



# Agenda

## 1. Introductions

## 2. Overview

- Review schedule update
- Reviewing use of legacy WisDOT applications
- Masterworks Phase I timeline will be just in time delivery
- Review WisDOT training schedule for 2017
- add acronyms for: forms, reports and master libraries

## 3. Scope of this Statement of Delivery (SOD)

### Discussion in bulleted points

- Review As-is, To-Be user stories, data entry forms, list of reports, master libraries to be created for SOD
- **Construction Management** - Functional Requirements and Deliverables
  - Financial Tracking shall be across all phases of Construction Management
  - All Megas will be able to add in an inflation rate
  - Documentation of terms will be needed
  - i. **Budget Estimation**
    - User will do versioning of budget and provide justification
    - Add risks in the contingency stage
    - User may want report to see follow up estimate by segment, region, etc
  - ii. **Contractor Pre-Qualification**
  - iii. **PS&E Submittal**
    - PS&E can be on shelf for many years between submitted and approved – could note this with a status field
    - Add Q/A post advertisement
  - iv. **Construction Contract**
  - v. **Construction Change Management**
    - Step “Rough order of magnitude...”, “No Change Notification...” should be done in Masterworks
    - Utilize mail merge functionality when possible for notification
    - Contract change order actual, approved \$ vs budget \$ vs pending \$
    - There are different workflows for different regions
    - Add roles Design Project Manager and Construction Project Manager
  - vi. **Request for Information**
  - vii. **Design Issue Notice**
    - New Section – Submittal Management
    - New Section – Punch List
    - New Section – Correspondence

- Set turnaround time
- viii. Risk Management**
- ix. Issue Management**
- x. Project Schedule**
- xi. Document Management**
  - Correspondence/Transmittals, Meeting Minutes, Submittals/Materials may be managed by Document Management Folder
  - Document register – creation of document register list
  - Update latest file structure and RDA file
  - Document Number is unique. MW should autogenerate number for identification
  - Expand role names
- xii. Financial Tracking**
  - Inflation rates shall be global or project
  - Connected process in As-Is, To-Be should have reference numbers
  - Railroad project estimates to come from FIIPS
  - Rename C/E, CCO \$ to be C/E, Contract Amendments; CCO\$ from CCO module in MW to CCO\$ from CCO module in MW/AWP, LET\$ from AWP to LET@, CCO from AWP
  - Add report to see variation of data in Peoplesoft and AWP
  - Update pending amount in Build Out Budget (BOB)
- xiii. Pay Estimates**
- xiv. Purchase Orders**
- xv. Daily Diary**
- xvi. Explanation of Variation**
- xvii. Item Daily Record**
- xviii. Force Account Cost**
- xix. Construction Project**

#### **4. Masterworks Navigation Tree**

- Project Navigation Tree
- Contract Navigation Tree
- Enterprise Navigation Tree

#### **5. Integration**

- Masterworks Integration with WisDOT systems – Business Process
- Masterworks and AWP Integration – User Stories

#### **6. Data Migration**

- Data Migration – Scope
- Data Migration – Process
- Data Migration – Business Requirements

**7. Appendix**

**8. Questions**