



**aurigo**

**Aurigo Software Technologies Inc.**

**Consultant Guide**

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## 1 Getting Started

Masterworks allows you to view bimonthly solicitations, raise questions about solicitations, receive clarification to your questions, and express interest in a solicitation by responding to a 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>, 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.

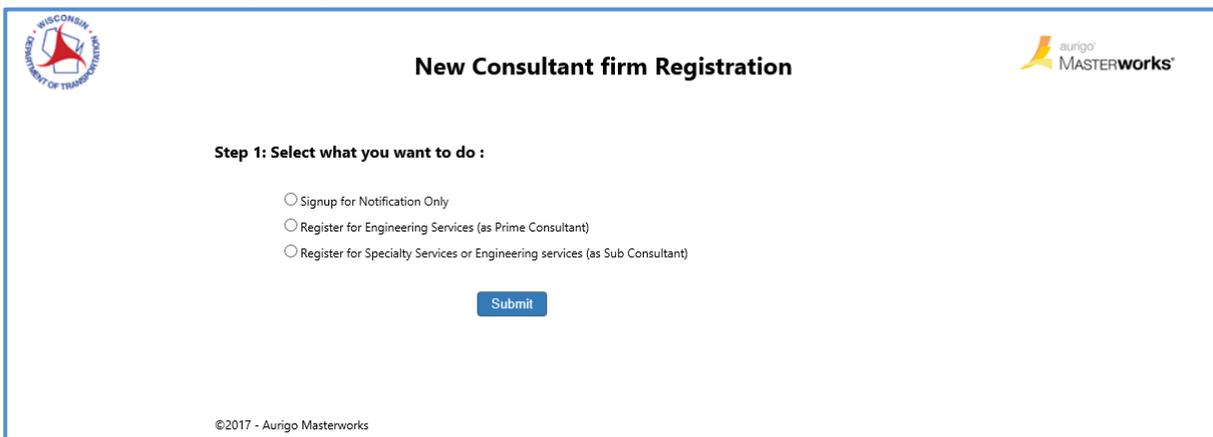
---

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.

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.				
<a href="#">Add</a>	<a href="#">Edit</a>	<a href="#">Delete</a>		

[Submit](#)

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

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

Title

First Name

Last Name

Telephone

Email

[Save](#) [Close](#)

- 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
<b>Title</b>	Enter the title of the user.
<b>First Name</b>	Enter the first name of the user.
<b>Last Name</b>	Enter the last name of the user.

Item	Description
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.

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

Firm Name :  \*

Title :  \*

First Name :  \*

Last Name :  \*

Telephone :  \*

Email:  \*

Firm Federal Identification Number :  \*

Create your Masterworks User ID :  \*

**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.

Item	Description
<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 :  \*

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.

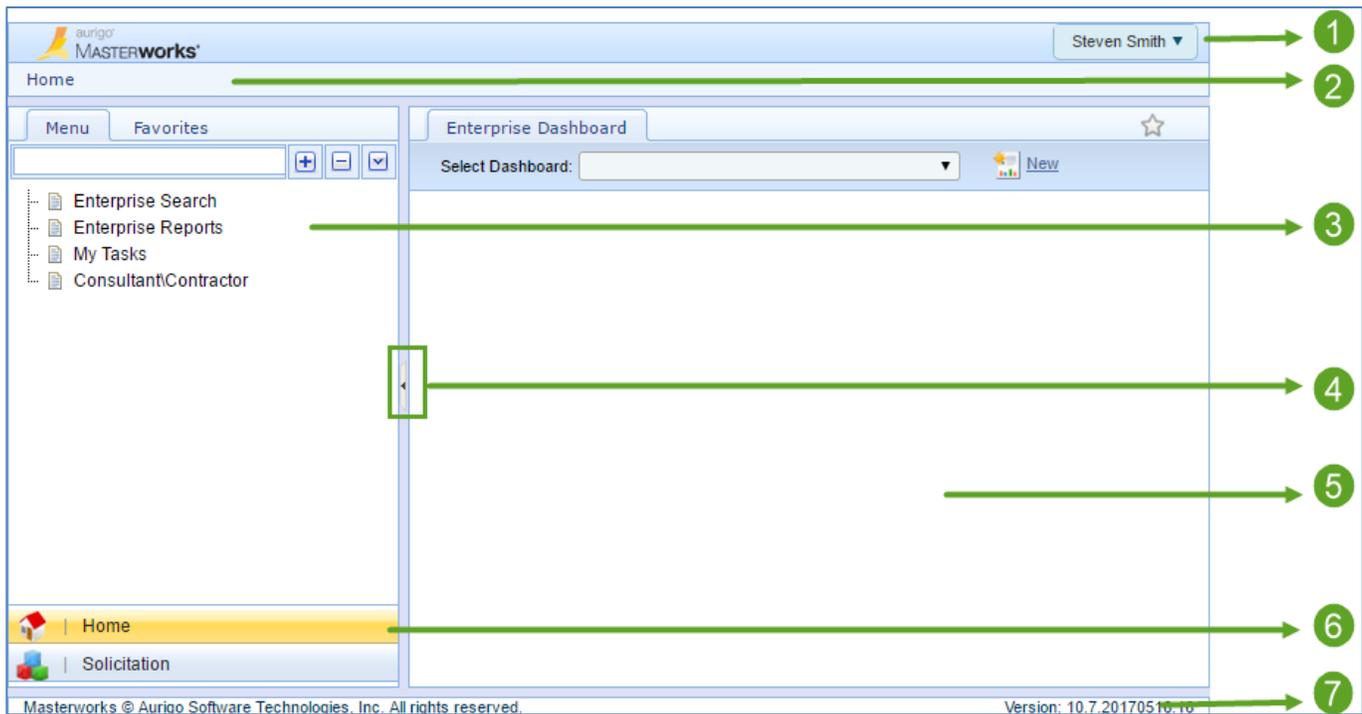
Item	Description
<b>Firm Name</b>	Enter the firm name of the sub-consultant firm.
<b>Title</b>	Enter the title of the sub-consultant firm.
<b>First Name</b>	Enter the first name of the sub-consultant firm.
<b>Last Name</b>	Enter the last name of the sub-consultant firm.
<b>Telephone</b>	Enter the telephone 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.

Item	Description
CFR to be submitted by your firm?	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.

Item	Description
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 Consultant\Contractor Details

To view the Consultant\Contractor details, perform the following steps:

1. In the **Home** module, click **Consultant\Contractor**.  
The Consultant\Contractor page displays the consultant details of the logged in user.
2. Select the firm and click **View**.  
The consultant details are displayed.
3. In the navigation pane, expand the consultant folder.  
The list of consultant library forms is displayed.

The screenshot shows the 'Firm Details page' for 'Firmy Constructions Company'. The page is divided into several sections:

- General Information:**
  - Firm Federal Identification Number : FFI 101
  - Firm Name : \* Firmy Constructions Company
  - Legal Name : \* FCC - Updated
  - Firm Type : \* Federal Agency
- Office Locations:**

Address 1	Address 2	Address 3	City	State	Country	Zip Code	Telephone Number	FAX Number	Number of Staff	Primary Location
A1 - O2	A2	A3	MADISON	Wisconsin	United States	445566	22334455	12345678	50	No
- Contact Information:**

Name	Title	Telephone	Email	Contact Type
FCC - Name 1	CFO	1234567890	cu29@aurigo.com	CFO
FCC - Name 2	CEO	112233445566	cu30@aurigo.com	CEO

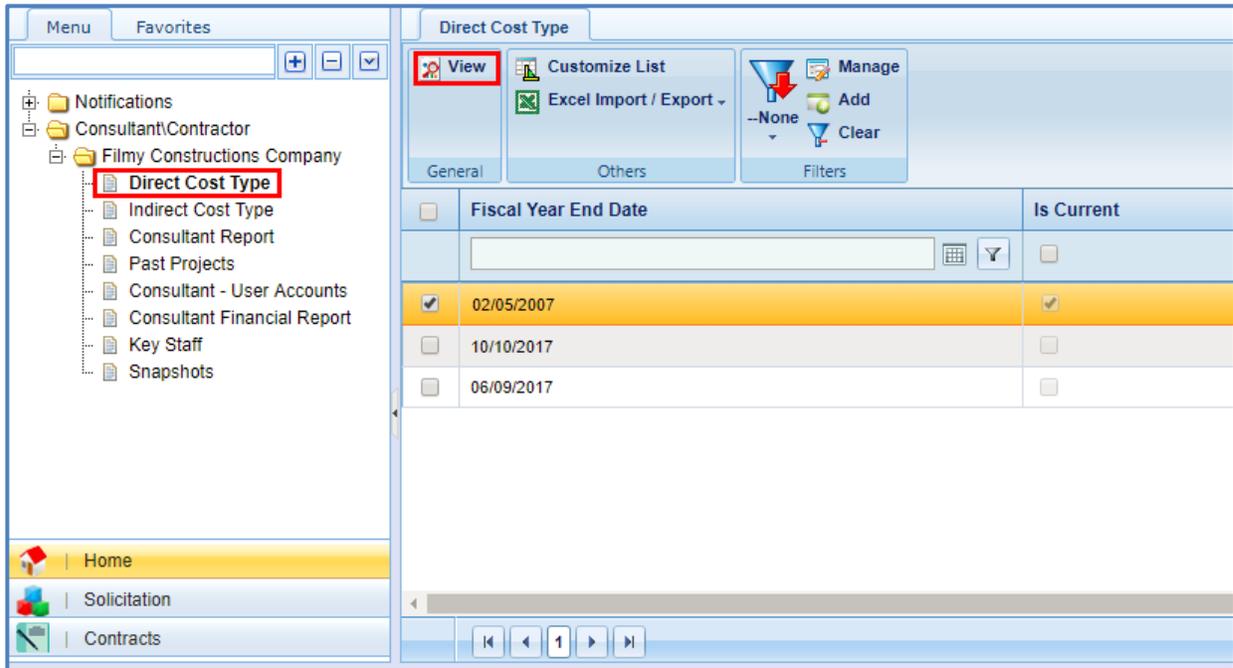
### 2.1 Viewing Direct Cost Type

To view the Direct Cost Type details.

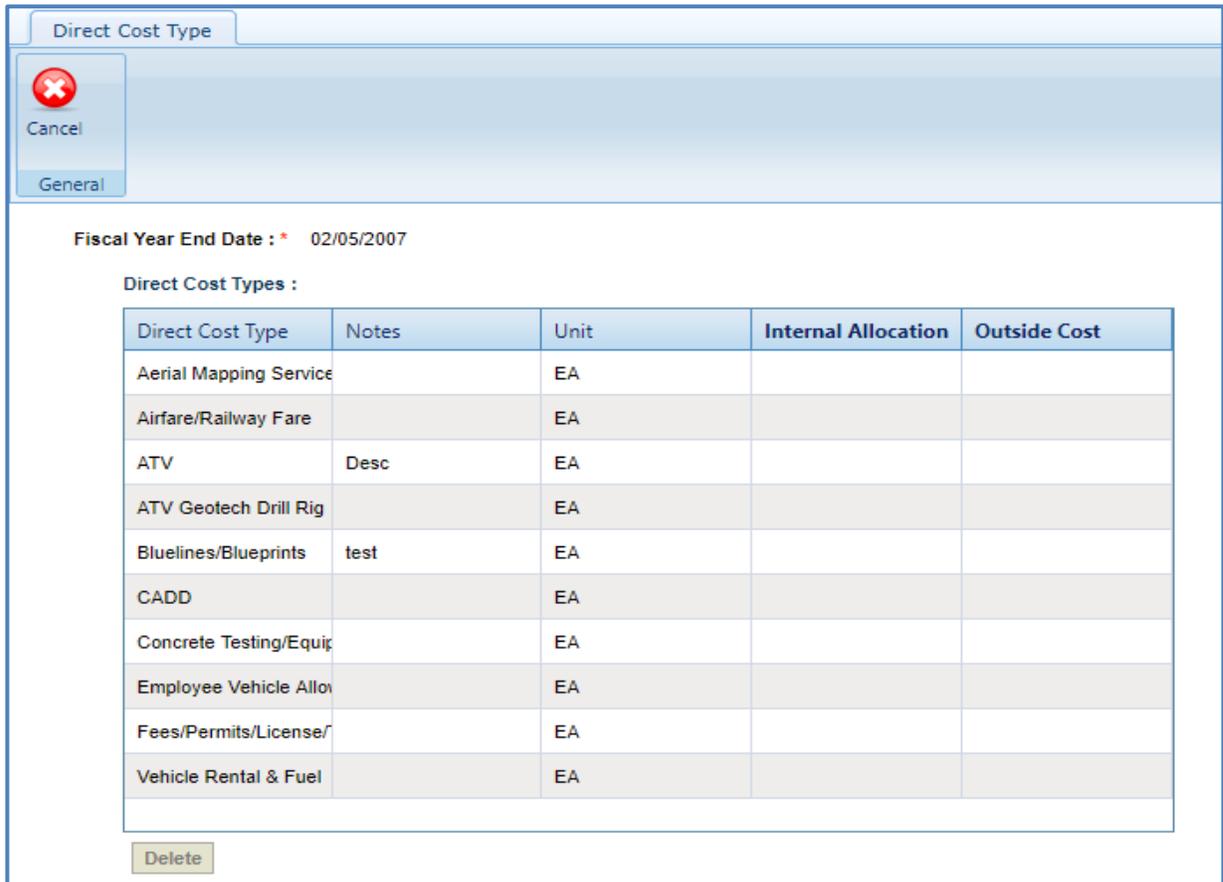
Steps:

1. In the navigation pane, click **Direct Cost Type**.  
The Direct Cost Type records that are created by WisDOT for the consultant are displayed.

2. Select the Direct Cost Type record that is marked "Is Current" and click **View**.



The Direct Cost Type page is displayed.

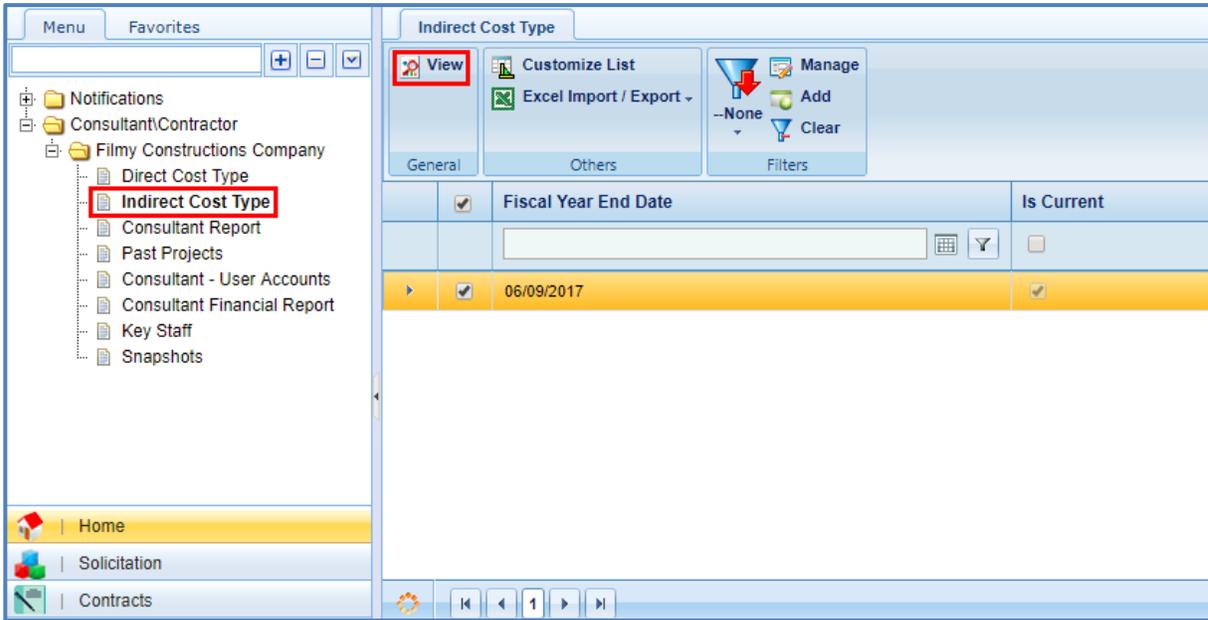


## 2.2 Viewing Indirect Cost Type

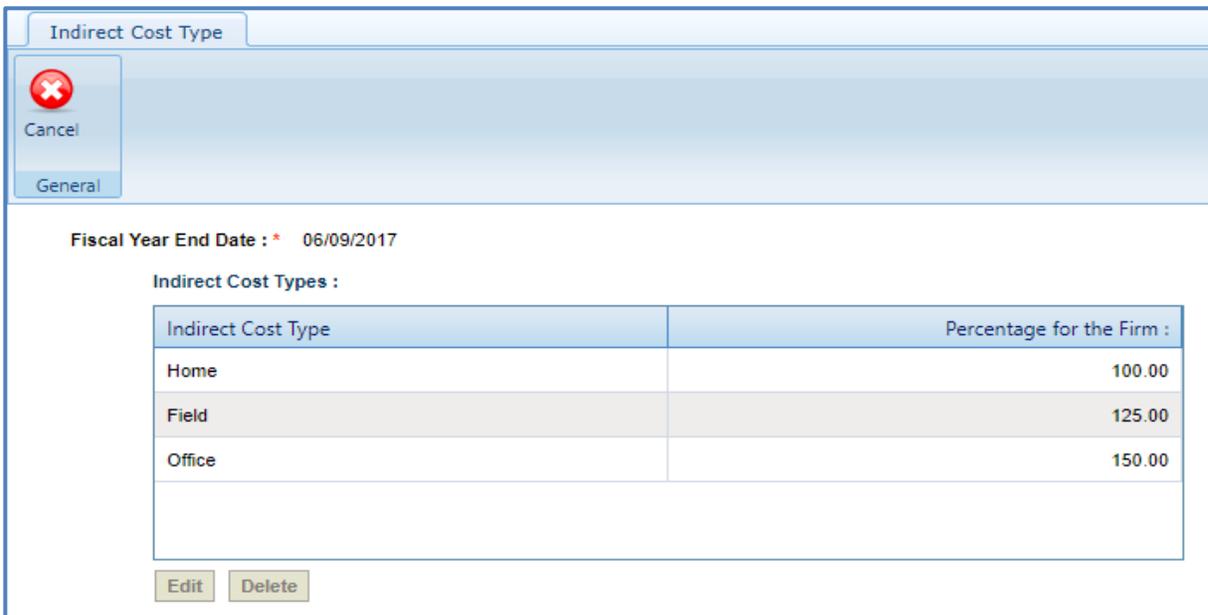
To view the Indirect Cost Type details.

Steps:

1. In the navigation pane, click **Indirect Cost Type**.  
The Indirect Cost Type records that are created by WisDOT for the consultant are displayed.
2. Select the Indirect Cost Type record that is marked “Is Current” and click **View**.



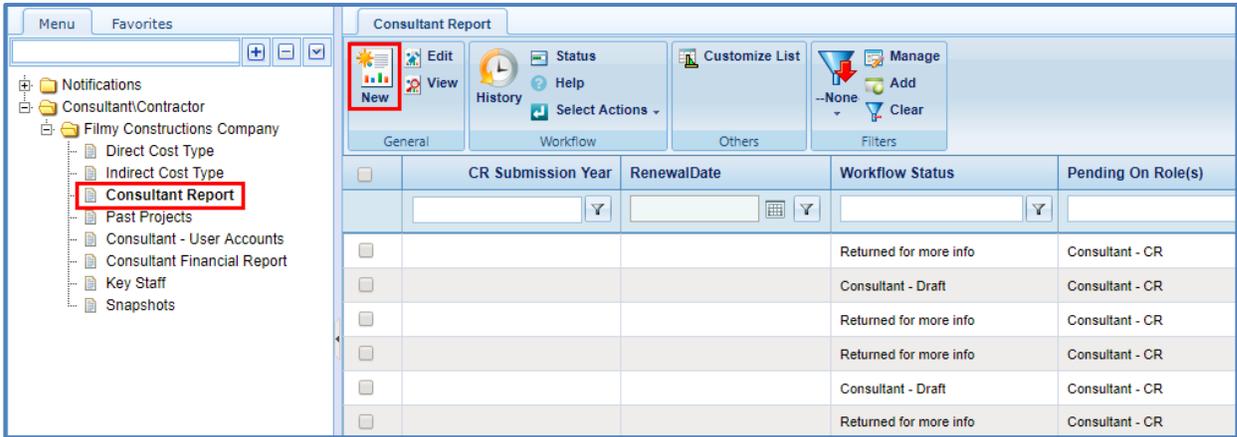
The Indirect Cost Type page is displayed.



## 2.3 Creating Consultant Report

To create the consultant report, perform the following steps:

1. In the navigation pane, click **Consultant Report**.  
The **Consultant Report** list page is displayed.



2. Click **New**.  
The Consultant Report details page is displayed.

**Consultant Report**

Save Cancel History Submit Ball In Court Instructions

General Workflow Others

Firm Name : Filmy Constructions Company

Firm Federal Identification Number : FFI 101

Legal Name : \*

Firm Type : \*

Year Present Firm Established :

Month and Date :

Name of Parent Company & Address :

CR Submission Year :

Affiliated Consultants & Contractors :

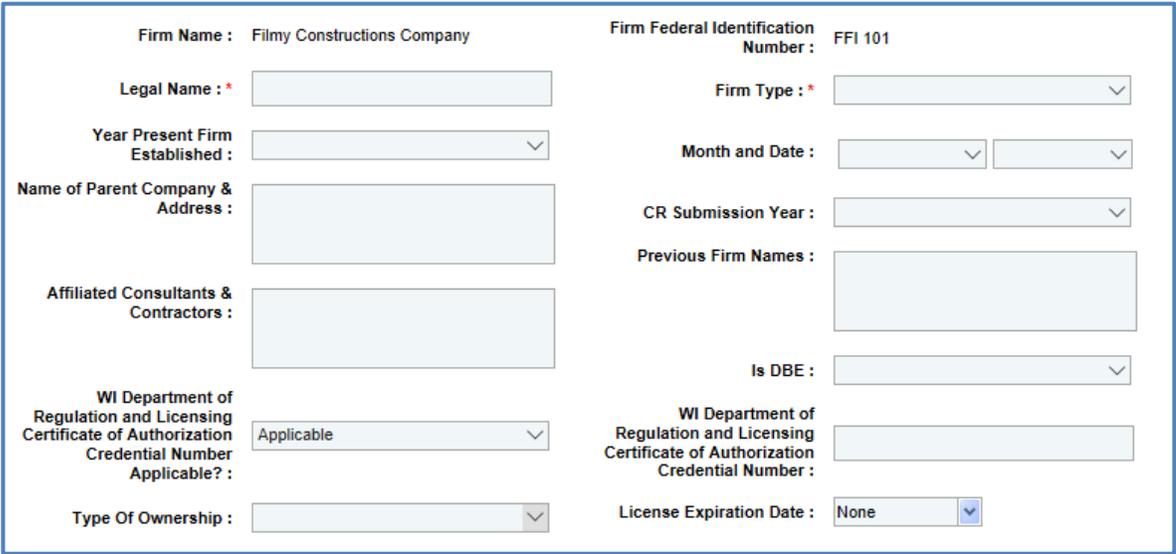
Previous Firm Names :

Is DBE :

WI Department of Regulation and Licensing Certificate of Authorization Credential Number Applicable? :

WI Department of Regulation and Licensing Certificate of Authorization Credential Number :

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

Field	Mandatory / Non-mandatory	Description
 <p>The screenshot shows a form with the following fields and values:</p> <ul style="list-style-type: none"> <li>Firm Name: Filmy Constructions Company</li> <li>Firm Federal Identification Number: FFI 101</li> <li>Legal Name: *</li> <li>Firm Type: *</li> <li>Year Present Firm Established: *</li> <li>Month and Date: *</li> <li>Name of Parent Company &amp; Address: *</li> <li>CR Submission Year: *</li> <li>Affiliated Consultants &amp; Contractors: *</li> <li>Previous Firm Names: *</li> <li>WI Department of Regulation and Licensing Certificate of Authorization Credential Number Applicable?: *</li> <li>Is DBE: *</li> <li>Type Of Ownership: *</li> <li>WI Department of Regulation and Licensing Certificate of Authorization Credential Number: *</li> <li>License Expiration Date: None</li> </ul>		
<b>Firm Name</b>	–	The consultant firm name is displayed.
<b>Firm Federal Identification Number</b>	–	The Federal Identification Number of the firm is displayed.
<b>Legal Name</b>	Mandatory	Enter the legal name.
<b>Firm Type</b>	Mandatory	From the drop-down list, select the firm type. The list of options is defined in the <b>Firm Type</b> catalog of the library.
<b>Year Present Firm Established</b>	Non-mandatory	From the drop-down list, select the year of establishment of the present firm. The list of options is defined in the <b>Years</b> catalog of the library.
<b>Month and Date</b>	Non-mandatory	From the drop-down list, select the month and date of establishment of the present firm.
<b>Name of Parent Company &amp; Address</b>	Mandatory	Enter the name and address of the parent company.
<b>CR Submission Year</b>	Mandatory	From the drop-down list, select the year of CR Submission.
<b>Note:</b> You can create only one Consultant Report for a given CR Submission year.		
<b>Previous Firm Names</b>	Non-mandatory	Enter the previous firm names.

Field	Mandatory / Non-mandatory	Description
<b>Affiliated Consultants &amp; Contractor</b>	Non-mandatory	Enter the affiliated consultants and contractors.
<b>Is DBE</b>	Non-mandatory	From the drop-down, select 'Yes' if it is DBE.
<b>WI Department of Regulation and Licensing Certificate of Authorization Credential Number Applicable?</b>	Non-mandatory	From the drop-down, select 'Applicable' if the WI Department of Regulation and Licensing Certificate of Authorization Credential Number is applicable. The ' <b>WI Department of Regulation and Licensing Certificate of Authorization Credential Number</b> ' and ' <b>License Expiration Date</b> ' fields are displayed.
<b>WI Department of Regulation and Licensing Certificate of Authorization Credential Number</b>	Non-mandatory	Enter the <b>WI Department of Regulation and Licensing Certificate of Authorization Credential Number</b> .
<b>License Expiration Date</b>	Non-mandatory	From the drop-down calendar, select the expiry date of the license.
<b>Type Of Ownership</b>	Non-mandatory	From the drop-down list, select the Type Of Ownership. The list of options is defined in the <b>Type Of Ownership</b> catalog of the library.

4. To add the contact information of the consultant firm:

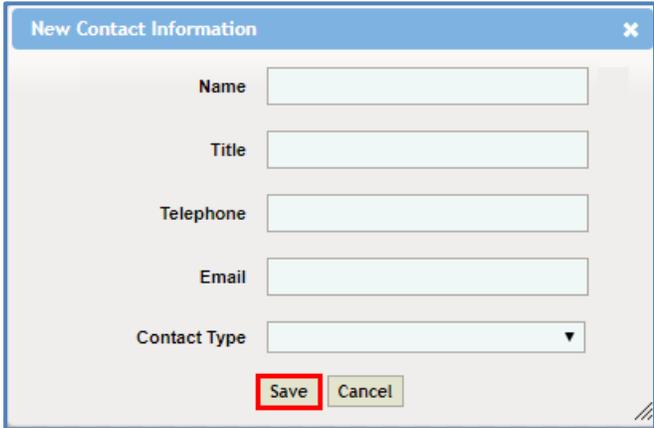
a. Click **Add**.

The **New Contact Information** dialog box is displayed.

**Contact Information**

Name	Title	Telephone	Email	Contact Type
FCC - Name 1	CFO	1234567890	cu29@aurigo.com	CFO
FCC - Name 2	CEO	112233445566	cu30@aurigo.com	CEO

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

Field	Mandatory / Non-mandatory	Description
		
<b>Name</b>	–	Enter the name of the contact.
<b>Title</b>	–	Enter the title.
<b>Telephone</b>	–	Enter the telephone number of the contact.
<b>Email</b>	–	Enter the email address of the contact.
<b>Contact Type</b>	–	From the drop-down list, select the appropriate option. The list of options is defined in the <b>Contact Type</b> catalog of the library.

c. Click **Save**.

5. In the **Services Offered** section, to add the services offered:

a. Select one or more options from the services offered list and click **Add**.  
The selected services are added to the consultant report.

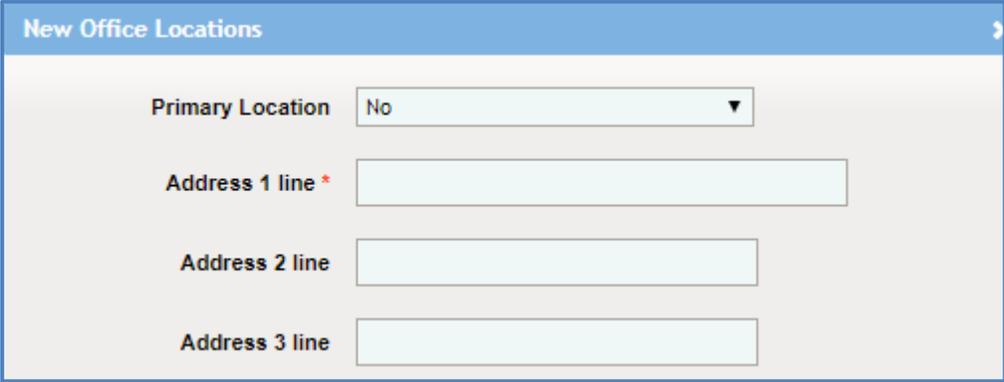
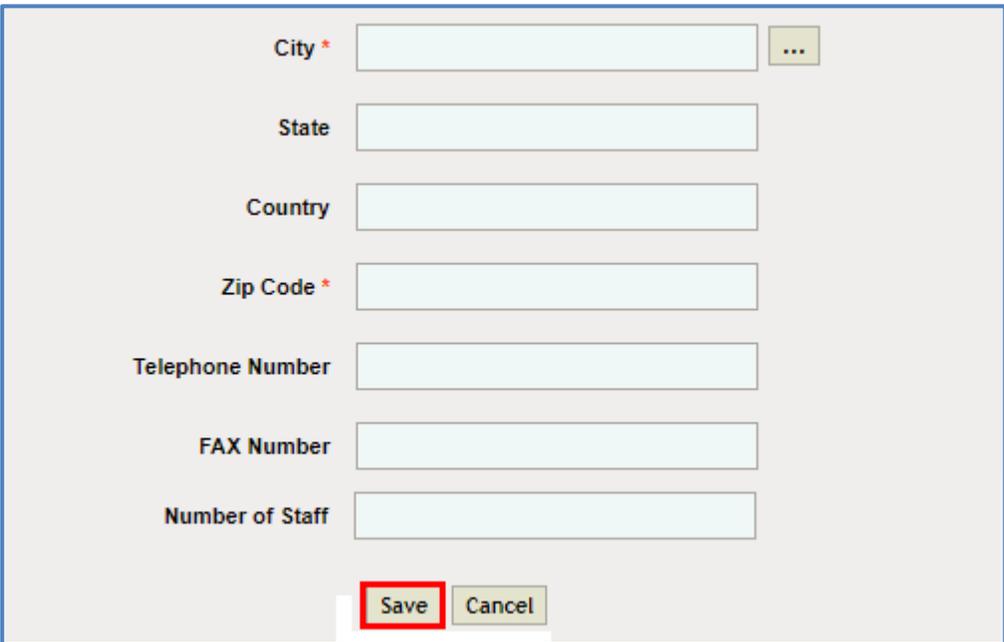


**Note:** You can click **<<Remove** to remove an added service.

6. In the **Office Locations** section, to add the office locations of the consultant firm:

a. Click **Add**.  
The New Office Locations dialog box is displayed.

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

Field	Mandatory / Non-mandatory	Description
		
Primary Location	Non-mandatory	Select 'Yes' to set the location of the consultant firm as the primary location.
<p><b>Note:</b> You can set only one location as the primary location for the consultant firm.</p>		
Address 1 line	Mandatory	Enter the address of the new office location.
Address 2 line	Non-mandatory	
Address 3 line	Non-mandatory	
		
City	Mandatory	To select the city where the office is located: 1. Click  . The <b>City</b> dialog box is displayed.

Field	Mandatory / Non-mandatory	Description
		2. Select the city and then click <b>Select</b> .
<b>State</b>	Non-mandatory	Enter the state where the office is located.
<b>Country</b>	Non-mandatory	Enter the country where the office is located.
<b>Zip Code</b>	Mandatory	Enter the five digit zip code of the area where the office is located.
<b>Telephone Number</b>	Non-mandatory	Enter the telephone number of the office is located.
<b>FAX Number</b>	Non-mandatory	Enter the FAX Number of the office is located.
<b>Number of Staff</b>	Non-mandatory	Enter the number of staff.

c. Click **Save** to save the details.

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

Field	Mandatory / Non-mandatory	Description
<div style="border: 1px solid black; padding: 5px;"> <p>Total Personnel : <input type="text"/>      WI Based Personnel : <input type="text"/></p> <p>WI Based Transportation Personnel : <input type="text"/></p> </div>		
Total Personnel	Non-mandatory	Enter the total number of personnel.
WI Based Personnel	Non-mandatory	Enter the number of WI based personnel.
WI Based Transportation Personnel	Non-mandatory	Enter the number of WI based transportation personnel.

8. In the **Profile of Firm's Project Expenditure (Last 5 years)** section, to the firm expenditure details of the previous five years, perform the following steps:

a. Click **Add**.

The **New Profile of Firm's Project Expenditure (Last 5 years)** dialog box is displayed.

b. To add the Profile Code:

i. Click **...**.

The **Profile Code** dialog box is displayed. For availability of options in the dialog box, profile code must be defined in the **Profile Code** catalog of the library.

ii. Select the profile code and then click **Select**.

The **Profile Description** is auto-populated.

c. In the **Number of Projects**, enter the number of projects.

d. In the **Total Gross Fees (In Thousands)**, enter the total gross fees.

e. Click **Save** to save the details.

9. Click **Save**.

The Consultant Report is saved in 'Consultant – Draft' workflow status.

**Note:** When you create the consultant report, the information in the following fields are auto-populated from the approved Consultant Report of the latest fiscal year:

- **Legal name**
- **Firm type**
- **Year Present Firm Established**
- **Month and Date**
- **CR Submission Year**
- **Name of Parent Company and Address**
- **Previous Firm Names**
- **Affiliated Consultants and Contractors**
- **WI Department of Regulation and Licensing Certificate of Authorized Credential Number**
- **Services offered.**

10. To submit the Consultant Report, perform the following steps:

- a. Select the Consultant Report in **Consultant – Draft** workflow status.
- b. In the **Workflow** group, click **Select Actions**.
- c. Click **Submit**. The **WisDOT Masterworks** dialog box is displayed.
- d. Enter the required information and then click **OK**.  
The Consultant Report is submitted for review to WisDOT.

11. If the Consultant Report is in the '**Returned for more info**' workflow stage, to resubmit the Consultant Report, perform the following steps:

- a. Select the Consultant Report that is in the **Returned for more info** workflow status.
- b. In the **Workflow** group, click **Select Actions**.
- c. Click **Resubmit**. The **WisDOT Masterworks** dialog box is displayed.
- d. Enter the required information and then click **OK**.  
The Consultant Report is submitted for review to WisDOT.

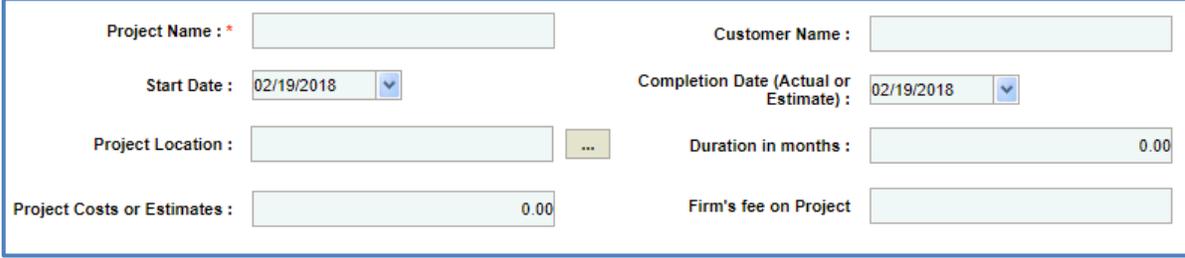
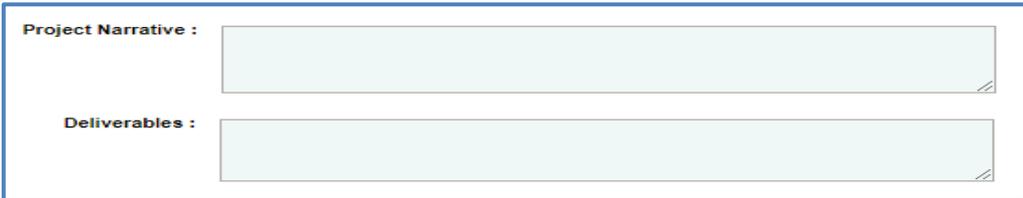
## 2.4 Recording Past Projects Details

To record the past project details, perform the following steps:

1. In the navigation pane, click **Past Projects**.  
The **Past Projects** list page is displayed.

	Project Name	Customer Name	Project Costs or Estimates	Duration in months
<input type="checkbox"/>	PP 01 - 0607 - 01		1000000000000000.00	0.00
<input type="checkbox"/>	PP 02	Customer Name 2	9876543210.00	44.00
<input type="checkbox"/>	PP 01	Customer Name 1	1234567890.00	33.00

- Click **New**.  
The **Past Projects** details page is displayed.
- Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
<b>Project Name</b>	Mandatory	Enter the project name.
<b>Customer Name</b>	Non-mandatory	Enter the customer name.
<b>Start Date</b>	Non-mandatory	From the drop-down calendar, select the start date.
<b>Completion Date (Actual or Estimate)</b>	Non-mandatory	From the drop-down calendar, select the completion date.
<b>Project Location</b>	Non-mandatory	To select the project location: <ol style="list-style-type: none"> <li>Click .</li> <li>The <b>Project Location</b> dialog box is displayed. For availability of options in the dialog box, location must be defined in the <b>City-Town-Village</b> catalog of the library.</li> <li>Select a location code and click <b>Select</b>.</li> </ol>
<b>Duration in months</b>	Non-mandatory	Enter the duration in months.
<b>Project Costs or Estimates</b>	Non-mandatory	Enter the project costs or estimates.
<b>Firm's fee on Project</b>	Non-mandatory	Enter the firm's fee on project.
		

Field	Mandatory / Non-mandatory	Description
Project Narrative	Non-mandatory	Enter the project narrative.
Deliverables	Non-mandatory	Enter the deliverables of the past project.

4. In the **Reference** section, to add a reference:

a. Click **Add**.

The **Reference** dialog box is displayed.

Reference :

Contact Name	Contact Email	Contact Number	Contact Address
No records to display.			

**Add** Edit Delete

b. Enter the details as below:

- Contact Name – Enter the contact name.
- Contact Email – Enter the contact email.
- Contact Number – Enter the contact number.
- Contact Address – Enter the contact address.

New Reference :

Contact Name

Contact Email

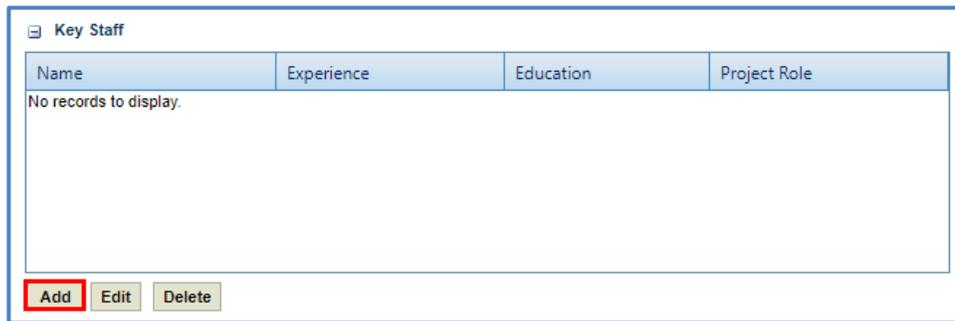
Contact Number

Contact Address

**Save** Cancel

c. Click **Save** to save the details.

5. In the **Key Staff** section, to add the key staff details:
  - a. Click **Add**.  
The **Key Staff** dialog box is displayed.

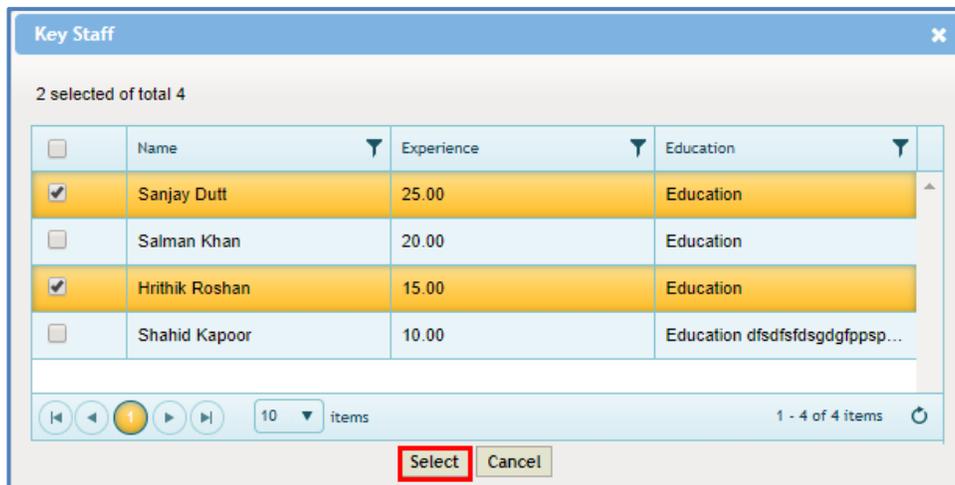


Key Staff

Name	Experience	Education	Project Role
No records to display.			

**Add** Edit Delete

- b. Select the key staff and click **Select**.  
The key staff members are displayed.



Key Staff

2 selected of total 4

<input type="checkbox"/>	Name	Experience	Education
<input checked="" type="checkbox"/>	Sanjay Dutt	25.00	Education
<input type="checkbox"/>	Salman Khan	20.00	Education
<input checked="" type="checkbox"/>	Hrithik Roshan	15.00	Education
<input type="checkbox"/>	Shahid Kapoor	10.00	Education dfsdfsfdsgdggfppsp...

10 items 1 - 4 of 4 items

**Select** Cancel

6. Expand **Attachments** to upload images and files relevant to the project. For information on attachments, refer [Attachments](#).
7. Click **Save**.

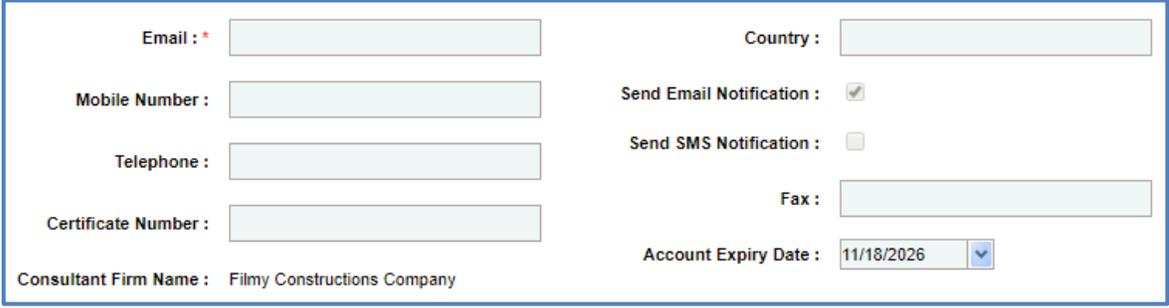
## 2.5 Creating Consultant – User Accounts

To create the consultant user account, perform the following steps:

1. In the navigation pane, click **Consultant – User Accounts**.  
The **Consultant – User Accounts** list page is displayed.
2. Click **New**.  
The **Consultant – User Accounts** details page is displayed.

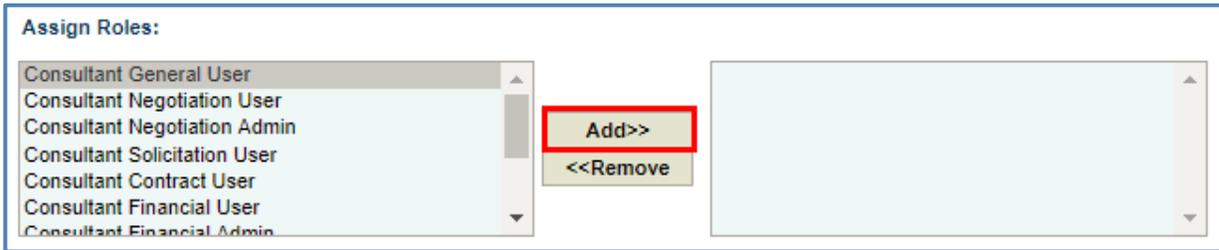
3. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
<b>User ID</b>	Mandatory	Enter a unique name to identify the user.
<b>First Name, Middle Name, Last Name</b>	–	Enter the first name, middle name, and last name of the user.
<b>Address Line 1, 2 and 3</b>	Non-mandatory	Enter the communication address of the user.

Field	Mandatory / Non-mandatory	Description
City	Non-mandatory	Enter the name of the city in which the user resides.
Zip Code	Non-mandatory	Enter the five digit zip code of the city.
State	Non-mandatory	Enter the name of the state to which the residing city of the user belongs.
		
Email	Mandatory	Enter a valid e-mail address of the user for communication.
Country	Non-mandatory	Enter the country name.
Mobile Number	Non-mandatory	Enter the mobile number of the user.
Send Email Notification	Non-mandatory	Select the check box to send an email notification to the user.
Telephone	Non-mandatory	Enter the contact telephone number of the user.
Send SMS Notification	Non-mandatory	Select the check box to send an SMS notification to the user.
Certificate Number	Non-mandatory	Enter the access certificate number assigned to the user.
Fax	Non-mandatory	Enter the FAX number of the user for facsimile communication.
Account Expiry Date	Non-mandatory	Enter a date until which the account will be valid. The user is denied access after this date.

The **Consultant Firm Name** is displayed.

- In the **Assign Roles** section, from the available roles list, select appropriate user roles for the user, and click **Add>>** to include the roles in the associated role(s) box.

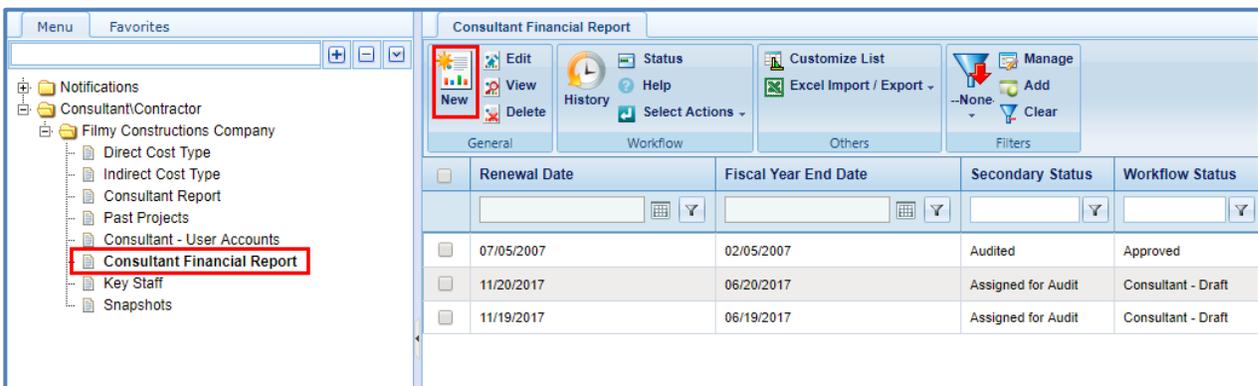


- Click **Save**.

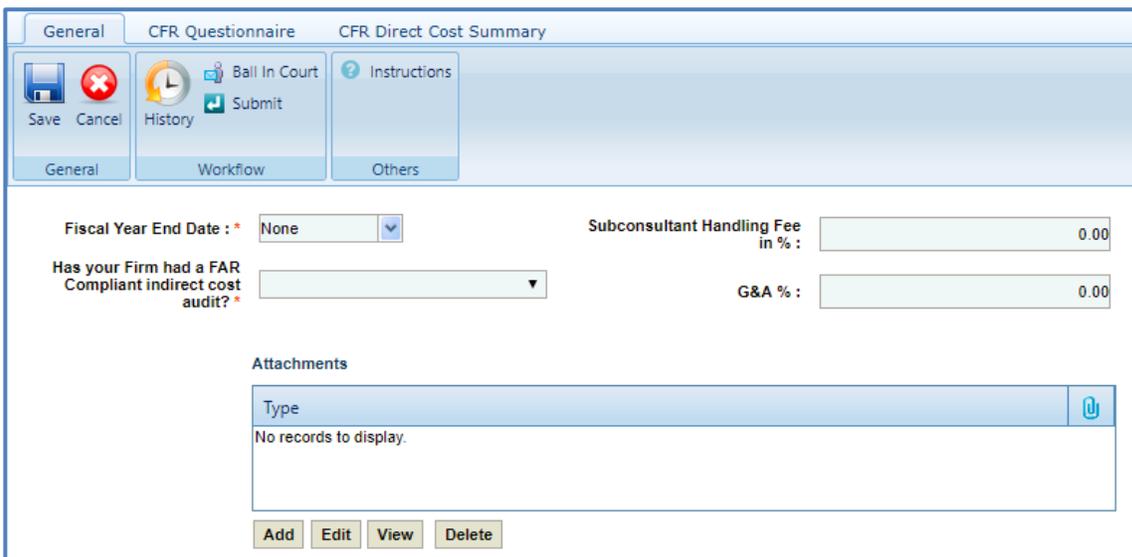
## 2.6 Creating Consultant Financial Report

To create the Consultant Financial Report, perform the following steps:

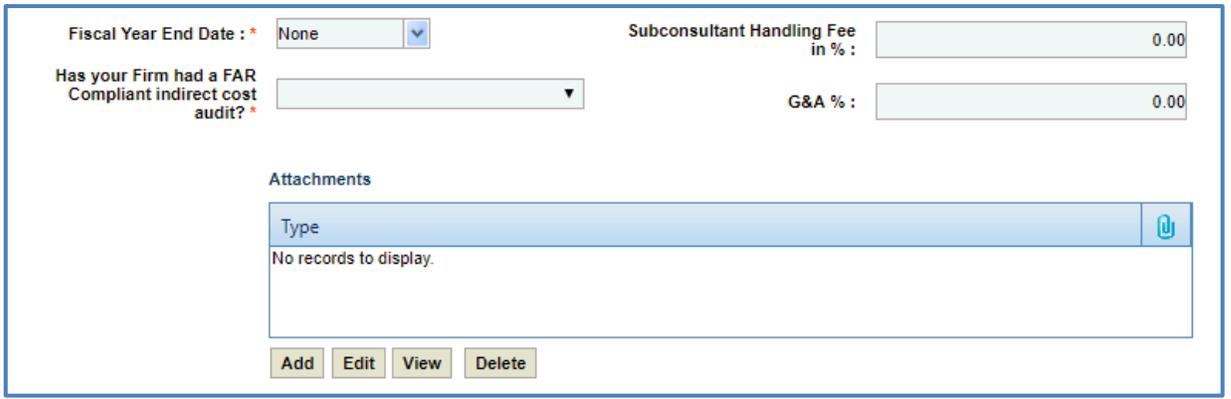
- In the navigation pane, click **Consultant Financial Report**. The **Consultant Financial Report** list page is displayed.



- Click **New**. The Consultant Financial Report details page is displayed.

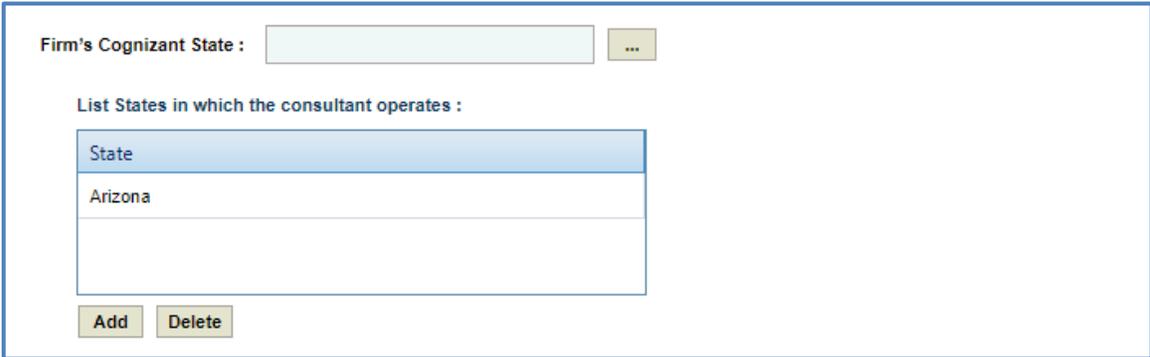


3. In the **General** tab, provide the following information:

Field	Mandatory / Non-mandatory	Description
 <p>The screenshot shows a form with the following elements:</p> <ul style="list-style-type: none"> <li><b>Fiscal Year End Date</b>: A dropdown menu currently set to "None".</li> <li><b>Subconsultant Handling Fee in %</b>: A text input field containing "0.00".</li> <li><b>Has your Firm had a FAR Compliant indirect cost audit?</b>: A dropdown menu.</li> <li><b>G&amp;A %</b>: A text input field containing "0.00".</li> <li><b>Attachments</b>: A section with a table header "Type" and a "No records to display." message. Below the table are buttons for "Add", "Edit", "View", and "Delete".</li> </ul>		
<b>Fiscal Year End Date</b>	Mandatory	From the drop-down calendar, select the fiscal year end date.
<b>Subconsultant Handling Fee in %</b>	Non-mandatory	Enter the percentage of subconsultant handling fee.
<b>Has your Firm had a FAR Compliant indirect cost audit?</b>	Mandatory	From the drop-down, select 'Yes' if the firm had a FAR Compliant Indirect Cost Audit.
<b>G&amp;A %</b>	Non-mandatory	Enter the G&A percentage.
<b>Attachments</b>	Non-mandatory	<p>To attach documents:</p> <ol style="list-style-type: none"> <li>1. Click <b>Add</b>. The <b>New Attachments</b> dialog box is displayed.</li> <li>2. Click  and select the type of document to be attached.</li> <li>3. Click <b>Upload Document</b> to upload relevant images and files. For information on form attachments, refer <a href="#">Attachments</a>.</li> </ol>

4. Click **CFR Questionnaire** tab and provide the following information:

Field	Mandatory / Non-mandatory	Description								
<div style="border: 1px solid #ccc; padding: 10px;"> <p style="text-align: center;">Firm Name : Filmy Constructions Company</p> <p>Explain any Business combinations : <input style="width: 200px; height: 20px;" type="text"/></p> <p>Revenue Information</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #e1ecf4;">Business Activity During Period</th> <th style="background-color: #e1ecf4;">Total as Prime and Sub Consultant</th> </tr> </thead> <tbody> <tr> <td>WISDOT Gross Revenue</td> <td style="text-align: right;">0.00*</td> </tr> <tr> <td>Other Customer Revenue</td> <td style="text-align: right;">0.00*</td> </tr> <tr> <td>Total Firm Gross Revenue</td> <td style="text-align: right;">0.00</td> </tr> </tbody> </table> <p>Number of States in which the consultant operates : <input style="width: 100px; height: 20px;" type="text"/></p> </div>			Business Activity During Period	Total as Prime and Sub Consultant	WISDOT Gross Revenue	0.00*	Other Customer Revenue	0.00*	Total Firm Gross Revenue	0.00
Business Activity During Period	Total as Prime and Sub Consultant									
WISDOT Gross Revenue	0.00*									
Other Customer Revenue	0.00*									
Total Firm Gross Revenue	0.00									
<b>Firm Name</b>	–	The consultant firm name is displayed.								
<b>Explain any Business combinations</b>	Non–mandatory	Enter the details of any business combinations.								
<b>WISDOT Gross Revenue</b>	Mandatory	Enter the total value of WISDOT Gross Revenue including Prime and Sub consultant during the business activity period.								
<b>Other Customer Revenue</b>	Mandatory	Enter the total value of Other Customer Revenue including Prime and Sub consultant during the business activity period.								
<b>Total Firm Gross Revenue</b>	Non–mandatory	The total value of the firm gross revenue during the business activity period is displayed.								
<b>Number of States in which the consultant operates</b>	Non–mandatory	Enter the number of states in which the consultant operates.								

Field	Mandatory / Non-mandatory	Description
		
<p><b>Firm's Cognizant State</b></p>	<p>Non-mandatory</p>	<p>To select the firm's cognizant state:</p> <ol style="list-style-type: none"> <li>1. Click .</li> <li>The <b>State and Country</b> dialog box is displayed. For availability of options in the dialog box, state must be defined in the <b>State and Country</b> catalog of the library.</li> <li>2. Select a State and click <b>Select</b>.</li> </ol>
<p><b>List States in which the consultant operates</b></p>	<p>Mandatory to submit the form</p>	<p>To add the state to the list:</p> <ol style="list-style-type: none"> <li>1. Click <b>Add</b>. The <b>State and Country</b> dialog box is displayed. For availability of options in the dialog box, state must be defined in the <b>State and Country</b> catalog of the library.</li> <li>2. Select a state and click <b>Select</b>.</li> </ol>

Field	Mandatory / Non-mandatory	Description
<div style="border: 1px solid blue; padding: 10px;"> <p>Has Firm received a cognizant review/audit acceptance? : <input type="text"/></p> <p>If yes, list the state or agency that performed the review/audit and the name and contact information of representative for State or Agency : <input type="text"/></p> <p>Has a cognizant review/audit commitment been made by a State or Agency? : <input type="text"/></p> <p>If yes, list the state or agency that Committed and the name and contact information of representative for State or Agency : <input type="text"/></p> </div>		
<p><b>Has Firm received a cognizant review/audit acceptance?</b></p>	<p>Non-mandatory</p>	<p>From the drop-down, select 'Yes' if the firm has received a cognizant review/audit acceptance.</p>
<p><b>If yes, list the state or agency that performed the review/audit and the name and contact information of representative for State or Agency</b></p>	<p>Non-mandatory</p>	<p>If the firm has received a cognizant review/audit acceptance, enter the details of the state or agency that performed the review/audit and the name and contact information of representative for State or Agency.</p>
<p><b>Has a cognizant review/audit commitment been made by a State or Agency?</b></p>	<p>Non-mandatory</p>	<p>From the drop-down, select 'Yes' if the firm has a cognizant review/audit commitment been made by a State or Agency.</p>
<p><b>If yes, list the state or agency that Committed and the name and contact information of representative for State or Agency</b></p>	<p>Non-mandatory</p>	<p>If the firm has a cognizant review/audit commitment been made by a State or Agency, enter the details of the state or agency that Committed and the name and contact information of representative for State or Agency.</p>

- Expand **Attachments** to upload images and files relevant to the project. For information on attachments, refer [Attachments](#).

**Note:** To submit the Consultant Financial Report for review, all mandatory attachments must be uploaded.

6. Click **CFR Direct Cost Summary** tab.  
The **Firm Name** and **Fiscal Year End Date** is displayed.

Firm Name : Filmy Constructions Company

Fiscal Year End Date : 01/30/2018

Direct Cost

Internal Allocation (Direct Cost)	Outside Cost (Direct Cost)	Indirect Cost	N/A	Title	Notes (Enter notes here)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Aerial Mapping Services - modifi	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Aerial Photography	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Airfare/Railway Fare	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Asphalt Lab Test	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ATV	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ATV Geotech Drill Rig	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Binding	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bluelines/Blueprints	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Boat	

7. In the **Direct Cost** section, to select the Direct Cost items, select the relevant checkbox for all the Direct Cost types and in the **Notes** column, enter the notes for each of them.

8. Click **Save**.

The Consultant Financial Report is saved in the 'Consultant – Draft' workflow status.

9. To submit the Consultant Financial Report, perform the following steps:

- Select the Consultant Financial Report in the **Consultant – Draft** workflow status.
- In the **Workflow** group, click **Select Actions**.
- Click **Submit**. The **WisDOT Masterworks** dialog box is displayed.
- Enter the required information and then click **OK**.

The Consultant Financial Report is submitted for review to WisDOT.

10. If the Consultant Financial Report is in the '**Returned for more info**' workflow stage, to resubmit the Consultant Financial Report, perform the following steps:

**Note:** When a Consultant Financial Report is 'returned for more info', the attachment of type 'Management Representation & Certification' document will be deleted. To resubmit the Consultant Financial Report, upload a new 'Management Representation & Certification' document.

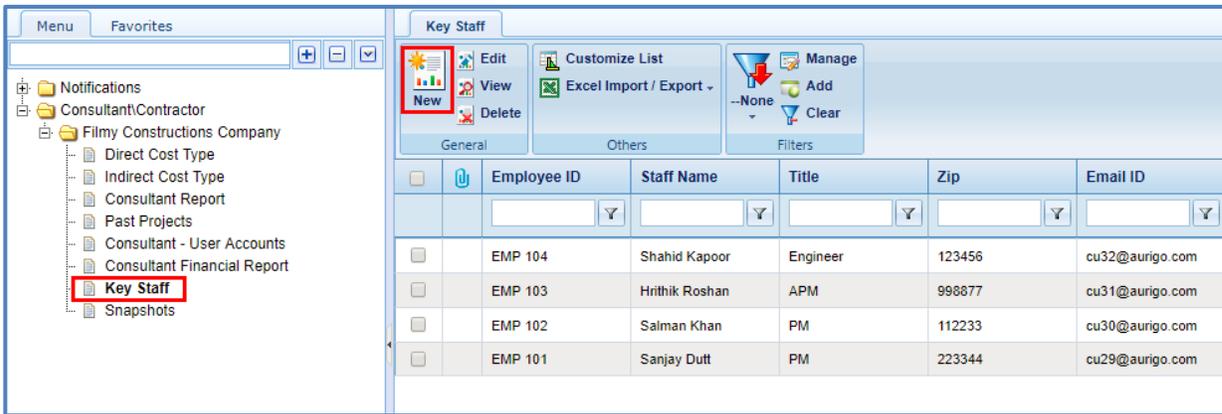
- Select the Consultant Financial Report that is in the **Returned for more info** workflow status.
- In the **Workflow** group, click **Select Actions**.
- Click **Resubmit**. The **WisDOT Masterworks** dialog box is displayed.
- Enter the required information and then click **OK**.

The Consultant Financial Report is submitted for review to WisDOT.

## 2.7 Creating Key Staff

To create the key staff, perform the following steps:

1. In the navigation pane, click **Key Staff**.  
The **Key Staff** list page is displayed.



2. Click **New**.  
The **Key Staff Details** page is displayed.

Key Staff Details

Save Cancel

General

Employee ID :

First Name : \*

Middle Name :

Last Name :

Title :

Firm : Filmy Constructions Company

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

Field	Mandatory / Non-mandatory	Description						
<div style="border: 1px solid #0070C0; padding: 10px;"> <p>Employee ID : <input type="text"/></p> <p>First Name : * <input type="text"/></p> <p>Middle Name : <input type="text"/></p> <p>Last Name : <input type="text"/></p> <p>Title : <input type="text"/></p> <p>Firm : Filmy Constructions Company</p> </div>								
Employee ID	Non-mandatory	Enter the employee ID of the staff.						
First Name, Middle Name, Last Name	Mandatory	Enter the first name, middle name, and last name of the staff.						
Title	Non-mandatory	Enter the title of the staff.						
Firm	-	The name of the firm is displayed.						
<div style="border: 1px solid #0070C0; padding: 10px;"> <p>State : <input type="text"/></p> <p>City : <input type="text"/></p> <p>Zip : <input type="text"/></p> <p>Email ID : <input type="text"/></p> <p>Telephone Number <input type="text"/></p> <p><input type="checkbox"/> Experience</p> <table border="1" data-bbox="472 1507 870 1682"> <thead> <tr> <th>Firm</th> <th>Experience in Years</th> </tr> </thead> <tbody> <tr> <td>Current Firm</td> <td><input type="text" value="0.00"/></td> </tr> <tr> <td>Previous Firm</td> <td><input type="text" value="0.00"/></td> </tr> </tbody> </table> <p>Total : 0.00</p> </div>			Firm	Experience in Years	Current Firm	<input type="text" value="0.00"/>	Previous Firm	<input type="text" value="0.00"/>
Firm	Experience in Years							
Current Firm	<input type="text" value="0.00"/>							
Previous Firm	<input type="text" value="0.00"/>							
State, City	Non-mandatory	From the drop-down list, select the name of the state and city in which the staff resides.						
Zip	Non-mandatory	Enter the five digit zip code of the city.						

Field	Mandatory / Non-mandatory	Description
Email ID	Non-mandatory	Enter a valid e-mail address of the user for communication.
Telephone	Non-mandatory	Enter the contact telephone number of the user.
Current Firm (Experience in Years)	Non-mandatory	Enter the work experience of the staff in current organization.
Previous Firm (Experience in Years)	Non-mandatory	Enter the work experience of the staff in previous organization.
Total	–	The total work experience (in years) of the staff is displayed.

Education :

Narrative :

Hourly Rate in \$ :

Education	Non-mandatory	Enter the education details of the staff.
Narrative	Non-mandatory	Enter the details of the narrative.
Hourly Rate in \$	Non-mandatory	Enter the hourly rate in \$.

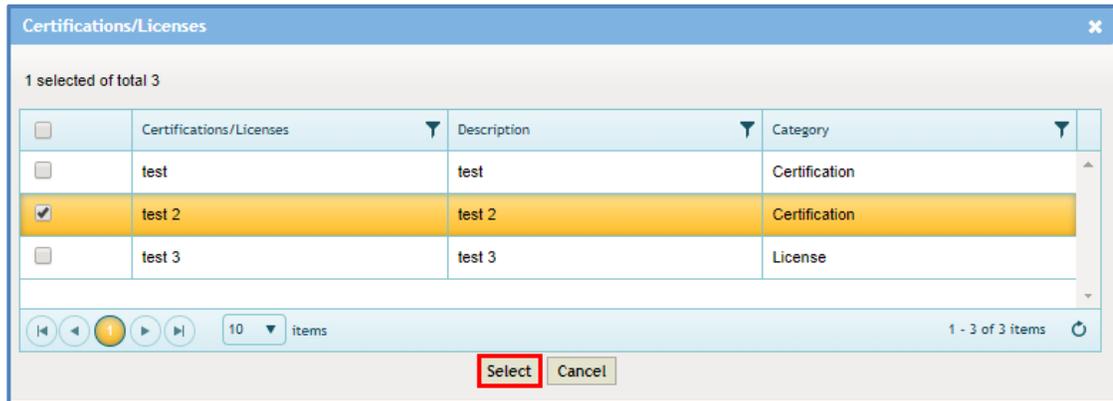
4. In the **Certifications/Licenses** section:
  - a. Click **Add**. The **Certifications/Licenses** dialog box is displayed.

**Certifications/Licenses**

Certifications/Licenses	Description	Category
No records to display.		

Add
Delete

- b. Select the appropriate certificates/licenses and click **Select**.  
The details are displayed in the **Certifications/Licenses** section.



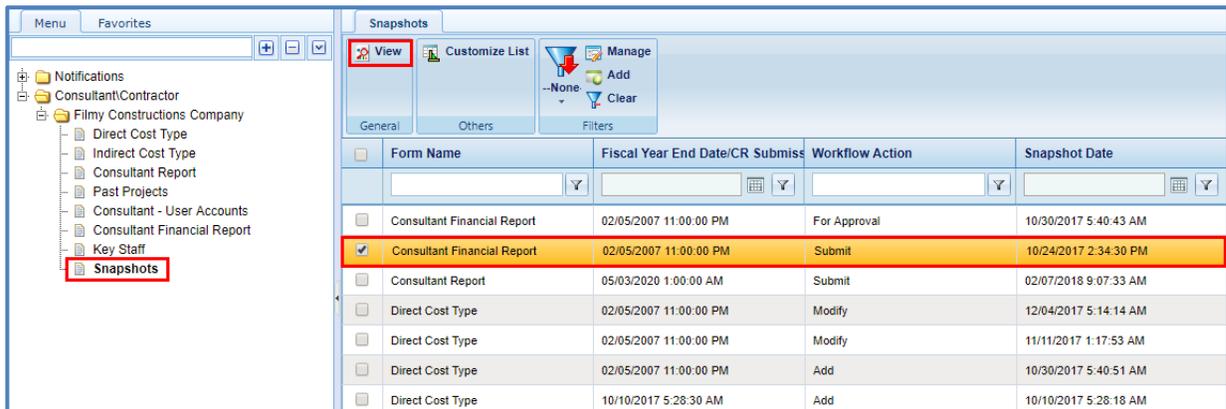
- 5. Expand **Attachments** to upload images and files relevant to the project. For information on attachments, refer [Attachments](#).
- 6. Click **Save**.

## 2.8 Viewing Snapshots

While performing workflow actions, snapshots of the Consultant forms are created and stored in the Snapshots form in the **Consultant\Contractor** folder.

Steps:

- 1. In the navigation pane, click **Snapshots**.  
The Snapshots list page is displayed.



- Select the form and click **View**.  
The snapshot of the form is displayed.

General
CFR Questionnaire
CFR Direct Cost Summary

Cancel

General

**Secondary Status :** Audited

<b>Fiscal Year End Date : *</b> 02/05/2007	<b>Subconsultant Handling Fee in % :</b> 0.00
<b>Has your Firm had a FAR Compliant indirect cost audit? *</b> No	<b>G&amp;A % :</b> 0.00

**Attachments**

Type	📎
No records to display.	

Add
Edit
View
Delete

**WisDOT's Consultant Financial Report Questionnaire** Not Completed

**Note :** Go to 'CFR Questionnaire' tab to fill the information

Direct Cost Summary Not Completed

### 3 Bimonthly Solicitation

The system allows you to express your interest in a solicitation by responding to the Notice of Interest (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.

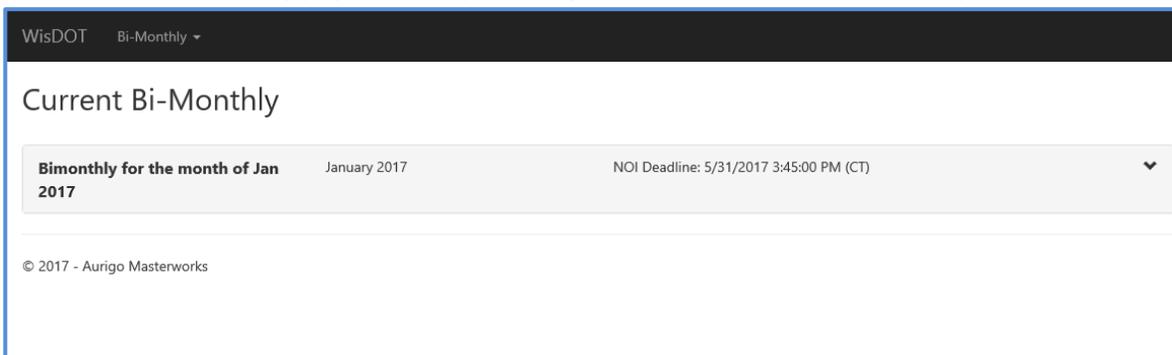
#### 3.1 Viewing Bimonthly Solicitation Details on Public Portal

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.

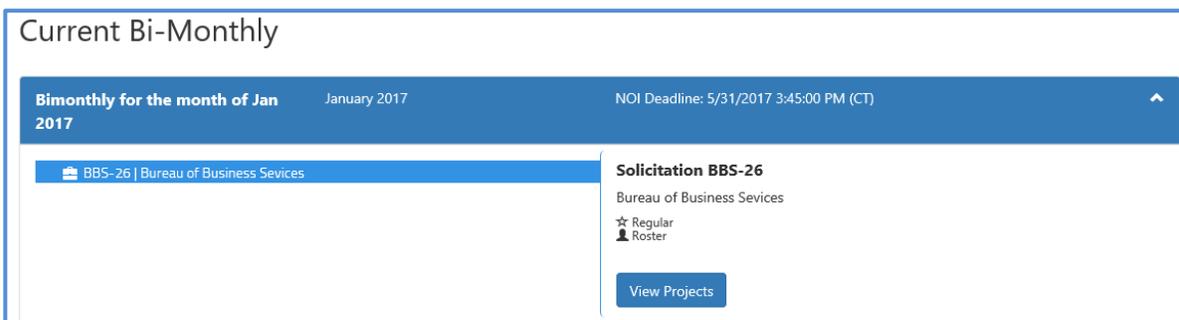
Steps:

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.



- 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 Services  
 ☆ Regular  
 👤 Roster

**Scope of Service** ▼

**Projects**

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

Bureau of Business Services  
 ☆ 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

- 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 Services Highway: 123 CITY OF ADAMS	▲
-------------------	------------	--	---

📁 Expand All   📁 Collapse All

In Scope 🗨    If Authorized 🔒

- 📁 LandSurvey
- 📁 ENVIRONMENTAL SURVEY

- 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.

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



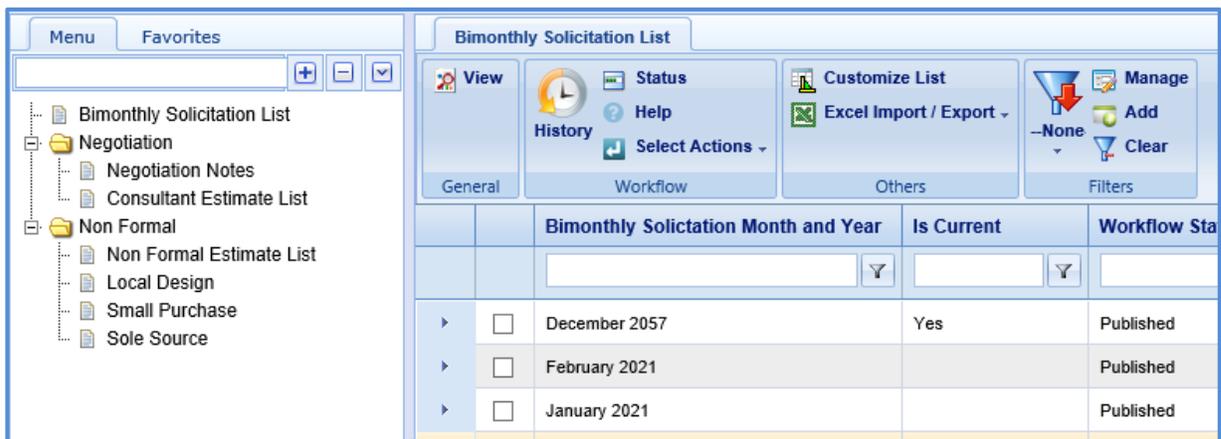
### 3.2 Questions and Responses

The system allows you to submit questions against the Bimonthly solicitation. The questions are 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.

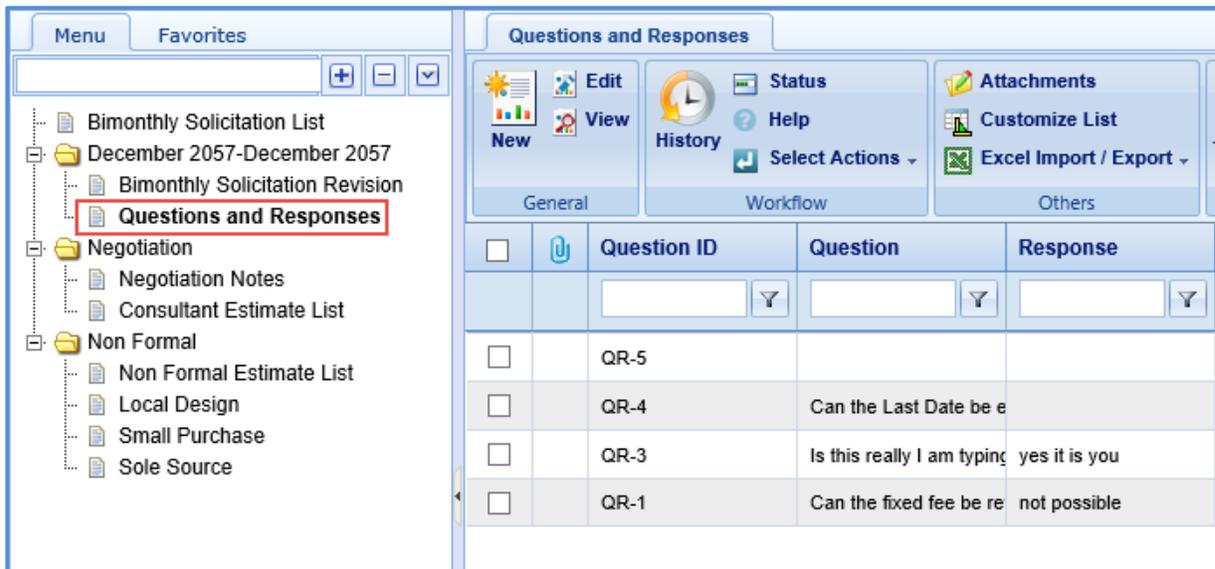
- In the module menu, click **Solicitation**.  
The **Bimonthly Solicitation List** page is displayed.



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

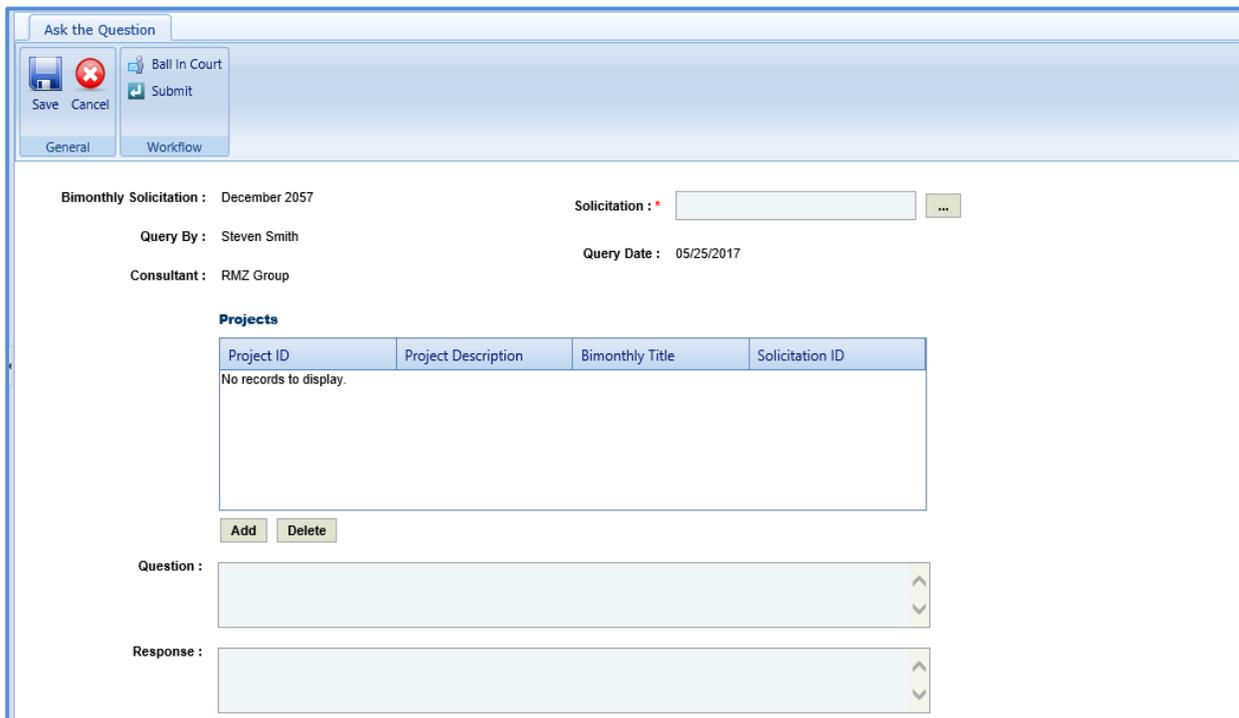
- In the navigation pane, expand the selected **Bimonthly Solicitation** record, and then click **Questions and Responses**.

The **Questions and Responses** page is displayed



- Click **New**.

The **Ask the Question** page is displayed.



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

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

- a. Click .
 

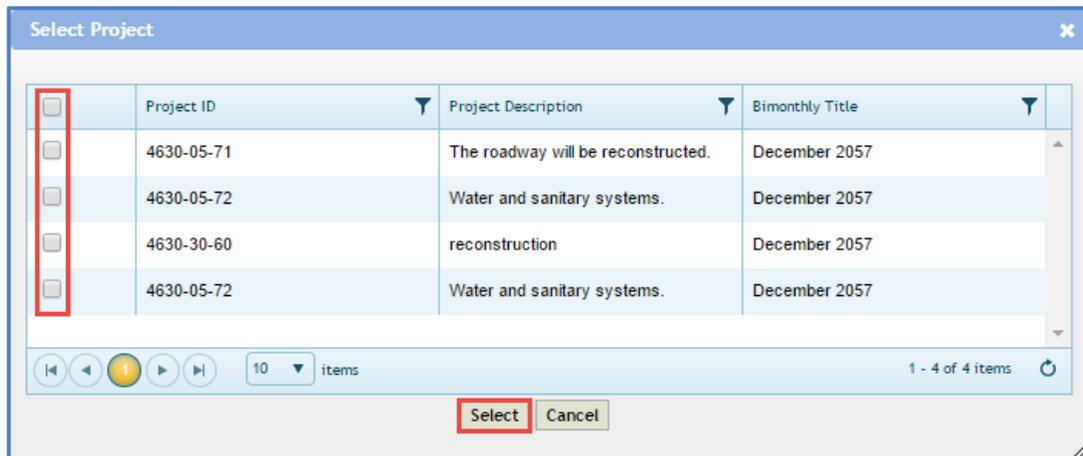
The **Select Solicitation** dialog box is displayed listing the solicitations that are associated with the Bimonthly Solicitation.
  - b. Select the solicitations for which the question is raised and then click **Select**.
6. In the **Projects** section, perform the following steps to add projects for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



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

**Add** **Delete**

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



<input type="checkbox"/>	Project ID	Project Description	Bimonthly Title
<input type="checkbox"/>	4630-05-71	The roadway will be reconstructed.	December 2057
<input type="checkbox"/>	4630-05-72	Water and sanitary systems.	December 2057
<input type="checkbox"/>	4630-30-60	reconstruction	December 2057
<input type="checkbox"/>	4630-05-72	Water and sanitary systems.	December 2057

10 items 1 - 4 of 4 items

**Select** **Cancel**

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
<p>Question :</p> <p>Response :</p> <p>Notes :</p>	
<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.
<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** dialog box is displayed. Enter required information and then click **OK**. The question is submitted to WisDOT.

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.

## 4 Notice of Interest (NOI)

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

### 4.1 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

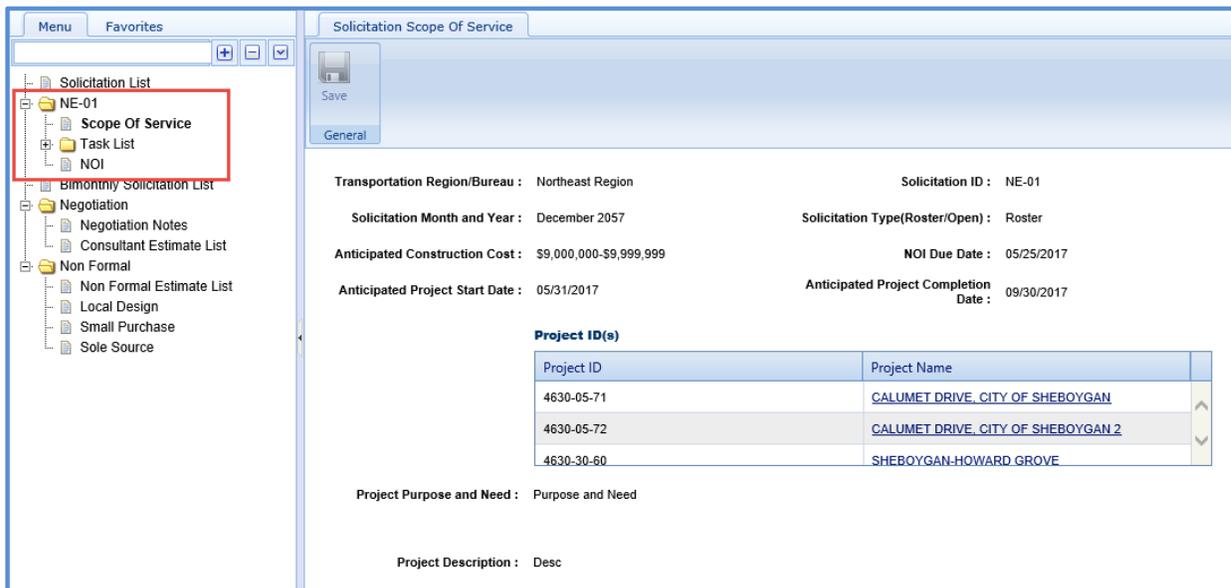
3. Select the required Bimonthly Solicitation record, and then click **View**.  
The selected **Bimonthly Solicitation Details** page is displayed.

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

- 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.

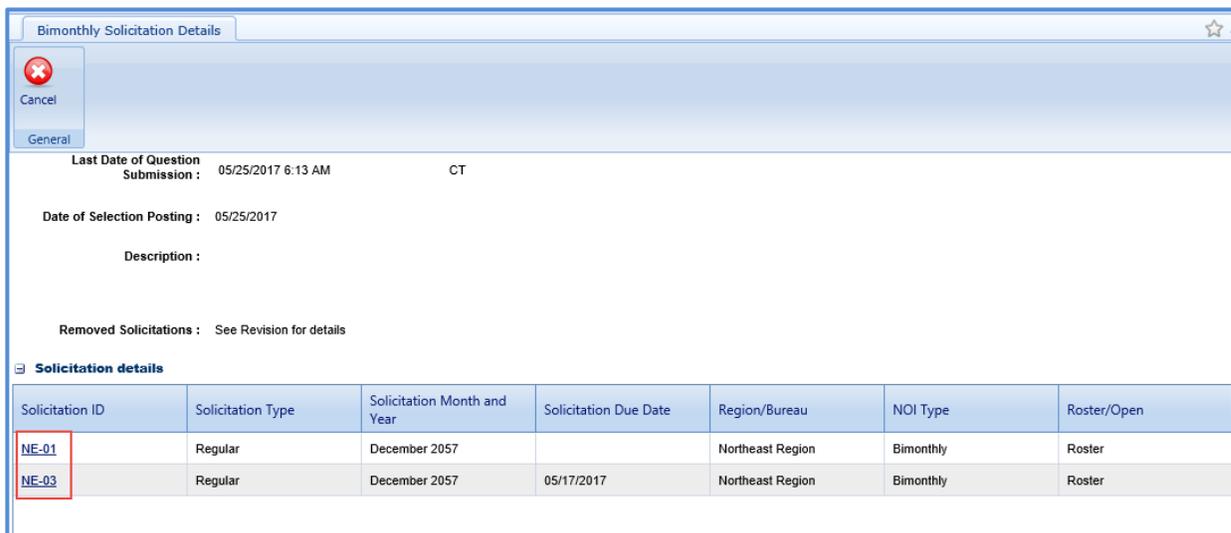
- In the navigation pane, expand the solicitation folder, and click **Scope of Service** to view the solicitation scope of service or click **Task List** to view the solicitation task details.



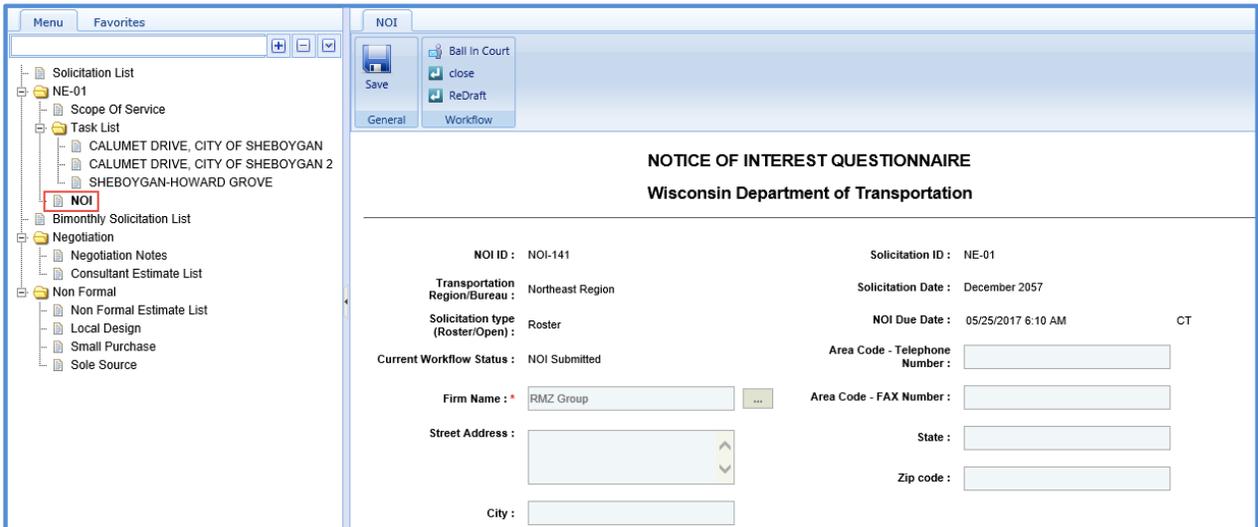
## 4.2 Submitting the Notice of Interest

The system allows you to duly fill in the NOI 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.
<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
		<p>a. Click .</p> <p>The <b>Select Key Staff</b> dialog box is displayed listing all the key staffs of the consultant firm.</p> <p>b. Select the required key staff, and then click <b>Select</b>.</p> <p>The values in the <b>Firm</b>, <b>Years Experience</b>, and <b>Education</b> fields auto-populated.</p>
<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.

*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**.

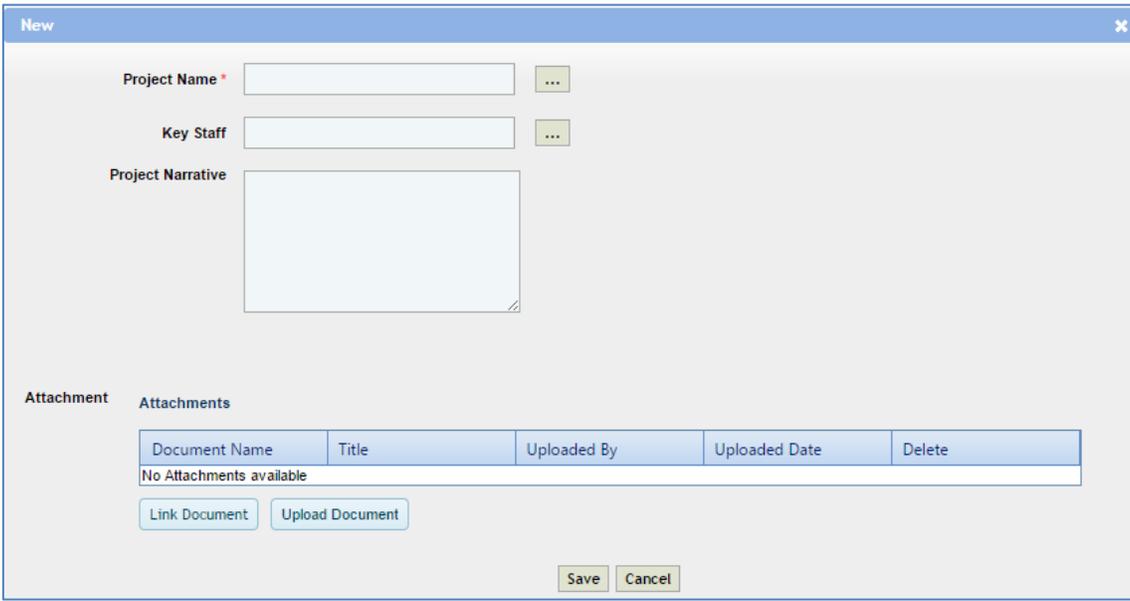
3. List recently completed or substantially completed projects for each key staff/project manager and provide contact name for each project. Only show the deliverables for which key staff/project manager were responsible on the project. If showing more than two projects, add tables using the format provided. 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.						

**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>The project narration is auto-populated when a project is selected. You can edit the existing narration or enter a new narration about the 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 auto; width: 80%;"> <div style="background-color: #4f81bd; color: white; padding: 5px; display: flex; justify-content: space-between;"> <span>New</span> <span>✕</span> </div> <div style="padding: 10px;"> <p>DBE Firm Name <input style="width: 100%;" type="text"/> <input style="float: right; width: 30px; height: 20px; background-color: #ccc;" type="button" value="..."/></p> <p>Anticipated Work Areas <input style="width: 100%;" type="text"/></p> <p>NAICS Code <input style="width: 100%;" type="text"/> <input style="float: right; width: 30px; height: 20px; background-color: #ccc;" type="button" value="..."/></p> <p>Estimated Percentage of Work Area <input style="width: 100%;" type="text" value="0.00"/></p> <p>Comment : <input style="width: 100%;" type="text"/></p> <p style="text-align: right; margin-top: 10px;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </p> </div> </div>	

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: <ol style="list-style-type: none"><li>Click .</li><li>The <b>NAICS</b> dialog box is displayed.</li><li>Select the required code, and then click <b>Select</b>.</li></ol>
<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** dialog box is displayed.

WisDOT MasterWorks

Notes :

Set Days To Complete for Next Stage :

**Attachments**

Document Name	Title	Uploaded By	Uploaded Date	Delete	File Size
No Attachments available					

Upload Document

OK Cancel

14. Enter required information and then click **OK**.

The **NOI** is submitted to WisDOT.

15. Optionally, if changes have to be made to the submitted NOI, perform the following steps:

**Prerequisite:** You can make changes to a submitted NOI only when the due date of the NOI has not expired.

- a. In the **Workflow** group, click **ReDraft**.  
The **WisDOT Masterworks** dialog box is displayed.
- b. Enter the required information and then click **OK**.
- c. Make the required changes.
- d. Click **Save**.
- e. In the **Workflow** group, click **Submit**.  
The **WisDOT Masterworks** dialog box is displayed.
- f. Enter the required information and then click **OK**.  
The NOI is resubmitted to WisDOT.

**Note:** Once you click **ReDraft**, the submitted NOI record is deleted from the WisDOT records and the NOI has to be resubmitted to WisDOT.

## 5 Construction Fair

The system allows you to express your interest in a construction fair by submitting the Notice of Interest (NOI) for the current construction fair. Prior to submitting NOI, you can also raise queries regarding the construction fair and receive appropriate answers.

### 5.1 Viewing Construction Fair Details

The system allows you to view the construction fair details including construction fair packages associated with the construction fair.

The procedure to view the construction fair details is described.

1. In the module menu, click **Solicitation**.
2. In the navigation pane, click **Construction Fair**.  
The **Construction Fair** list page is displayed.

The screenshot shows the 'Construction Fair' module interface. On the left, the navigation pane lists 'Bimonthly Solicitation List', 'Construction Fair' (highlighted), 'Construction Fair - Aug 2017', 'NOI', 'Construction Fair Questions', 'Solicitations Responded', and 'Negotiation'. The main area features a toolbar with 'View', 'Status', 'History', 'Help', 'Select Actions', 'Customize List', 'Excel Import / Export', 'Manage', 'Add', and 'Clear'. Below the toolbar is a table with the following data:

	Construction Fair Month and Year	Last Date of NOI Submission	Last Date of Question Submission
<input checked="" type="checkbox"/>	August 2017	07/30/2017	07/30/2017
<input type="checkbox"/>	January 2015	07/28/2017	07/28/2017
<input type="checkbox"/>	January 2013	07/28/2017	07/28/2017
<input type="checkbox"/>	January 2017	07/28/2017	07/28/2017

3. Select the required construction fair record, and then click **View**.  
The selected **Construction Fair details** page is displayed.

Package ID	Contract Type	Package Month and Year	Package Due Date	Region/Bureau
SW-53	Regular	August 2017	07/28/2017	Southwest Region
SW-52	Regular	August 2017	08/23/2017	Southwest Region
BOA-01	Master	August 2017	07/27/2017	Bureau of Aeronautics

4. In the **Package details** section, click the **Package ID** link of which you want to view the details of the associated construction package.

Package ID	Contract Type	Package Month and Year	Package Due Date	Region/Bureau	NOI Type	Roster/Open
<a href="#">SW-53</a>	Regular	August 2017	07/28/2017	Southwest Region	Construction Fair	Roster
<a href="#">SW-52</a>	Regular	August 2017	08/23/2017	Southwest Region	Construction Fair	Roster
<a href="#">BOA-01</a>	Master	August 2017	07/27/2017	Bureau of Aeronautics	Construction Fair	Roster

## 5.2 Questions and Responses

The system allows you to submit questions regarding the construction fair. The questions have to be submitted before the expiry of the last date of question submission, which is defined on the **Construction Fair details** page. WisDOT will publish relevant answers to the questions submitted.

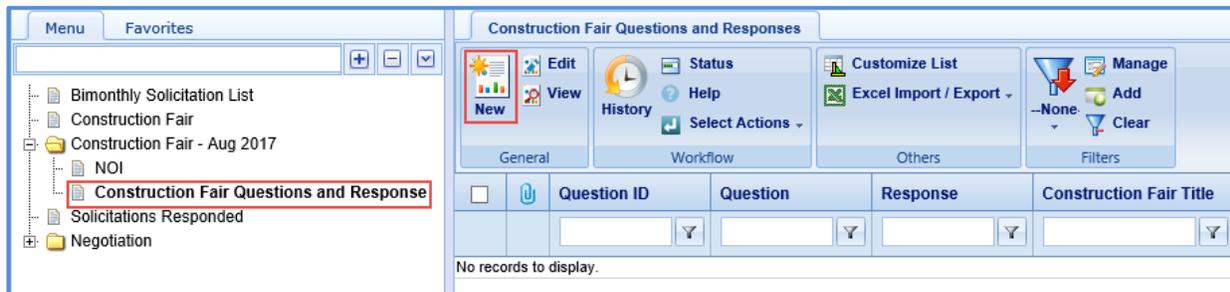
To raise questions regarding the construction fair, perform the following steps:

**Prerequisite:** The construction fair has to be in the **Construction Fair Published** status and marked as current construction fair. The last date of question submission has not expired.

1. In the module menu, click **Solicitation**.
2. In the navigation pane, click **Construction Fair**. The **Construction Fair** list page is displayed.
3. Select the construction fair record and then click **View**.  
The **Construction Fair details** page is displayed.

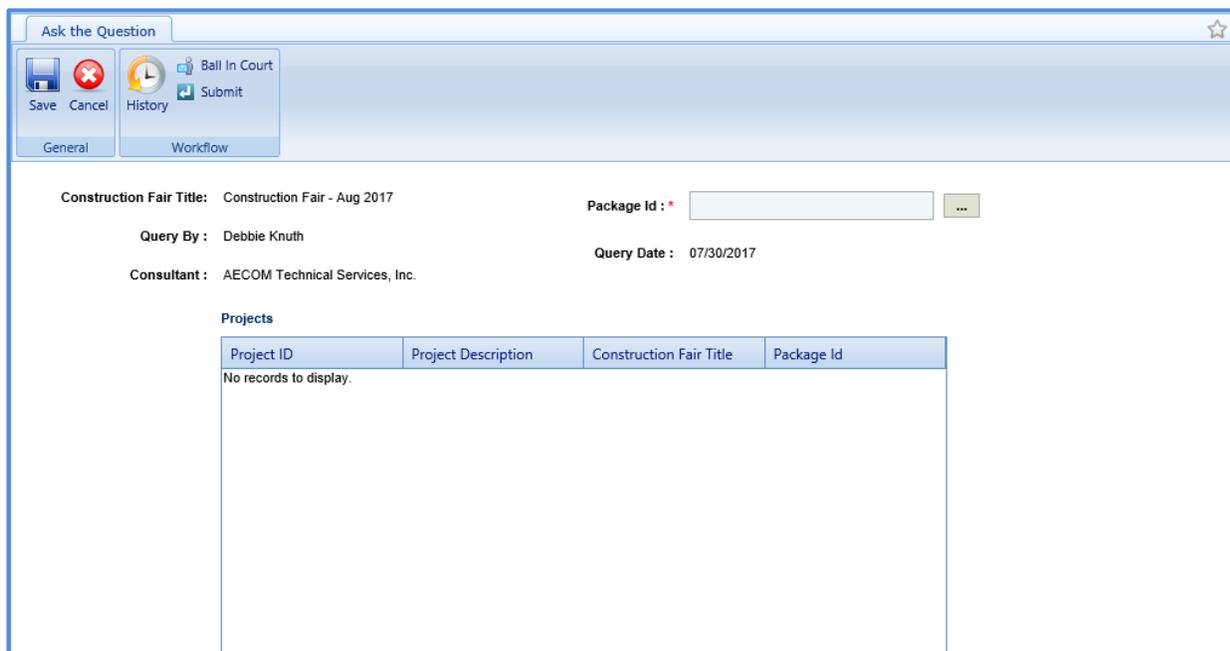
4. In the navigation pane, expand the selected construction fair folder, and then click **Construction Fair Questions and Responses**.

The **Construction Fair Questions and Responses** page is displayed.



5. Click **New**.

The **Ask the Question** page is displayed.



The values in the **Construction Fair Title**, **Query By**, **Consultant**, **Query Date** fields are auto-populated.

6. In the **Package ID** field, perform the following steps to select construction packages for which the question is raised:
  - a. Click .
 

The **Select Package** dialog box is displayed listing all the construction packages that are associated with the construction fair.
  - b. Select the construction packages for which the question is raised and then click **Select**.

7. In the **Projects** section, perform the following steps to add projects for which the question is raised:

Project ID	Project Description	Construction Fair Title	Package Id
No records to display.			

Add Delete

- a. Click **Add**. The **Select Project** dialog box is displayed listing all the projects that are associated with the construction fair.
- b. Select the required projects, and then click **Select**.

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

8. 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
<p>Question : <input type="text"/></p> <p>Response : <input type="text"/></p> <p>Notes : <input type="text"/></p>	
<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.
<b>Notes</b>	This section is available for WisDOT User to enter any notes about the response.

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

## 6 Construction Fair Notice of Interest (NOI)

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

### 6.1 Submitting Construction Fair Notice of Interest

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

1. In the module menu, click **Solicitation**.
2. In the navigation pane, click **Construction Fair**.  
The **Construction Fair** list page is displayed.
3. Select the current **Construction Fair** record, which is marked “Is Current” as **Yes**. and then click **View**.  
The selected **Construction Fair details** page is displayed.

Package ID	Contract Type	Package Month and Year	Package Due Date	Region/Bureau	NOI Type	Roster/Open
SW-53	Regular	August 2017	07/30/2017	Southwest Region	Construction Fair	Roster

4. In the navigation pane, expand the construction fair folder, and click **NOI**. The **Construction Fair NOI** page is displayed.

**NOTICE OF INTEREST QUESTIONNAIRE**  
Wisconsin Department of Transportation

NOI ID : <Auto Generated>      Construction Fair ID : CF for the month of Aug 2017

Construction Fair Date : August 2017      NOI Due Date : 07/31/2017 4:00 AM      CT

Current Workflow Status : Draft

Firm Name : AECOM Technical Services, Inc.      Area Code - Telephone Number :

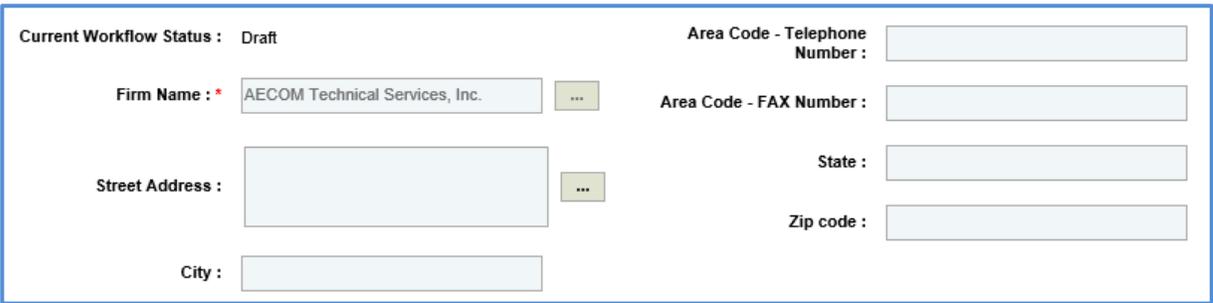
Street Address :       Area Code - FAX Number :

City :       State :       Zip code :

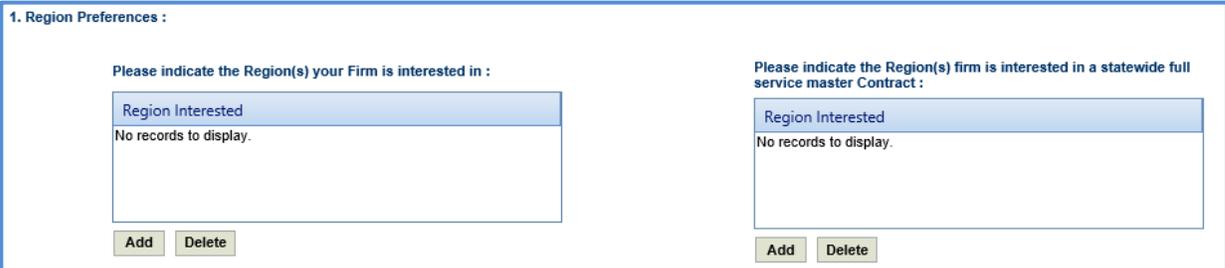
**Note:** The values in the **NOI ID, Construction Fair ID, Construction Fair Date, NOI Due Date, Current Workflow Status, and Firm Name** are auto-populated.

- 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 firm.
<b>City</b>	Enter the city of the consultant firm.
<b>Area Code - Telephone Number</b>	Enter the telephone number with the area code of the consultant firm.
<b>Area Code - FAX Number</b>	Enter the fax number with the area code of the consultant firm.
<b>State</b>	Enter the name of the state where the consultant firm is located.
<b>Zip code</b>	Enter the zip code of the consultant firm location.

- For factor 1, perform the following steps to add region of interest.



- To add regions of interest:
  - Click **Add**. The **Region/Bureau** dialog box is displayed listing the regions.
  - Select the required regions and then click **Select**.
- To add regions of interest in a statewide full service master contract:
  - Click **Add**. The **Region/Bureau** dialog box is displayed listing all the regions.
  - Select the required regions and then click **Select**.

7. For factor 2, perform the following steps to add construction leader details.

2. List credentials, qualifications and years experience for the construction leaders you propose for this construction season. Select the work types a construction leader will be able to complete.

Keystaff/Construc Leader	Firm	Years Experience	Education	Registration (PE, RLS, etc.)	Region Preferences	Work Types	Narrative	
No records to display.								

Add Edit View Delete

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

**New**

**Keystaff/Construction Leader** \*  ...

**Firm**

**Years Experience**

**Education**

**Registration (PE, RLS, etc.)**

**Region Preferences**  ...

**Work Types**  ...

**Narrative**

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

Field	Mandatory / Non-mandatory	Description
<b>Key Staff/Construction Leader</b>	Mandatory	To select key staff/construction leader: a. Click  . The <b>Select Key Staff</b> dialog box is displayed listing all the key staffs of the consultant firm.

Field	Mandatory / Non-mandatory	Description
		b. Select the required key staff/construction leader, 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/construction leader belongs is auto-populated.
<b>Years Experience</b>	-	The years of experience of the selected key staff/construction leader is auto-populated.
<b>Education</b>	-	Enter the education details of the selected key staff/construction leader.
<b>Registration (PE, RLS, etc.)</b>	-	Enter the registration details of the key staff/construction leader.
<b>Region Preferences</b>	Non-mandatory	To select region preferences of the key staff/construction leader:  a. Click  . The <b>Region/Bureau</b> dialog box is displayed listing all the regions selected in Factor 1.  b. Select the required regions and then click <b>Select</b> .
<b>Work Types</b>	Non-mandatory	To select work types of the key staff/construction leader:  c. Click  . The <b>Select Work Type</b> dialog box is displayed listing all the work types.  d. Select the required worktypes and then click <b>Select</b> .
<b>Narrative</b>	Non-mandatory	The narration is auto-populated when the key staff/construction leader is selected. You can edit the existing narration or enter a new narration about the key staff/construction leader.

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

8. For factor 3, perform the following steps to enter details about the interested construction package of the construction fair, construction leader for the package, and support staff for the package:

3. List the packages your firm is interested in the order of interest, you proposed project construction leader and any additional support staff you anticipate assigning to those projects. If listing any staff from other consultant firms, please note them as such.

Region	Package Id	Project Construction Leader	Construction Leader Firm	Additional Support Staff	Support Staff Firm	
No records to display.						

Add Edit View Delete

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

**New**

Region  ...

Package Id  ...

Project Construction Leader  ...

Construction Leader Firm

Additional Support Staff  ...

Support Staff Firm

**Attachments**

Document Name	Title	Uploaded By	Uploaded Date	Delete	Annotations
<					

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

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

Field	Description
<b>Region</b>	To select region: <ol style="list-style-type: none"> <li>a. Click  . The <b>Region/Bureau</b> dialog box is displayed listing all the regions selected in Factor 1.</li> <li>b. Select the required key staff/construction leader, and then click <b>Select</b>.</li> </ol>

Field	Description
	The values in the <b>Firm</b> , <b>Years Experience</b> , and <b>Education</b> fields auto-populated.
<b>Package Id</b>	To select interested construction fair package ID: a. Click  . The <b>Select Package</b> dialog box is displayed listing all the construction packages associated with the construction fair is displayed. b. Select the required package, and then click <b>Select</b> .
<b>Project Construction Leader</b>	To select the project construction leader for the construction fair: a. Click  . The <b>Select Key Staff</b> dialog box is displayed listing the construction leaders added in Factor 2. b. Select the required person as the project construction leader and then click <b>Select</b> .
<b>Construction Leader Firm</b>	The value in this field is auto-populated when the project construction leader is selected.
<b>Additional Support Staff</b>	To select additional support staff for the construction fair: a. Click  . The <b>Select Key Staff</b> dialog box is displayed listing tall the key staffs. b. Select the required person as additional support staff and then click <b>Select</b> .
<b>Support Staff Firm</b>	The value in this field is auto-populated when the additional support staff is selected.

- c. In the **Attachments** section, upload relevant images and files. For information on form attachments, refer [Attachments](#).
  - d. Click **Save**.
9. For factor 4, perform the following steps to add the past completed project details of the construction leader:

4. List recently completed or substantially completed projects for each project construction leader and provide a contract name for each project.

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

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

- 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
<b>Project Name</b>	Mandatory	To select a project: a. Click  . The <b>Select Project</b> dialog box is displayed listing all the past projects of the consultant firm. b. Click the required project, and then click <b>Select</b> .
<b>Key Staff</b>	Non-mandatory	To select key staff: a. Click  . The <b>Select Key Staff</b> dialog box is displayed listing all the key staffs. b. Select the required key staff options, and then click <b>Select</b> .  The selected key staff details are added.
<b>Project Narrative</b>	Non-mandatory	The project narration is auto-populated when a project is selected. You can edit the existing narration or enter a new narration about the project.

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

10. For factor 5, perform the following steps to add additional support staff details for the construction fair:

5. List additional support staff and select the expertise in each field

Support Staff	Firm	Region Preferences	Work Types	
No records to display.				

Add Edit View Delete

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

New

Support Staff  ...

Firm

Region Preferences  ...

Work Types  ...

**Attachments**

Document Name	Title	Uploaded By	Uploaded Date	Delete	Annotations
No Attachments available					

Upload Document

Save Cancel

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

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

Field	Mandatory / Non-mandatory	Description
<b>Support Staff</b>	Mandatory	To select support staff for the construction fair: 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 as support staff for the construction fair and then click <b>Select</b> . The value in the <b>Firm</b> field auto-populated.
<b>Firm</b>	-	The firm to which the selected additional support staff belongs is auto-populated.
<b>Region Preferences</b>	Non-mandatory	To select region preferences of the additional support staff: a. Click  . The <b>Region/Bureau</b> dialog box is displayed listing all the regions selected in Factor 1. b. Select the required regions and then click <b>Select</b> .
<b>Work Types</b>	Non-mandatory	To select work types of the additional support staff: a. Click  . The <b>Select Work Type</b> dialog box is displayed listing all the work types. b. Select the required work types and then click <b>Select</b> .

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

11. For factor 6, perform the following steps to record laboratory certification and testing activities related details:

6. All laboratories and personnel performing acceptance sampling and testing activities for all WisDOT highway improvement projects, including federal aid projects on the national highway system, must be qualified under the Wisconsin Laboratory Qualification Program.

Is your lab certified with WisDOT? :

Which tests are you certified to perform? :

- a. From the **Is your lab certified with WisDOT?** field drop-down list, select **Yes** or **No** to indicate whether the laboratory performing acceptance sampling and testing activities for WisDOT is certified with WisDOT. If the selected option is **Yes**, then the **Which tests are you certified to perform ?** is available.
- b. If the lab is certified with WisDOT, then in the **Which tests are you certified to perform ?** field enter details about the test certified.

12. For factor 7, perform the following steps to record about the available equipment and personnel details to provide the construction engineering services.

7. Does your firm have all the necessary equipment and personnel to provide construction engineering services?

Survey ? :  Construction Administration Systems ? :  ...

Inspection ? :  Testing ? :  ...

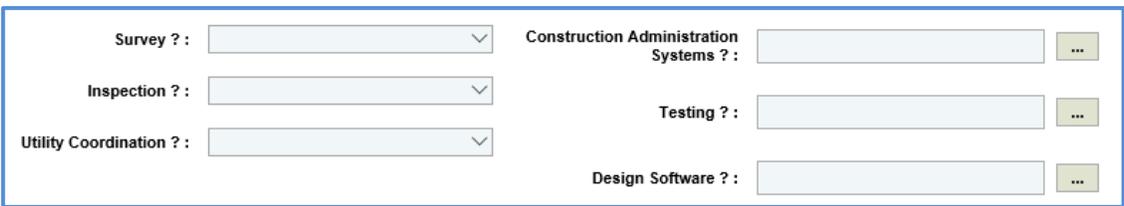
Utility Coordination ? :  Design Software ? :  ...

If no, what construction engineering services would your firm sublet, (survey, material testing, etc)? Please list those operations and furnish the name of the subcontractor, if known at this time.

Services to be sublet	Anticipated subcontractor name, if known
No records to display.	

a. 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>Survey ?</b>	From the drop-down list, select <b>Yes</b> if all the equipment and personnel required for the survey of construction fair are available or select <b>No</b> if all the equipment and personnel required for the survey of construction fair are not available.
<b>Construction Administration Systems ?</b>	To select construction administration systems: a. Click  . The <b>Construction Administration System</b> dialog box is displayed listing all the construction administration systems.

Field	Description
	b. Select the required construction administration systems and then click <b>Select</b> .
<b>Inspection ?</b>	From the drop-down list, select <b>Yes</b> if all the equipment and personnel required for the inspection of construction fair are available or select <b>No</b> if all the equipment and personnel required for the inspection of construction fair are not available.
<b>Testing ?</b>	To select testing systems: a. Click  . The <b>Testing</b> dialog box is displayed listing all the testing systems. b. Select the required testing systems and then click <b>Select</b> .
<b>Utility Coordination ?</b>	From the drop-down list, select <b>Yes</b> if all the equipment and personnel required for the utility coordination of construction fair are available or select <b>No</b> if all the equipment and personnel required for the utility coordination of construction fair are not available.
<b>Design Software ?</b>	To select design software: a. Click  . The <b>Design Software</b> dialog box is displayed listing all the design software. b. Select the required design software and then click <b>Select</b> .

- b. If any engineering related services is not available and being sublet, then to add the sublet details, perform the following steps:

If no, what construction engineering services would your firm sublet, (survey, material testing, etc)? Please list those operations and furnish the name of the subconsultant, if known at this time.

Services to be sublet	Anticipated subcontractor name, if known
No records to display.	

Add Edit View Delete

- i. Click **Add**. The New dialog box is displayed.

New
✕

**Services to be sublet**

**Anticipated subcontractor name, if known**

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

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

Field	Description
<b>Services to be sublet</b>	Enter details about the services that will be sublet for construction fair.
<b>Construction Administration Systems ?</b>	Enter the name of the subcontractor who will be providing the services.

13. For factor 8, perform the following steps to record previously completed bridge painting job related details.

8. If your firm has handled recent bridge painting jobs please, list them below:

Project	Year	Description	Project Cost	Certifications Required
No records to display.				

Add Edit View Delete

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

New
✕

Project  ...

Year  ▾

Description

Project Cost

Certifications Required

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

Field	Description
<b>Project</b>	To select previously completed project:  a. Click  . The <b>Select Project</b> dialog box is displayed listing all the projects.  b. Select the required project and then click <b>Select</b> .
<b>Year</b>	From the drop-down list, select the year of the project.
<b>Description</b>	Enter description about the project.
<b>Project Cost</b>	Enter the project cost.
<b>Certifications Required</b>	Enter the certification details that was required for the project.

14. For factor 9, perform the following steps to record affiliation details with contractors.

9. If your firm is affiliated with any contractors, please list the contractor and type of work below:

Contractor name	Type of work they perform
No records to display.	

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

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

**New** ✕

Contractor name

Type of work they perform

**Save** **Cancel**

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

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

Field	Description
Contractor name	Enter the name of the contractor.
Type of work they perform	Enter details about the types of work performed by the contractor.

- 6. For factor 10, in the **Description of cost-effectiveness measures** field, enter details about the cost effective measures that will be executed by the firm for the construction fair.

10. What measures does your firm take to deliver services cost effectively (especially those not close in proximity of your firms home office)?

Description of cost-effectiveness measures :

- 7. For factor 11, perform the following steps to add details about current and previous services associated with WisDOT.

11. List your firm's current WisDOT obligations (in any region) or other obligations for the previous construction season.

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

Add Edit View Delete

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

**New**

Project Name \*  ...

Key Staff  ...

Project Narrative

**Attachments**

Document Name	Title	Uploaded By	Uploaded Date	Delete	Annotations
No Attachments available					

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

Field	Mandatory / Non-mandatory	Description
<b>Project Name</b>	Mandatory	To select project: a. Click  . The <b>Select Project</b> dialog box is displayed listing all the projects. b. Select the required project and then click <b>Select</b> .
<b>Key Staff</b>	Non-mandatory	To select key staff for the construction fair: a. Click  . The <b>Select Key Staff</b> dialog box is displayed listing all the key staffs of the consultant firm associated with the project. b. Select the required key staff and then click <b>Select</b> .
<b>Project Narrative</b>	Non-mandatory	The project narration is auto-populated when a project is selected. You can edit the existing narration or enter a new narration about the project.

- c. In the **Attachments** section, upload relevant images and files. For information on form attachments, refer [Attachments](#).
- d. Click **Save**.
8. In the **Workflow** group, click **Submit**.  
 The **WisDOT Masterworks** dialog box is displayed.
9. Enter required information and then click **OK**.
10. Optionally, if changes have to be made to the submitted construction fair NOI, perform the following steps:  
**Prerequisite:** You can make changes to a submitted construction fair NOI only when the due date of the construction fair NOI has not expired.
- In the **Workflow** group, click **ReDraft**.  
 The **WisDOT Masterworks** dialog box is displayed.
  - Enter the required information and then click **OK**.
  - Make the required changes and click **Save**.
  - In the **Workflow** group, click **Submit**.  
 The **WisDOT Masterworks** dialog box is displayed.
  - Enter the required information and then click **OK**.  
 The construction fair NOI is resubmitted to WisDOT.

**Note:** Once you click **ReDraft**, the submitted construction fair NOI record is deleted from the WisDOT records and the construction fair NOI has to be resubmitted to WisDOT.

## 7 Viewing Responded Solicitations

You can view all the solicitations for which you have saved the NOI.

### 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 for which the NOI is saved.

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

**Note:** The **NOI status** column on the page displays the current workflow status of the NOI of the Solicitation.

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

## 8 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.

### 8.1 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.

**Note:** You can view only the consultant estimate records that have been moved to the **Scope Finalized** workflow status by WisDOT.

## 8.2 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.

**Consultant Estimate Project Details**

**Consultant Estimate ID :** CE-BBS-22-284      **Consultant Estimate Title :** Consultant Estimate Title  
**Selection Type :** Solicitation      **Bimonthly Solicitation Title :** Bimonthly for the month of June 2017  
**Bimonthly Solicitation Month/Year :** June 2017      **Solicitation ID :** BBS-22  
**Region/Bureau :** Bureau of Business Services      **Fixed Fee % :** 7.00  
**Selected Prime Consultant :** Nagarjuna Constructions      **Negotiation Submission Due Date :** 06/30/2017  
**Import Task List from :** Solicitation Task List

**Projects (In scope excluding If authorized)**

Project ID	Project Name	Direct Labor Cost in \$	Direct Cost in \$	Indirect Cost in \$	Fixed Fee in \$	Marked as Final	Total in \$
No records to display.							
		0.00	0.00	0.00	0.00		0.00

**Projects (If authorized)**

Project ID	Project Name	Direct Labor Cost	Direct Cost	Indirect Cost	Fixed Fee	Marked as Final	Total in \$
------------	--------------	-------------------	-------------	---------------	-----------	-----------------	-------------

- 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.

The screenshot shows the 'Consultant Estimate Details' page with the following information:

- Consultant Estimate ID:** CE-BBS-22-284
- Solicitation ID:** BBS-22
- Project ID:** 2905-29-05
- Description:** (Empty text area)
- Measurement System:** IS System
- Bimonthly Solicitation Month and Year:** June 2017
- Project Name:** project 2905 title

Two cost summary tables are displayed:

Cost Type	Amount in \$
Direct Labor Cost	7,026.55
Direct Cost	0.00
Fixed Fee	1,229.65
Indirect Cost	2,079.86
<b>Estimate Total in \$:</b> 10,336.06	

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	

**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 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.

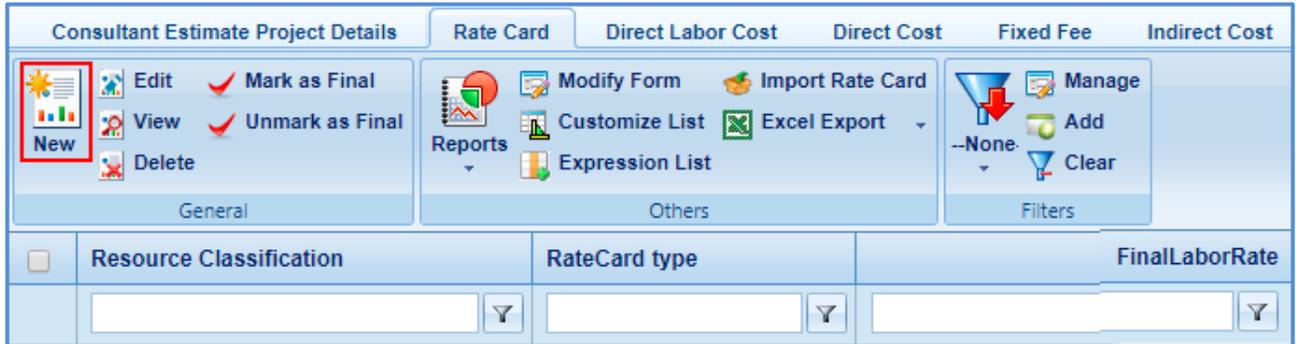
Cost Summary (If authorized)	
Cost Type	Amount in \$
Direct Labor Cost	3,710.65
Direct Cost	81.00
Fixed Fee	649.38
Indirect Cost	887.41
<b>Estimate Total in \$:</b> 5,328.44	

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

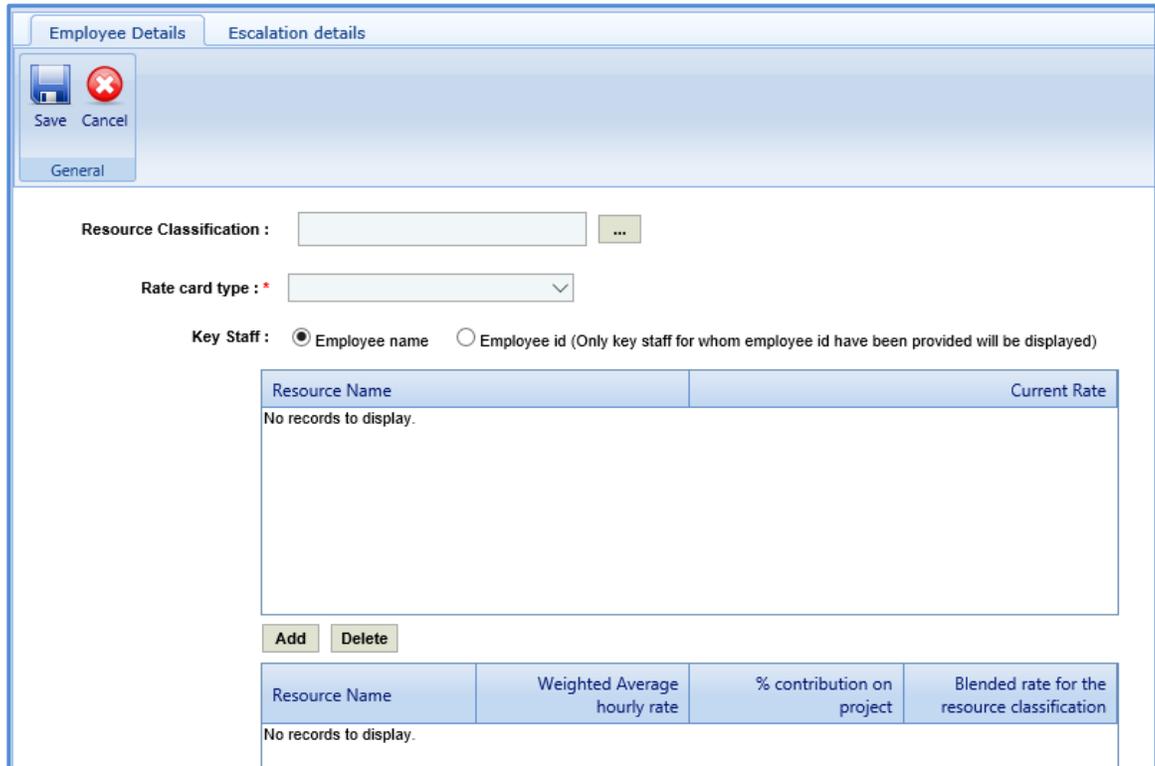
### 8.2.1 Creating Rate Card

You can either create a new rate card or import an existing rate card. Steps to create a rate card is described below. For information on importing a rate card, refer [Importing Rate Card](#).

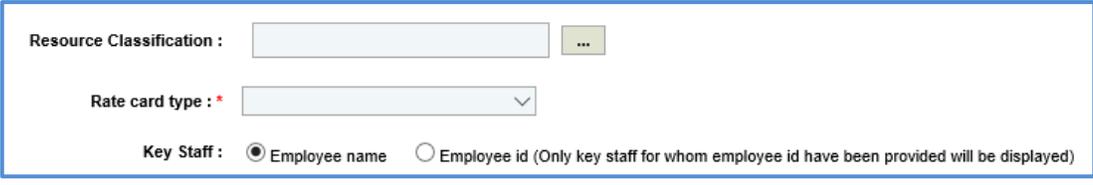
1. Click the **Rate Card** tab and perform the following steps to enter employee rate details and finalize the rate card for the estimate.



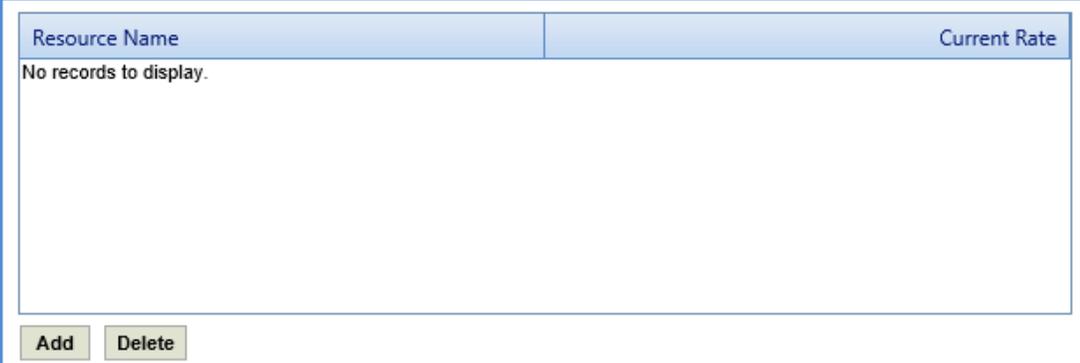
- a. Click **New**. The **Employee Details** page is displayed.



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

Field	Mandatory/ Non-mandatory	Description
		
<b>Resource Classification</b>	Mandatory	To select the classification of the resource: <ol style="list-style-type: none"> <li>Click . The <b>Resource Classification</b> dialog box is displayed.</li> <li>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 for actual cost and lump sum basis of payments.</li> <li><b>NA:</b> Select the option for cost per unit basis of payment.</li> <li><b>Specific Rate:</b> Select this option for specific rate basis of payment.</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:



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.

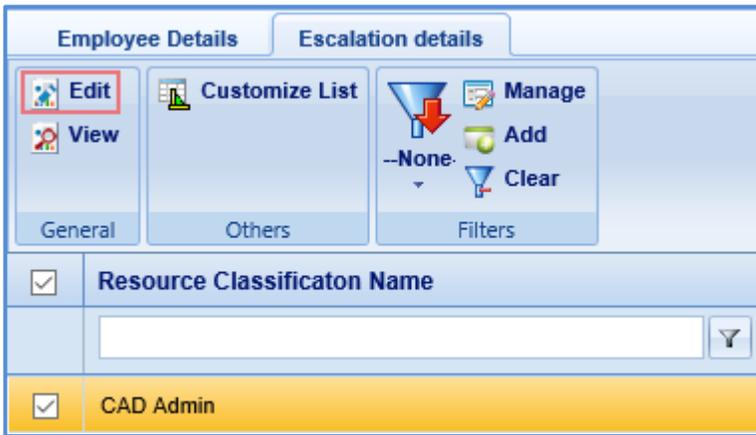
8.2.1.1 Adding Escalation Details

You can add escalation details for a key staff record.

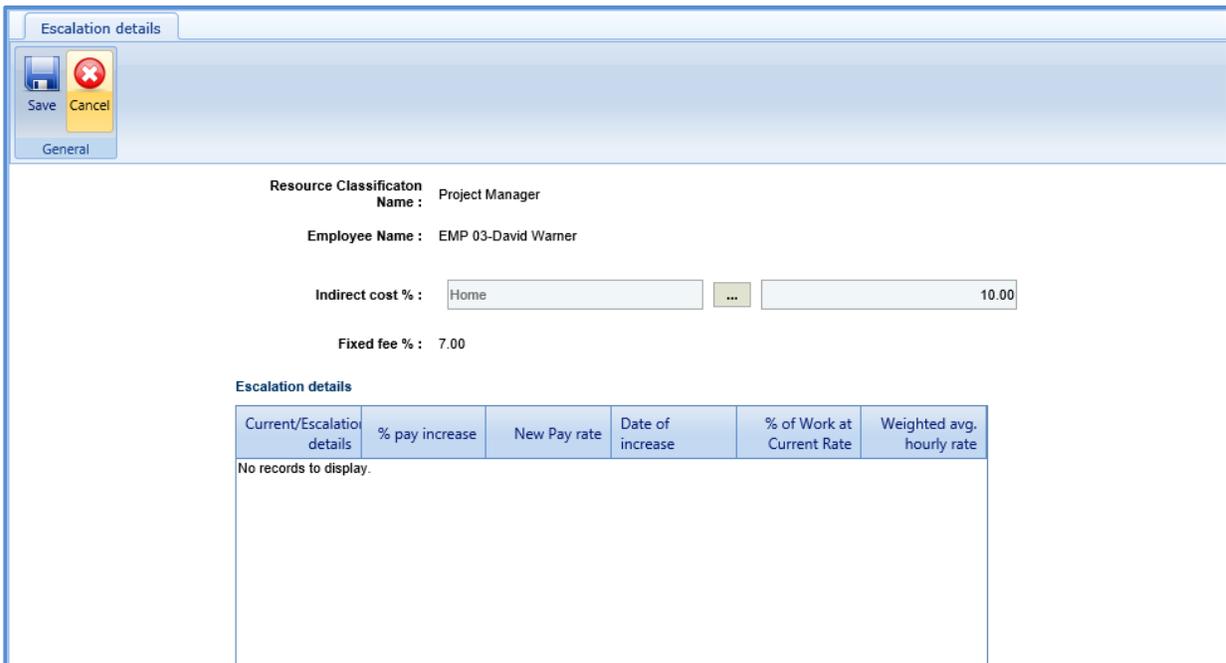
**Pre-requisite:** The key staff records are added in the **Employee Details** tab of the rate card in the consultant estimate.

**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
<b>Resource Classification Name</b>	Indicates the name of the resource classification of the key staff.
<b>Employee Name</b>	Indicates the name and employee ID of the key staff.
<b>Indirect cost %</b>	<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>
<b>Fixed fee %</b>	<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

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

**New Escalation details** [X]

**Current/Escalation details** 54.21

**% pay increase \***

**New Pay rate** 54.21

**Date of increase \***  [v]

**% 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 <b>New Pay rate</b> and <b>% of Work at Current Rate</b> fields.

Field	Mandatory/ Non-mandatory	Description
<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%.

5. On the **Escalation Details** page, click **Save**. The defined escalation details are displayed on the **Employee Details** tab.
6. Click the **Employee Details** tab, in the second table, the key staff record with the actual labor related rate is displayed.

7. 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.

**Steps:**

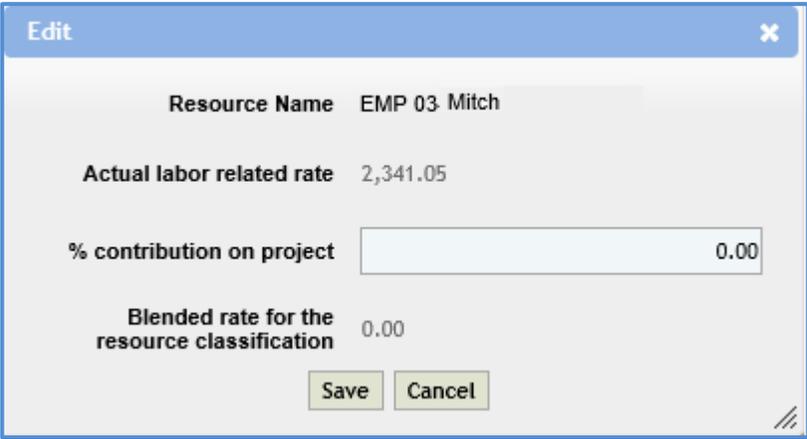
- a. Select the record for which you want to add the percentage contribution and blended rate for the resource classification.

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**

- b. Click **Edit**. The **Edit** dialog box is displayed.
- c. 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.
<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.

d. Click **Save**.

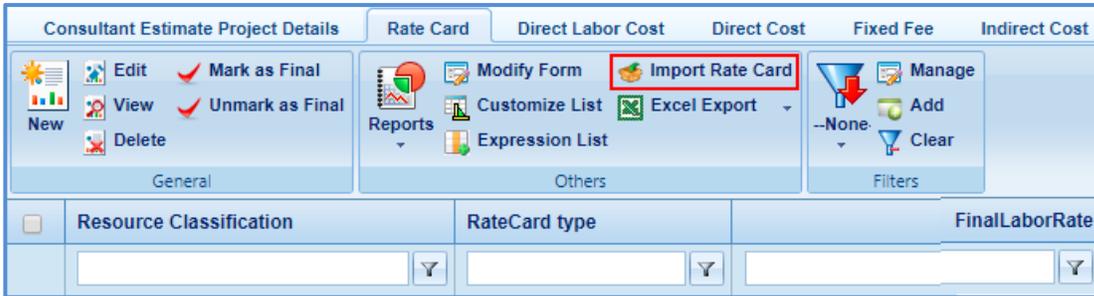
**Note:** Ensure that the sum of the % **contribution on project** field for all the records together must be equal to 100%.

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

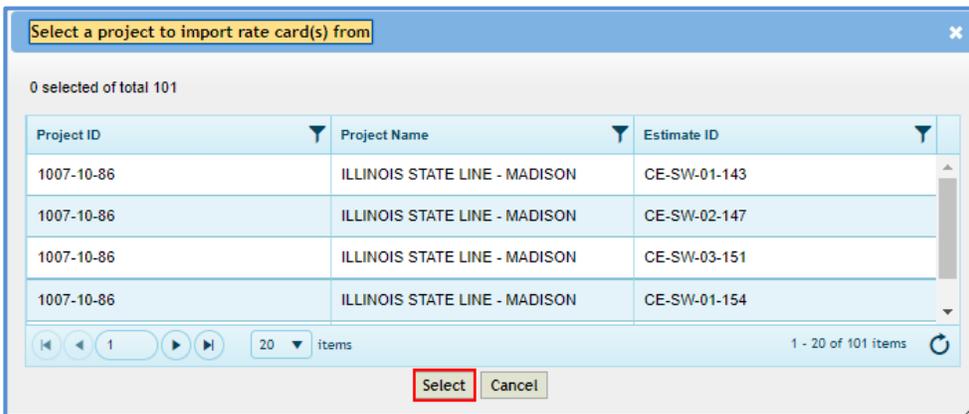
8.2.1.2 Importing Rate Card

**Steps:**

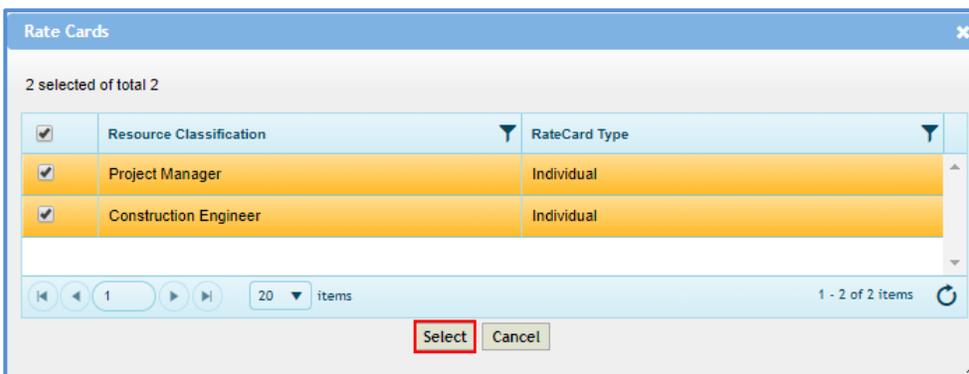
1. On the **Rate Card** page, in the **Others** group, click **Import Rate Card**.



2. In the dialog box, select a project to import the rate card and click **Select**. The **Rate cards** dialog box is displayed.

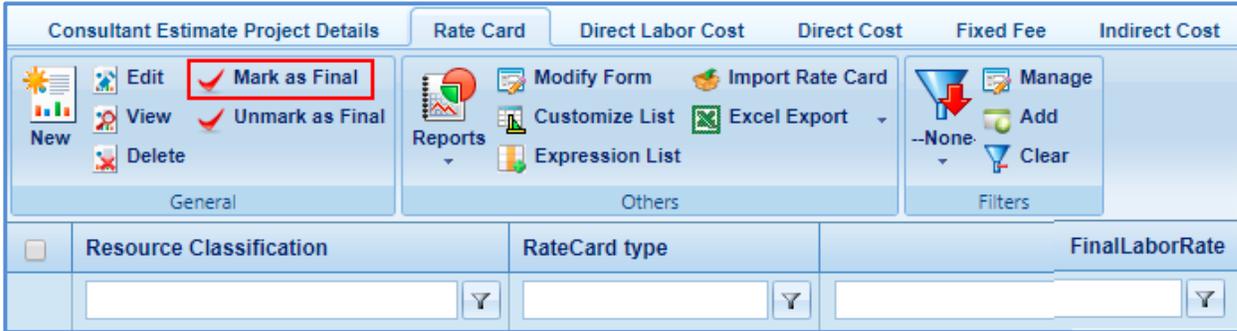


3. Select the rate card and click **Select**. The rate card details are added in Rate Card list page.



8.2.1.3 Mark as Final

1. 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.



2. Click **OK**. The **Rate Card Status** is set to **Final**.

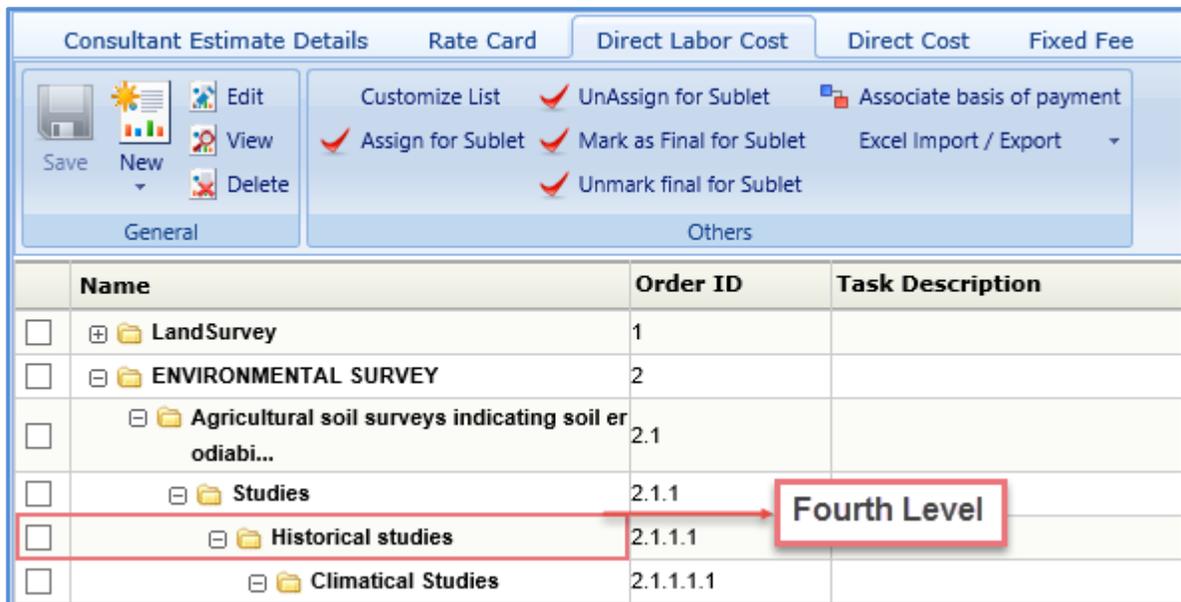
**Note:**

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

8.2.2 Adding Direct Labor Cost task

1. 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.
  - 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.

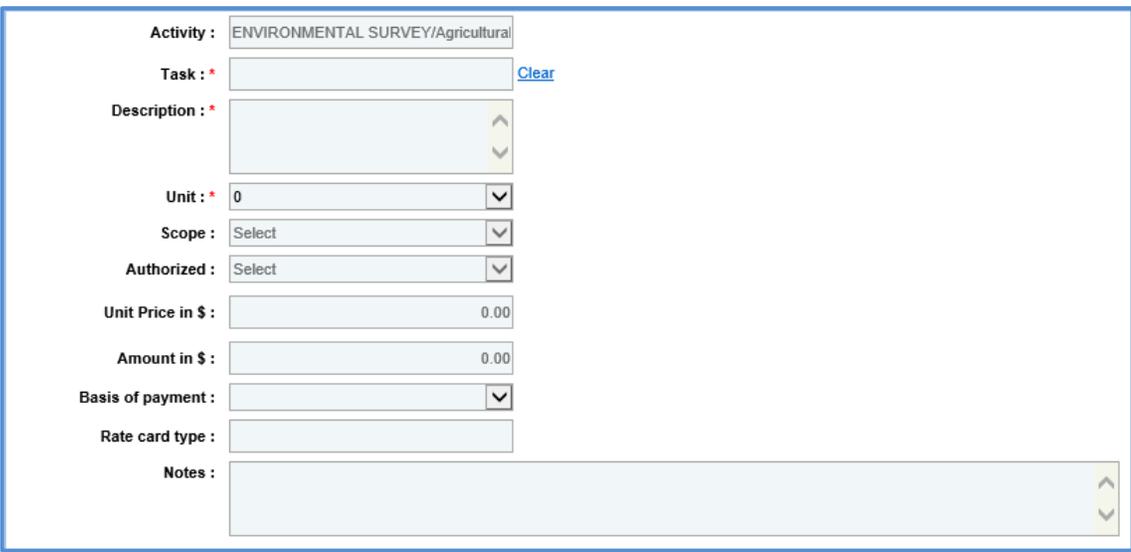
**Pre-requisite:** The additional direct labor cost tasks can be added only after the fourth level of an existing task.



2. 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:

Field	Mandatory / Non-mandatory	Description
	-	The name of the selected activity folder in which the task is being added is auto-populated.

Field	Mandatory / Non-mandatory	Description
<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						

- Click **Add**. The **Resource** dialog box is displayed. The dialog box displays only those resource classifications that are associated with the rate card.
- Select the required resources and then click **Select**. The selected resources are displayed in the **Resources** section.
- Click in the **Associated Indirect Cost** column and from the drop-down list, select required type of indirect cost to associate with the resource.
- 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**.
- 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**.

8.2.2.1 Adding an Activity

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

The screenshot shows a software interface with tabs for 'Consultant Estimate Details', 'Rate Card', 'Direct Labor Cost', 'Direct Cost', and 'Fixed Fee'. Below the tabs is a menu bar with 'Save', 'New', 'Edit', 'View', and 'Delete'. A 'General' section contains options like 'Customize List', 'Assign for Sublet', 'UnAssign for Sublet', 'Mark as Final for Sublet', 'Unmark final for Sublet', and 'Associate basis of payment'. Below this is a table with columns 'Name', 'Order ID', and 'Task Description'.

Name	Order ID	Task Description
LandSurvey	1	
ENVIRONMENTAL SURVEY	2	
Agricultural soil surveys indicating soil erodiabi...	2.1	
Studies	2.1.1	
Historical studies	2.1.1.1	
Climatical Studies	2.1.1.1.1	

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

The 'New Activity' form has a 'General' tab and a 'Save' button. It contains the following fields:

- Name :** [Text input field]
- Code :** [Text input field]
- Description :** [Text area with up/down arrows]
- Notes :** [Text area with up/down arrows]

- 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.

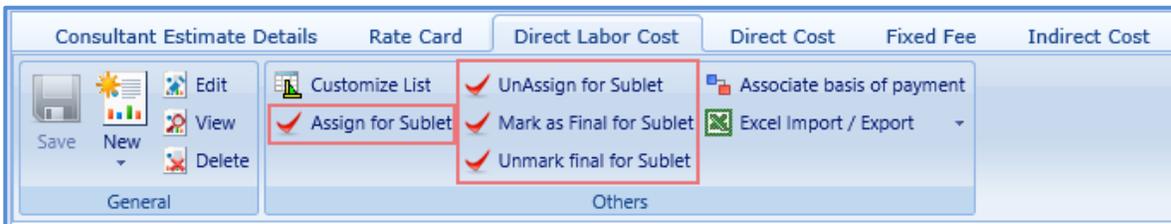
- c. Click **Save**.

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

### 8.2.2.2 Assigning for Sublet

In the **Direct Labor Cost** tab, you can mark tasks for subletting.

1. 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**.

### 8.2.3 Adding Direct Cost details

1. Click the **Direct Cost** tab to add direct costs and perform the following steps:

Consultant/Sub Name	Direct Cost Type	Unit Type	Fiscal Year End Date	Is Current	For If Authorized	Basis of Payment	Quantity	Rate (per quantity)	Total Expenses
No records to display.									
									0.00

- 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.

**Edit Direct Cost**

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

Save Cancel

- 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 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**.

2. 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

### 8.2.4 Viewing Fixed Fee

The fixed fee details are displayed based on the tasks that are marked **In Scope** and **If Authorized**.

1. Click the **Fixed Fee** tab to view the fixed fee details of the consultant estimate. The 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.

### 8.2.5 Viewing Indirect Cost

1. Click the **Indirect Cost** tab. The indirect cost details are displayed. The 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															
<div style="border: 1px solid blue; padding: 5px;"> <p><b>In Scope excluding If Authorized</b></p> <p><b>Consultant</b></p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;"></th> <th style="width: 20%;">Total direct labor cost against an indirect cost type</th> <th style="width: 15%;">Indirect type %</th> <th style="width: 20%;">Indirect cost against an indirect cost type</th> <th style="width: 15%;"></th> </tr> </thead> <tbody> <tr> <td>Consultant Office</td> <td style="text-align: right;">7026.55</td> <td style="text-align: right;">20.00</td> <td style="text-align: right;">1405.31</td> <td></td> </tr> <tr> <td colspan="3" style="text-align: right;"><b>Total Consultant Indirect Cost</b></td> <td style="text-align: right;"><b>1405.31</b></td> <td></td> </tr> </tbody> </table> </div>			Total direct labor cost against an indirect cost type	Indirect type %	Indirect cost against an indirect cost type		Consultant Office	7026.55	20.00	1405.31		<b>Total Consultant Indirect Cost</b>			<b>1405.31</b>	
	Total direct labor cost against an indirect cost type	Indirect type %	Indirect cost against an indirect cost type													
Consultant Office	7026.55	20.00	1405.31													
<b>Total Consultant Indirect Cost</b>			<b>1405.31</b>													
<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.															
<div style="border: 1px solid blue; padding: 5px;"> <p><b>G&amp;A</b></p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Total Direct Labor Cost</th> <th style="width: 20%;">Total Direct Cost</th> <th style="width: 20%;">Total Consultant Indirect Cost</th> <th style="width: 10%;">G&amp;A %</th> <th style="width: 30%;">G&amp;A Indirect Cost</th> </tr> </thead> <tbody> <tr> <td style="text-align: right;">7026.55</td> <td style="text-align: right;">0.00</td> <td style="text-align: right;">1405.31</td> <td style="text-align: right;">8.00</td> <td style="text-align: right;">674</td> </tr> </tbody> </table> </div>		Total Direct Labor Cost	Total Direct Cost	Total Consultant Indirect Cost	G&A %	G&A Indirect Cost	7026.55	0.00	1405.31	8.00	674					
Total Direct Labor Cost	Total Direct Cost	Total Consultant Indirect Cost	G&A %	G&A Indirect Cost												
7026.55	0.00	1405.31	8.00	674												
<b>Total Direct Labor Cost</b>	The total direct labor cost for G&A is auto-populated.															

Field	Description																		
<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.																		
<div style="border: 1px solid blue; padding: 5px;"> <p><b>Sub Consultant Handling Fee</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="font-size: small;">All Subconsultant Total Direct Labor Cost</th> <th style="font-size: small;">All Subconsultant Total Direct Cost</th> <th style="font-size: small;">All Subconsultant Total Indirect Cost</th> <th style="font-size: small;">All Subconsultant Total Fixed Fee</th> <th style="font-size: small;">Subconsultant Handling fee %</th> <th style="font-size: small;">Subconsultant Handling fee</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">0.00</td> <td style="text-align: center;">0.00</td> <td style="text-align: center;">0.00</td> <td style="text-align: center;">0.00</td> <td style="text-align: center;">32.00</td> <td style="text-align: center;">0.00</td> </tr> <tr> <td colspan="5" style="text-align: right; font-weight: bold; font-size: small;">Total Indirect Cost</td> <td style="text-align: center;">2079.86</td> </tr> </tbody> </table> </div>		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	Total Indirect Cost					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														
Total Indirect Cost					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.

2. Click **Save**.

### 8.3 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.

	Sublet ID	Sublet No	Solicitation ID
<input type="checkbox"/>			
<input type="checkbox"/>	Sublet-CE-2	SL001	BBS-22
<input type="checkbox"/>	Sublet-CE-1	Nag-Modern	BBS-22

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

Sublet ID : <Auto Generated>

Sublet No : \*

Sublet By : Nagarjuna Constructions

Sublet Date : 06/12/2017 12:00 AM

Solicitation ID: BBS-22

Sublet to Consultant : \*

Fixed Fee % : 7.00

Description : \*

Scope of work : \*

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

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

Sublet List			
General	Workflow		Others
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Sublet-CE-3	SL002	BBS-22
<input type="checkbox"/>	Sublet-CE-2	SL001	BBS-22

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.

Sublet Estimate Details		Rate Card	Direct Labor Cost
Save			
General			
Sublet ID:		Sublet-CE-3	
Solicitation ID:		BBS-22	
Project ID:		2905-29-05	
Description:		<input type="text"/>	

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.

## 8.4 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.

The screenshot shows the 'Sublet Estimate Details' page. The left navigation pane has a tree view with the following structure:

- Solicitation List
  - Bimonthly Solicitation List
  - Solicitations Responded
  - Negotiation
    - Negotiation Notes
    - Consultant Estimate List
      - CE-BBS-22-284 (Nagarjuna Constructions)
        - Sublet List
          - Sublet-CE-1 (Modern Demolishing Company)
            - project 2905 title

The main content area displays the following information:

- Sublet ID: Sublet-CE-1
- Solicitation ID: BBS-22
- Project ID: 2905-29-05
- Bimonthly Solicitation Month and Year: Bimonthly for the month of June 2017
- Project Name: project 2905 title
- Description: [Empty text box]
- Measurement System: IS System

There are two cost summary tables:

Cost Summary (In scope excluding If authorized)	
Cost Type	Amount in \$
Direct Labor Cost	0.00
Direct Cost	0.00
Fixed Fee	0.00

Cost Summary (If authorized)	
Cost Type	Amount in \$
Direct Labor Cost	10,200.00
Direct Cost	0.00
Fixed Fee	1,785.00

**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 \$:</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	

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](#).

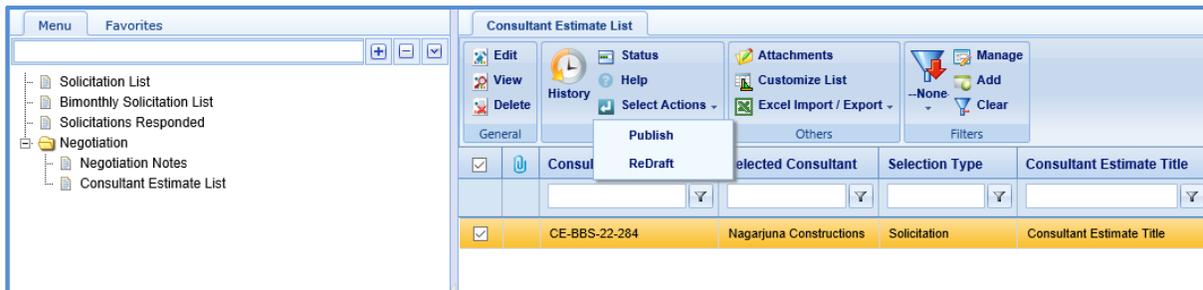
11. Click **Direct Labor Cost tab**. The tasks that are assigned to you by the Prime Consultant are displayed. If required, additional direct labor cost tasks and activity folders can be added. You can further sublet the tasks to other consultant firms. For more information on adding direct labor cost 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.

## 8.5 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.

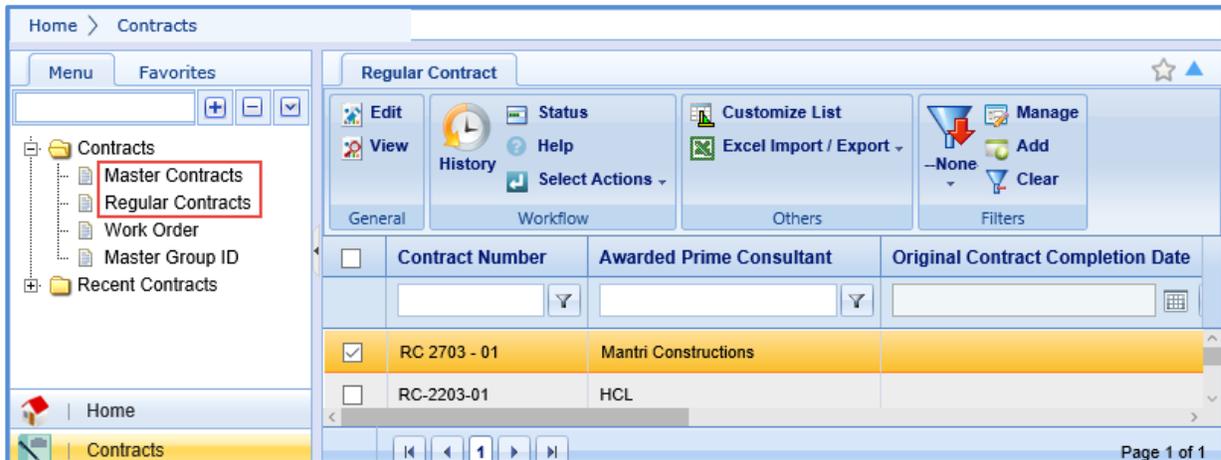
**Note:** Optionally, in the **Workflow** group, in **Select Actions**, you can click **ReDraft**, enter required information in the dialog box that is displayed, and then click **OK** to redraft the record.

## 9 Reviewing Contracts

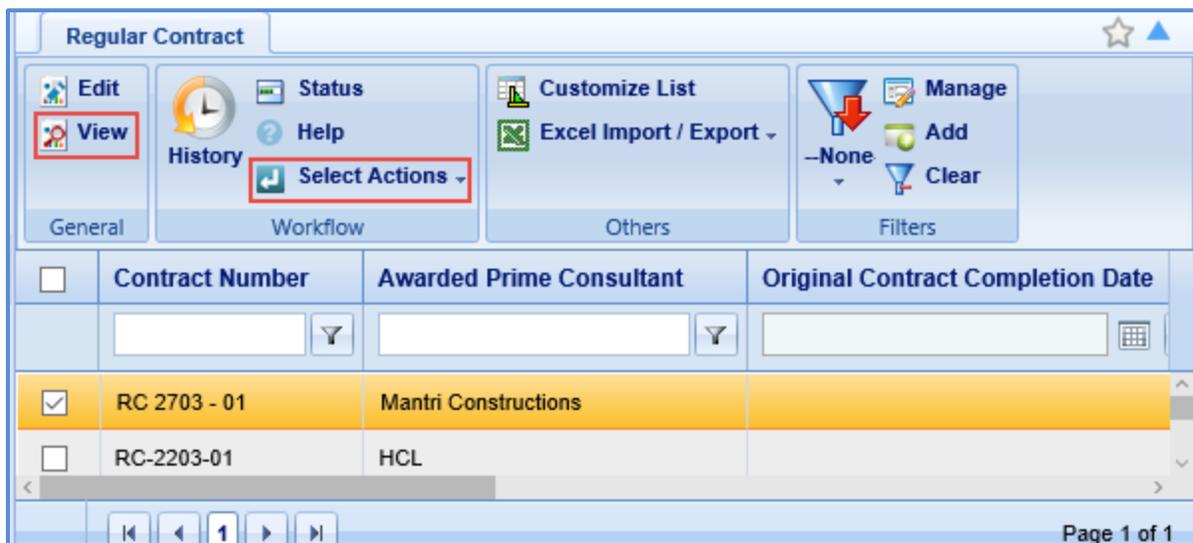
The procedure to review the contracts that have been submitted to you by WisDOT is described.

### Steps:

1. In the module menu, click **Contracts**.



2. In the navigation pane, expand the **Contracts** folder, and then based on the contract that are reviewed, click **Master Contracts** or **Regular Contracts**. The **Master Contracts** or **Regular Contract** list page is displayed.



3. Select the contract that is reviewed and click **View** to view the contract details.
4. In the **Workflow** group, click **Select Actions**, and then click **Reviewed**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK**. The contract is reviewed and sent to WisDOT.

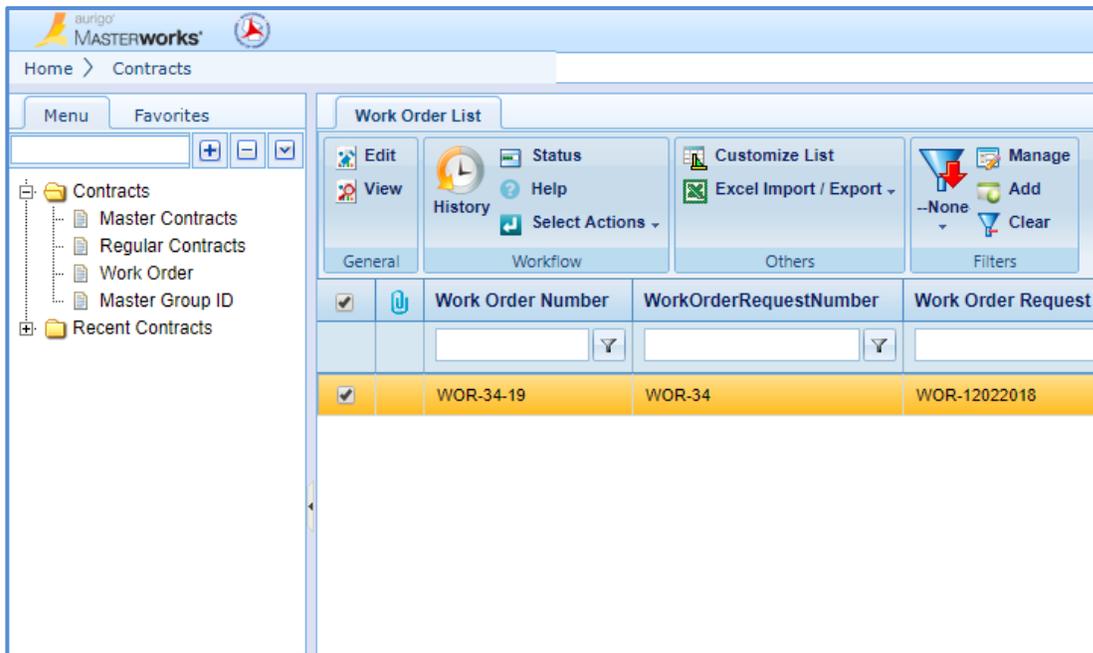
Optionally, in the **Workflow** group, in **Select Actions**, you can click **Request to Revisit**, enter required information in the dialog box that is displayed, and then click **OK** to return the record to WisDOT to revisit the contract details.

## 10 Reviewing Work Order Contracts

The procedure to review the work order contracts that have been submitted to you by WisDOT is described.

### Steps:

1. In the module menu, click **Contracts**.
2. In the navigation pane, expand the **Contracts** folder, and then click **Work Order**. The **Work Order List** page is displayed.



3. Select the work order contract record that has to be reviewed and click **View** to view the work order contract details.
4. On the **Work Order Contract List** page, select the record, in the **Workflow** group, click **Select Actions**, and then click **Reviewed**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK**. The work order contract record is reviewed and sent to WisDOT.  
Optionally, in the **Workflow** group, in **Select Actions**, you can click **Request to Revisit**, enter required information in the dialog box that is displayed, and then click **OK** to return the record to WisDOT to redraft the work order contract details.

## 11 Contract Amendments

If there are changes in approved contracts, contract amendments are created by WisDOT and primary consultants have to provide an amended estimate for the tasks assigned to them for negotiation purposes. If the tasks are sublet to other consultant firms, then these consultant firms have to provide their amended estimate to primary consultants. Similarly, if the sublet firms have further sublet the tasks to other consultant firms, they have to receive amended estimates from the consultant firms.

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

### 11.1 Amending Consultant Estimate for Contract Amendments

The procedure to amend the consultant estimate for regular and master contracts is described.

1. In the module menu, click **Contracts**.
2. In the navigation pane, expand the **Contracts** folder, and then based on the contract amendment that is being published, click **Master Contracts** or **Regular Contracts**.  
The **Master Contracts** or **Regular Contract** list page is displayed.
3. Select the contract for which estimate has to be amended and published and click **View**.
4. In the navigation pane, expand the selected contract folder, and then click **Contract Amendment**.  
The **Contract Amendment** list page is displayed.
5. Select the required amendment record and click **View**.  
The **Contract Amendment** details page is displayed.
6. In the navigation pane, expand the contract amendment folder, and click **Amendment Consultant Estimate**.

The **Amendment Consultant Estimate** list page is displayed.

Consultant Estimate ID	SelectedConsultant	Selection Type	Consultant Estimate Title	Region/Bureau	SolicitationID/RequestID/PackageID
CE-LD-64-733	Propmart Technologies Ltd	Local Design	Local design 1804		LD-64

7. Select the required amendment consultant estimate record that has to be amended and click **Edit**. The **Amendment Consultant Estimate Details** page is displayed.

**Amendment Consultant Estimate Details**

Save Cancel History Publish ReDraft

General Workflow

Ball In Court

Consultant Estimate ID : CE-LD-64-733 Consultant Estimate Title : Local design 1804

Amendment Consultant Estimate Title : 001A Contract Amendment Request ID : CA-2

Contract Number : Contractnumber1804-01 Request ID : LD-64

Selection Type : Local Design Fixed Fee % : 12.00

Request Title : Local Design1804 Negotiation Submission Due Date : 04/17/2019

Selected Prime Consultant : Propmart Technologies Ltd Governor's Approval Required :

Import Task List from : Approved Current Contract

**Basis of Payment**

Basis of Payment:
Cost Per Unit
Lump Sum
Specific Rate

Add Delete

8. If required, edit the values in the following fields:
- **Amendment Estimate Title**
  - **Fixed Fee %**
  - **Negotiation Submission Due Date**
9. Select or clear the **Governor's Approval Required** check box, if the amendment requires Governor's approval.
10. In the **Basis of Payment** section, you can add a new basis of payment or delete an existing basis of payment. Perform the following steps to add a new basis of payment.
- Click **Add**.  
**The Basis of Payment will be one or more of the following:** dialog box is displayed.
  - Select the required basis of payments that has to be added.
  - Click **Select**.
- Note:** To delete an existing basis of payment, select the basis of payment that has to be deleted and click **Delete**.
11. In the **Notes** field, enter notes, if any about the amendment of the estimate.
12. In the **Attachments** section, upload images and files relevant to the amendment. For information on attachments, refer [Attachments](#).
13. Click **Save**.  
The associated project tasks is available for amendment. For information, refer [Amending Contract Project Estimation Details](#).

### 11.1.1 Amending Contract Project Estimation Details

The procedure to amend the details of the project associated with the consultant estimate is described.

1. On the **Amendment Consultant Estimate** list page, select the estimate for which the project estimation has to be amended, and click **Edit**.
2. In the navigation pane, expand the amendment consultant estimate folder, and then click the required project.

Cost Summary (In scope excluding If authorized)		Cost Summary (If authorized)	
Cost Type	Amount in \$	Cost Type	Amount in \$
Direct Labor Cost	16,729.29	Direct Labor Cost	3,511.55

3. In the **Contract Amendment Project Estimation Details** tab, the work order details and the cost summary is displayed. For more information, refer [Adding Consultant Estimation](#). If required, you can edit the following in the tab:
  - **Description**
  - In the **Attachments** section, upload documents and images relevant to the project estimation amendment. For information on attachments, refer [Attachments](#).
4. Click the **Rate Card** tab to add a new rate card, edit an existing rate card details, and finalize the rate card.
  - To add a new rate card or finalize the rate card, refer [adding rate card details](#).
  - To edit an existing rate card, perform the following:
 

**Prerequisite:** The **Rate Card Status** must be in the **Not Final** status.

    - a. In the **Rate Card** tab, select the rate card that has to be edited, and then click **Edit**.  
**Note:** If a rate card is marked as final, then click **Unmark as Final** in **General** Group and then edit the rate card details.
    - b. Make the required changes in the **Employee Details** tab and the **Escalation Details** tab. For more information, refer [adding rate card details](#).
    - c. Click **Save**.
5. To mark a rate card as final, refer [Mark as Final](#).

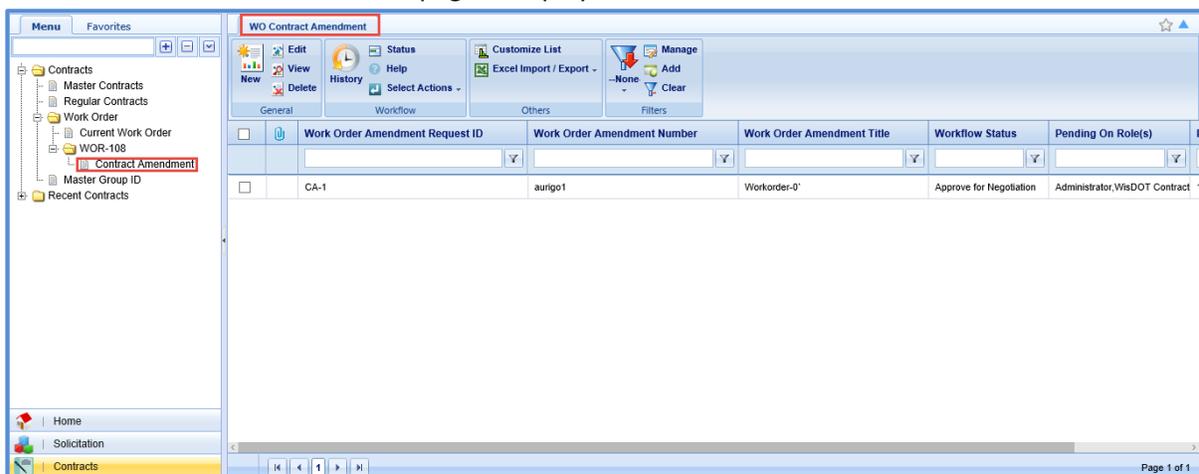
6. Click the **Direct Labor Cost** tab, add a new record or edit an existing record, and then click **Save**. You can also sublet the tasks, and mark as final. For more information, refer [adding direct labor cost details](#). The total of direct labor costs is displayed in the **Cost Summary** section on the **Contract Amendment Project Estimation Details** tab.
7. Click the **Direct Cost** tab, add a new record or edit an existing record, and then click **Save**. For more information, refer [direct cost details](#). The total of direct costs is displayed in the **Cost Summary** section on the **Contract Amendment Project Estimation Details** tab.
8. Click the **Fixed Fees** tab, make the required changes, and then click **Save**. For more information on fixed fee details, refer [Viewing Fixed Fee](#). The total fixed fees is displayed in the **Cost Summary** section on the **Contract Amendment Project Estimation Details** tab.
9. Click the **Indirect Cost** tab to view the indirect cost details. For more information on viewing the indirect cost details, refer [viewing indirect cost details](#) step in the Adding Consultant Estimation Details topic.
10. Click **Save**.

## 11.2 Amending Consultant Estimate for Work Order Amendments

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

### Steps:

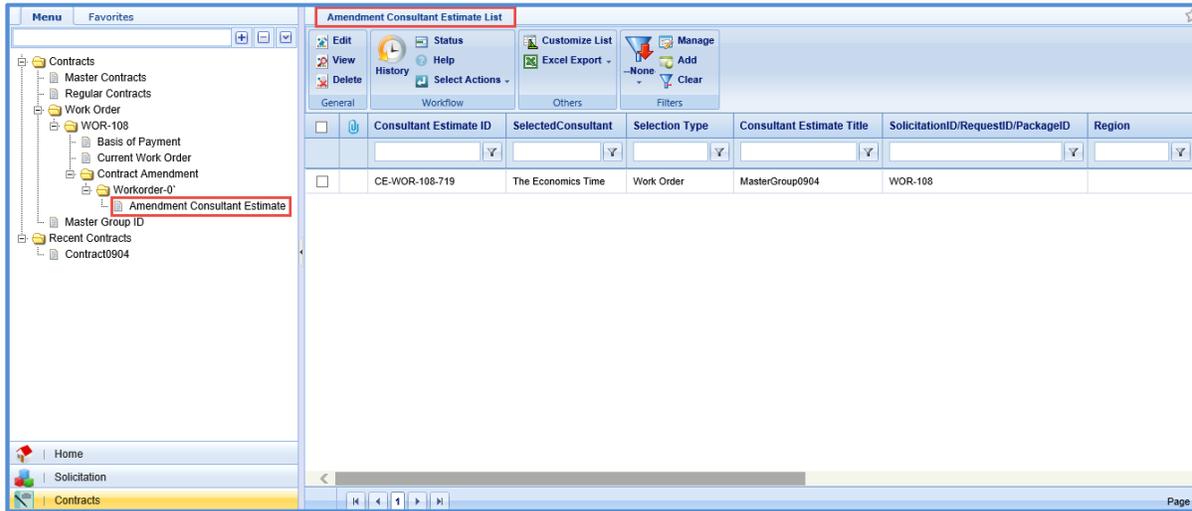
1. In the module menu, click **Contracts**.
2. In the navigation pane, expand the **Contracts** folder, and then click **Work Order**. The **Work Order List** page is displayed.
3. Select the work order for which amendment estimate has to be published and click **View**.
4. In the navigation pane, expand the selected work order folder, and then click **Contract Amendment**. The **WO Contract Amendment** list page is displayed.



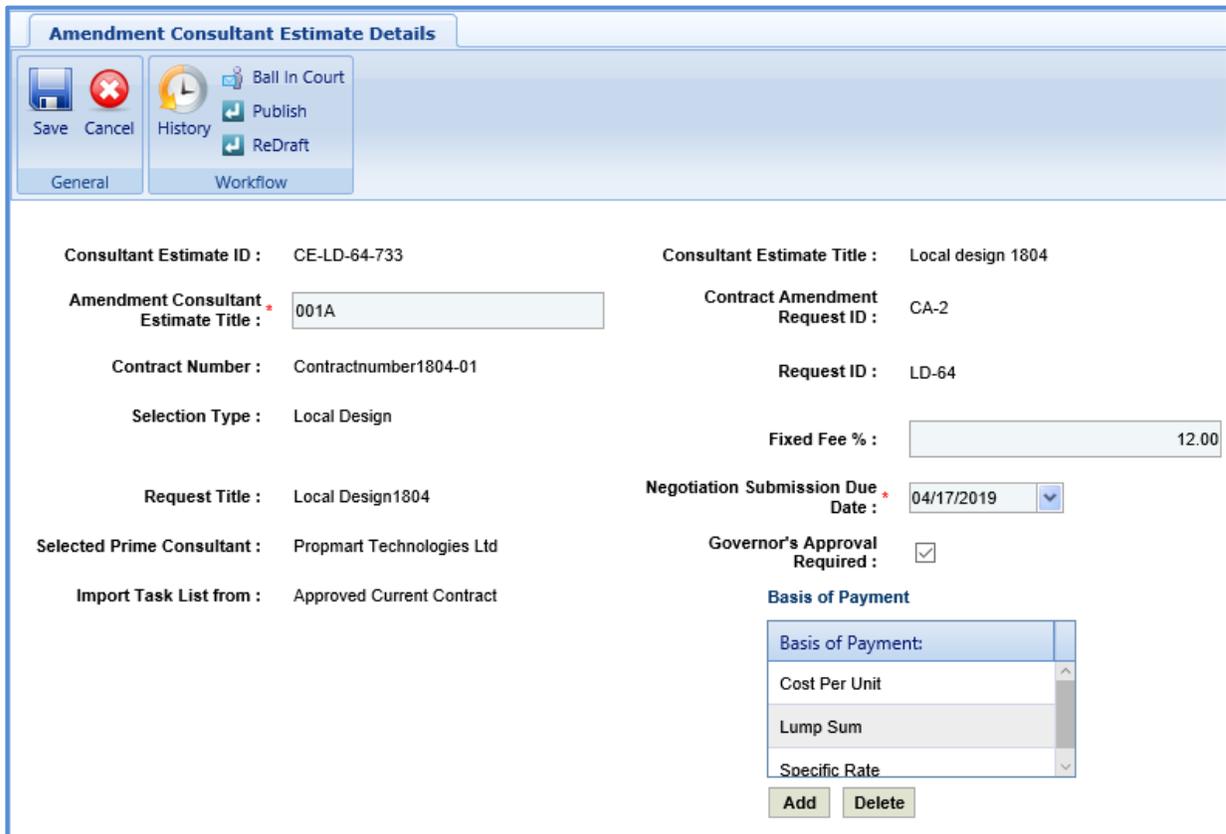
5. Select the required amendment record for which the negotiation estimate has to be amended and click **View**. The **WO Contract Amendment** details page is displayed.

- In the navigation pane, expand the work order amendment folder, and click **Amendment Consultant Estimate**.

The **Amendment Consultant Estimate List** page is displayed.



- Select the required amendment consultant estimate record that has to be amended and click **Edit**. The **Amendment Consultant Estimate Details** page is displayed.



- If required, edit the values in the following fields:
  - Amendment Consultant Estimate Title**
  - Fixed Fee %**
  - Negotiation Submission Due Date**

9. In the **Basis of Payment** section, you can add a new basis of payment or delete an existing basis of payment. Perform the following steps to add a new basis of payment.
  - a. Click **Add**.  
 The **Basis of Payment will be one or more of the following:** dialog box is displayed.
  - b. Select the required basis of payments that has to be added.
  - c. Click **Select**.

**Note:** To delete an existing basis of payment, select the basis of payment that has to be deleted and click **Delete**.

10. In the **Notes** field, enter notes, if any about the amendment of the estimate.
11. In the **Attachments** section, upload images and files relevant to the amendment. For information on attachments, refer [Attachments](#).
12. Click **Save**.  
 The associated project tasks is available for amendment. For information, refer [Amending Project Estimation Details](#).

### 11.2.1 Amending Work Order Project Estimation Details

The procedure to amend the details of the project associated with the consultant estimate is described.

1. On the **Amendment Consultant Estimate** list page, select the estimate for which the project details has to be amended, and click **Edit**.
2. In the navigation pane, expand the amendment consultant estimate folder, and then click the required project.

The screenshot displays the 'WO Amendment Project Estimation Details' window. On the left, a navigation pane shows a tree structure under 'Contracts' > 'Work Order' > 'WOR-108' > 'Contract Amendment' > 'Amendment Consultant Estimate' > 'CE-WOR-108-719 (The Economics Time...)' > 'proj-03-04-Project 0304'. The main content area is titled 'WO Amendment Project Estimation Details' and includes a 'Save' button and a 'General' tab. The 'General' tab contains the following information:

- Consultant Estimate ID: CE-WOR-108-719
- Work Order Number: WO1
- Request ID: WOR-108
- Project ID: proj-03-04
- Awarded Prime Consultant: The Economics Time
- Description: [Empty text box]
- Measurement System: IS System
- Work Order Amendment Request ID: CA-1
- Request Title: MasterGroup0904
- Project Name: Project 0304

At the bottom, there are two cost summary tables:

Cost Summary (In scope excluding If authorized)	
Cost Type	Amount in \$
Direct Labor Cost	1,722.16
Direct Cost	272.00
Fixed Fee	387.48

Cost Summary (If authorized)	
Cost Type	Amount in \$
Direct Labor Cost	135.96
Direct Cost	0.00
Fixed Fee	30.60

3. In the **WO Amendment Project Estimation Details** tab, the work order details and the cost summary is displayed. For more information, refer [Adding Consultant Estimation](#). If required, you can edit the following in the tab:
  - **Description**
  - In the **Attachments** section, upload documents and images relevant to the project estimation amendment. For information on attachments, refer [Attachments](#).

4. Click the **Rate Card** tab to add a new rate card or edit an existing rate card details.
  - To add a new rate card, refer to the [adding rate card details](#) step in the Adding Consultant Estimation Details topic.
  - To edit an existing rate card, perform the following:
    - Prerequisite:** The **RateCard Status** must be in the **Not Final** status.
    - a. In the **Rate Card** tab, select the rate card that has to be edited, and then click **Edit**.
      - Note:** *If a rate card is marked as final, then click **Unmark as Final** in **General Group** and then edit the rate card details.*
    - b. Make the required changes in the **Employee Details** tab and the **Escalation Details** tab. For more information, refer [adding rate card details](#).
    - c. Click **Save**.
5. To mark a rate card as final, refer [Mark as Final](#).
6. Click the **Direct Labor Cost** tab, add a new record or edit an existing record, and then click **Save**. For more information, refer to the [adding direct labor cost details](#) step in the Adding Consultant Estimation Details topic.

The total of direct labor costs is displayed in the **Cost Summary** section on the **Contract Amendment Project Estimation Details** tab.
7. Click the **Direct Cost** tab, add a new record or edit an existing record, and then click **Save**. For more information, refer to the adding [direct cost details](#) step in the Adding Consultant Estimation Details topic.

The total of direct costs is displayed in the **Cost Summary** section on the **Contract Amendment Project Estimation Details** tab.
8. Click the **Fixed Fees** tab, make the required changes, and then click **Save**. For more information on fixed fee details, refer to the [fixed fee details](#) step in the Adding Consultant Estimation Details topic.
9. The total fixed fees is displayed in the **Cost Summary** section on the **Contract Amendment Project Estimation Details** tab.
10. 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.
11. Click **Save**.

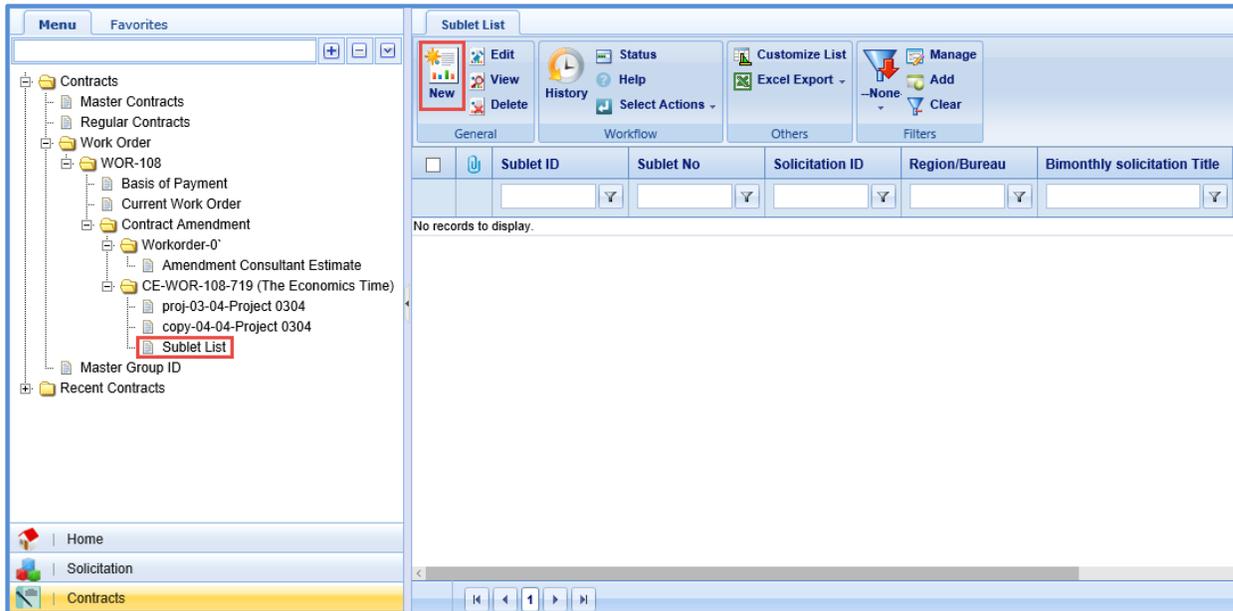
### 11.3 Finalizing Scope for Subletting Contract Amendment Tasks

A prime consultant can sublet contract amendment 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.

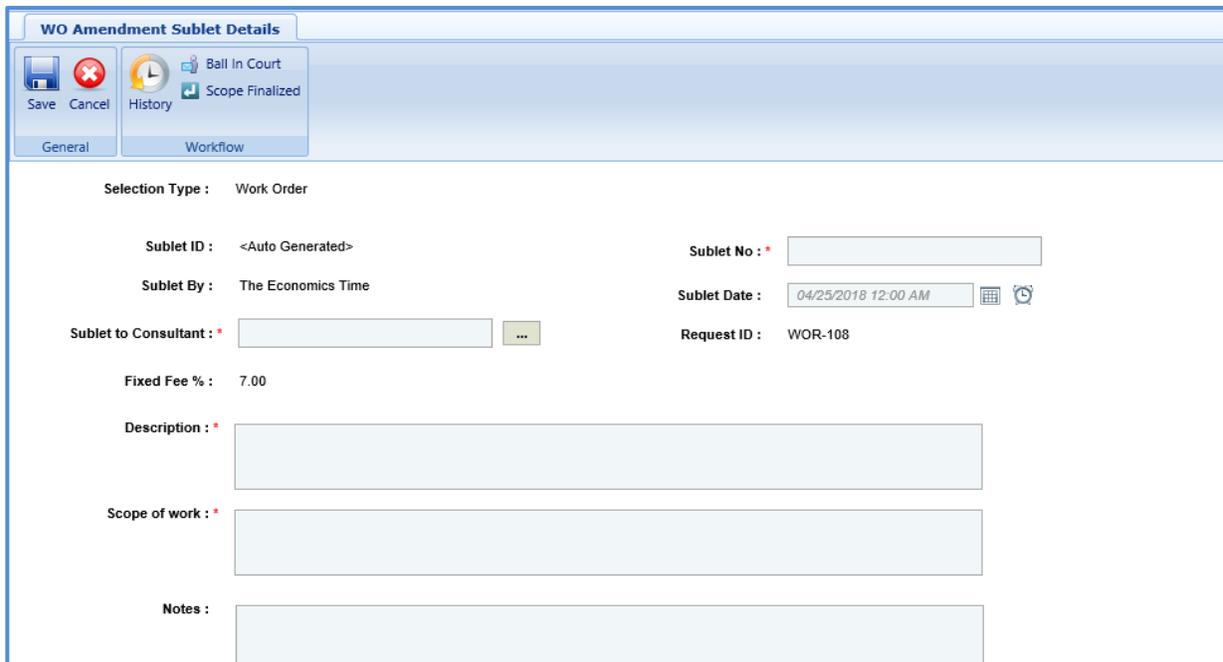
The procedure to add and finalize the scope for subletting contract amendment tasks is described.

1. In the module menu, click **Contracts**.
2. In the navigation pane, expand **Master Contracts**, **Regular Contracts**, or **Work Orders**.
3. Select the required contract and click **View**.
4. In the navigation pane, expand the contract folder, and then click **Contract Amendment**.
5. Select the required contract amendment record and click **View**.

6. On the navigation pane, click **Amended Consultant Estimate List**.  
The **Amended Consultant Estimate List** page is displayed.
7. Select a consultant estimate and click **View**. The **Consultant Estimate Project Details** page is displayed.
8. In the navigation pane, in the amendment consultant estimate of the primary consultant folder, click **Sublet List**. The **Sublet List** page is displayed.



9. Click **New**. The **WO Amendment Sublet Details** page is displayed.



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

Field	Mandatory/Non-mandatory	Description
<b>Selection Type</b>	-	The selection type of the contract amendment is auto-populated.
<b>Sublet ID</b>	-	The Sublet ID is auto-generated.
<b>Sublet No</b>	Mandatory	Enter a unique number for the sublet.
<b>Sublet By</b>	-	The name of the consultant firm who is subletting is auto-populated.
<b>Sublet Date</b>	Non-mandatory	Click the Calendar icon to select the date of sublet and click the Time Picker icon to select the time of sublet.
<b>Sublet to Consultant</b>	Mandatory	To select subconsultant for whom the task has to be sublet: <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>Request ID</b>	-	The request 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 the contract amendment tasks.
<b>Scope of Work</b>	Mandatory	Enter scope of work details for subletting.

11. In the **Notes** field, enter notes about subletting of contract amendment tasks.

Notes :

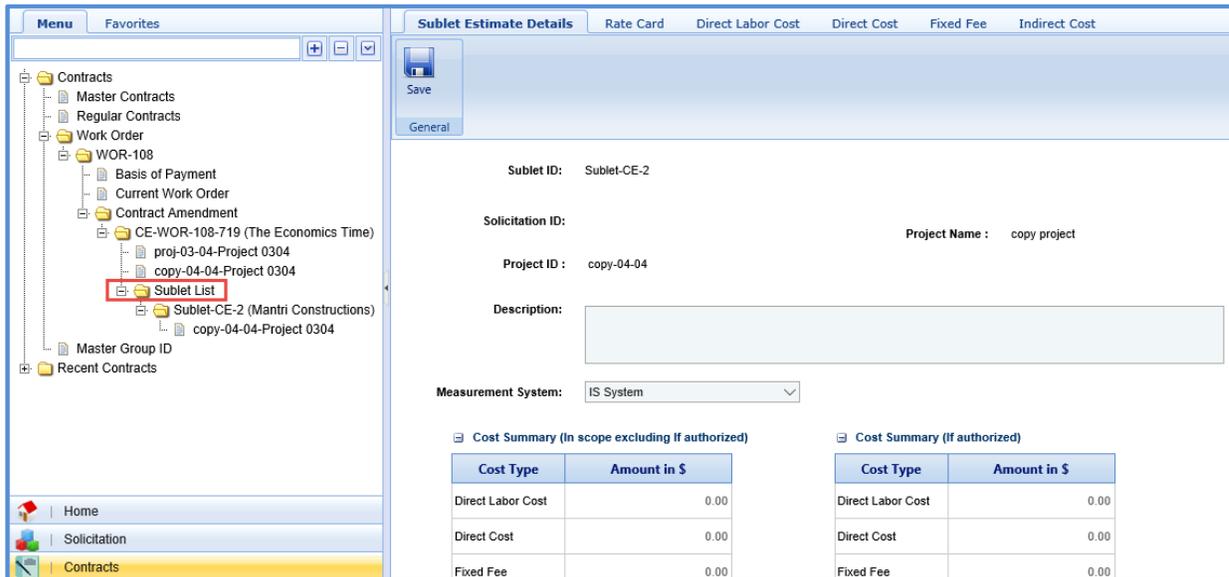
12. In the **Attachments** section, upload images and files relevant to subletting. For information on form attachments, refer [Attachments](#).

13. Click **Save**.

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

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

15. 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.



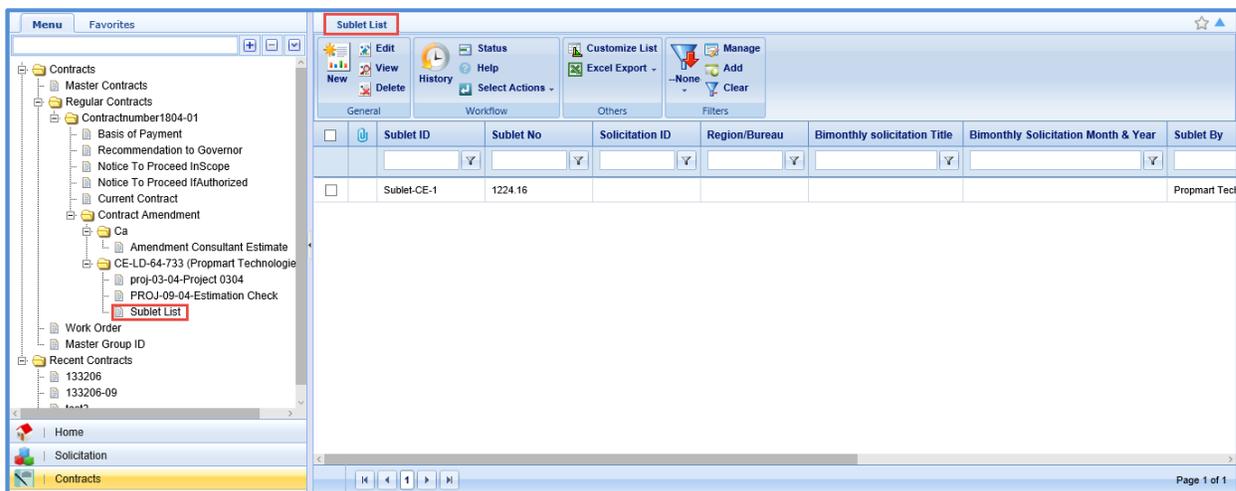
16. Click the **Direct Labor cost** tab and then click **Add Task**. The **Select Task** dialog box is displayed. The dialog box displays all the tasks of the selected project that are marked as final for sublet.
- Click the **Rate Card** tab to add a new rate card rate card details, refer [Creating Rate Card](#).
  - To mark a rate card as final, refer [Mark as Final](#).
12. Click the **Direct Labor Cost** tab, add a new record or edit an existing record, and then click **Save**. For more information, refer [Adding Direct Labor Cost task](#) .  
The total of direct labor costs is displayed in the **Cost Summary** section on the **Sublet Estimate Details** tab.
13. Click the **Direct Cost** tab, add a new record or edit an existing record, and then click **Save**. For more information, refer [Adding Direct Cost details](#).  
The total of direct costs is displayed in the **Cost Summary** section on the **Sublet Estimate Details** tab.
14. Click the **Fixed Fees** tab, make the required changes, and then click **Save**. For more information on fixed fee details, refer [Viewing Fixed Fee](#).
15. The total fixed fees is displayed in the **Cost Summary** section on the **Contract Amendment Project Estimation Details** tab.
16. Click the **Indirect Cost** tab to view the indirect cost details. For more information on viewing the indirect cost details, refer [Viewing Indirect Cost](#).
17. Click **Save**.
18. In the navigation pane, click **Sublet List**. The **Sublet List** page is displayed.
19. Select the record for which the sublet estimate details is saved, 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.

## 11.4 Amending and Publishing Sublet Estimation

The subconsultant can provide the amended estimate for the tasks assigned to them and publish the amended estimate to the Prime Consultant.

Steps:

1. In the module menu, click **Contracts**.
2. In the navigation pane, expand the **Contracts** folder, and then based on the contract amendment that is being published, click **Master Contracts**, **Regular Contracts**, or **Work Order**.  
The **Master Contracts**, **Regular Contracts**, or **Work Order** list page is displayed.
3. Select the contract for which negotiation estimate has to be amended and published and click **View**.
4. In the navigation pane, expand the selected contract folder, and then click **Contract Amendment**.  
The **Contract Amendment** list page is displayed.
5. Select the required amendment record for which the negotiation estimate has to be amended and click **View**.  
The **Contract Amendment** details page is displayed to view the details of the amendment.
6. In the navigation pane, expand the contract amendment folder, and click **Amendment Consultant Estimate**.  
The **Amendment Consultant Estimate** list page is displayed.
7. In the navigation pane, in the amendment consultant estimate folder, click **Sublet List**.  
The **Sublet List** page is displayed.



8. Select the record for which you want to provide amended estimation and click **Edit**.  
The **Amendment Sublet Details** page is displayed.
9. Make the required changes and click **Save**. For more information on amending the details, refer [Amending Consultant Estimate for Contract Amendments](#).
10. Once the amendment sublet details is saved, you can amend the project estimation associated with the amendment sublet and click **Save**. For more information on amending the project estimation, refer [Amending Project Estimation Details](#).
11. Select the amended record on the **Sublet List** page, 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.

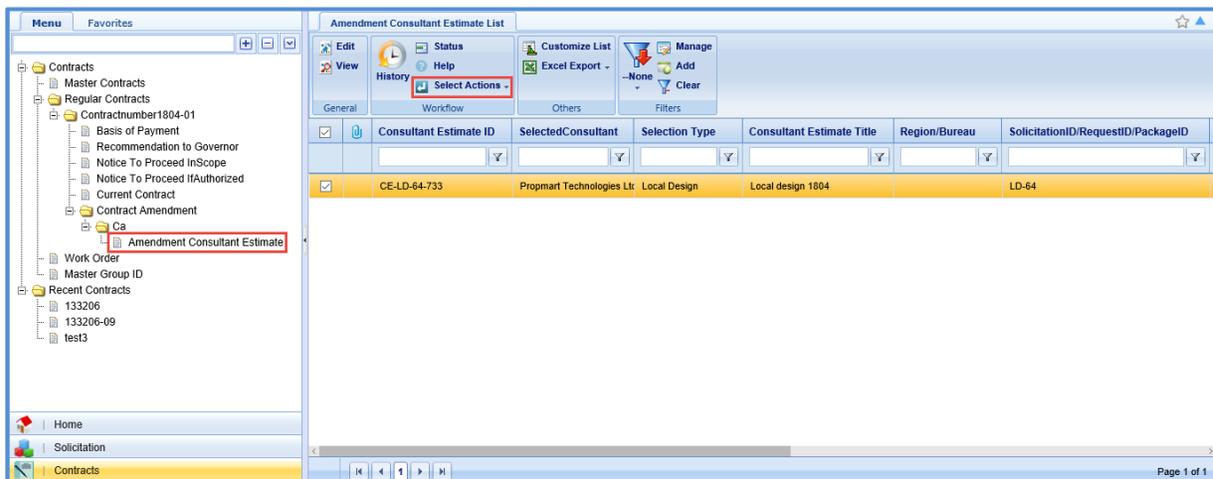
**Note:** *Optionally, in the **Workflow** group, in **Select Actions**, you can click **ReDraft**, enter required information in the dialog box that is displayed, and then click **OK** to redraft the record.*

## 11.5 Publishing Amended Consultant Estimate

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

1. In the module menu, click **Contracts**.
2. In the navigation pane, expand the **Contracts** folder, and then based on the contract amendment that is being published, click **Master Contracts** or **Regular Contracts**, or **Work Order**.  
The list page of the selected contract is displayed.
3. Select the contract for which amendment estimate has to be published and click **View**.
4. In the navigation pane, expand the selected contract folder, and then click **Contract Amendment**.  
The **Contract Amendment** list page is displayed.
5. Select the required amendment record for which the amended negotiation estimate has to be published, and click **Edit**.
6. In the navigation pane, expand the contract amendment folder, and click **Amendment Consultant Estimate**.

The **Amendment Consultant Estimate List** page is displayed.



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

## 12 Attachments

### 12.1 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 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 displayed in the attachment grid.
  5. In the **Title** column, enter the titles for the linked files.

### 12.2 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.