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MASTERworks®

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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.

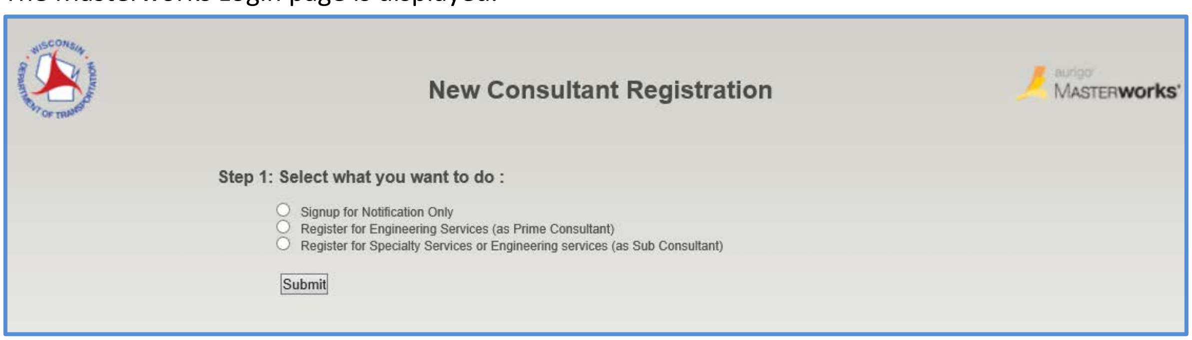
***Note**: The password is case sensitive.*

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.

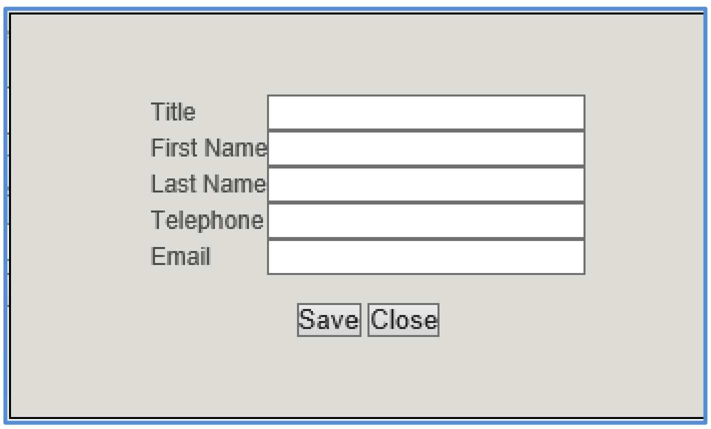
- **Register for Specialty Services or Engineering services (as Sub Consultant)**: Click this to register as sub consultant firm for specialized services.

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.

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

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



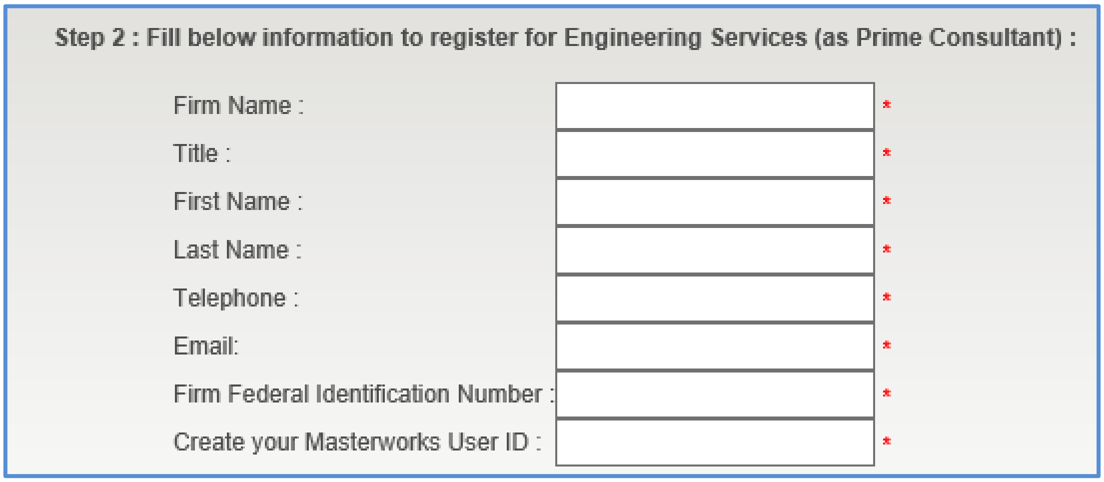
ii. Enter information in the required fields. The fields are described in the below table.

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

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

iii. Click **Save**.

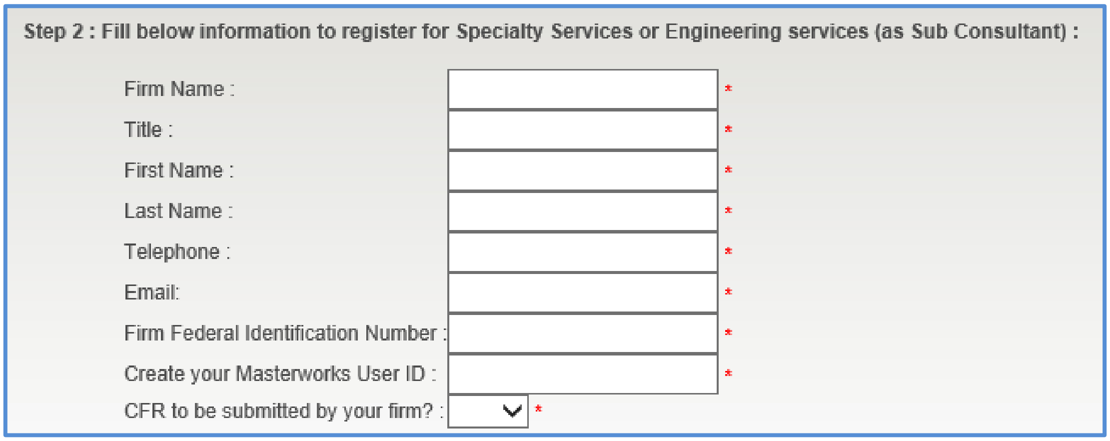
- When the **Register for Engineering Services (as Prime Consultant)** option is selected, enter information in the fields displayed in step 2. The different fields are described in the following table.



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

Item	Description
Firm Name	Enter the prime consultant firm name.
Title	Enter the title of the prime consultant firm.
First Name	Enter the first name of the prime consultant firm.
Last Name	Enter the last name of the prime consultant firm
Telephone	Enter the telephone number of the prime consultant firm.
Email	Enter e-mail ID of the prime consultant firm.
Firm Federal Identification Number	Enter the firm's federal identification number.
Create your Masterworks User ID	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 :	*
Title :	*
First Name :	*
Last Name :	*
Telephone :	*
Email:	*
Firm Federal Identification Number :	*
Create your Masterworks User ID :	*
CFR to be submitted by your firm? :	*

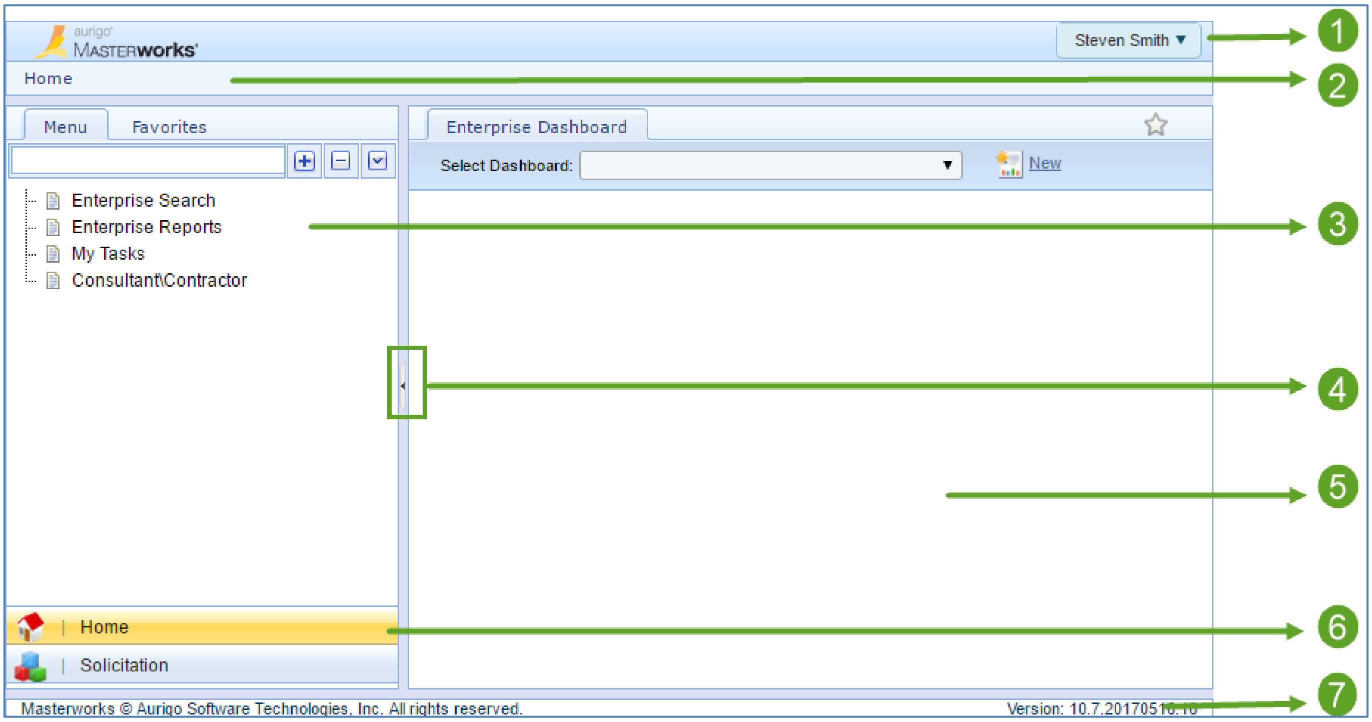
***Note**: All fields described in the below table are mandatory fields.*

Item	Description
Firm Name	Enter the firm name of the sub-consultant firm.
Title	Enter the title of the sub-consultant firm.
First Name	Enter the first name of the sub-consultant firm.
Last Name	Enter the last name of the sub-consultant firm.
Telephone	Enter the telephone number of the sub-consultant firm.
Email	Enter e-mail ID of the sub-consultant firm.
Firm Federal Identification Number	Enter the firm's federal identification number.
Create your Masterworks User ID	Enter the Masterworks User ID to be created for the sub-consultant firm.
CFR to be submitted by your firm?	From the drop-down list, select **Yes** or **No** 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 **Yes**.

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.

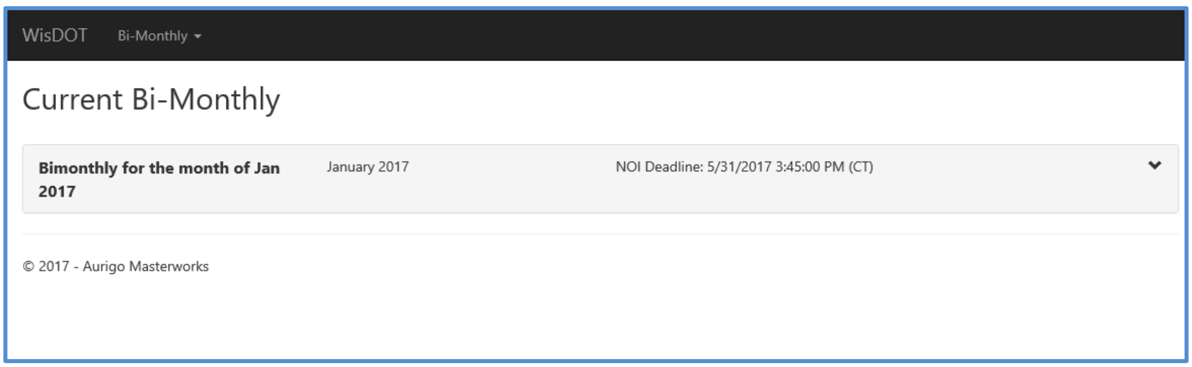
The Bimonthly Solicitations can be viewed in the application or in the public portal.

2.1 Viewing Bimonthly Solicitation Details on Public Portal

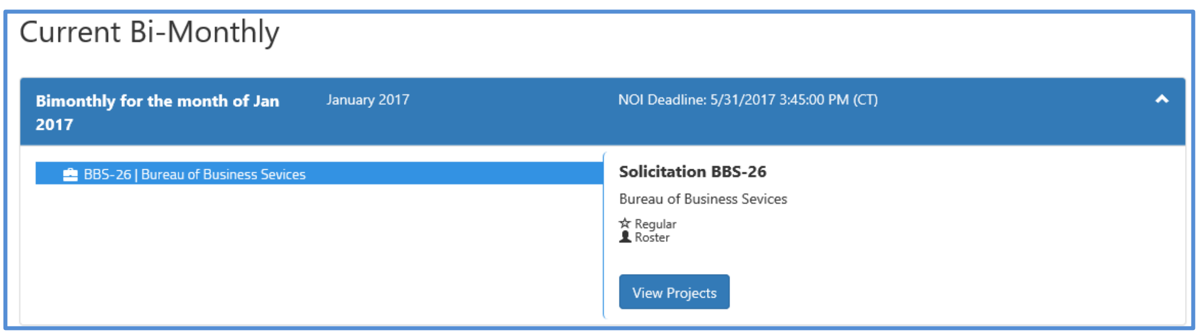
On the public portal, you can also view the current bimonthly solicitations. You can also view solicitations, projects, and tasks associated with the bimonthly solicitation.

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.

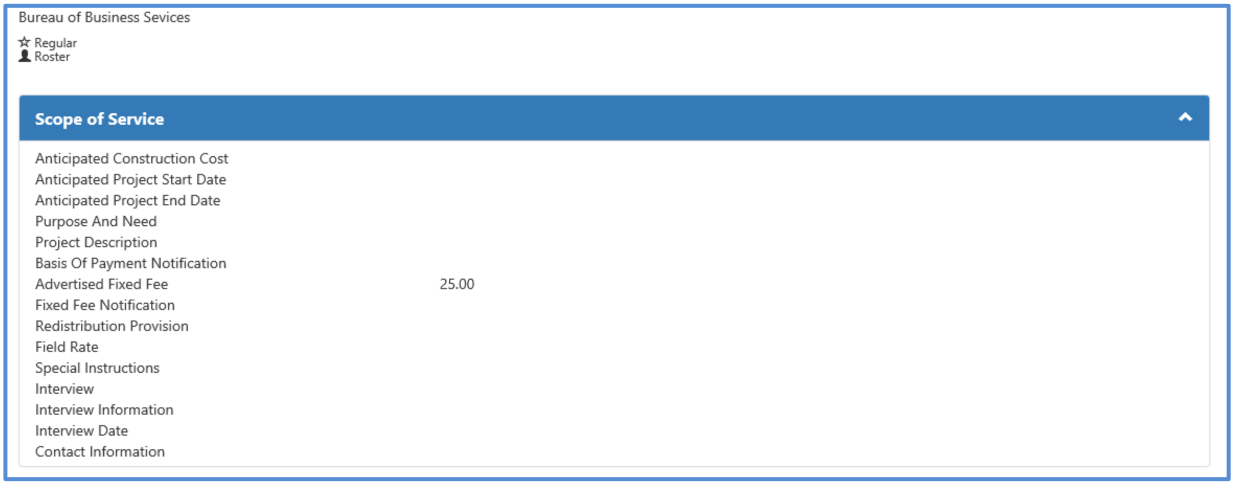


3. Click the bimonthly solicitation record to view the solicitations associated with the bimonthly solicitation. The solicitations associated with the bimonthly solicitation is displayed.

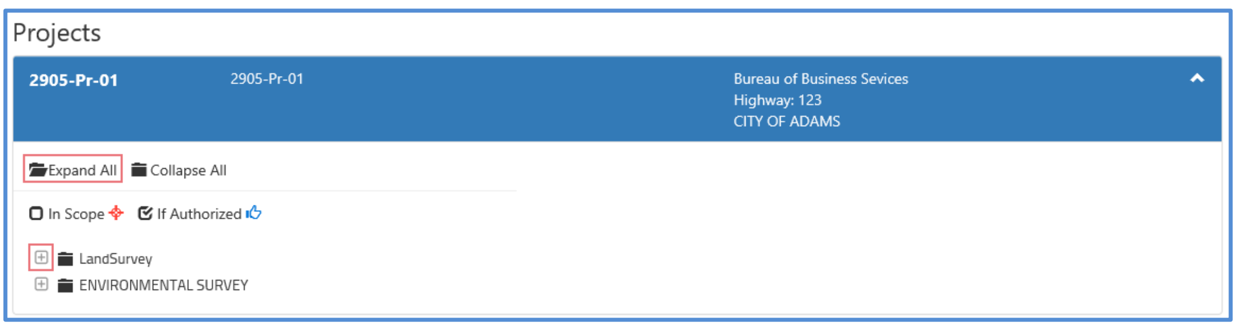


4. Click **View Projects** to view the projects associated with the solicitation. The scope of service and projects associated with the solicitation are displayed.

5. Click **Scope of Service.** The list of scope of service items associated with the solicitation is displayed.

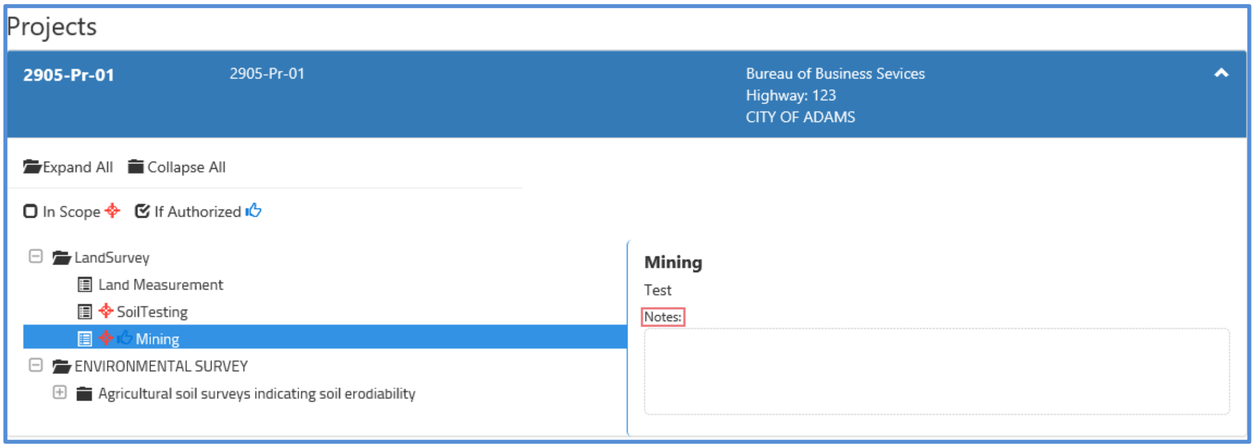


6. Click a project record to view the list of tasks associated with the project.



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.



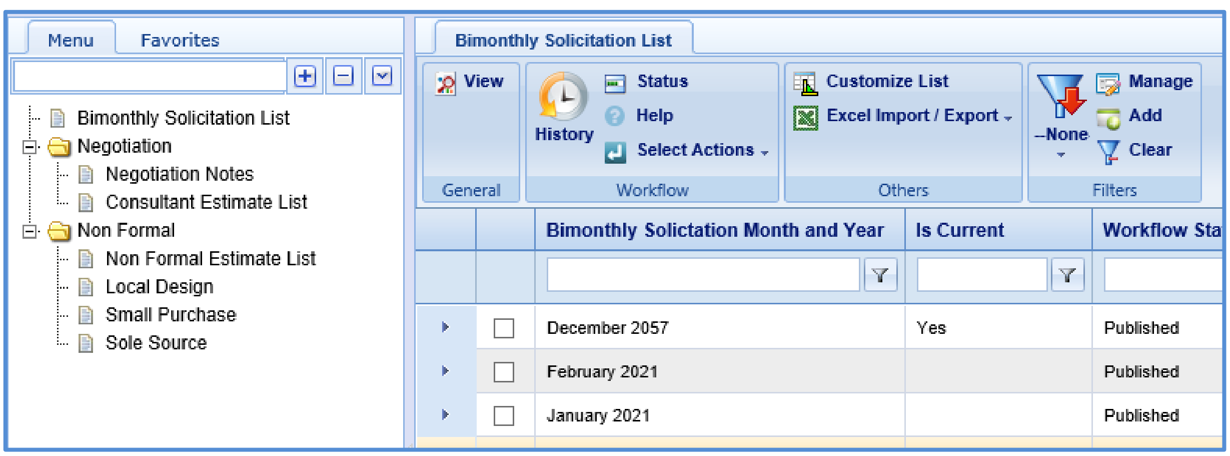
2.2 Questions and Responses

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:

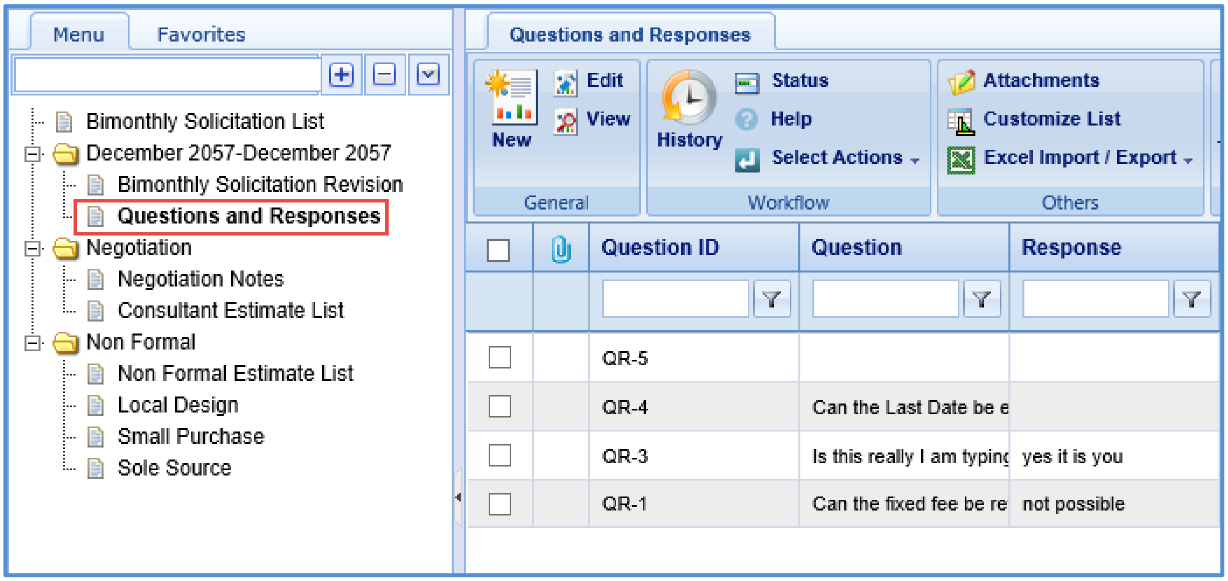
Prerequisite: The last date of question submission has not expired.

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

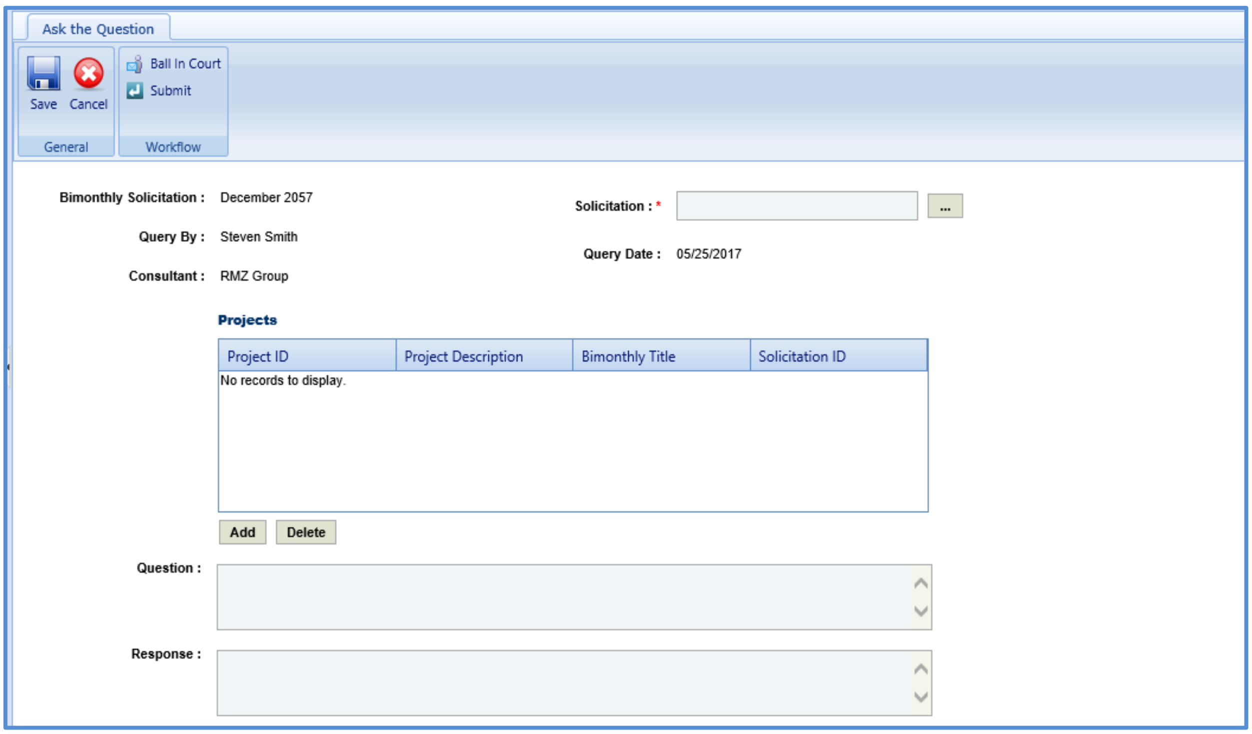


2. Select the **Bimonthly Solicitation** record, which is in 'Published' status, and then click **View**.
   The **Bimonthly Solicitation Details** page is displayed.

3. In the navigation pane, expand the selected **Bimonthly Solicitation** record, and then click **Questions and Responses**.
   The **Questions and Responses** page is displayed



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



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

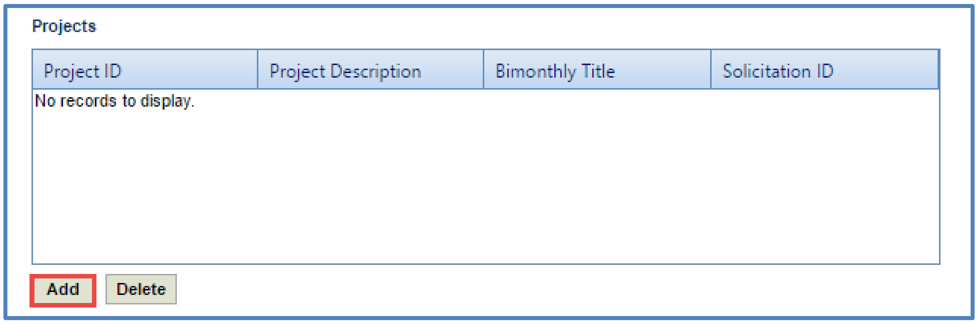
5. In the **Solicitation** field, perform the following steps to select solicitations for which the question is raised:

   a. Click ....
      The **Select Solicitation** dialog box is displayed listing the solicitations that are associated with the Bimonthly Solicitation.

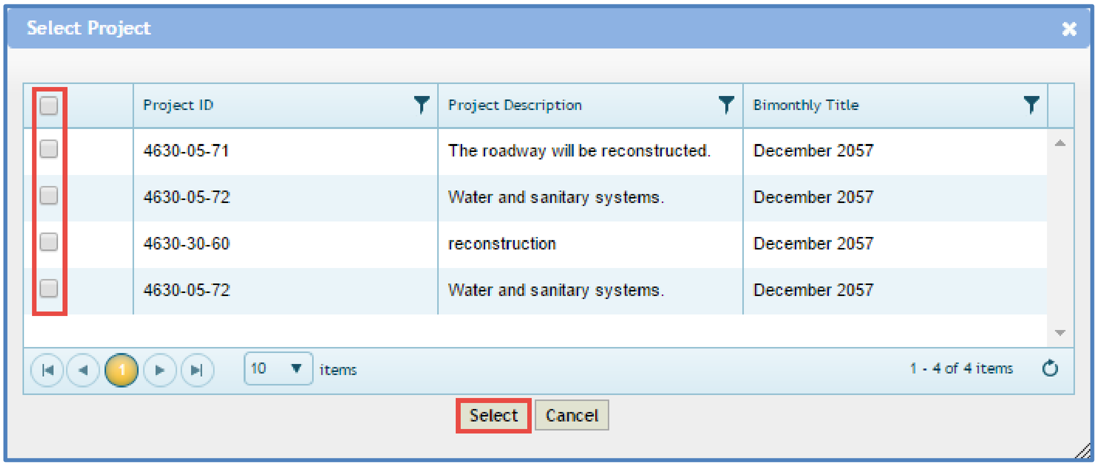
   b. Select the solicitations for which the question is raised and then click **Select**.

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
	
Question	Enter the question.
Response	The response for the question is auto-populated in this field when it is published by WisDOT.

Field	Description
Notes	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

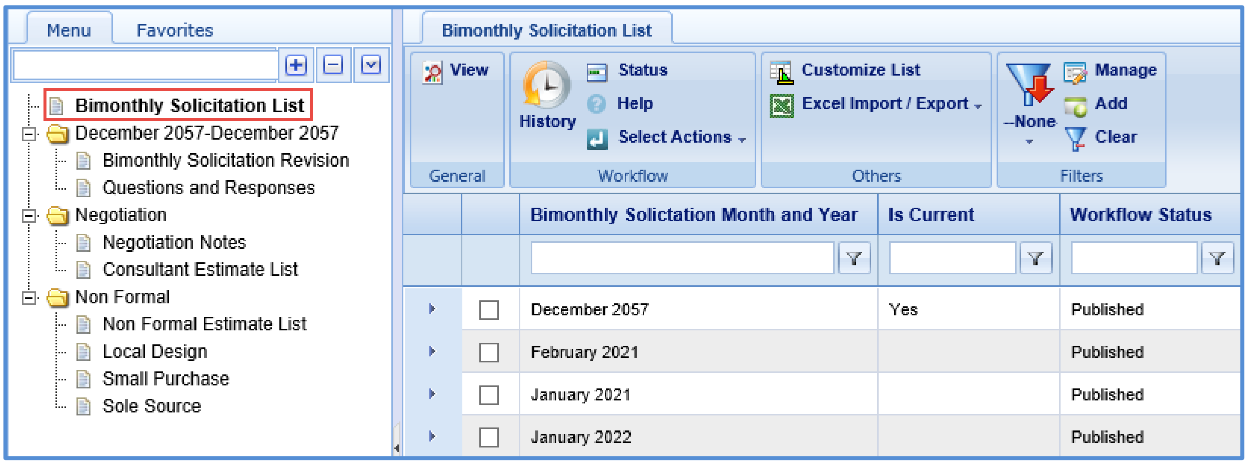
The system allows you to view the solicitation details and express your interest in the solicitation by submitting the duly filled-in NOI questionnaire to WisDOT.

3.1 Viewing the Solicitation Details

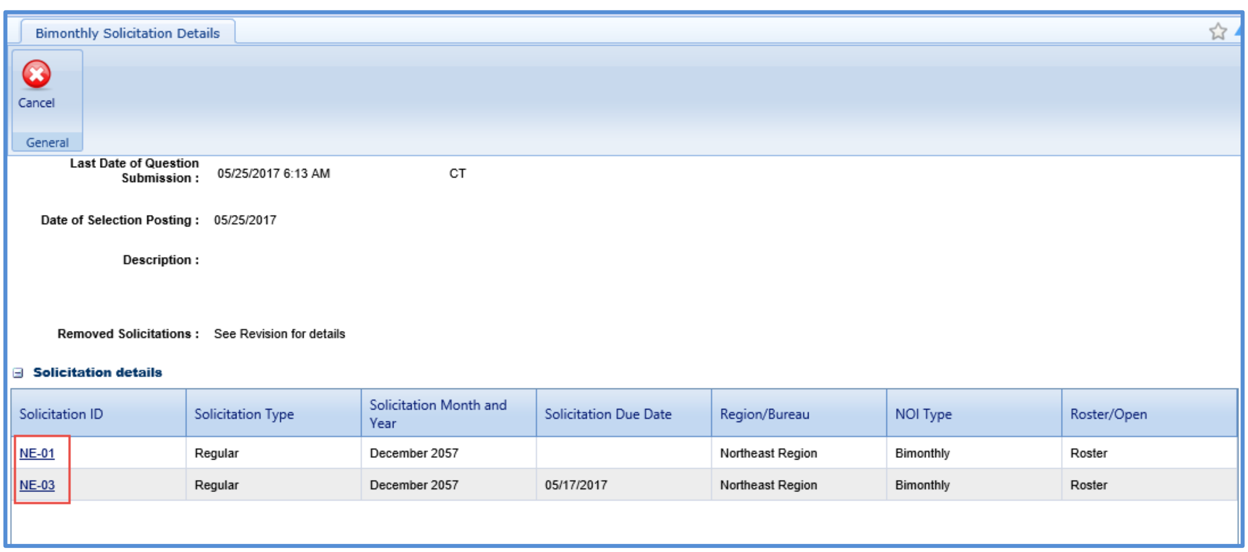
The system allows you to view the solicitation details such as projects associated with the solicitation, scope of service, and tasks associated with the solicitation.

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.



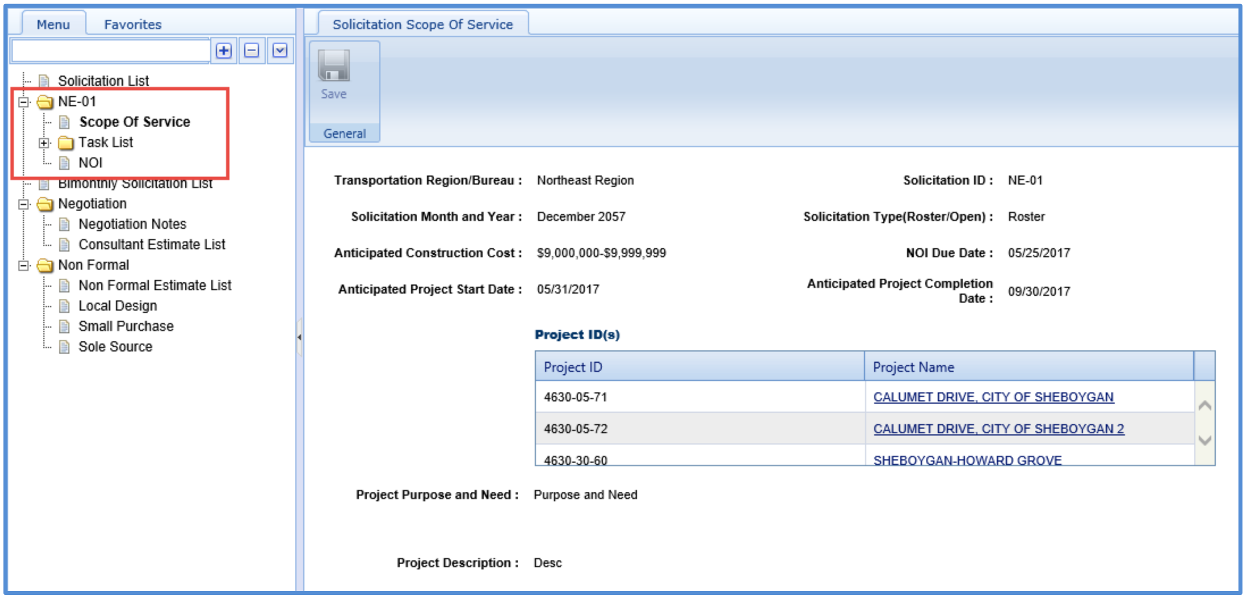
3. Select the required Bimonthly Solicitation record, and then click **View**.
   The selected **Bimonthly Solicitation Details** page is displayed.



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.

5. 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.

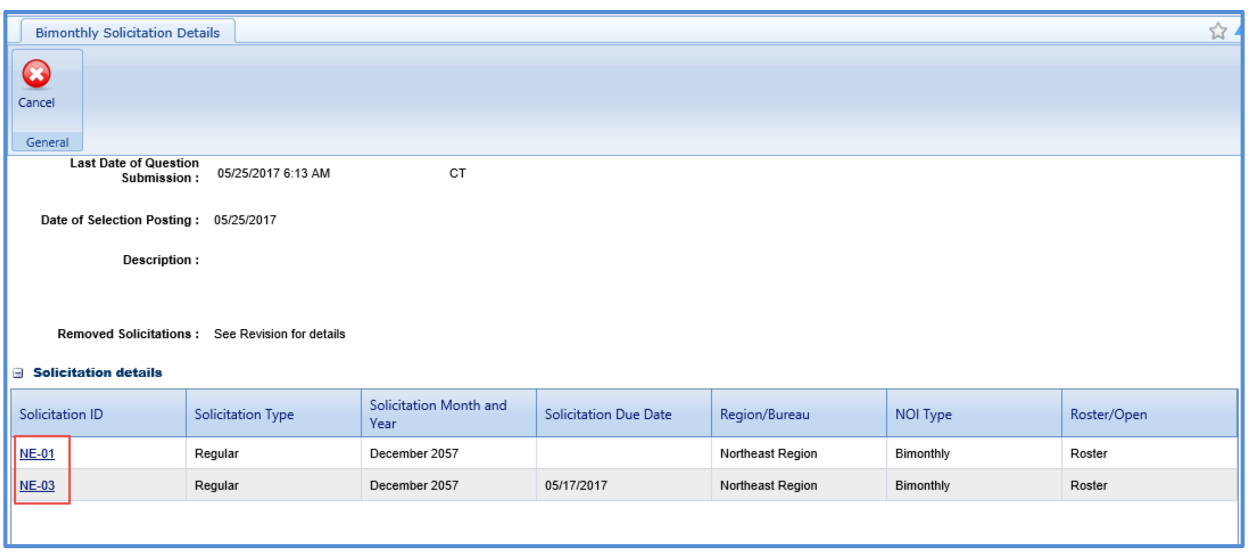


3.2 Submitting the Notice of Interest Questionnaire

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

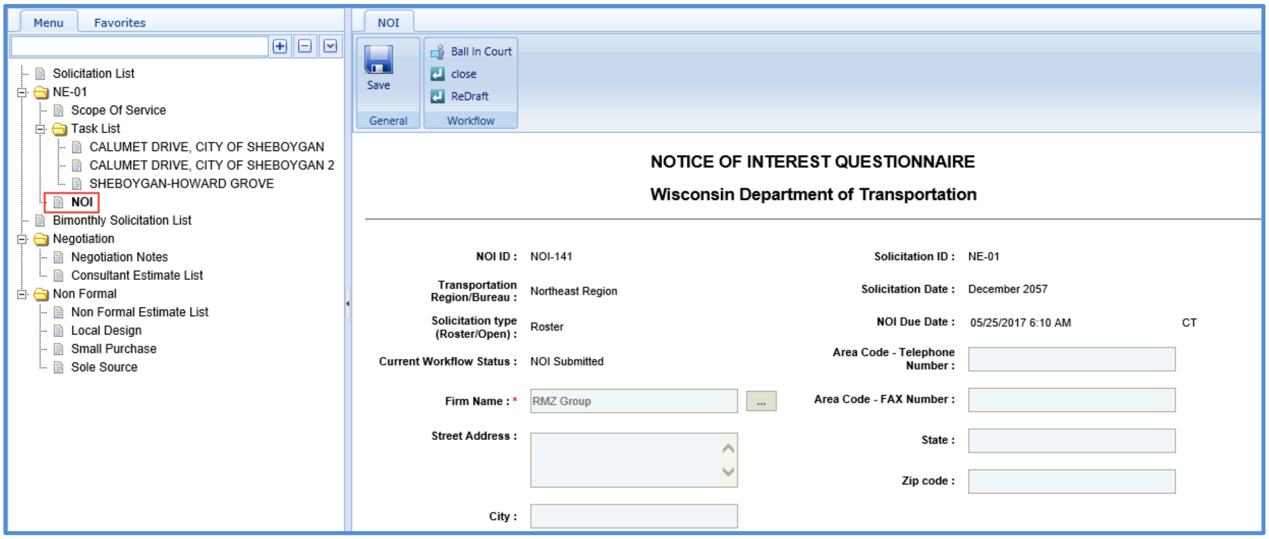
1. In the module menu, click **Solicitation**.
   The **Bimonthly Solicitation List** page is displayed.

2. 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.



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

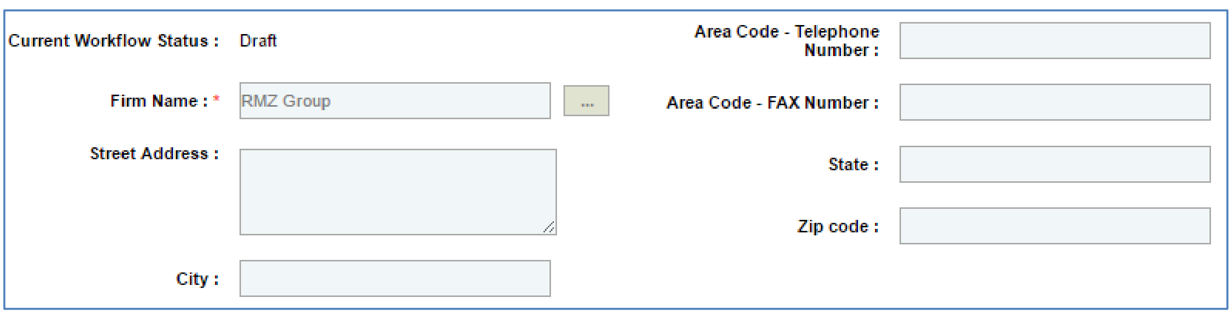
4. In the navigation pane, expand the solicitation folder, and click **NOI**. The **NOI** page is displayed.



***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.*

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

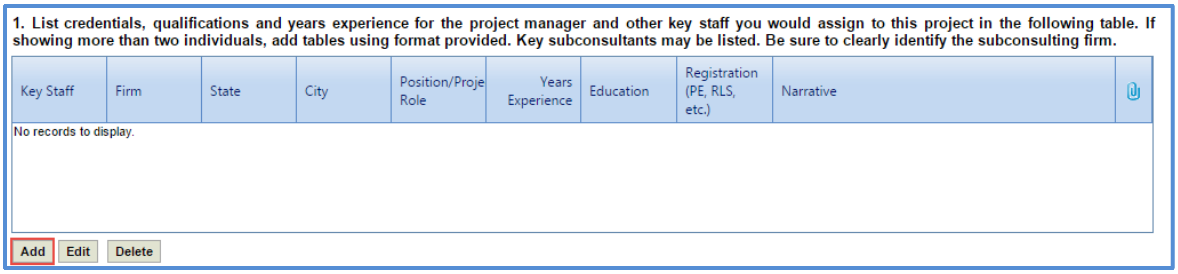
***Note**: All the fields described in the below table are non-mandatory fields.*



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

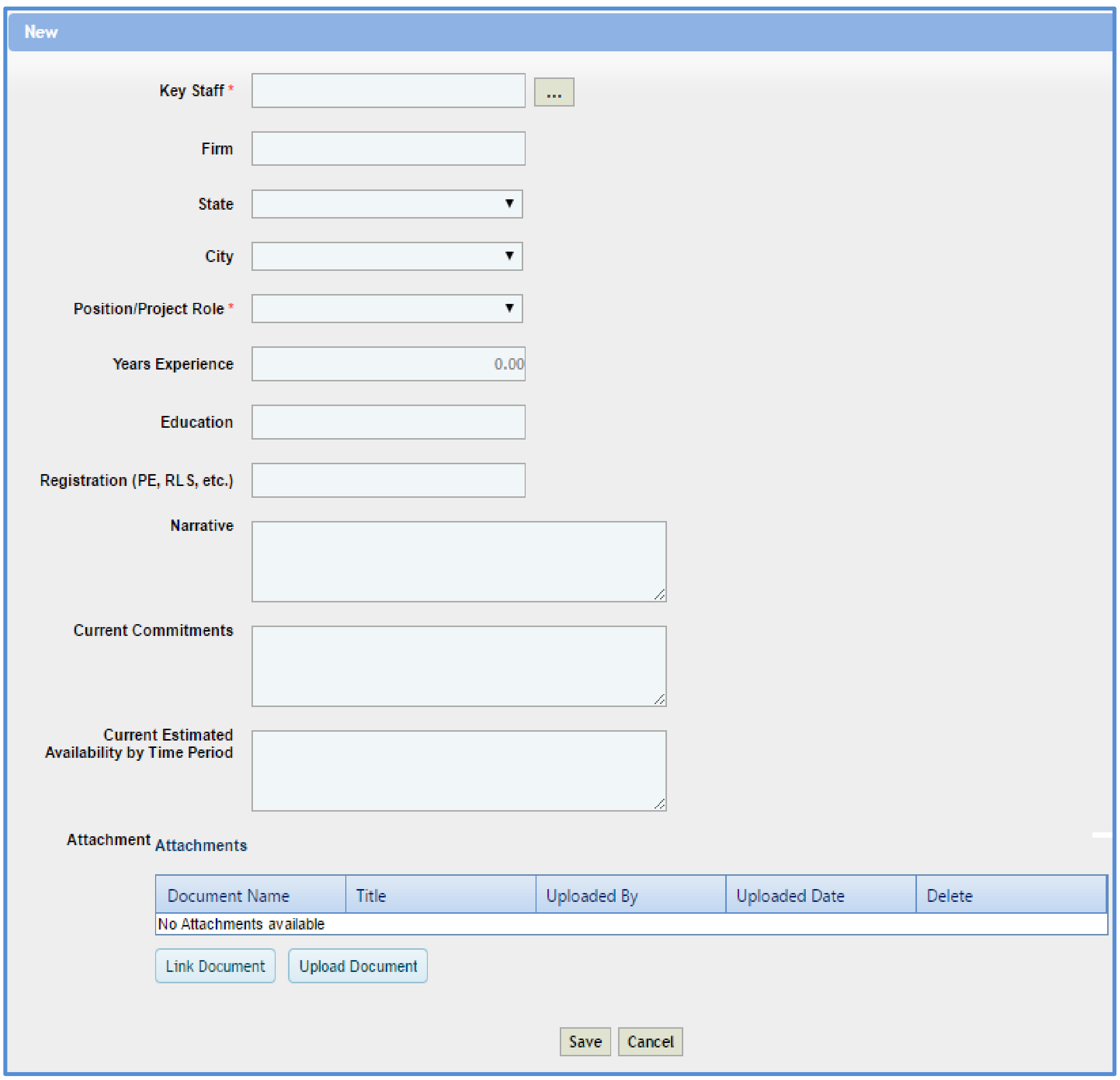
6. For factor 1, perform the following steps to add key staff details:

   a. Click **Add**.



   The **New** dialog box is displayed.

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

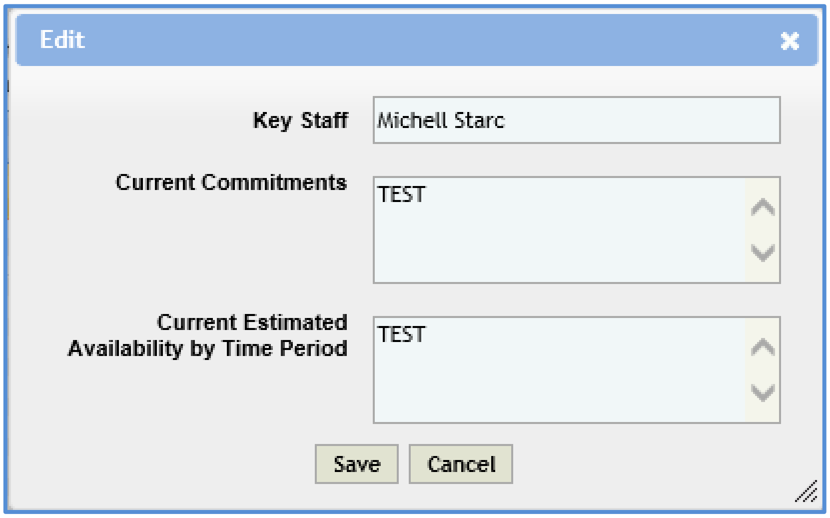
<table>
<tr><th>Field</th><th>Mandatory / Non-mandatory</th><th>Description</th></tr>
<tr><td colspan="3">
</td></tr>
<tr><td>Key Staff</td><td>Mandatory</td><td>To select key staff:</td></tr>
</table>

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



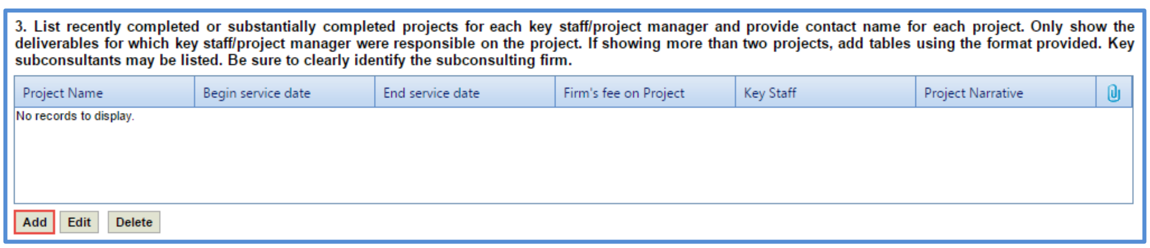
***Note**: The value in the **Key Staff, Current Commitments,** and* **Current Estimated Availability by Time Period** *field is auto-populated.*

b. If required edit information in the **Current Commitments** and **Current Estimated Availability by Time Period** fields.

c. Click **Save**.

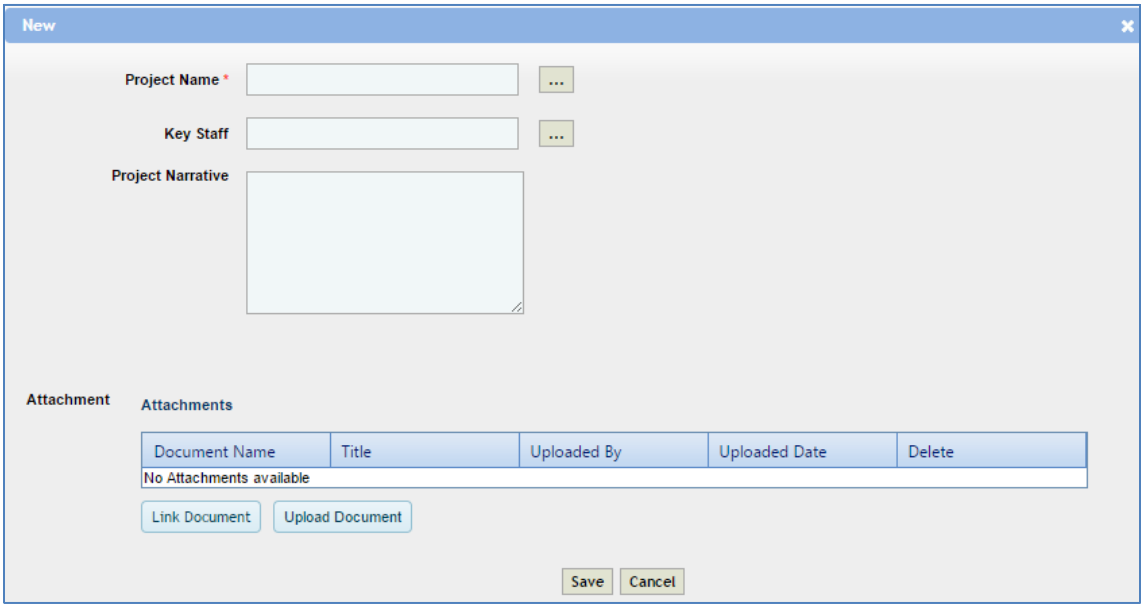
8. For factor 3, perform the following steps to add the past project details of the key staff:

   a. Click **Add**.



   The **New** dialog box is displayed.

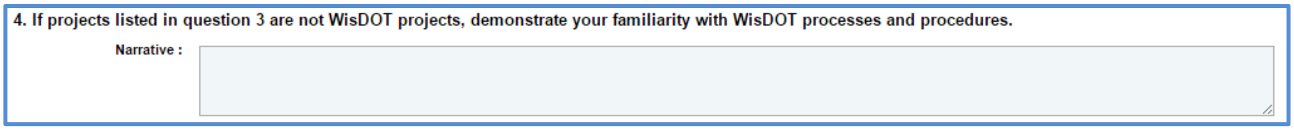
   b. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-Mandatory	Description
		
Project Name	Mandatory	To select a project: a. Click . The **Select Project** dialog box is displayed listing all the past projects of the consultant firm. b. Click the required project, and then click **Select**.
Key Staff	-	To select key staff: a. Click . The **Select Key Staff** dialog box is displayed listing all the key staffs of the selected project. b. Select the required key staff options, and then click **Select**. The selected key staff options are added.
Project Narrative	-	Enter the details of the selected past project.

   c. In the **Attachments** section, upload relevant images and files. For information on form attachments, refer *Attachments*.

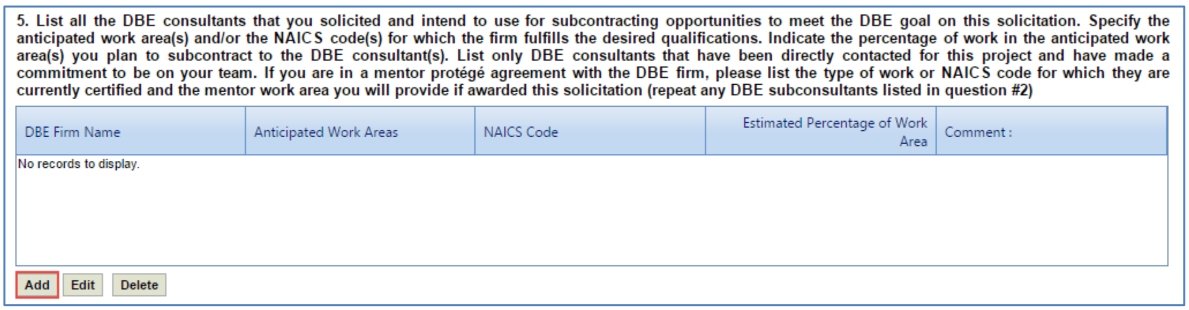
   d. Click **Save**.

9. For factor 4, in the **Narrative** box, enter details of the staffs' familiarity with WisDOT processes and procedures.



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

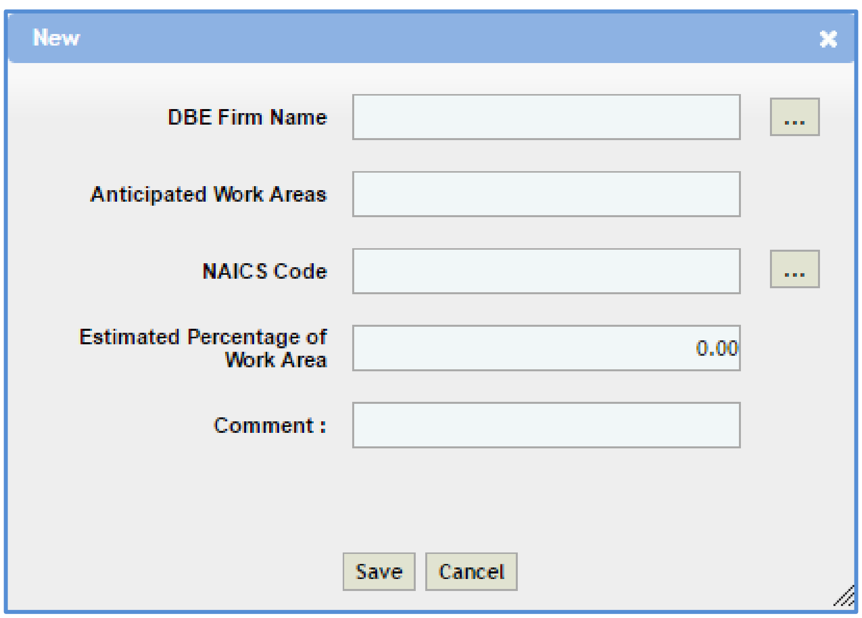
   a. Click **Add**.



   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.*

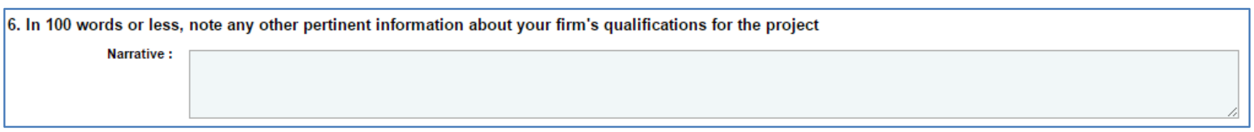


Field	Description
DBE Firm Name	To select a DBE firm: a. Click ... . The **Firm Name** dialog box is displayed listing all the DBE firms. b. Select the required firm, and then click **Select**.

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



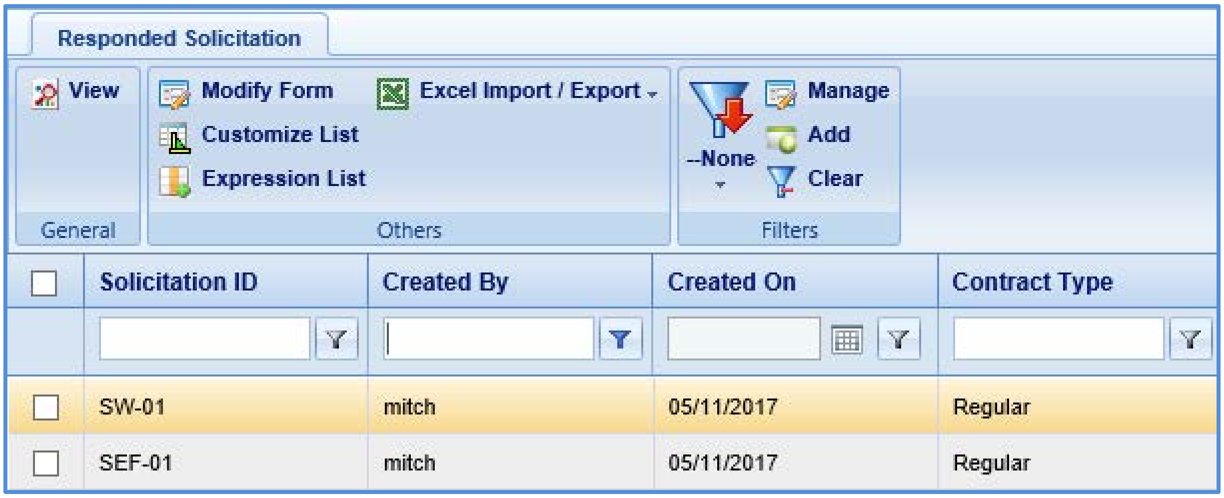
12. Click **Save**.
13. In the **Workflow** group, click **Submit**.
    The **WisDOT Masterworks Staging** dialog box is displayed.
14. Enter required information and then click **OK**.

4 Viewing Responded Solicitations

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

Steps:

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



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

5 Negotiation

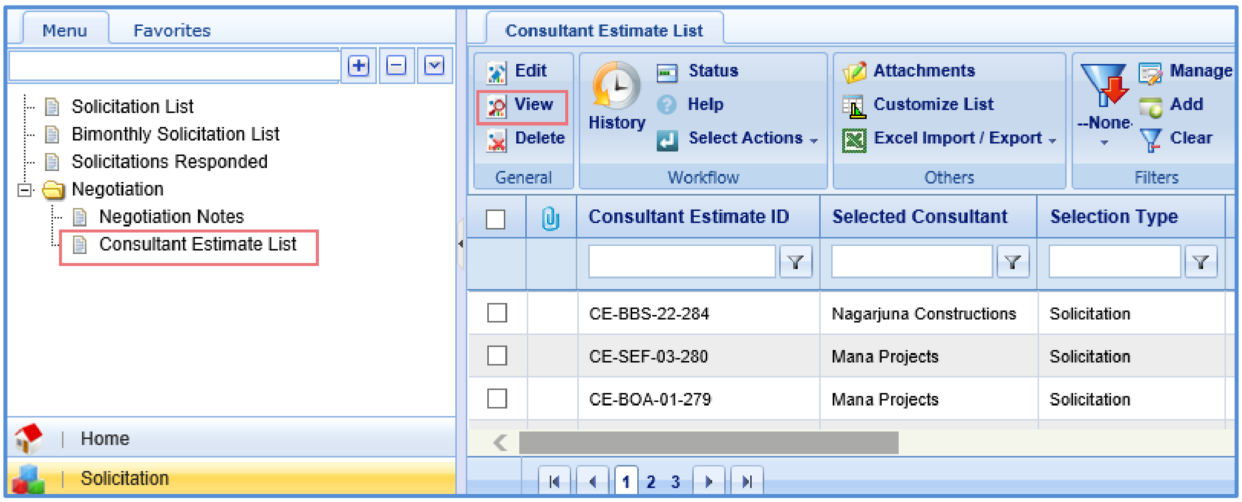
The system allows primary consultants to provide an estimate for the tasks assigned to them for negotiation purposes. If required, the primary consultants can sublet these tasks to other consultant firms and receive their estimation. Similarly, the sublet firms can further sublet the tasks to other consultant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

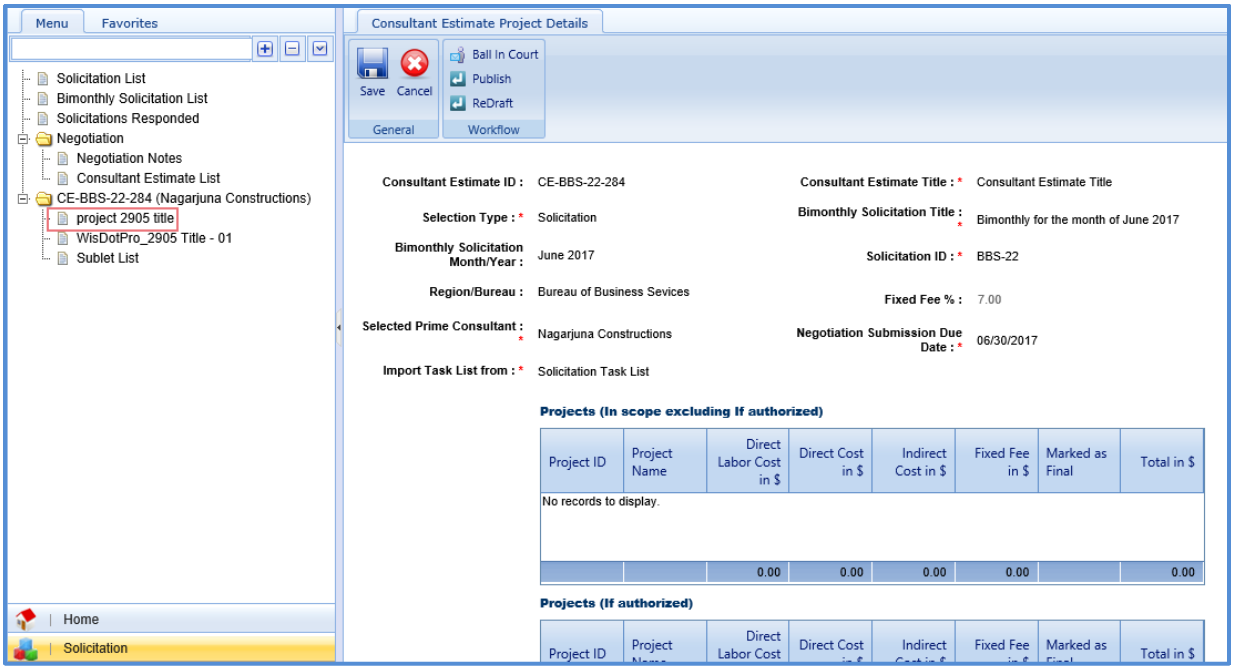


3. Select a consultant estimate record and click **View**. The **Consultant Estimate Project Details** page is displayed.

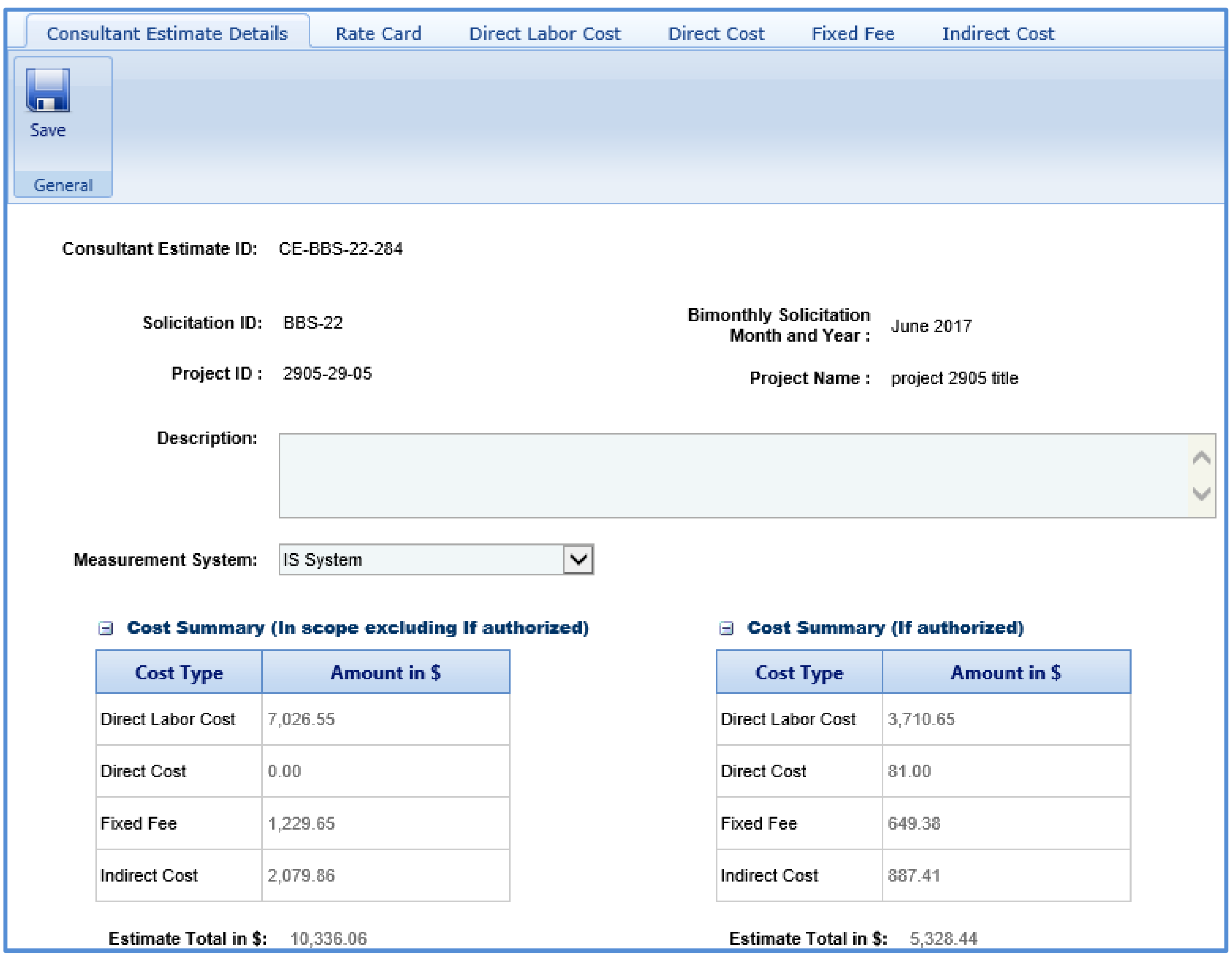
5.2 Adding Consultant Estimation

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.



4. 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.*

5. 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

Estimate Total in $: 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

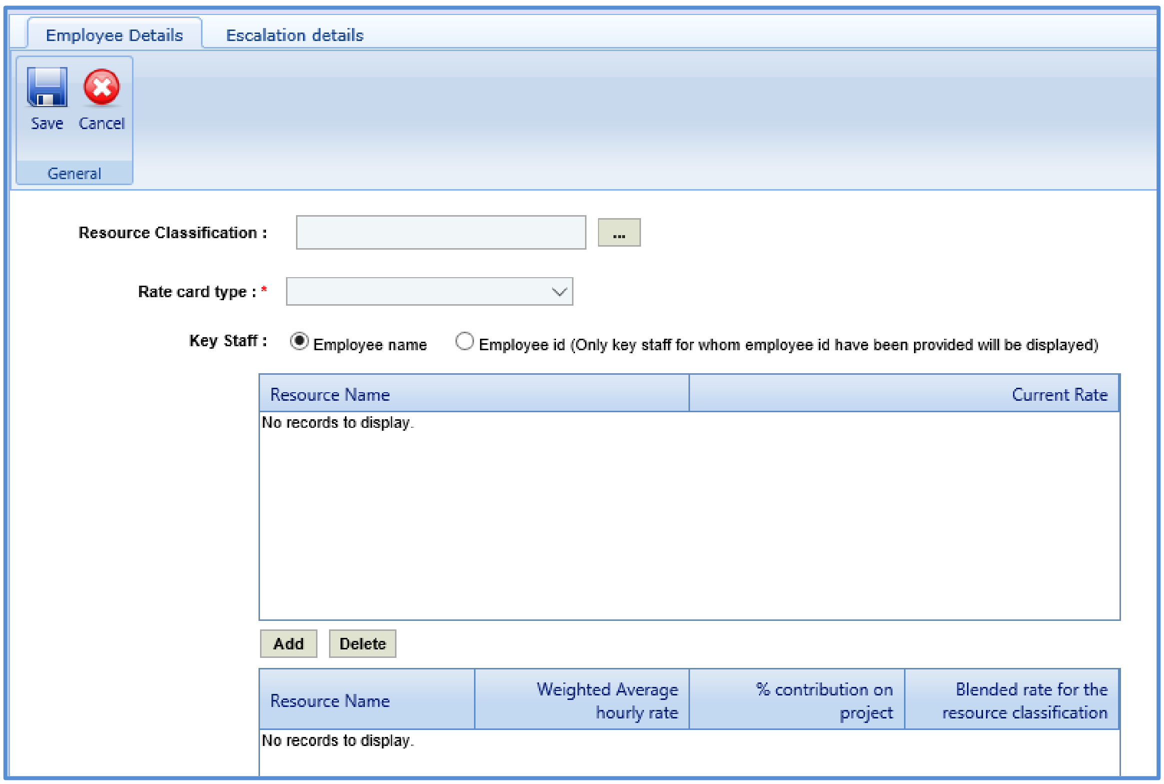
Estimate Total in $: 5,328.44

6. In the **Attachments** section, upload images and files relevant to the consultant estimate. For information on form attachments, refer *Attachments*.

7. Click **Save.**

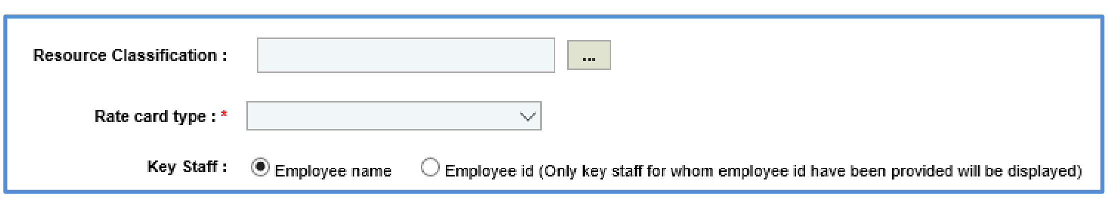
8. Click the **Rate Card** tab and perform the following steps to enter employee rate details and finalize the rate card for the estimate.

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



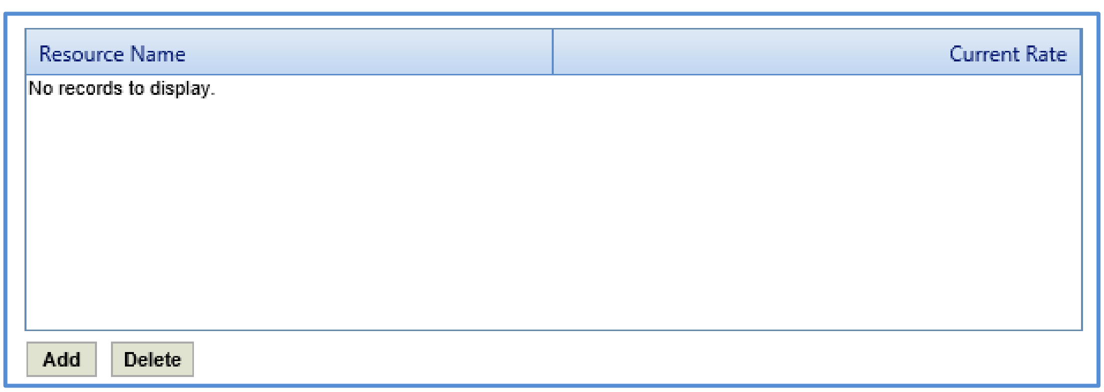
   b. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory/Non-mandatory	Description



Field	Mandatory/Non-mandatory	Description
Resource Classification	Mandatory	To select the classification of the resource: 1. Click . The **Resource Classification** dialog box is displayed. 2. Select the required resource classification and click **Save**.
Rate Card type	Mandatory	From the drop-down list, select one of the below options: • **Individual Wage**: Select this option to define the rate of resource inclusive of indirect costs and fixed fees. • **NA**: Select the option if the rate is not based on rate card. • **Specific Rate**: Select this option to define the rate of resource by specifying the rates of fixed fee and indirect cost.
Key Staff	Non-mandatory	• **Employee name:** Click this option to select key staff based on employee name. • **Employee id (Only key staff for whom employee id have been provided will be displayed):** Click this option to select key staff based on the employee ID.

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



i. 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.

ii. 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.

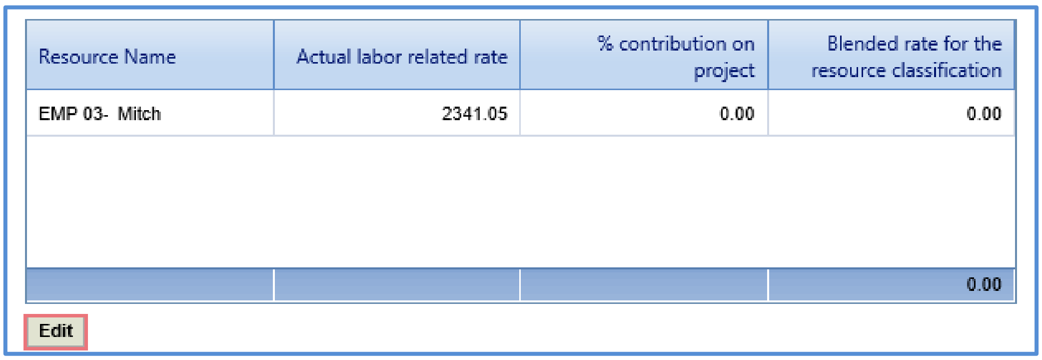
e. Click the **Employee Details** tab, in the second table, the key staff record with the actual labor related rate is displayed after adding the escalation details.

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:

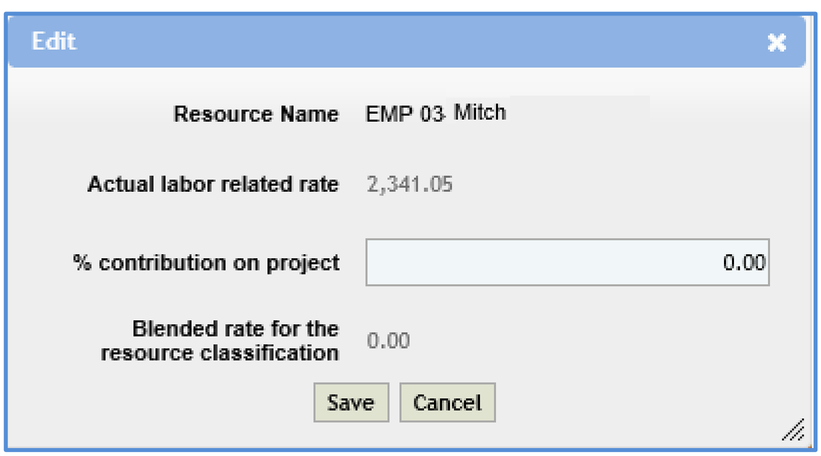
i. Select the record for which you want to add the percentage contribution and blended rate for the resource classification.



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
	
Resource Name	The name of the resource is auto-populated.

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

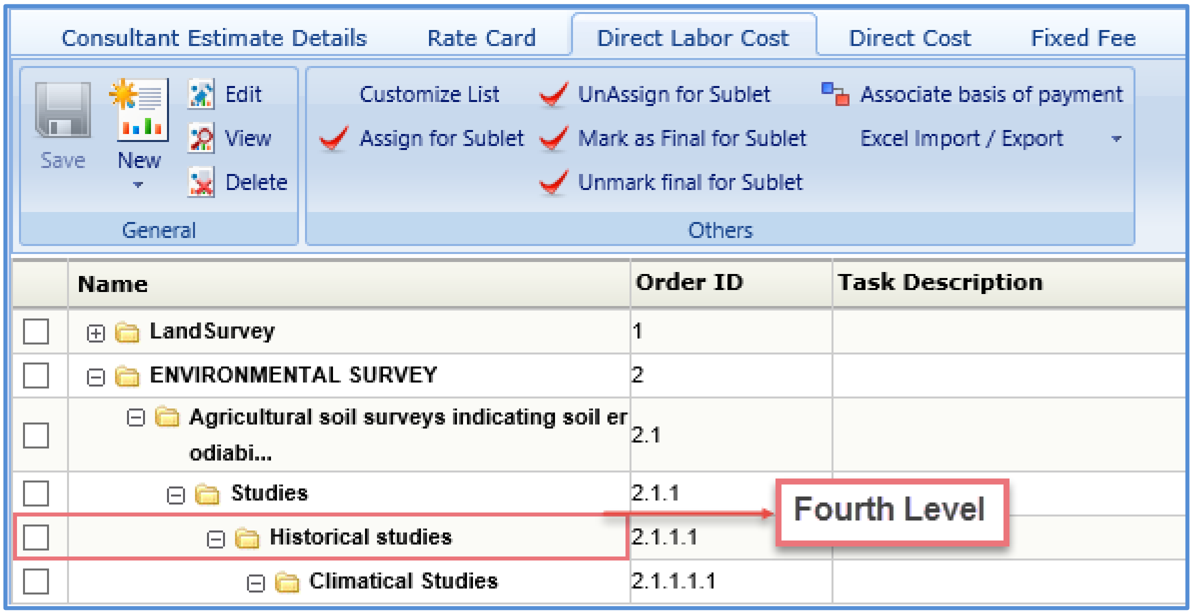
- *Multiple rate card records can be marked as final.*
- *To unmark a marked final record click the rate card record marked as final.*

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.

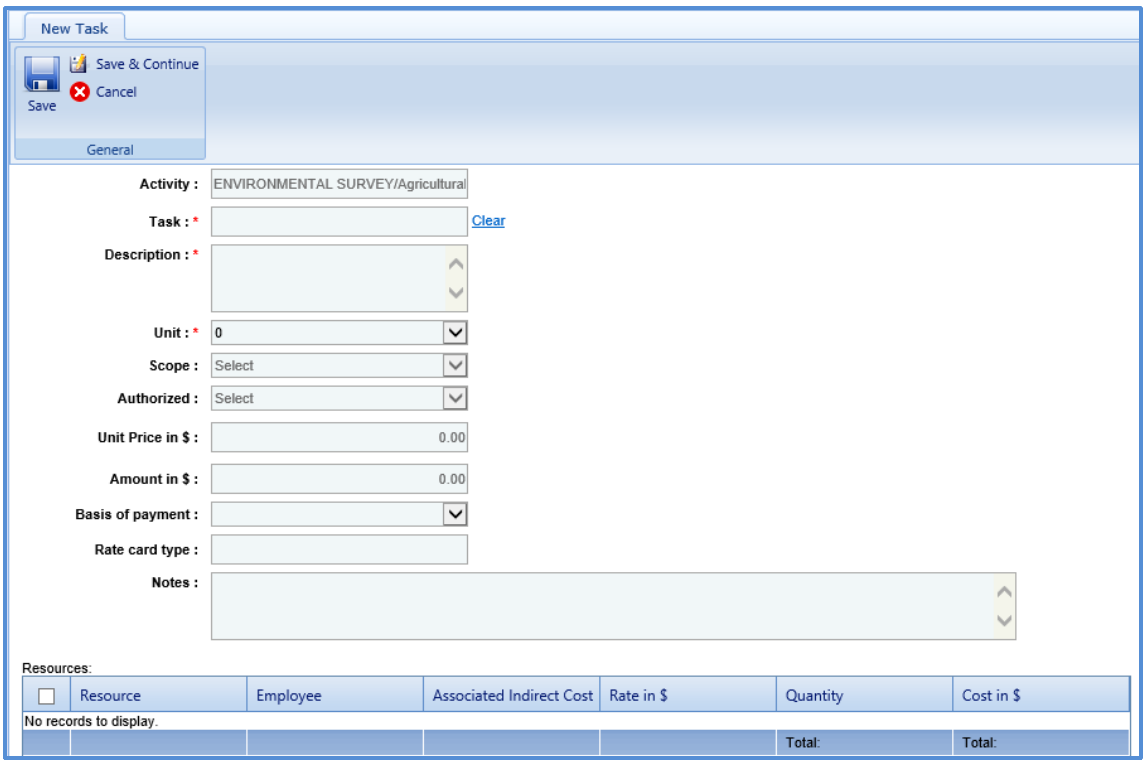
Adding a direct labor cost task

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

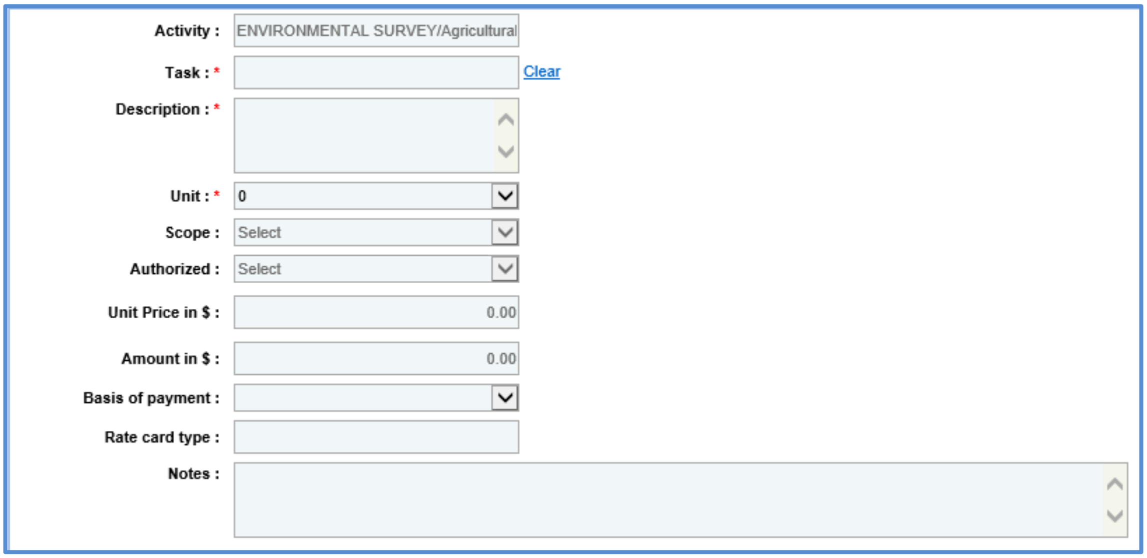


To add a direct labor cost task, perform the following steps:

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



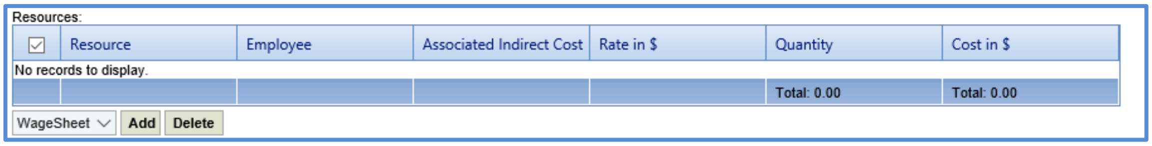
b. Provide information in the required fields. The fields in the section are described in the following table:

<table>
<tr><th>Field</th><th>Mandatory / Non-mandatory</th><th>Description</th></tr>
<tr><td colspan="3">


</td></tr>
<tr><td>Activity</td><td>-</td><td>The name of the selected activity folder in which the task is being added is auto-populated.</td></tr>
<tr><td>Task</td><td>Mandatory</td><td>Enter a name for the task.</td></tr>
<tr><td>Description</td><td>Mandatory</td><td>Enter description about the task.</td></tr>
<tr><td>Unit</td><td>Mandatory</td><td>From the drop-down list, select the unit of measurement for the task.</td></tr>
<tr><td>Scope</td><td>-</td><td>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.</td></tr>
<tr><td>Unit Price in $</td><td>-</td><td>The value in this field is auto-calculated and displayed from the Resources section.</td></tr>
<tr><td>Amount in $</td><td>-</td><td>The value in this field is auto-calculated and displayed from the Resources section.</td></tr>
<tr><td>Basis of Payment</td><td>Mandatory</td><td>From the drop-down list, select the required basis of payment. The drop-down lists all the basis of payment associated with the solicitation.</td></tr>
<tr><td>Rate Card Type</td><td>-</td><td>The rate card type is auto-populated based on the selected basis of payment.</td></tr>
<tr><td>Notes</td><td>Non-mandatory</td><td>Enter notes about the task.</td></tr>
</table>

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.



   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.

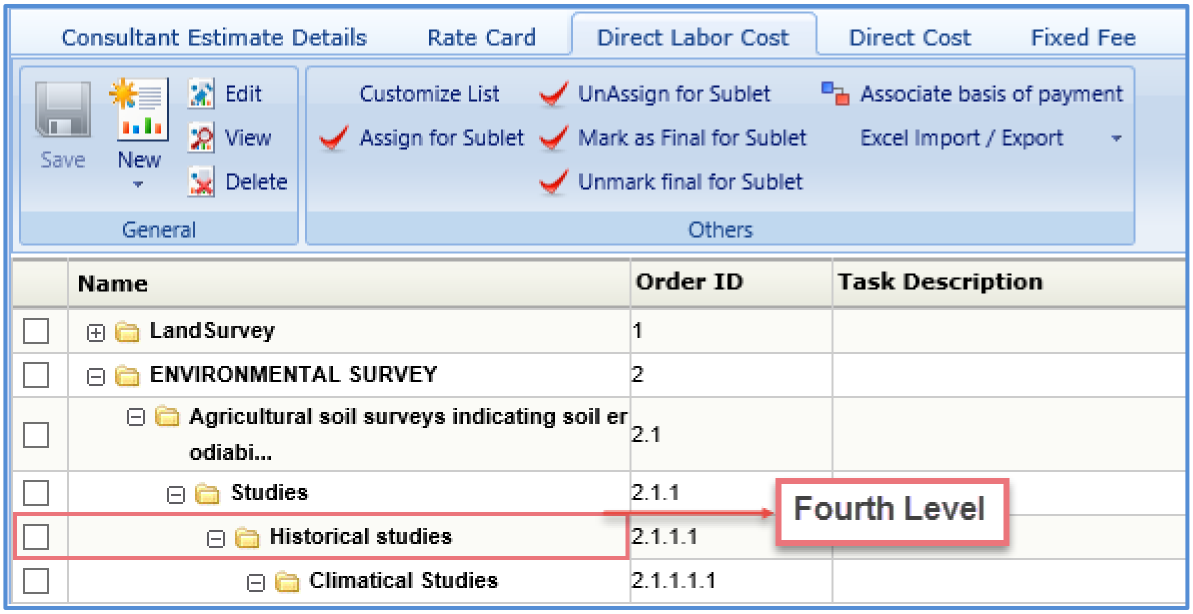
   Note: *The **Cost in $** for each resource is auto-calculated and displayed in the **Cost in $** column based on the **Rate in $** and **Quantity** values. The sum of cost in $ is also auto-calculated and displayed in the column.*

d. In the next section, upload images and files relevant to the task. For information on form attachments, refer *Attachments*.

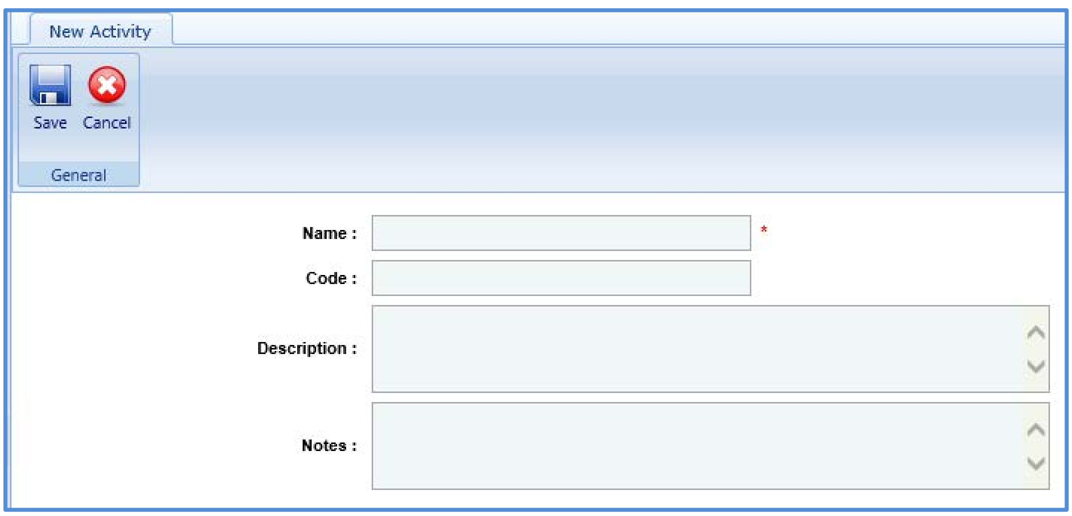
e. Click **Save**.

Adding an Activity

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



a. Click New 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:

a. Select the tasks that have to be sublet.

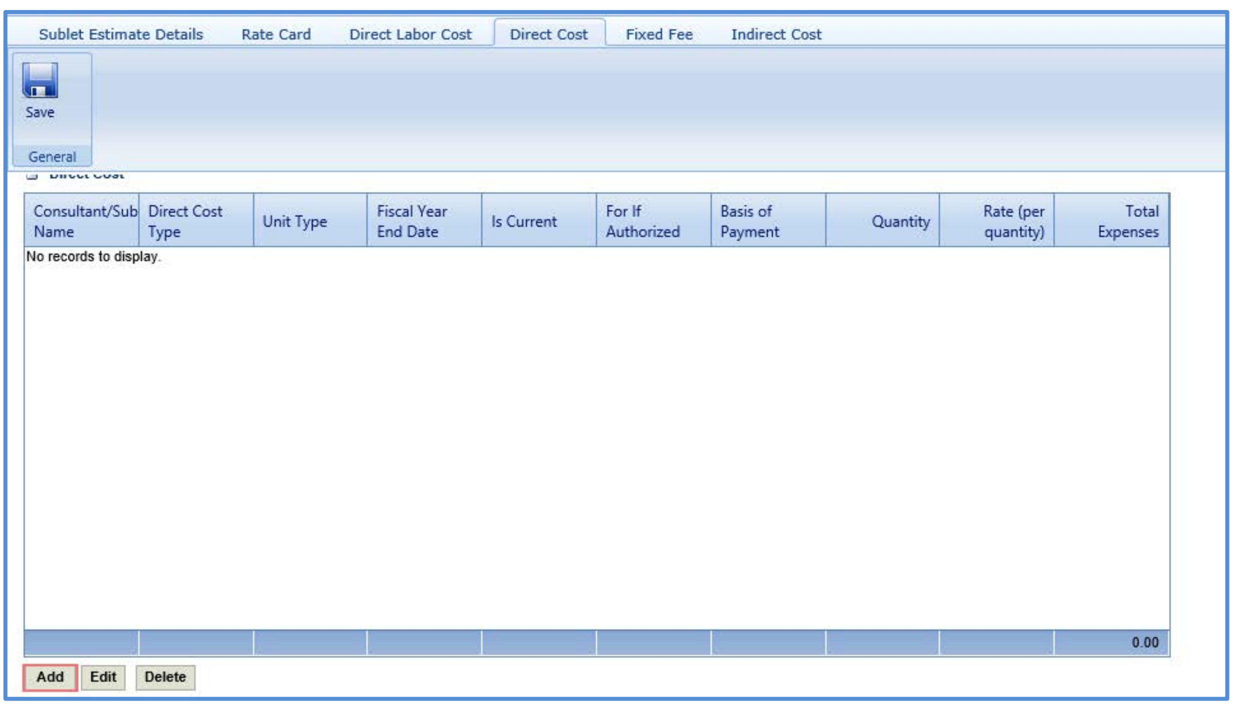
b. Click **Assign for Sublet**. If rate card details are entered for a task, then a message to confirm that the rate card details will be deleted and then assigned for subletting appears. Click **OK**.

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

c. 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**.*

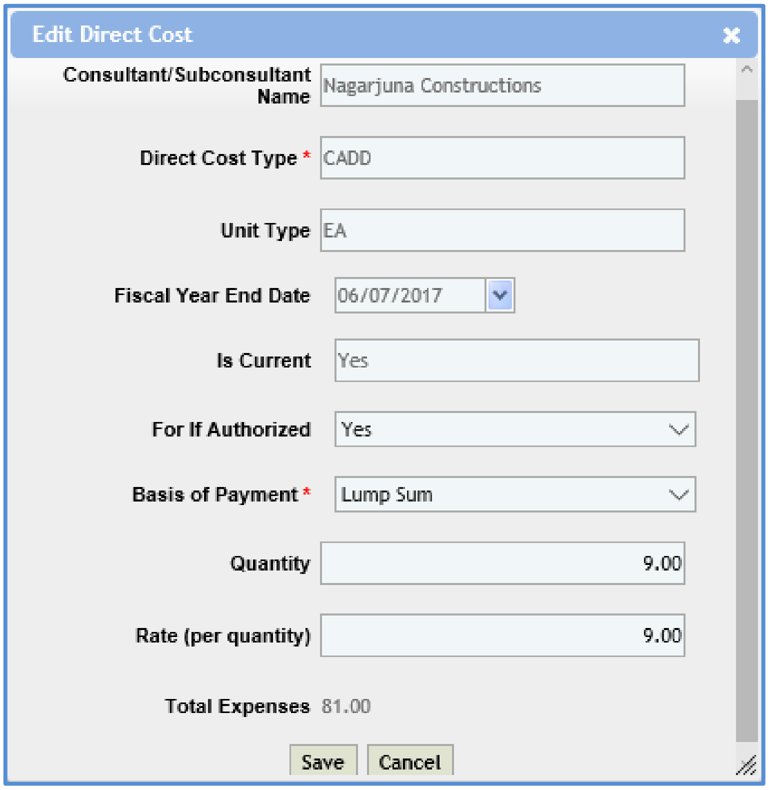
10. Click the **Direct Cost** tab to add direct costs. Perform the following steps:



a. 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.



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

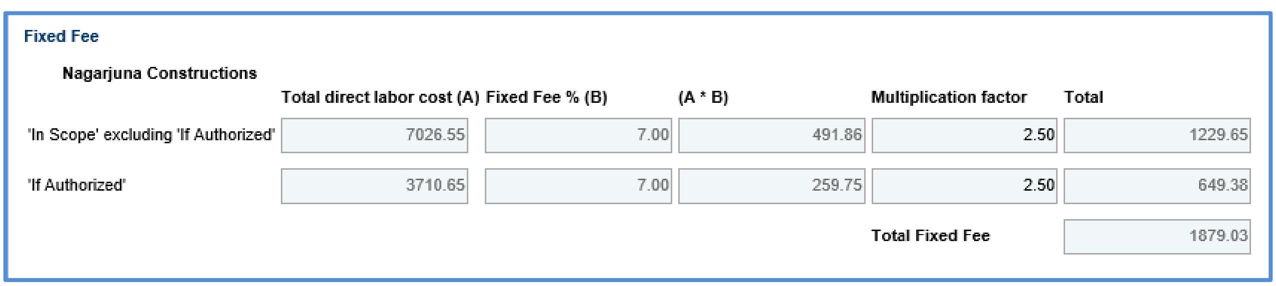
Field	Mandatory / Non-Mandatory	Description
Consultant/Subconsultant Name	-	The name of the consultant or sub-consultant firm is auto-populated.
Direct Cost Type	-	The name of the selected direct cost type is auto-populated.
Unit Type	-	The unit type of the selected direct cost is auto-populated.
Fiscal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

Field	Mandatory / Non-Mandatory	Description
		selected option is **Yes**, then the cost details are available for future implementation.
Basis of Payment	**Mandatory**	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.
Quantity	**Non-mandatory**	Enter quantity for the direct cost.
Rate (per quantity)	**Non-mandatory**	Enter the rate for one quantity of the direct cost.
Total Expenses	**-**	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.

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.



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.

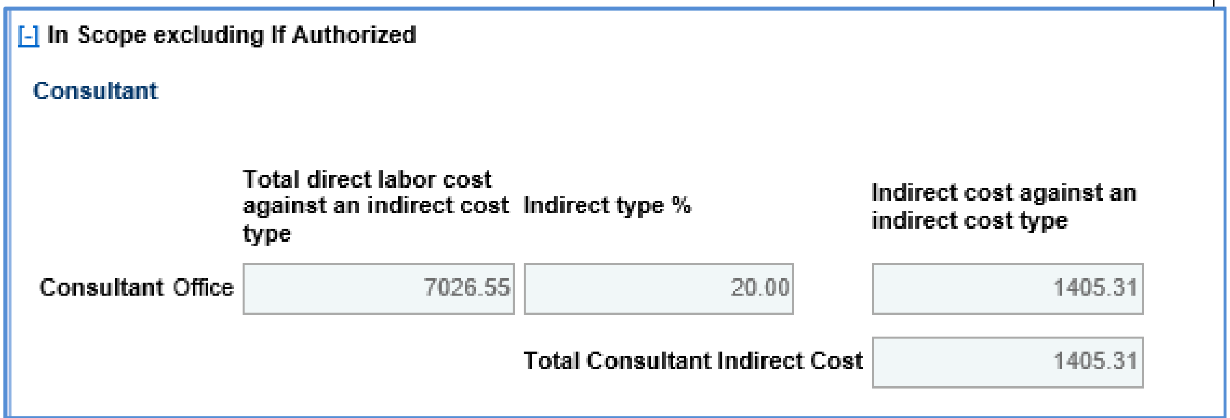
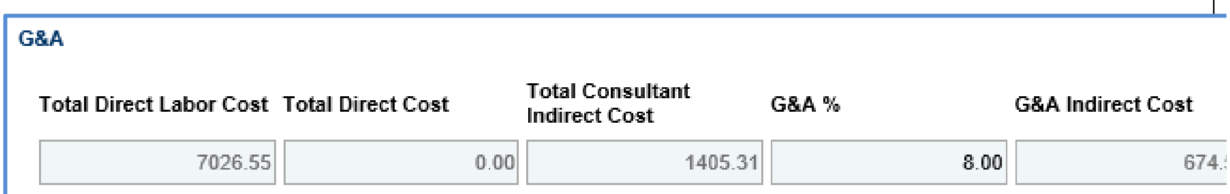
Field	Description
Total direct labor cost (A)	Indicates the total direct labor cost of the resource. The value in this field is auto-populated based on the total direct labor cost in the **New Task** page of the **Direct Labor Cost** tab.
Fixed Fee % (B)	Indicates the percentage of fixed fee defined for the resource. The value in this field is auto-populated based on the percentage defined in the **Fixed Fee %** section of the **Scope Details** 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.
(A * B)	Indicates the product of total direct labor cost and fixed fee percentage.
Multiplication factor	Indicates multiplication factor used to calculate the total fixed fee of a resource.
Total	Indicates the total fixed fee for the resource, which is auto-calculated based on the fixed fee amount and the multiplication factor.
Total Fixed Fee	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.

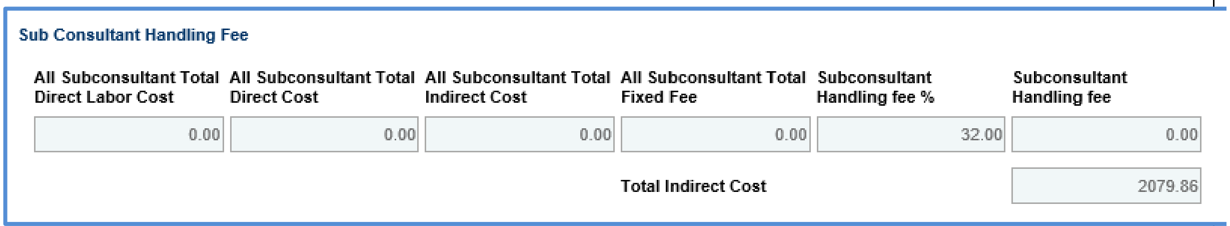
The total fixed fees is displayed in the **Cost Summary** section of the **Consultant Estimate Details** tab.

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
	
Total direct labor cost against an indirect cost type	The total direct labor cost associated with an indirect cost type for the consultant is auto-populated.
Indirect type %	Indicates the percentage of indirect cost defined for the consultant.
Indirect cost against an indirect cost type	Indicates the indirect cost amount of each indirect cost type, which is auto-calculated based on the total direct labor cost and indirect type %.
Total Consultant Indirect Cost	The total of consultant indirect cost is auto-calculated and displayed.
	
Total Direct Labor Cost	The total direct labor cost for G&A is auto-populated.
Total Direct Cost	The total direct cost for G&A is auto-populated.
Total Consultant Indirect Cost	The total consultant indirect cost for G&A is auto-populated.
G&A %	In the **In Scope excluding If Authorized** section, enter the percentage for G&A. The same percentage is auto-populated in the **G&A %** column in the **If Authorized** section.
G&A Indirect Cost	The total of the G&A indirect cost is auto-calculated and displayed.

Field	Description
	
All Subconsultant Total Direct Labor Cost	The total of sublet direct labor costs associated with an indirect cost type for the subconsultant is auto-populated.
All Subconsultant Total Direct Cost	The total of direct costs of all the subconsultants is auto-populated.
All Subconsultant Total Indirect Cost	The total of indirect costs associated of all the subconsultants is auto-calculated and displayed.
All Subconsultant Total Fixed Fee	The total of fixed fees of all the subconsultants is auto-populated.
Subconsultant Handling fee %	The total percentage of sublet handling fee is auto-populated.
Subconsultant Handling fee	The total of handling fees of subconsultants is auto-populated.
Total Indirect Cost	The total indirect cost in the **In Scope excluding If Authorized** section or **If Authorized** 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

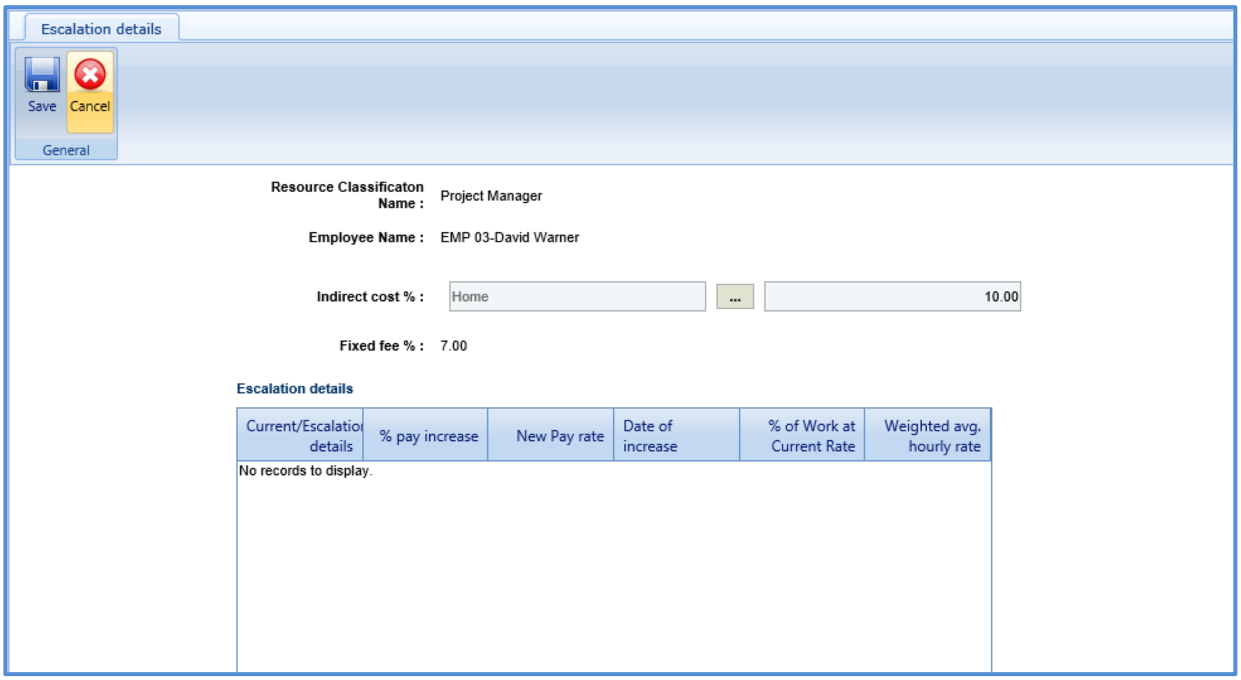
The system allows you to add escalation details for a key staff record. The procedure to add the escalation details is described.

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.



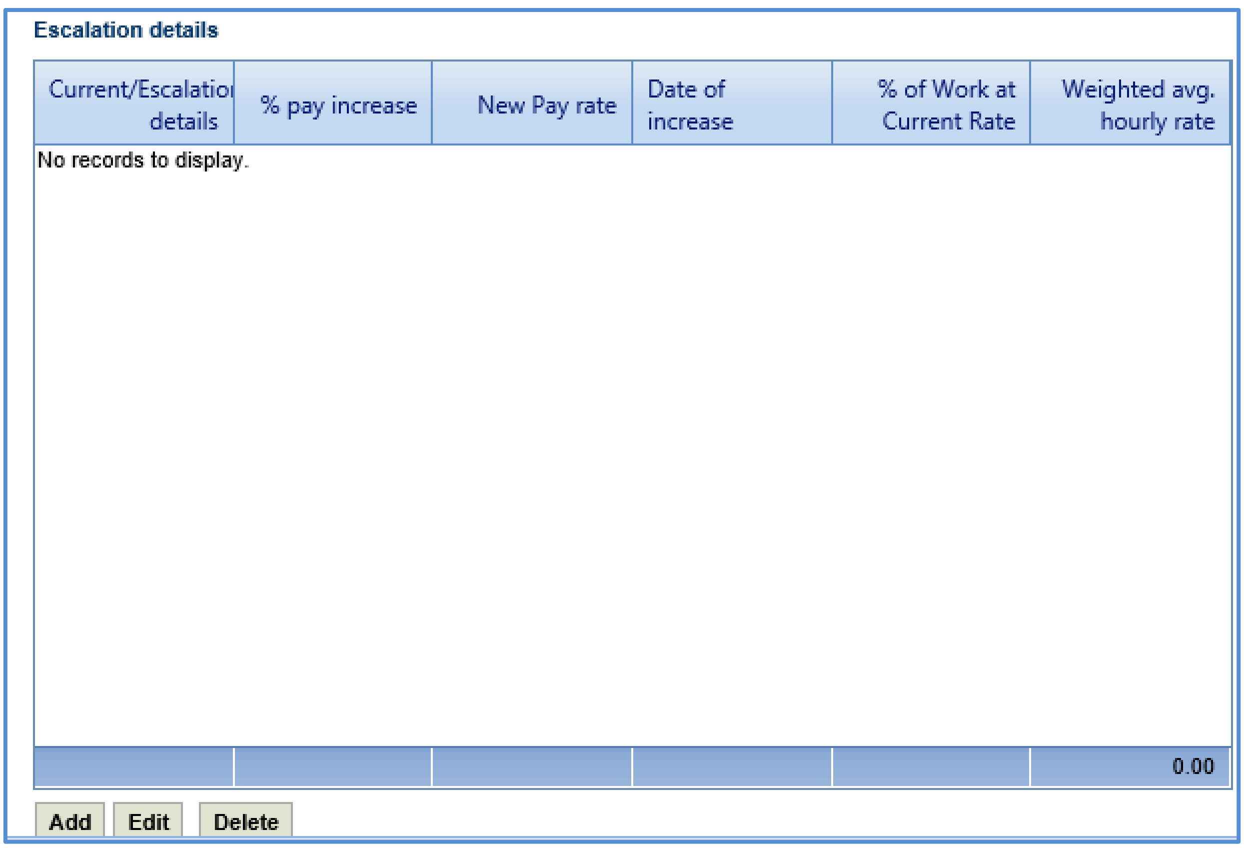
3. Enter information in the required fields. The fields are described in the following table.

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

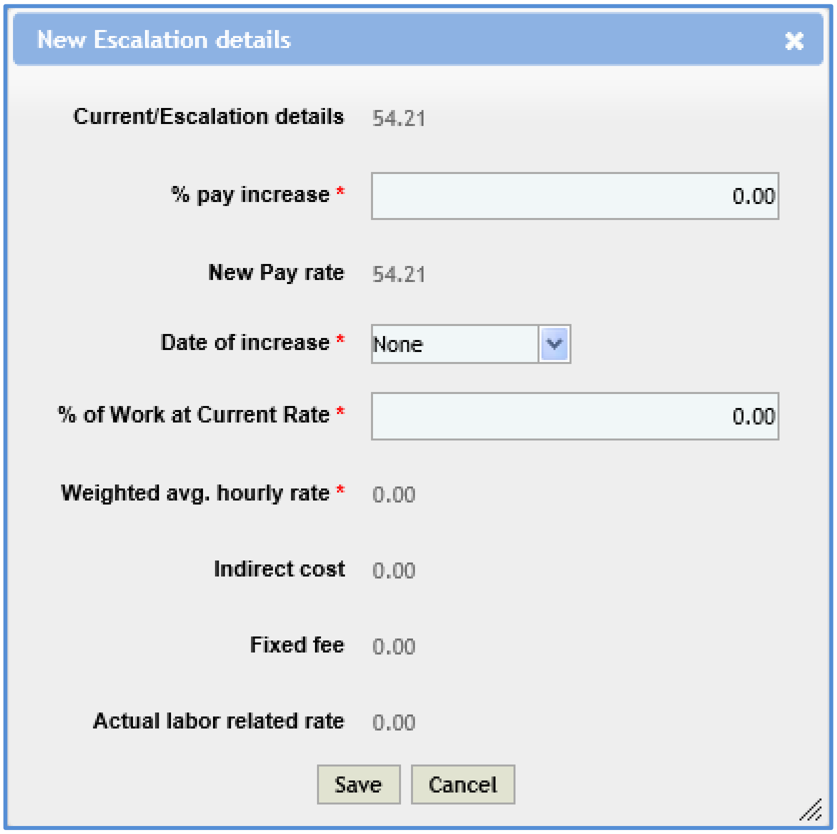
Field	Description
Resource Classification Name	Indicates the name of the resource classification of the key staff.
Employee Name	Indicates the name and employee ID of the key staff.

Field	Description
Indirect cost %	The field is displayed only when the **Rate Card type** is **Specific**. To select indirect cost percentage: 1. Click . The **Indirect Cost** dialog box is displayed listing all the indirect cost types associated with the consultant and are marked as current. 2. Select the required indirect cost and click **Select**. The percentage of the selected indirect cost is displayed in the corresponding box.
Fixed fee %	The field is displayed only when the **Rate Card type** is **Specific**. The percentage of fixed fee associated with the consultant on the Solicitation Scope of Service is auto-populated.

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



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



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

Field	Mandatory/Non-mandatory	Description
Current/Escalation details	-	The current rate of the key staff is auto-populated.
% pay increase	Mandatory	Enter the percentage of increase in pay for the key staff.
New Pay rate	-	The new pay rate for the key staff is auto-calculated and displayed. The auto-calculation is based on the values defined in the **Current/Escalation details** and **% pay increase** fields.
Date of increase	Mandatory	From the drop-down calendar, select the date from when the percentage of pay increase is applicable for the key staff.
% of Work at Current Rate	Mandatory	Enter the percentage of work that will be executed by the key staff at the defined current rate.
Weighted avg. hourly rate	-	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
		New Pay rate and **% of Work at Current Rate** fields.
Indirect cost	-	The field is displayed only when the **Rate Card type** is **Specific**. The indirect cost associated with the key staff is auto-calculated and displayed. The auto-calculation is based on the values defined in the **New Pay rate**, **% of Work at Current Rate,** and **Indirect cost %** fields.
Fixed fee	-	The field is displayed only when the **Rate Card type** is **Specific**. The fixed fee associated with the key staff is auto-calculated and displayed. The auto-calculation is based on the values defined in the **New Pay rate**, **% of Work at Current Rate,** and **Fixed fee** fields.
Actual labor related rate	-	The field is displayed only when the **Rate Card type** is **Specific**. 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 **Weighted avg. hourly rate**, **Indirect cost**, and **Fixed fee** 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%.*

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

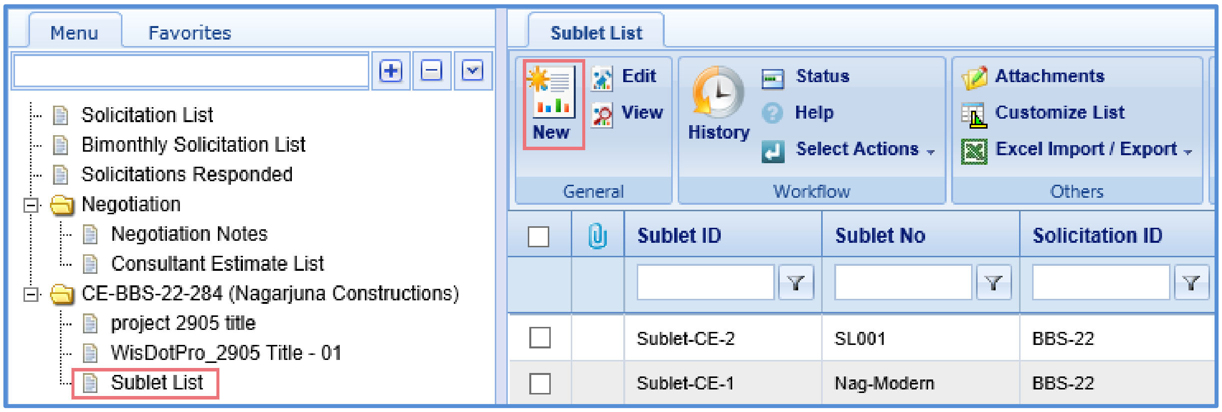
5.3 Finalizing Scope for Subletting

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.

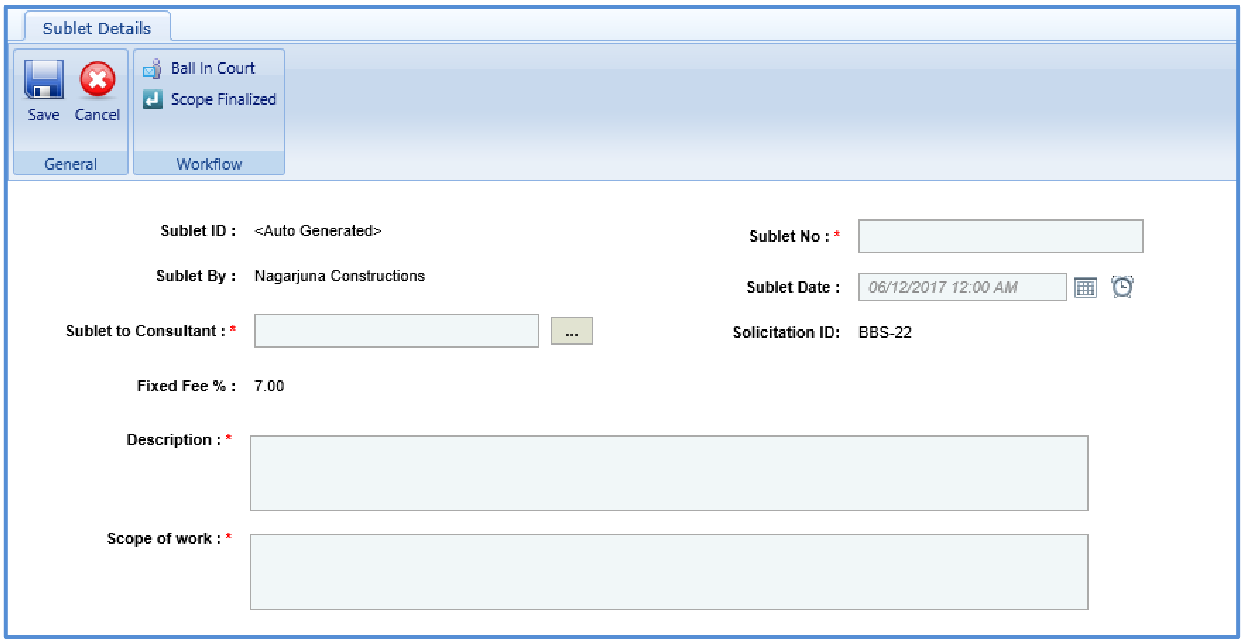
The procedure to add and finalize the scope for subletting is described:

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 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.

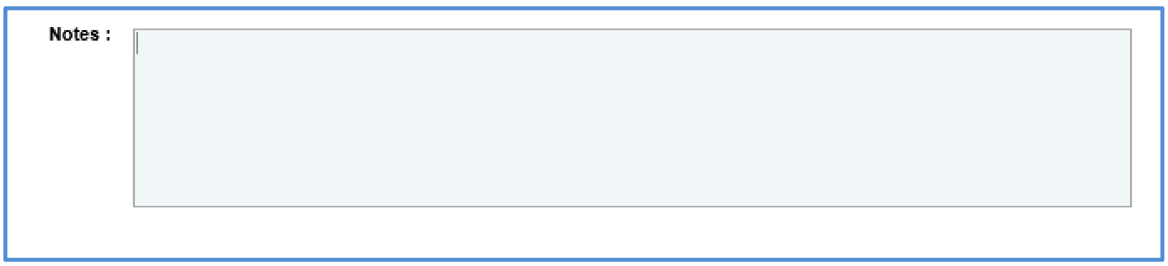


6. Enter information in the required fields. The fields are described in the following table.

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:

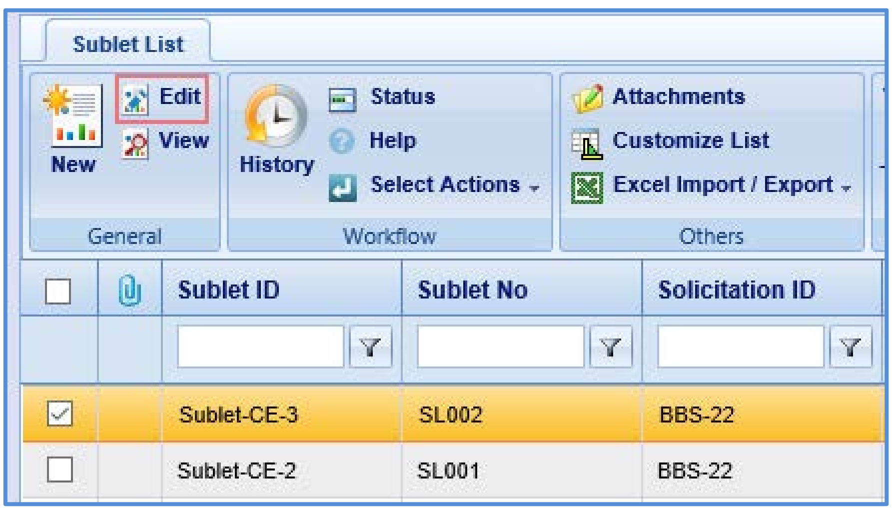
Field	Mandatory/Non-mandatory	Description
		1. Click . The **Consultant Name** dialog box is displayed listing names of the consultant firms. 2. Select the required consultant firm name and click **Select.**
Solicitation ID	-	The solicitation ID is auto-populated.
Fixed Fee %	-	The fixed fee percentage of the consultant is auto-populated.
Description	Mandatory	Enter description about subletting.
Scope of Work	Mandatory	Enter scope of work details for subletting.

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



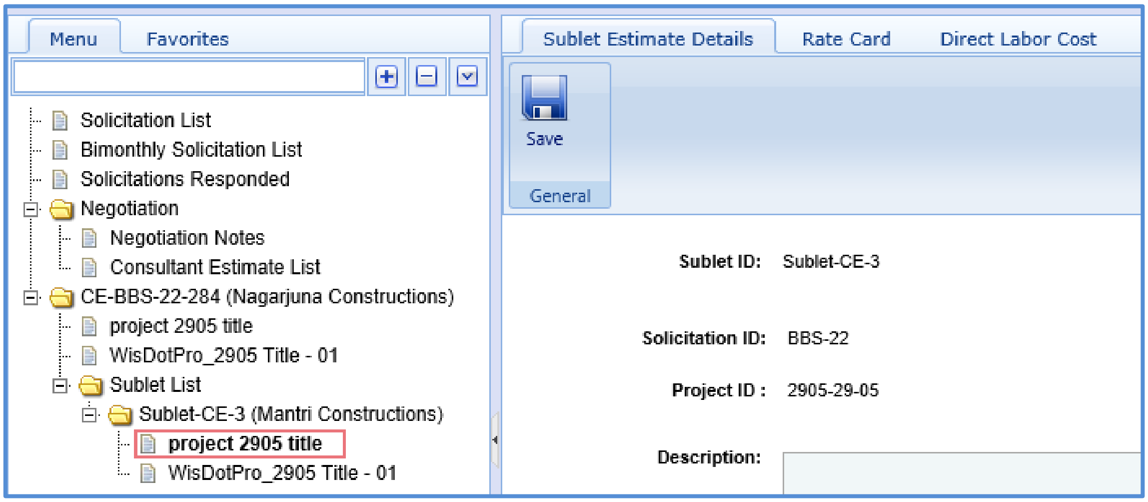
8. In the **Attachments** section, upload images and files relevant to subletting. For information on form attachments, refer *Attachments*.

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.

11. 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.



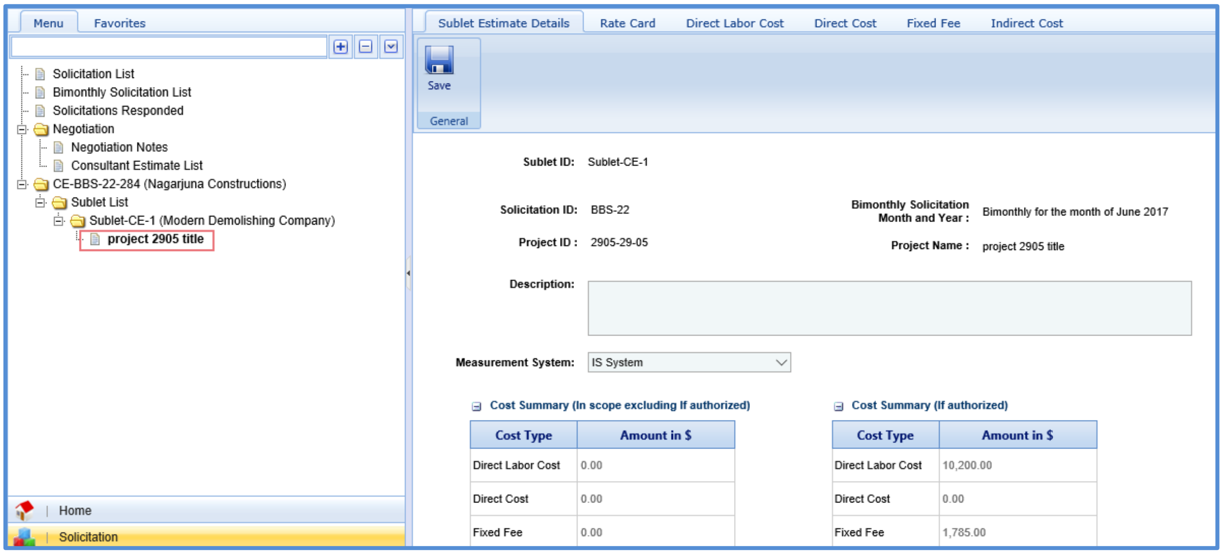
12. Click the **Direct Labor cost** tab and then click **Add Task**. The **Select Task** dialog box is displayed. The dialog box displays all the tasks of the selected project that are marked as final for sublet.
13. Select the required tasks that are to be sublet and then click **Select**.
14. In the navigation pane, click **Sublet List.** The **Sublet List** page is displayed.
15. 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.
16. 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:

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 and click **Edit**. The **Consultant Estimate Project Details** page is displayed.
4. In the navigation pane, in the consultant estimate folder, click **Sublet List.** The **Sublet List** page is displayed.
5. Select the record for which you want to provide estimation and click **Edit**.
6. 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

Estimate Total in $: 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

Estimate Total in $: 5,328.44

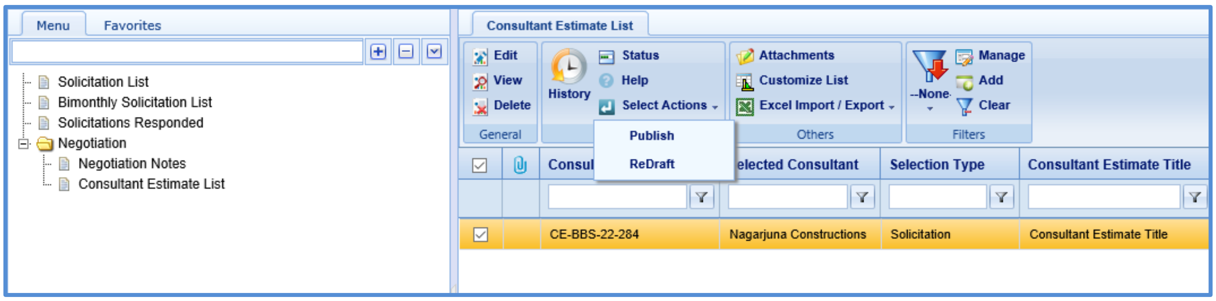
8. In the **Attachments** section, upload images and files relevant to the sublet estimate. For information on form attachments, refer *Attachments*.
9. Click **Save.**
10. Click the **Rate Card** to enter employee rate details and finalize the rate card for the estimate. For more information on the 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

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.