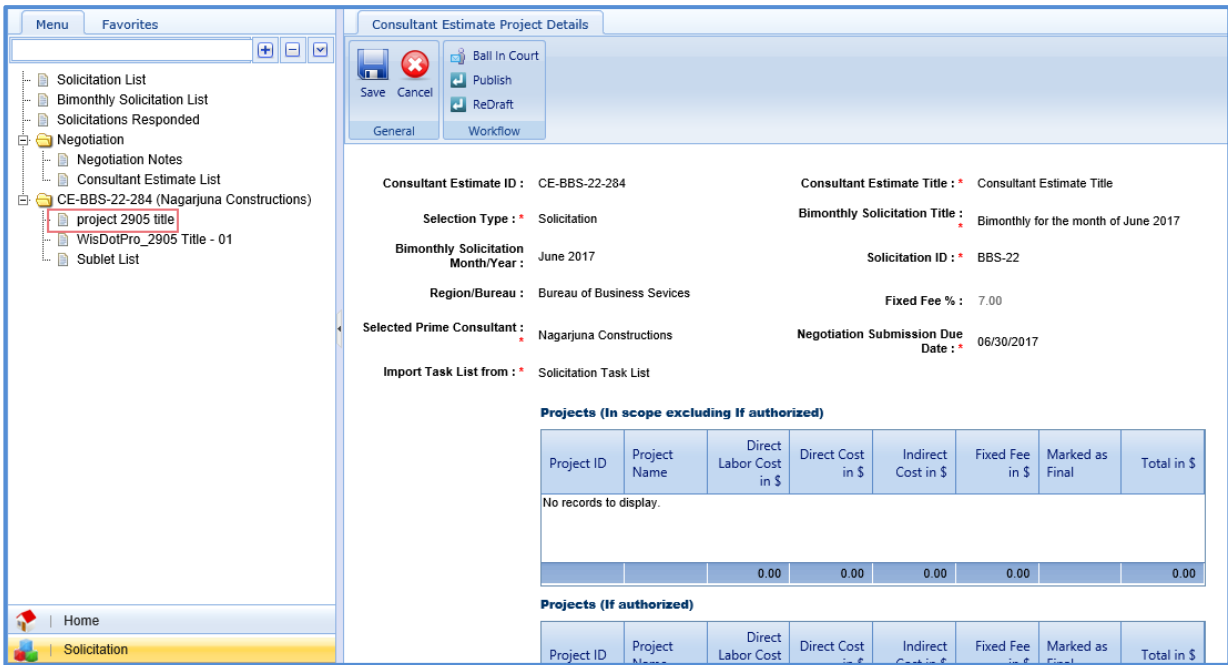
3. Select a consultant estimate record and click **View**. The **Consultant Estimate Project Details** page is displayed.

### 5.2 Adding Consultant Estimation

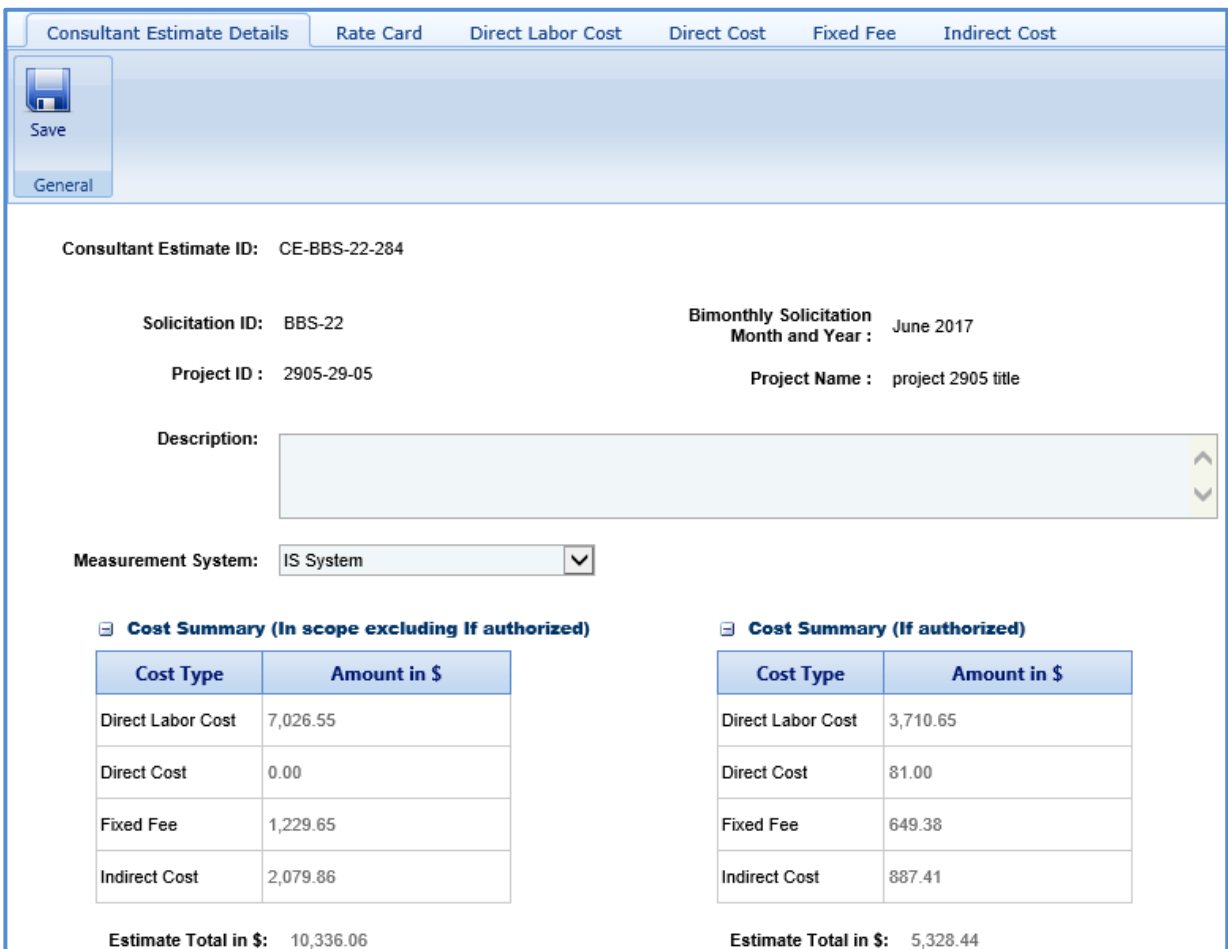
The procedure to add consultant estimation details are described.

1. In the module menu, click **Solicitation**.
2. In the navigation pane, in the **Negotiation** folder, click **Consultant Estimate List**. The **Consultant Estimate List** page is displayed.
3. Select a consultant estimate record and then click **Edit**. The **consultant Estimate Project Details** page is displayed.





- In the navigation pane, expand the consultant estimate folder, click the project for which the estimation details have to be added. The **Consultant Estimate Details** page is displayed.



**Note:** The values in the **Consultant Estimate ID, Solicitation ID, Bimonthly Solicitation Month and Year, Project ID, Project Name, and Region/Bureau** fields are auto-populated.

- In the **Description** field, enter description about the consultant estimate for negotiation.

**Note:**

- The **Cost Summary (In Scope excluding If authorized)** section auto-populates the total of Direct Labor Cost, Direct Cost, Fixed Fee, and Indirect Cost based on the values entered in the respective tabs and that are marked **In Scope** as **Yes**. This section excludes the values that are marked **If authorized** as **Yes**. The sum of all these costs are also auto-calculated and displayed in the **Estimate Total in \$** field.

Cost Summary (In scope excluding If authorized)	
Cost Type	Amount in \$
Direct Labor Cost	7,026.55
Direct Cost	81.00
Fixed Fee	1,229.65
Indirect Cost	2,086.34
<b>Estimate Total in \$:</b> 10,423.54	

- The **Cost Summary (If authorized)** section auto-populates the total of Task List, Direct Cost, Fixed Fee, Indirect Cost, and Risk based on the values entered in the respective tabs and that are marked **If authorized** as **Yes**. The sum of all these costs are also auto-calculated and displayed in the **Estimate Total in \$** field.

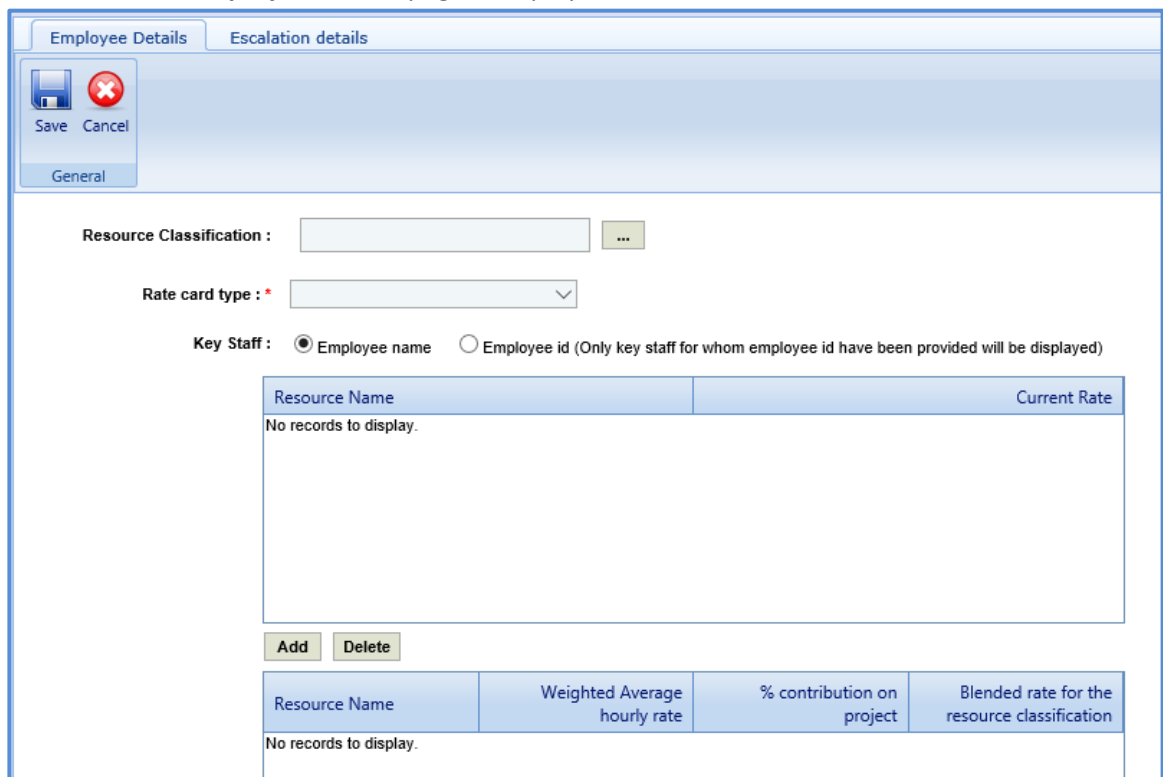
Cost Summary (If authorized)	
Cost Type	Amount in \$
Direct Labor Cost	3,710.65
Direct Cost	81.00
Fixed Fee	649.38
Indirect Cost	887.41
<b>Estimate Total in \$:</b> 5,328.44	

- In the **Attachments** section, upload images and files relevant to the consultant estimate. For information on form attachments, refer [Attachments](#).
- Click **Save**.

8. Click the **Rate Card** tab and perform the following steps to enter employee rate details and finalize the rate card for the estimate.




- a. Click **New**. The **Employee Details** page is displayed.



- b. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory/Non-mandatory	Description

Field	Mandatory/Non-mandatory	Description
<b>Resource Classification</b>	Mandatory	To select the classification of the resource:  <ol style="list-style-type: none"> <li>1. Click . The <b>Resource Classification</b> dialog box is displayed.</li> <li>2. Select the required resource classification and click <b>Save</b>.</li> </ol>
<b>Rate Card type</b>	Mandatory	From the drop-down list, select one of the below options: <ul style="list-style-type: none"> <li>• <b>Individual Wage:</b> Select this option to define the rate of resource inclusive of indirect costs and fixed fees.</li> <li>• <b>NA:</b> Select the option if the rate is not based on rate card.</li> <li>• <b>Specific Rate:</b> Select this option to define the rate of resource by specifying the rates of fixed fee and indirect cost.</li> </ul>
<b>Key Staff</b>	Non-mandatory	<ul style="list-style-type: none"> <li>• <b>Employee name:</b> Click this option to select key staff based on employee name.</li> <li>• <b>Employee id (Only key staff for whom employee id have been provided will be displayed):</b> Click this option to select key staff based on the employee ID.</li> </ul>

- c. To add key staff and define current rate for the key staff, perform the following steps:

Resource Name	Current Rate
No records to display.	
<div style="display: flex; justify-content: space-between; margin-top: 10px;"> <span>Add</span> <span>Delete</span> </div>	

- Click **Add**. The **Key Staff** dialog box is displayed. The dialog box lists the names or employee IDs of the key staff based on the option selected in the **Key Staff** field.
- Select the required key staff record and click **Select**. The record is displayed in the table.

- iii. Corresponding to a key staff record, click in the **Current Rate** column and enter the current rate of the resource.
- d. Click the **Escalation Details** tab to add escalation details and then click **Save**. For more information, refer [Adding Escalation Details](#).
- e. Click the **Employee Details** tab, in the second table, the key staff record with the actual labor related rate is displayed after adding the escalation details.

Perform the following steps to define percentage of contribution on project and blended rate for the resource classification.

**Pre-requisite:** The escalation details must be defined for the key staff record. For more information, refer [Adding Escalation Details](#).

Steps:

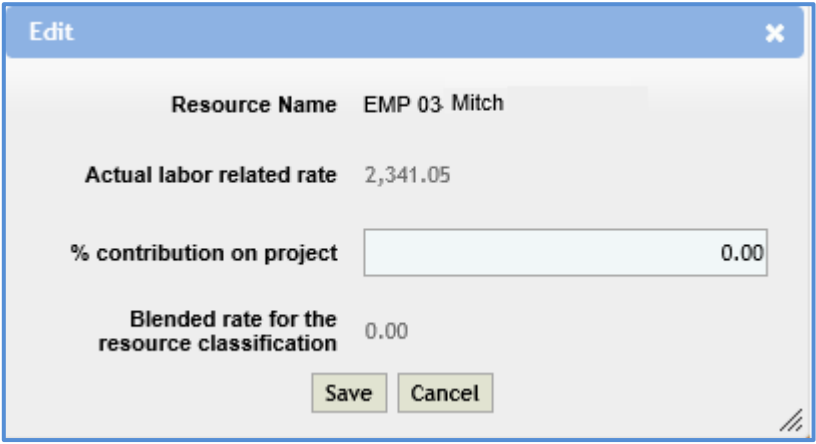
- i. Select the record for which you want to add the percentage contribution and blended rate for the resource classification.

Resource Name	Actual labor related rate	% contribution on project	Blended rate for the resource classification
EMP 03- Mitch	2341.05	0.00	0.00
			0.00

**Edit**

- ii. Click **Edit**. The **Edit** dialog box is displayed.
- iii. Enter information in the required fields. The different fields are described in the following table.

**Note:** All fields described in the below table are non-mandatory fields.

Field	Description
	
<b>Resource Name</b>	The name of the resource is auto-populated.

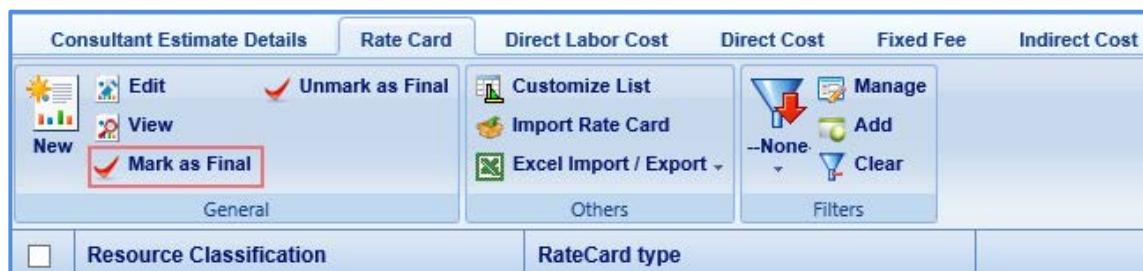
Field	Description
<b>Actual labor related rate</b>	The actual labor related rate is auto-populated.
<b>% contribution on project</b>	Enter the percentage of contribution towards project by the selected key staff.
<b>Blended rate for the resource classification</b>	The blended rate for resource classification is auto-calculated and displayed. The auto-calculation is based on the values defined in the <b>Actual labor related rate</b> and <b>% contribution on project</b> fields.

iv. Click **Save**.

**Note:** Ensure that the sum of the **% contribution on project** field for all the records together must be equal to 100%.

f. On the **Employee Details** tab, click **Save**.

g. Once the rate card details are recorded for the key staffs, to mark a rate card as final, on the **Rate Card** page, select an appropriate rate card record and click **Mark as Final**. A message to confirm the marking is displayed. Click **OK**. The **Rate Card Status** is set to **Final**.



**Note:**

- Multiple rate card records can be marked as final.
- To unmark a marked final record click the rate card record marked as final.

9. Click the **Direct Labor Cost** tab. The tasks that are associated with the solicitation and marked **In Scope** as **Yes** are displayed. In this tab, you can perform the following:

- Define basis of payment, rate card type, and add resources for the existing tasks that are displayed. For more information to define the basis of payment, rate card type, and add resources for existing tasks, refer to [adding task details and resources](#) described in Adding a direct labor cost task.
- If required, additional direct labor cost tasks and additional activity folders can be added. The procedure to add direct labor cost tasks and activity folders are described below.

**Adding a direct labor cost task**

**Pre-requisite:** The additional direct labor cost tasks can be added only after the fourth level of an existing task.

Consultant Estimate Details		Rate Card	Direct Labor Cost	Direct Cost	Fixed Fee
<input type="button" value="Save"/> <input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="View"/> <input type="button" value="Delete"/>		<input checked="" type="checkbox"/> Customize List <input checked="" type="checkbox"/> UnAssign for Sublet <input type="checkbox"/> Associate basis of payment <input checked="" type="checkbox"/> Assign for Sublet <input checked="" type="checkbox"/> Mark as Final for Sublet <input type="checkbox"/> Excel Import / Export <input checked="" type="checkbox"/> Unmark final for Sublet			
General		Others			
Name	Order ID	Task Description			
<input type="checkbox"/> LandSurvey	1				
<input type="checkbox"/> ENVIRONMENTAL SURVEY	2				
<input type="checkbox"/> Agricultural soil surveys indicating soil er odiabi...	2.1				
<input type="checkbox"/> Studies	2.1.1				
<input type="checkbox"/> Historical studies	2.1.1.1	Fourth Level			
<input type="checkbox"/> Climatcal Studies	2.1.1.1.1				

To add a direct labor cost task, perform the following steps:

- a. Click  and then click **New**. The **New Task** page is displayed.

Activity : ENVIRONMENTAL SURVEY/Agricultural

Task : \*  [Clear](#)

Description : \*

Unit : \* 0

Scope : Select

Authorized : Select

Unit Price in \$ :

Amount in \$ :

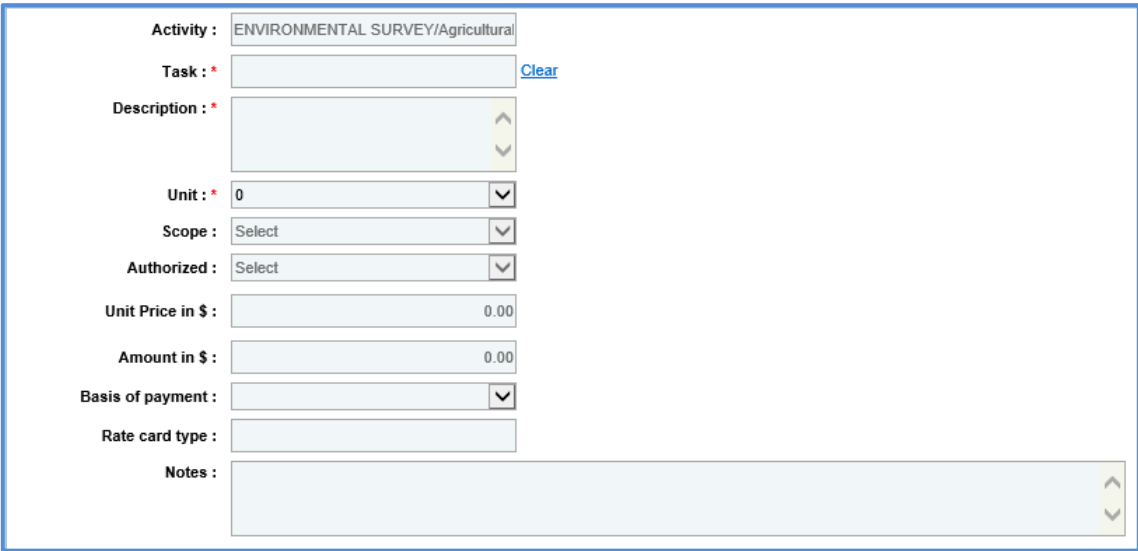
Basis of payment :

Rate card type :

Notes :

Resources:	Resource	Employee	Associated Indirect Cost	Rate in \$	Quantity	Cost in \$
No records to display.						
					Total:	Total:

- b. Provide information in the required fields. The fields in the section are described in the following table:

Field	Mandatory / Non-mandatory	Description
 <p>The screenshot shows a form with the following fields: Activity (text box with 'ENVIRONMENTAL SURVEY/Agricultural'), Task (text box with a 'Clear' link), Description (text box with up/down arrows), Unit (dropdown menu with '0'), Scope (dropdown menu with 'Select'), Authorized (dropdown menu with 'Select'), Unit Price in \$ (text box with '0.00'), Amount in \$ (text box with '0.00'), Basis of payment (dropdown menu), Rate card type (text box), and Notes (text box with up/down arrows).</p>		
<b>Activity</b>	-	The name of the selected activity folder in which the task is being added is auto-populated.
<b>Task</b>	Mandatory	Enter a name for the task.
<b>Description</b>	Mandatory	Enter description about the task.
<b>Unit</b>	Mandatory	From the drop-down list, select the unit of measurement for the task.
<b>Scope</b>	-	This is auto-populated based on the root folder to which the task is added. It indicates whether the task is marked as in scope or not.
<b>Unit Price in \$</b>	-	The value in this field is auto-calculated and displayed from the <b>Resources</b> section.
<b>Amount in \$</b>	-	The value in this field is auto-calculated and displayed from the <b>Resources</b> section.
<b>Basis of Payment</b>	Mandatory	From the drop-down list, select the required basis of payment. The drop-down lists all the basis of payment associated with the solicitation.
<b>Rate Card Type</b>	-	The rate card type is auto-populated based on the selected basis of payment.
<b>Notes</b>	Non-mandatory	Enter notes about the task.



- c. In the **Resources** section, perform the following steps to add resources for performing the task.

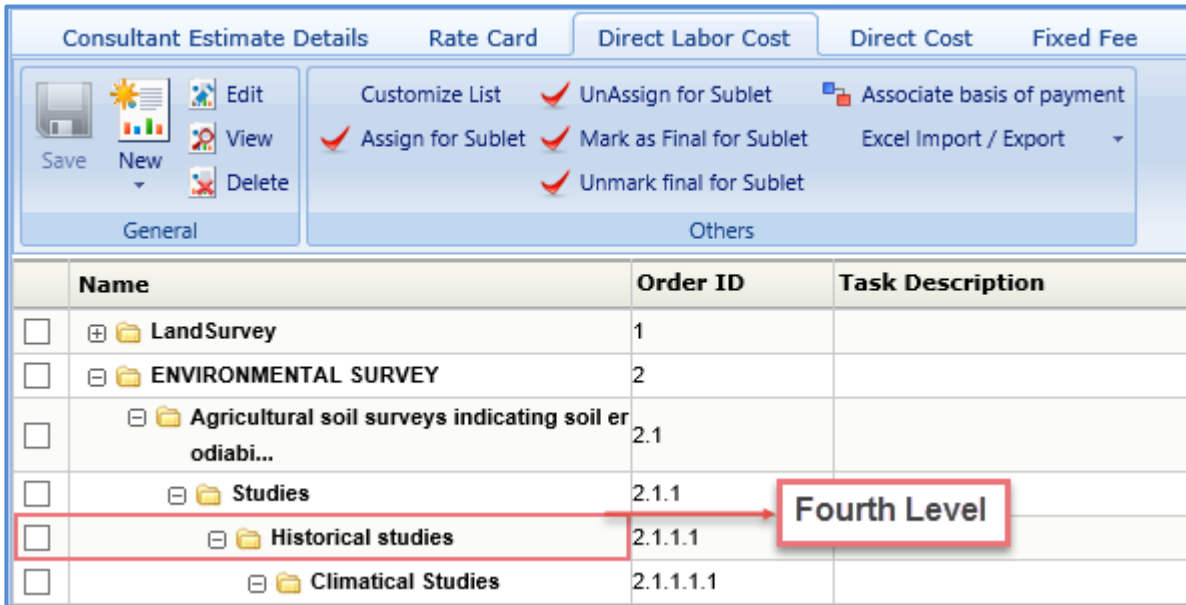
**Pre-requisite:** A rate card with all the relevant details and key staff associated must be marked final.

Resources:						
<input checked="" type="checkbox"/>	Resource	Employee	Associated Indirect Cost	Rate in \$	Quantity	Cost in \$
No records to display.						
					Total: 0.00	Total: 0.00
WageSheet ▾ Add Delete						

- i. Click **Add**. The **Resource** dialog box is displayed. The dialog box displays only those resource classifications that are associated with the rate card.
  - ii. Select the required resources and then click **Select**. The selected resources are displayed in the **Resources** section.
  - iii. Click in the **Associated Indirect Cost** column and from the drop-down list, select required type of indirect cost to associate with the resource.
  - iv. Click in the **Rate in \$** column to enter or edit the rate. The value in this column is auto-populated based on the selected **Resource**.
  - v. Click in the **Quantity** column to enter the number of hours required by the resource to complete the task. The total quantity of all the resources is auto-calculated and displayed in the column.
- Note:** The **Cost in \$** for each resource is auto-calculated and displayed in the **Cost in \$** column based on the **Rate in \$** and **Quantity** values. The sum of cost in \$ is also auto-calculated and displayed in the column.
- d. In the next section, upload images and files relevant to the task. For information on form attachments, refer [Attachments](#).
  - e. Click **Save**.

**Adding an Activity**

**Pre-requisite:** The additional activity folder can be added only after the fourth level of an existing task.



- a. Click  and then click **New Activity**. The **New Activity** page is displayed.

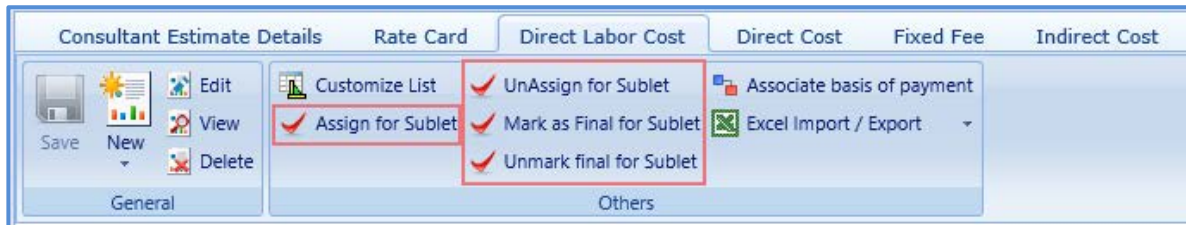
- b. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
Name	Mandatory	Enter a name for the activity.
Code	Non-mandatory	Enter the activity code.
Description	Non-mandatory	Enter description about the activity.
Notes	Non-mandatory	Enter notes about the activity.

- c. Click **Save**.

The total of direct labor costs is displayed in the in the **Cost Summary** section of the **Consultant Estimate Details** tab.

- In the **Direct Labor Cost** tab, you can mark tasks for subletting. To mark tasks for subletting, perform the following steps:



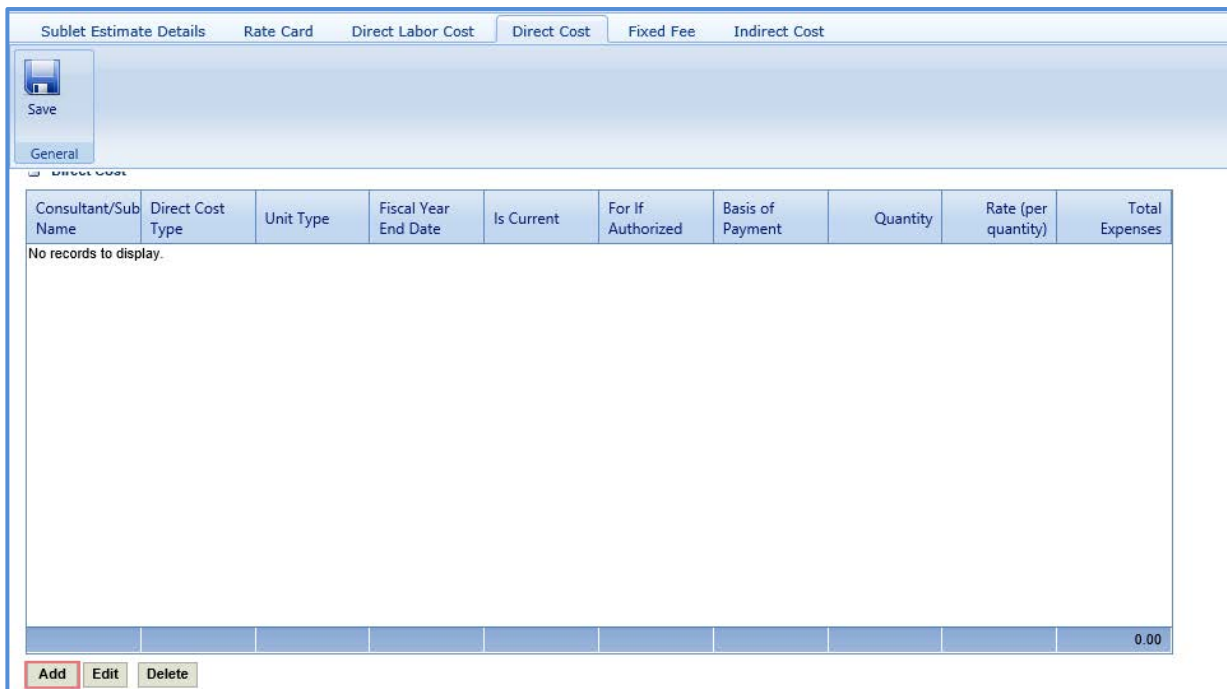
- Select the tasks that have to be sublet.
- Click **Assign for Sublet**. If rate card details are entered for a task, then a message to confirm that the rate card details will be deleted and then assigned for subletting appears. Click **OK**.

**Note:** You can unmark a task that is assigned for subletting. Select a record marked as **Assign for Sublet** and click **UnAssign for Sublet**.

- Click **Mark as Final for Sublet**. The tasks are available for the associating with the sublet consultant firms.

**Note:** You can unmark a task that is marked as final for subletting. Select a record marked as **final for Sublet** and click **Unmark final for Sublet**.

10. Click the **Direct Cost** tab to add direct costs. Perform the following steps:



- Click **Add**. The **Direct Cost** dialog box is displayed listing all the direct costs associated with the consultant and that are marked as current.

- b. Select the required direct costs and click **Select**. The selected direct costs are listed in the **Direct Cost** table.
- c. Select the direct cost for which you want to add/edit details, and then click **Edit**. The **Edit Direct Cost** dialog box is displayed.

The screenshot shows the 'Edit Direct Cost' dialog box with the following data:

Field	Value
Consultant/Subconsultant Name	Nagarjuna Constructions
Direct Cost Type *	CADD
Unit Type	EA
Fiscal Year End Date	06/07/2017
Is Current	Yes
For If Authorized	Yes
Basis of Payment *	Lump Sum
Quantity	9.00
Rate (per quantity)	9.00
Total Expenses	81.00

- d. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-Mandatory	Description
<b>Consultant/Subconsultant Name</b>	-	The name of the consultant or sub-consultant firm is auto-populated.
<b>Direct Cost Type</b>	-	The name of the selected direct cost type is auto-populated.
<b>Unit Type</b>	-	The unit type of the selected direct cost is auto-populated.
<b>Fiscal Year End Date</b>	-	The fiscal year end date of the direct cost is auto-populated.
<b>Is Current</b>	-	Indicates whether the selected direct cost is current or not.
<b>For If Authorized</b>	<b>Non-mandatory</b>	From the drop-down list, select <b>Yes</b> or <b>No</b> to indicate if the direct cost is authorized or not. If the

Field	Mandatory / Non-Mandatory	Description
		selected option is <b>Yes</b> , then the cost details are available for future implementation.
<b>Basis of Payment</b>	<b>Mandatory</b>	From the drop-down list, select the required type of basis of payment. The drop-down list lists the basis of payment types that are associated with the solicitation.
<b>Quantity</b>	<b>Non-mandatory</b>	Enter quantity for the direct cost.
<b>Rate (per quantity)</b>	<b>Non-mandatory</b>	Enter the rate for one quantity of the direct cost.
<b>Total Expenses</b>	-	The total direct cost expenses based on the entered quantity and rate is auto-calculated and displayed.

e. Click **Save**.

11. In the **Direct Cost** page, click **Save**. The total of direct costs are displayed based on whether the direct costs are marked as **Yes** in the **In Scope** and **If authorized** fields.

<b>In Scope excluding if authorized:</b>	3,500.00
<b>If authorized:</b>	2,250.00

12. Click the **Fixed Fee** tab to view the fixed fee details of the consultant estimate. The fixed fee details are displayed based on the tasks that are marked **In Scope** and **If Authorized**. The different field details that are displayed are described in the following table.

Fixed Fee						
Nagarjuna Constructions						
	Total direct labor cost (A)	Fixed Fee % (B)	(A * B)	Multiplication factor	Total	
'In Scope' excluding 'If Authorized'	7026.55	7.00	491.86	2.50	1229.65	
'If Authorized'	3710.65	7.00	259.75	2.50	649.38	
<b>Total Fixed Fee</b>					1879.03	

**Pre-requisite:** The fixed fee details are displayed only when the direct labor cost tasks are associated with a basis of payment and resources are assigned.

Field	Description
<b>Total direct labor cost (A)</b>	Indicates the total direct labor cost of the resource. The value in this field is auto-populated based on the total direct labor cost in the <b>New Task</b> page of the <b>Direct Labor Cost</b> tab.
<b>Fixed Fee % (B)</b>	Indicates the percentage of fixed fee defined for the resource. The value in this field is auto-populated based on the percentage defined in the <b>Fixed Fee %</b> section of the <b>Scope Details</b> page. (solicitation scope of service) The system also displays the fixed fee amount, which is auto-calculated based on the total direct labor cost and fixed fee percentage.
<b>(A * B)</b>	Indicates the product of total direct labor cost and fixed fee percentage.
<b>Multiplication factor</b>	Indicates multiplication factor used to calculate the total fixed fee of a resource.
<b>Total</b>	Indicates the total fixed fee for the resource, which is auto-calculated based on the fixed fee amount and the multiplication factor.
<b>Total Fixed Fee</b>	Indicates the total fixed fee of the project budget estimate, which is the auto-calculated based on the total of fixed fees of all the resources.

The total fixed fees is displayed in the **Cost Summary** section of the **Consultant Estimate Details** tab.

13. Click the **Indirect Cost** tab. The indirect cost details are displayed. The different details that are displayed are described in the following table.

**Note:**

- Based on whether the indirect costs are marked as **Yes for In Scope and If Authorized**, the details are displayed in appropriate sections.
- If the consultant is **marked as Yes** in **Is G&A** on the **Consultant\Contractor** page, then **G&A** sub-section with appropriate indirect cost details is displayed in the **In Scope excluding If Authorized** section and **If Authorized** sections.
- If the direct labor cost tasks are sublet, then **Sub Consultant Handling Fee** section with appropriate cost details is displayed.

Field	Description
-------	-------------

**In Scope excluding If Authorized**

**Consultant**

	Total direct labor cost against an indirect cost type	Indirect type %	Indirect cost against an indirect cost type
Consultant Office	<input type="text" value="7026.55"/>	<input type="text" value="20.00"/>	<input type="text" value="1405.31"/>
<b>Total Consultant Indirect Cost</b>			<input type="text" value="1405.31"/>

<b>Total direct labor cost against an indirect cost type</b>	The total direct labor cost associated with an indirect cost type for the consultant is auto-populated.
<b>Indirect type %</b>	Indicates the percentage of indirect cost defined for the consultant.
<b>Indirect cost against an indirect cost type</b>	Indicates the indirect cost amount of each indirect cost type, which is auto-calculated based on the total direct labor cost and indirect type %.
<b>Total Consultant Indirect Cost</b>	The total of consultant indirect cost is auto-calculated and displayed.

**G&A**

Total Direct Labor Cost	Total Direct Cost	Total Consultant Indirect Cost	G&A %	G&A Indirect Cost
<input type="text" value="7026.55"/>	<input type="text" value="0.00"/>	<input type="text" value="1405.31"/>	<input type="text" value="8.00"/>	<input type="text" value="674.91"/>

<b>Total Direct Labor Cost</b>	The total direct labor cost for G&A is auto-populated.
<b>Total Direct Cost</b>	The total direct cost for G&A is auto-populated.
<b>Total Consultant Indirect Cost</b>	The total consultant indirect cost for G&A is auto-populated.
<b>G&amp;A %</b>	In the <b>In Scope excluding If Authorized</b> section, enter the percentage for G&A. The same percentage is auto-populated in the <b>G&amp;A %</b> column in the <b>If Authorized</b> section.
<b>G&amp;A Indirect Cost</b>	The total of the G&A indirect cost is auto-calculated and displayed.

Field	Description																		
<b>Sub Consultant Handling Fee</b>																			
<table border="1"> <thead> <tr> <th>All Subconsultant Total Direct Labor Cost</th> <th>All Subconsultant Total Direct Cost</th> <th>All Subconsultant Total Indirect Cost</th> <th>All Subconsultant Total Fixed Fee</th> <th>Subconsultant Handling fee %</th> <th>Subconsultant Handling fee</th> </tr> </thead> <tbody> <tr> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>32.00</td> <td>0.00</td> </tr> <tr> <td colspan="5" style="text-align: right;"><b>Total Indirect Cost</b></td> <td>2079.86</td> </tr> </tbody> </table>	All Subconsultant Total Direct Labor Cost	All Subconsultant Total Direct Cost	All Subconsultant Total Indirect Cost	All Subconsultant Total Fixed Fee	Subconsultant Handling fee %	Subconsultant Handling fee	0.00	0.00	0.00	0.00	32.00	0.00	<b>Total Indirect Cost</b>					2079.86	
All Subconsultant Total Direct Labor Cost	All Subconsultant Total Direct Cost	All Subconsultant Total Indirect Cost	All Subconsultant Total Fixed Fee	Subconsultant Handling fee %	Subconsultant Handling fee														
0.00	0.00	0.00	0.00	32.00	0.00														
<b>Total Indirect Cost</b>					2079.86														
<b>All Subconsultant Total Direct Labor Cost</b>	The total of sublet direct labor costs associated with an indirect cost type for the subconsultant is auto-populated.																		
<b>All Subconsultant Total Direct Cost</b>	The total of direct costs of all the subconsultants is auto-populated.																		
<b>All Subconsultant Total Indirect Cost</b>	The total of indirect costs associated of all the subconsultants is auto-calculated and displayed.																		
<b>All Subconsultant Total Fixed Fee</b>	The total of fixed fees of all the subconsultants is auto-populated.																		
<b>Subconsultant Handling fee %</b>	The total percentage of sublet handling fee is auto-populated.																		
<b>Subconsultant Handling fee</b>	The total of handling fees of subconsultants is auto-populated.																		
<b>Total Indirect Cost</b>	The total indirect cost in the <b>In Scope excluding If Authorized</b> section or <b>If Authorized</b> section is auto-calculated and displayed. The total of indirect costs associated with Consultant, G&A, and Sub Consultant Handling Fees is displayed.																		

The total of indirect costs that are marked as in scope excluding fixed fee that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of indirect costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **Consultant Estimate Details** tab.

14. Click **Save**.

### 5.2.1 Adding Escalation Details

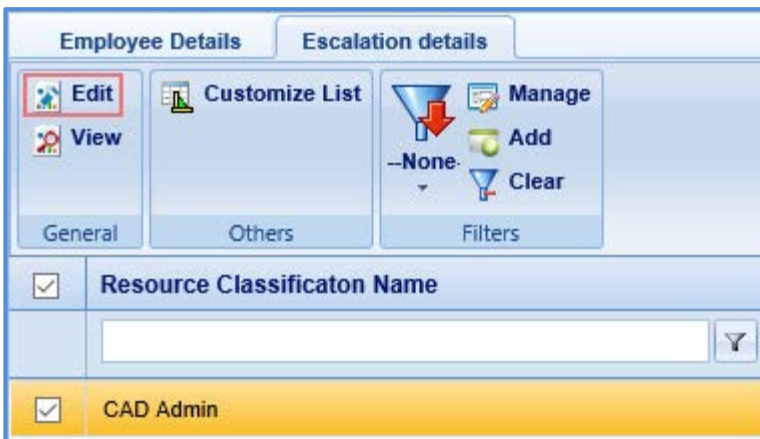
The system allows you to add escalation details for a key staff record. The procedure to add the escalation details is described.

**Pre-requisite:** The key staff records have to be added in the **Employee Details** tab of the rate card in the consultant estimate.

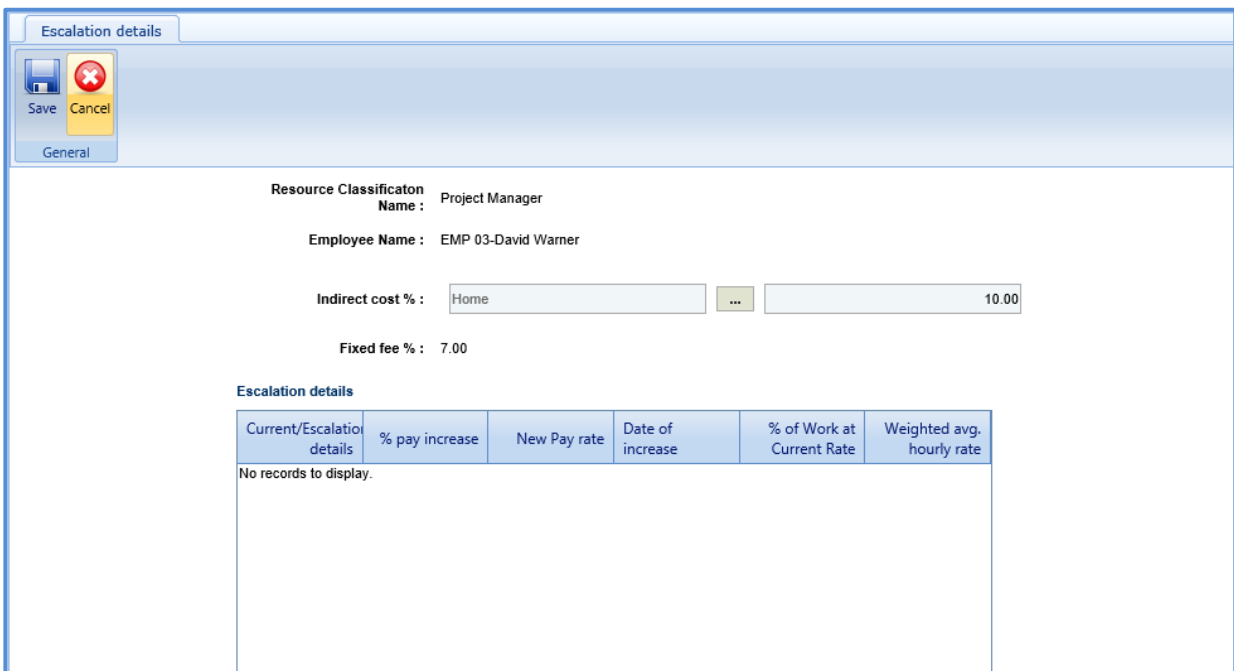
**Steps:**

1. Click the **Escalation details** tab. The list of key staff records added in the **Employee Details** tab is displayed.






2. Select a record and click **Edit**. The Select a key staff record for which you want to add the escalation details and click **Edit**. The **Escalation Details** page is displayed.



3. Enter information in the required fields. The fields are described in the following table.

**Note:** All the fields described in the below table are non-mandatory fields.

Field	Description
Resource Classification Name	Indicates the name of the resource classification of the key staff.
Employee Name	Indicates the name and employee ID of the key staff.

Field	Description
<p><b>Indirect cost %</b></p>	<p>The field is displayed only when the <b>Rate Card type</b> is <b>Specific</b>.</p> <p>To select indirect cost percentage:</p> <ol style="list-style-type: none"> <li>1. Click . The <b>Indirect Cost</b> dialog box is displayed listing all the indirect cost types associated with the consultant and are marked as current.</li> <li>2. Select the required indirect cost and click <b>Select</b>. The percentage of the selected indirect cost is displayed in the corresponding box.</li> </ol>
<p><b>Fixed fee %</b></p>	<p>The field is displayed only when the <b>Rate Card type</b> is <b>Specific</b>.</p> <p>The percentage of fixed fee associated with the consultant on the Solicitation Scope of Service is auto-populated.</p>

4. In the **Escalation details** section, perform the following steps to add escalation details for the selected key staff.

Escalation details					
Current/Escalation details	% pay increase	New Pay rate	Date of increase	% of Work at Current Rate	Weighted avg. hourly rate
No records to display.					
					0.00
<p><b>Add</b> <b>Edit</b> <b>Delete</b></p>					

- a. Click **Add**. The **New Escalation details** dialog box is displayed.

New Escalation details
✕

**Current/Escalation details** 54.21

**% pay increase \***

**New Pay rate** 54.21

**Date of increase \***  ▼

**% of Work at Current Rate \***

**Weighted avg. hourly rate \*** 0.00

**Indirect cost** 0.00

**Fixed fee** 0.00

**Actual labor related rate** 0.00

- b. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory/Non-mandatory	Description
<b>Current/Escalation details</b>	-	The current rate of the key staff is auto-populated.
<b>% pay increase</b>	Mandatory	Enter the percentage of increase in pay for the key staff.
<b>New Pay rate</b>	-	The new pay rate for the key staff is auto-calculated and displayed. The auto-calculation is based on the values defined in the <b>Current/Escalation details</b> and <b>% pay increase</b> fields.
<b>Date of increase</b>	Mandatory	From the drop-down calendar, select the date from when the percentage of pay increase is applicable for the key staff.
<b>% of Work at Current Rate</b>	Mandatory	Enter the percentage of work that will be executed by the key staff at the defined current rate.
<b>Weighted avg. hourly rate</b>	-	The weighted average hourly rate for the key staff is auto-calculated and displayed. The auto-calculation is based on the values defined in the

Field	Mandatory/Non-mandatory	Description
		<b>New Pay rate</b> and <b>% of Work at Current Rate</b> fields.
<b>Indirect cost</b>	-	The field is displayed only when the <b>Rate Card type</b> is <b>Specific</b> .  The indirect cost associated with the key staff is auto-calculated and displayed. The auto-calculation is based on the values defined in the <b>New Pay rate</b> , <b>% of Work at Current Rate</b> , and <b>Indirect cost %</b> fields.
<b>Fixed fee</b>	-	The field is displayed only when the <b>Rate Card type</b> is <b>Specific</b> .  The fixed fee associated with the key staff is auto-calculated and displayed. The auto-calculation is based on the values defined in the <b>New Pay rate</b> , <b>% of Work at Current Rate</b> , and <b>Fixed fee</b> fields.
<b>Actual labor related rate</b>	-	The field is displayed only when the <b>Rate Card type</b> is <b>Specific</b> .  The actual labor related rate associated with the key staff is auto-calculated and displayed. The auto-calculation is the sum of values in the <b>Weighted avg. hourly rate</b> , <b>Indirect cost</b> , and <b>Fixed fee</b> fields.

c. Click **Save**. The details are displayed in the **Escalation details** table.

**Note:** Ensure that the sum of the **% of work at current rate** field for all the records together must be equal to 100%.

- On the **Escalation Details** page, click **Save**. The defined escalation details are displayed on the **Employee Details** tab.

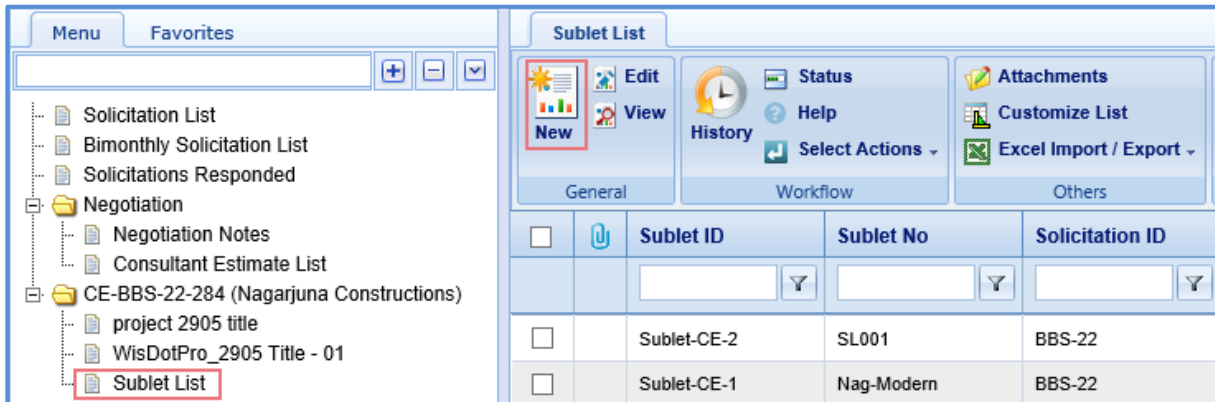
### 5.3 Finalizing Scope for Subletting

A prime consultant can sublet tasks to other consultant firms. The subconsultant can add their estimate details and publish to the prime consultant for negotiation purposes. The subconsultant can further sublet the tasks to other consultant firms.

The procedure to add and finalize the scope for subletting is described:

- In the module menu, click **Solicitation**.
- In the navigation pane, in the **Negotiation** folder, click **Consultant Estimate List**. The **Consultant Estimate List** page is displayed.
- Select a consultant estimate and click **View**. The **Consultant Estimate Project Details** page is displayed.

4. In the navigation pane, in the consultant estimate of the primary consultant folder, click **Sublet List**. The **Sublet List** page is displayed.




5. Click **New**. The **Sublet Details** page is displayed.

The screenshot shows the 'Sublet Details' page. The page contains several input fields and buttons. The 'Sublet ID' field is pre-filled with '<Auto Generated>'. The 'Sublet No' field is empty. The 'Sublet By' field is pre-filled with 'Nagarjuna Constructions'. The 'Sublet Date' field shows '06/12/2017 12:00 AM'. The 'Sublet to Consultant' field is empty. The 'Fixed Fee %' field is pre-filled with '7.00'. The 'Description' and 'Scope of work' fields are empty. The 'Save' and 'Cancel' buttons are visible in the top left corner.

6. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory/Non-mandatory	Description
Sublet ID	-	The Sublet ID is auto-generated.
Sublet No	Mandatory	Enter a unique number for the sublet.
Sublet By	-	The name of the consultant firm who is subletting is auto-populated.
Sublet Date	Non-mandatory	Click the Calendar icon to select the date of sublet and click the Time Picker icon to select the time of sublet.
Sublet to Consultant	Mandatory	To select subconsultant for whom the task has to be sublet:

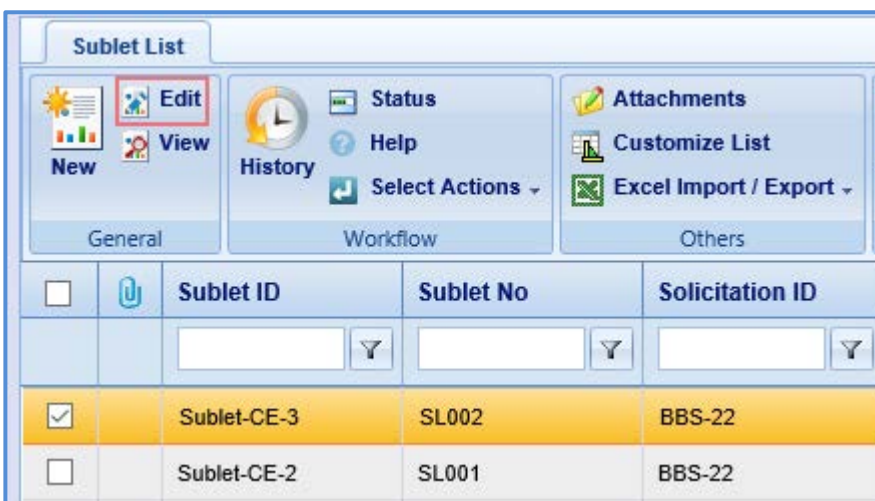
Field	Mandatory/Non-mandatory	Description
		<ol style="list-style-type: none"> <li>1. Click . The <b>Consultant Name</b> dialog box is displayed listing names of the consultant firms.</li> <li>2. Select the required consultant firm name and click <b>Select</b>.</li> </ol>
<b>Solicitation ID</b>	-	The solicitation ID is auto-populated.
<b>Fixed Fee %</b>	-	The fixed fee percentage of the consultant is auto-populated.
<b>Description</b>	Mandatory	Enter description about subletting.
<b>Scope of Work</b>	Mandatory	Enter scope of work details for subletting.

7. In the **Notes** field, enter notes about subletting of tasks.

Notes :

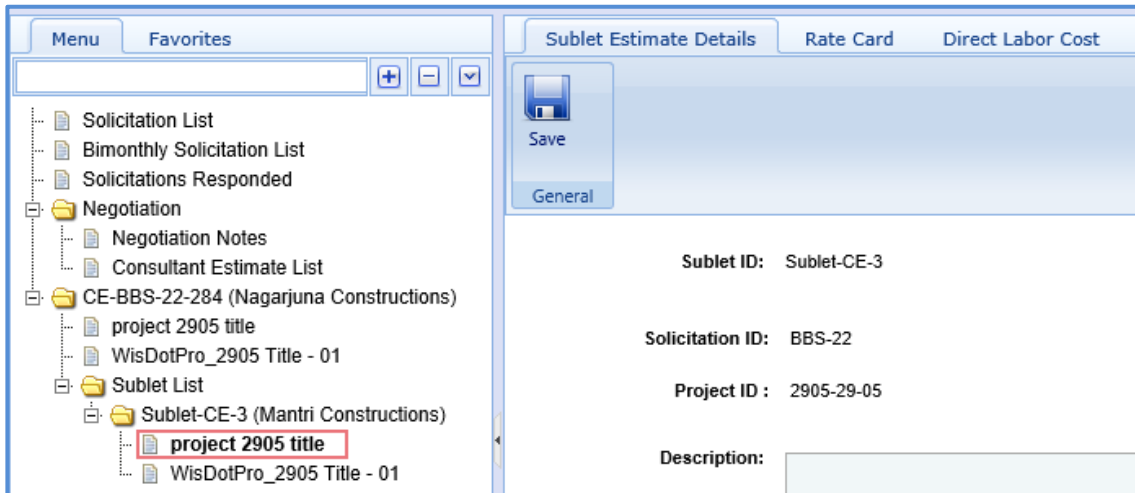
8. In the **Attachments** section, upload images and files relevant to subletting. For information on form attachments, refer [Attachments](#).

9. Click **Save**. The sublet record is listed in the **Sublet List** page.



10. Select the required sublet record and click **Edit**. The **Sublet Details** page is displayed.

- In the navigation pane, expand the sublet record folder and click the project for which the task has to be associated. The **Sublet Estimate Details** page is displayed.



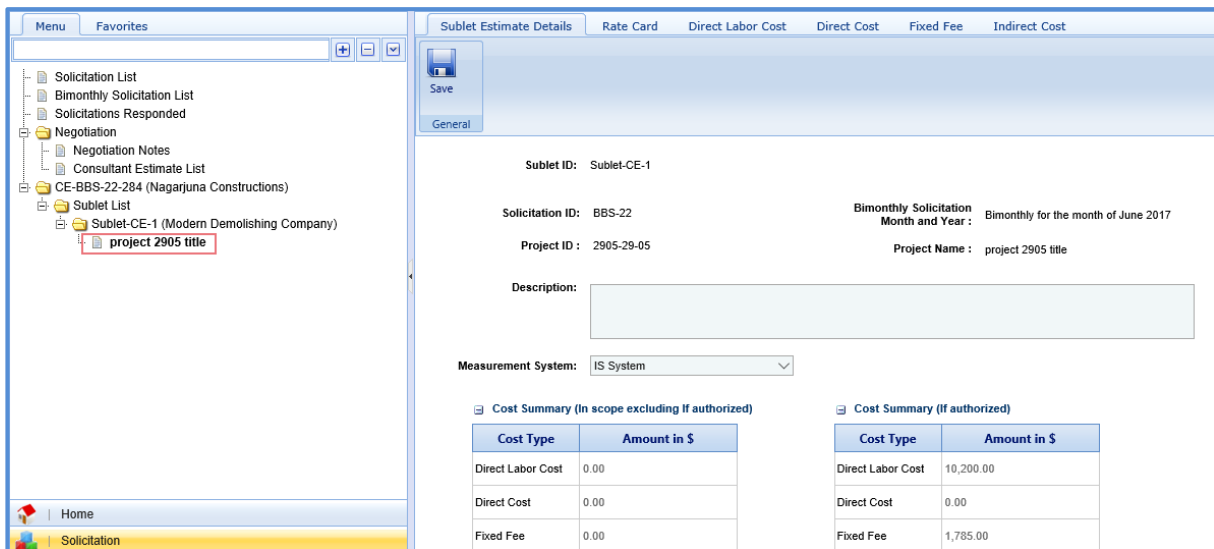
- Click the **Direct Labor cost** tab and then click **Add Task**. The **Select Task** dialog box is displayed. The dialog box displays all the tasks of the selected project that are marked as final for sublet.
- Select the required tasks that are to be sublet and then click **Select**.
- In the navigation pane, click **Sublet List**. The **Sublet List** page is displayed.
- Select the record, in the **Workflow** group, click **Select Actions**, and then click **Scope Finalized**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK**. The scope of work is published to subconsultants.
- Optionally, in the **Workflow** group, in **Select Actions**, you can click **Close** or **ReDraft**, enter required information in the dialog box that is displayed, and then click **OK** to close or redraft the record.

## 5.4 Adding and Publishing Sublet Estimation

The subconsultant can provide the estimation for the tasks assigned to them.

Steps:

- In the module menu, click **Solicitation**.
- In the navigation pane, in the **Negotiation** folder, click **Consultant Estimate List**. The **Consultant Estimate List** page is displayed.
- Select a consultant estimate and click **Edit**. The **Consultant Estimate Project Details** page is displayed.
- In the navigation pane, in the consultant estimate folder, click **Sublet List**. The **Sublet List** page is displayed.
- Select the record for which you want to provide estimation and click **Edit**.
- In the navigation pane, in the sublet estimation folder, click the project for which the estimation has to be provided. The **Sublet Estimate Details** page is displayed.



**Note:** The values in the **Sublet ID**, **Solicitation ID**, **Bimonthly Solicitation Month and Year**, **Project ID**, and **Project Name** fields are auto-populated.

7. In the **Description** field, enter description about the sublet estimate.

**Note:**

- The **Cost Summary (In Scope excluding If authorized)** section auto-populates the total of Direct Labor Cost, Direct Cost, Fixed Fee, and Indirect Cost based on the values entered in the respective tabs and that are marked **In Scope** as **Yes**. This section excludes the values that are marked **If authorized** as **Yes**. The sum of all these costs are also auto-calculated and displayed in the **Estimate Total in \$** field.

Cost Summary (In scope excluding If authorized)	
Cost Type	Amount in \$
Direct Labor Cost	7,026.55
Direct Cost	81.00
Fixed Fee	1,229.65
Indirect Cost	2,086.34
<b>Estimate Total in \$: 10,423.54</b>	

- The **Cost Summary (If authorized)** section auto-populates the total of Task List, Direct Cost, Fixed Fee, Indirect Cost, and Risk based on the values entered in the respective tabs and that are marked **If authorized** as **Yes**. The sum of all these costs are also auto-calculated and displayed in the **Estimate Total in \$** field.



Cost Summary (If authorized)	
Cost Type	Amount in \$
Direct Labor Cost	3,710.65
Direct Cost	81.00
Fixed Fee	649.38
Indirect Cost	887.41
<b>Estimate Total in \$:</b> 5,328.44	

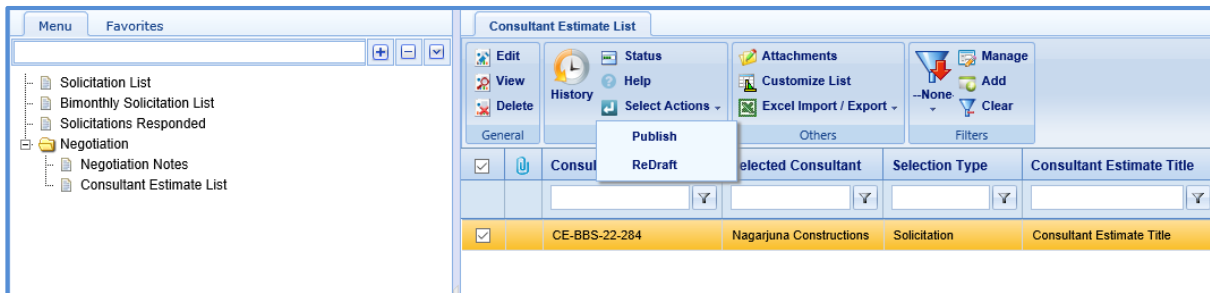
8. In the **Attachments** section, upload images and files relevant to the sublet estimate. For information on form attachments, refer [Attachments](#).
9. Click **Save**.
10. Click the **Rate Card** to enter employee rate details and finalize the rate card for the estimate. For more information on the procedure to add rate card details, refer to the [adding rate card details](#) step in the Adding Consultant Estimation Details topic.
11. Click **Direct Labor Cost tab**. The tasks that are assigned to you by the Prime Consultant are displayed. If required, additional direct labor cost tasks and activity folders can be added. You can further sublet the tasks to other consultant firms. For more information on adding direct labor cost details, refer to the [adding direct labor cost details](#) step in the Adding Consultant Estimation Details topic.
12. Click the **Direct Cost** tab to add direct costs. For more information on adding direct cost details, refer to the adding [direct cost details](#) step in the Adding Consultant Estimation Details topic.
13. Click the **Fixed Fee** tab to view the fixed fee details of the sublet estimate. For more information on viewing fixed fee details, refer to the [viewing fixed fee details](#) step in the Adding Consultant Estimation Details topic.
14. Click the **Indirect Cost** tab to view the indirect cost details. For more information on viewing the indirect cost details, refer to [viewing indirect cost details](#) step in the Adding Consultant Estimation Details topic.
15. Click **Save**.
16. In the navigation pane, click **Sublet List**. The **Sublet List** page is displayed.
17. Select the record, in the **Workflow** group, click **Select Actions**, and then click **Publish**. A message to confirm publishing of the estimate appears. Click **OK**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK**. The estimate is published to the prime consultant.
18. Optionally, in the **Workflow** group, in **Select Actions**, you can click **ReDraft**, enter required information in the dialog box that is displayed, and then click **OK** to redraft the record.

## 5.5 Publishing Consultant Estimate

A prime consultant can publish the estimate to WisDOT for negotiation. If tasks are sublet by the prime consultant, then the estimate can be published only after receiving all the sublet estimates.

Steps:

1. In the module menu, click **Solicitation**.
2. In the navigation pane, in the **Negotiation** folder, click **Consultant Estimate List**. The **Consultant Estimate List** page is displayed.
3. Select the record that has to be published.



4. In the **Workflow** group, click **Select Actions**, and then click **Publish**. A message to confirm publishing of the estimate appears. Click **OK**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK**. The estimate is published to WisDOT.

**Note:** Optionally, in the **Workflow** group, in **Select Actions**, you can click **ReDraft**, enter required information in the dialog box that is displayed, and then click **OK** to redraft the record.

# Appendix

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## 6 Attachments

### 6.1 Attaching a File to a Form

You can attach files to a form. You can also link a file in the document management folders to a form.

#### Steps:

- To upload files to a form, perform the following steps in the **Attachments** section:
  1. Click **Upload Document**. The **Choose File to Upload** dialog box is displayed.
  2. To upload a single file, click the required file.  
Alternatively, to upload multiple files, press CTRL, and then click the required files.
  3. Click **Open**.  
The files are uploaded to the form, and are displayed in the attachment grid.
  4. In the **Title** column, enter the titles for the files attached.
- To link files in the Masterworks **Documents** folders to a form, perform the following steps:
  1. In the **Attachments** section, click **Link Document**.
  2. From the **Folder** drop-down box, select the required folder where the files exist.  
The list of files in that folder are displayed.
  3. From the list of files, select the required files.
  4. Click **OK**.  
The files are linked to the form, and are displayed in the attachment grid.
  5. In the **Title** column, enter the titles for the linked files.

### 6.2 Accessing Attached Files

Files attached to a form can be accessed from the list page of the form.

#### Steps:

1. From the navigation tree, click the required form.  
The form list page is displayed.
2. In the tool bar, in the **Other** group, click **Attachments**.  
The attachments of all the forms are listed.