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MASTERworks®

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Aurigo Software Technologies Inc.

Consultant Guide

Aurigo® Software Technologies, Inc.

www.aurigo.com

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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.

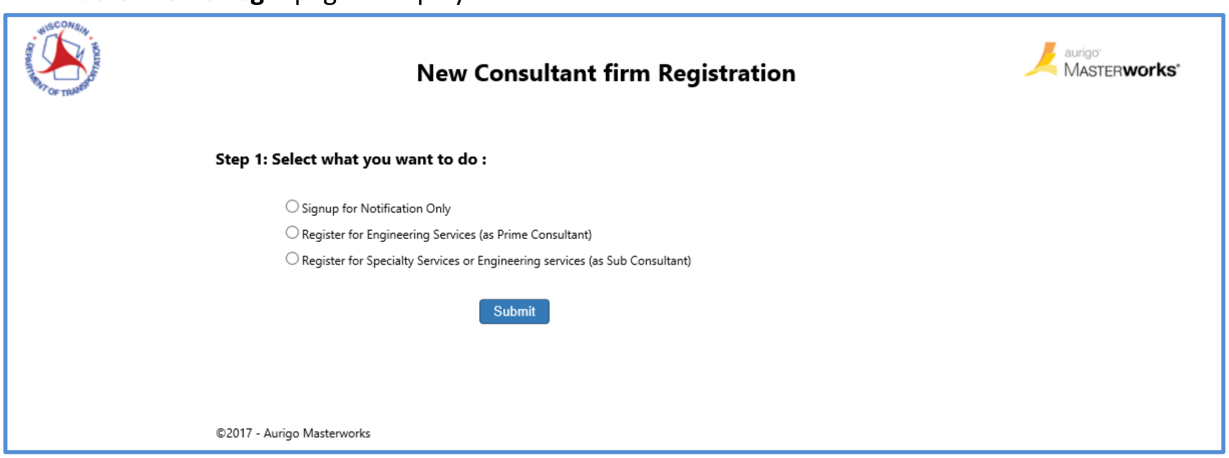
Note*: The password is case sensitive.*

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.

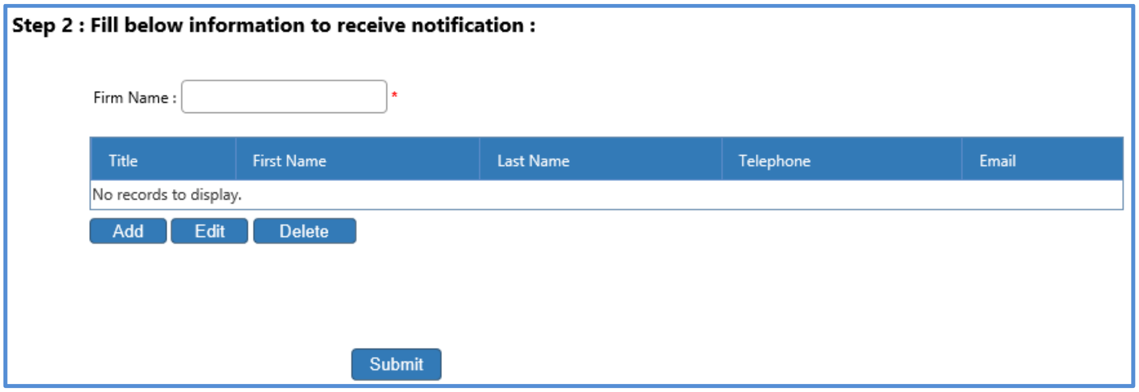


4. Select one of the following options:
   - **Signup for Notification Only**: Click this to register the consultant firm to receive only Bimonthly Solicitation notifications.
   - **Register for Engineering Services (as Prime Consultant)**: Click this to register as Prime Consultant firm.

- **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.



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

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

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

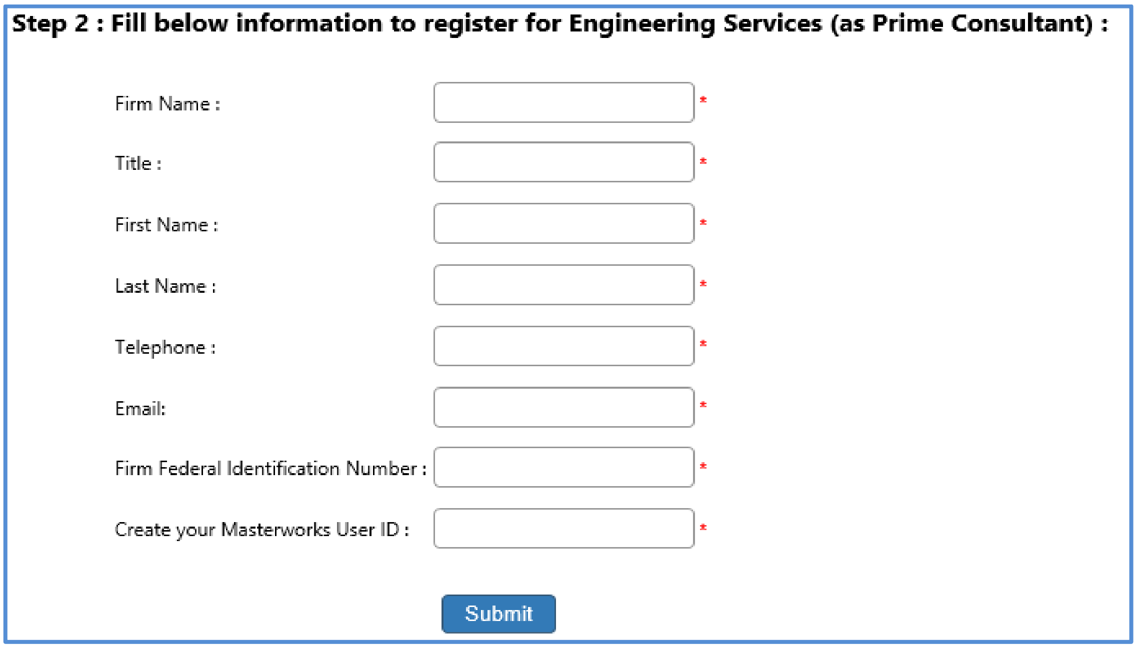
Note*: All fields described in the below table are mandatory fields.*

Item	Description
Title	Enter the title of the user.
First Name	Enter the first name of the user.
Last Name	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.

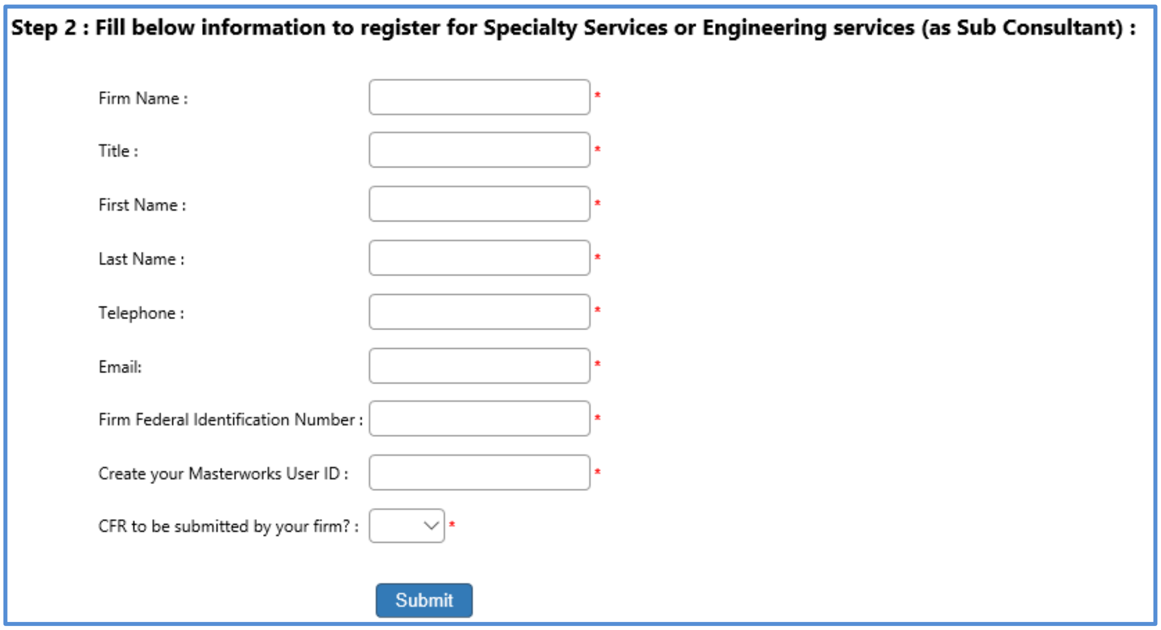


***Note**: All fields described in the below table are mandatory fields.*

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
Create your Masterworks User ID	Enter the Masterworks User ID to be created for the prime consultant.

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



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

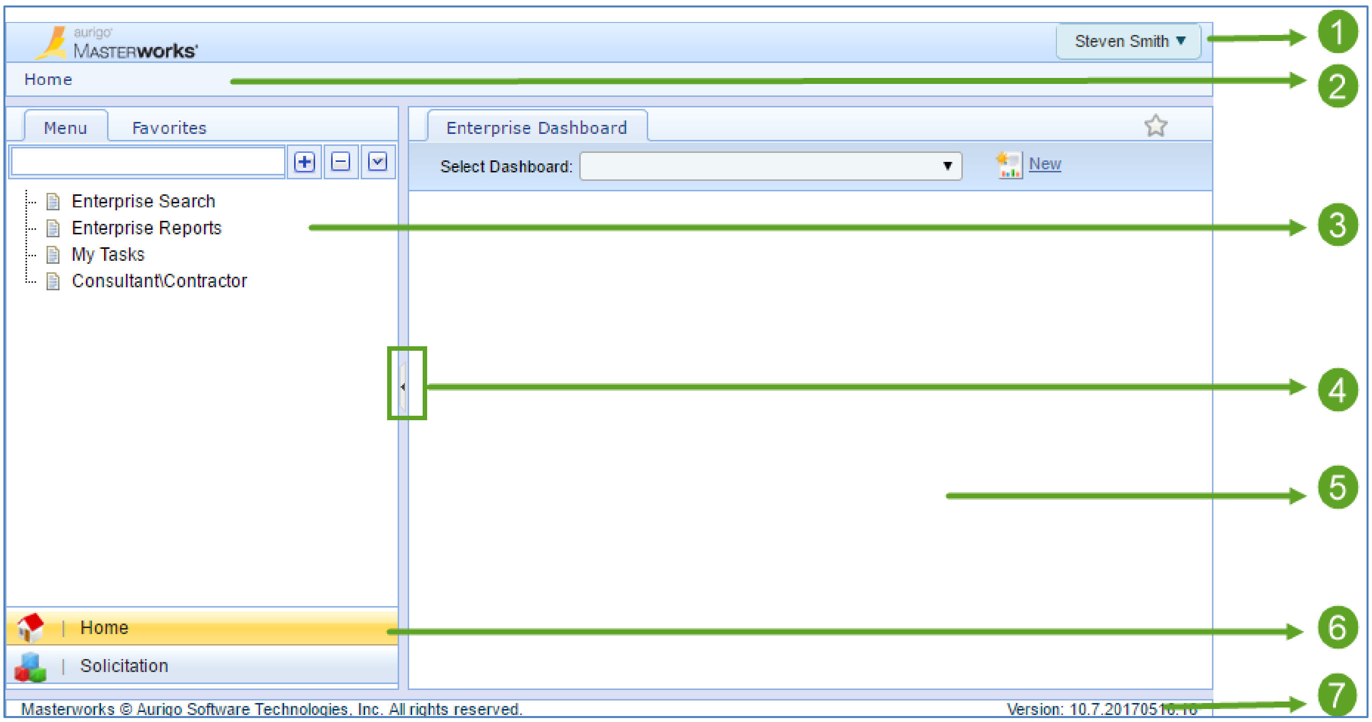
Item	Description
Firm Name	Enter the firm name of the sub-consultant firm.
Title	Enter the title of the sub-consultant firm.
First Name	Enter the first name of the sub-consultant firm.
Last Name	Enter the last name of the sub-consultant firm.
Telephone	Enter the telephone number of the sub-consultant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

Item	Description
CFR to be submitted by your firm?	From the drop-down list, select **Yes** or **No** to indicate if the Consultant Financial Report (CFR) has to be submitted or not. The Consultant Financial Report can be created by the consultant only if the selected option in this field is **Yes**.

6. Click **Submit**.

1.3 Understanding the User Interface

This section describes the elements of the Masterworks user interface.



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

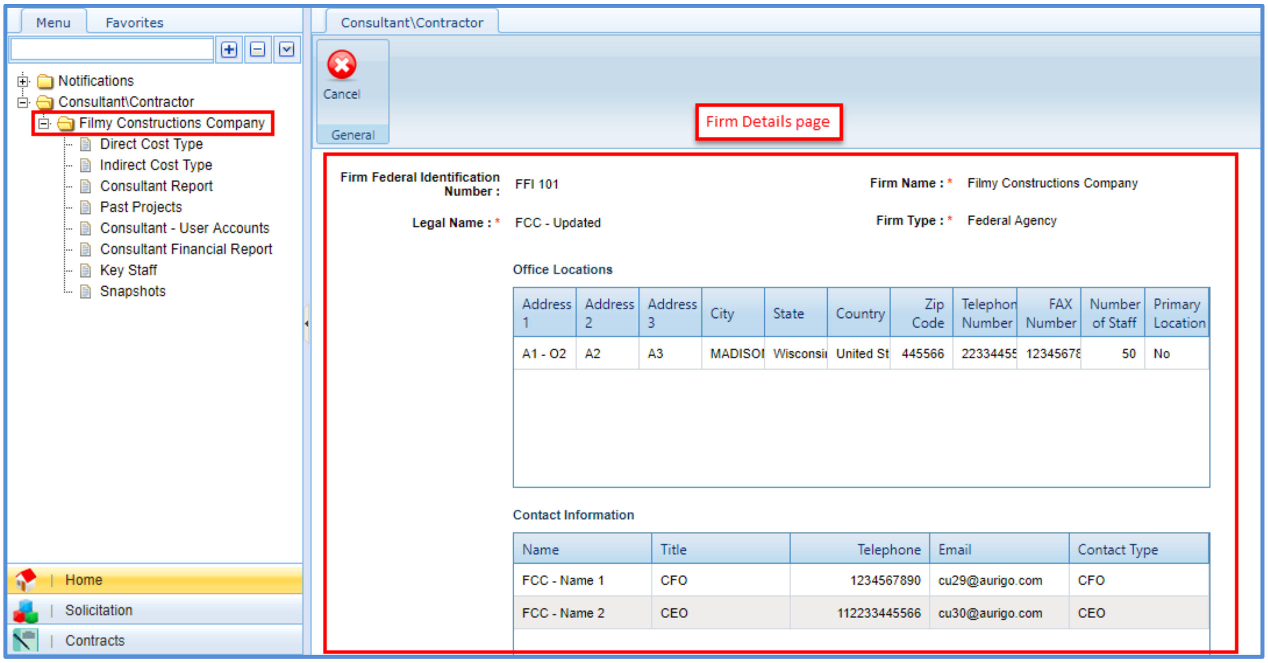
Item	Description
1. User Name, Profile, Help, Logout	Displays your user name. You can view your account profile, access help files, and logout from here.
2. Breadcrumbs	Displays the navigation path to your current page.
3. Left Pane	Navigation tree
4. Toggle button	Buttons to show or hide and resize the panes. Docking the left pane provides more space to view information in the right pane.

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.



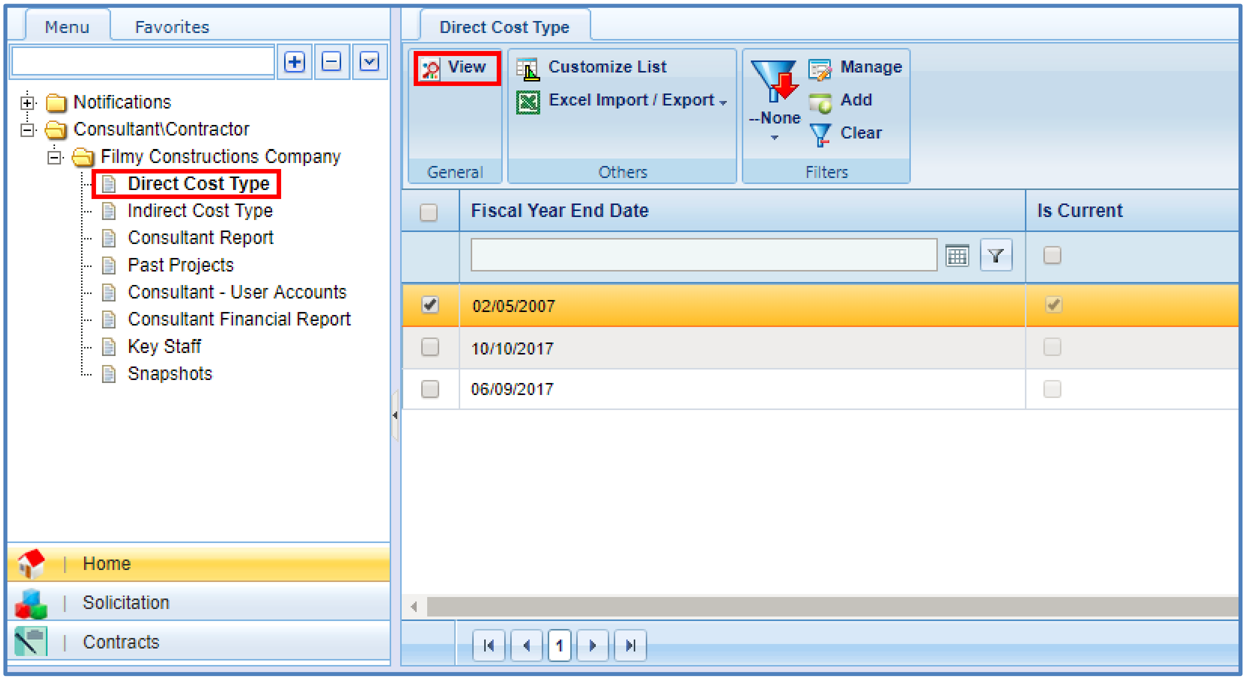
2.1 Viewing Direct Cost Type

To view the Direct Cost Type details.

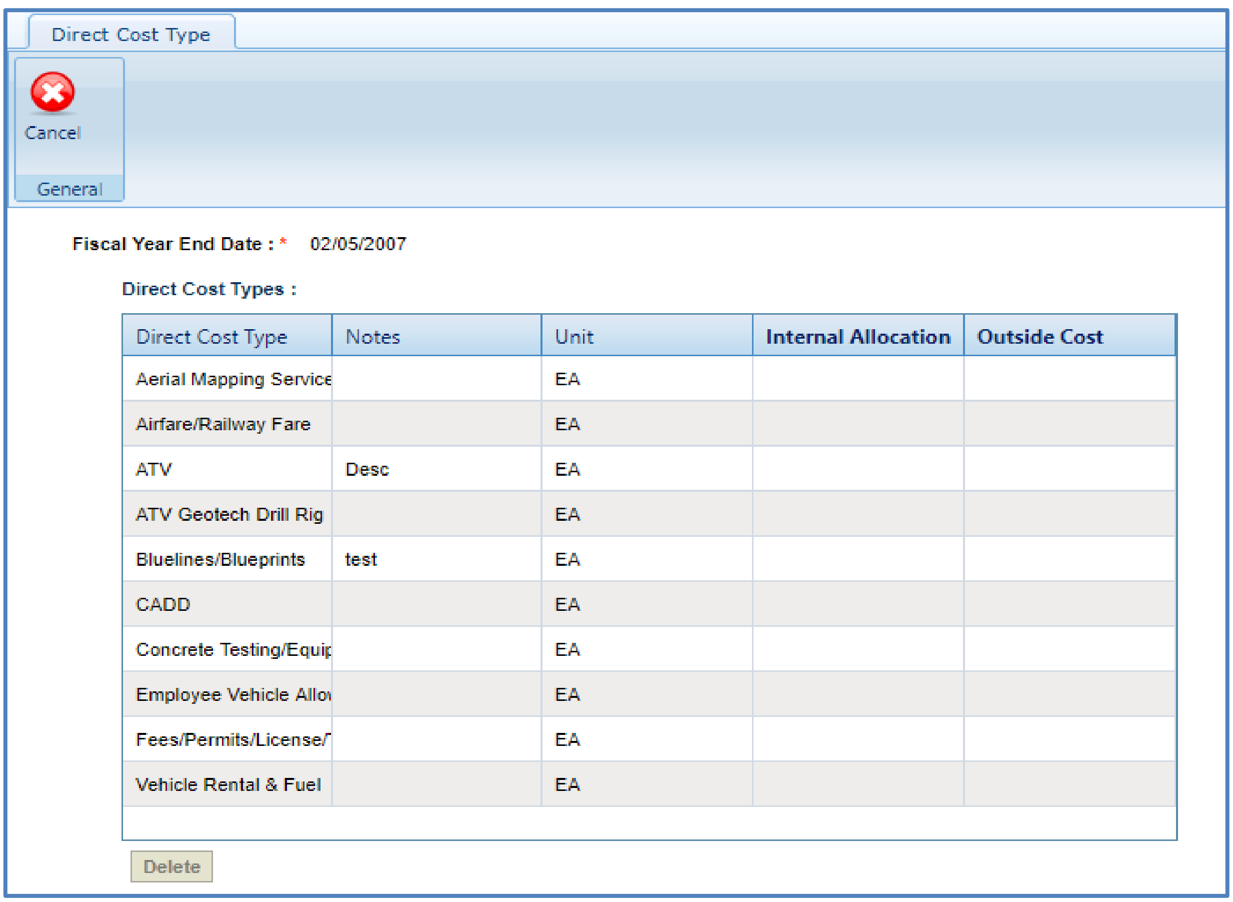
Steps:

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.



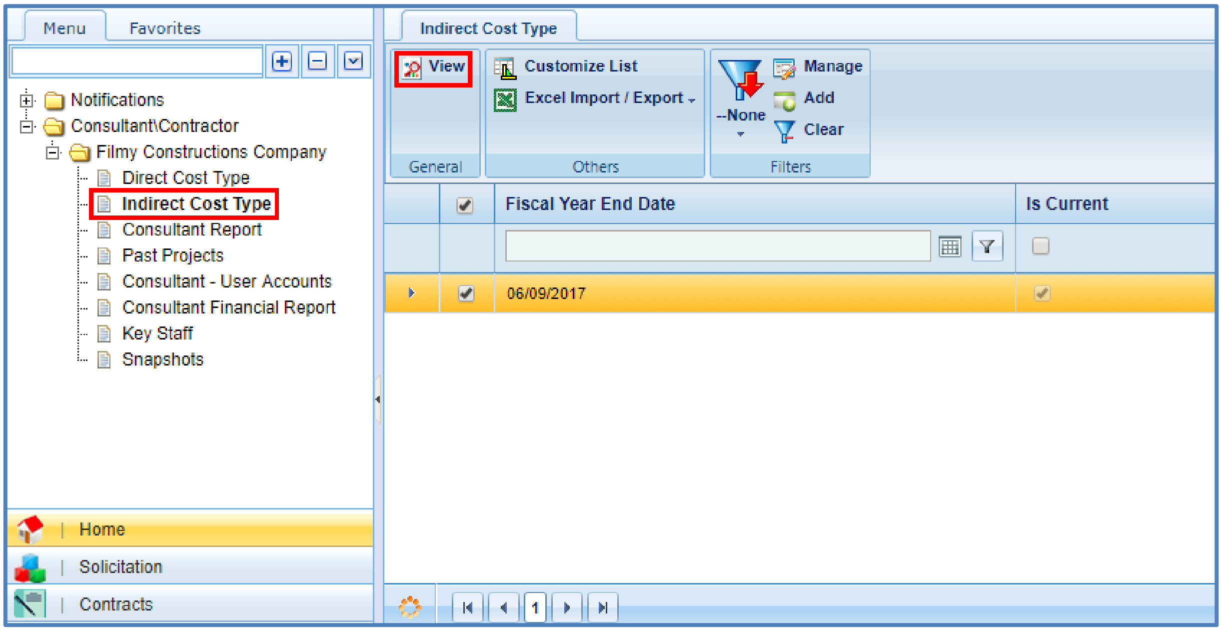
2.2 Viewing Indirect Cost Type

To view the Indirect Cost Type details.

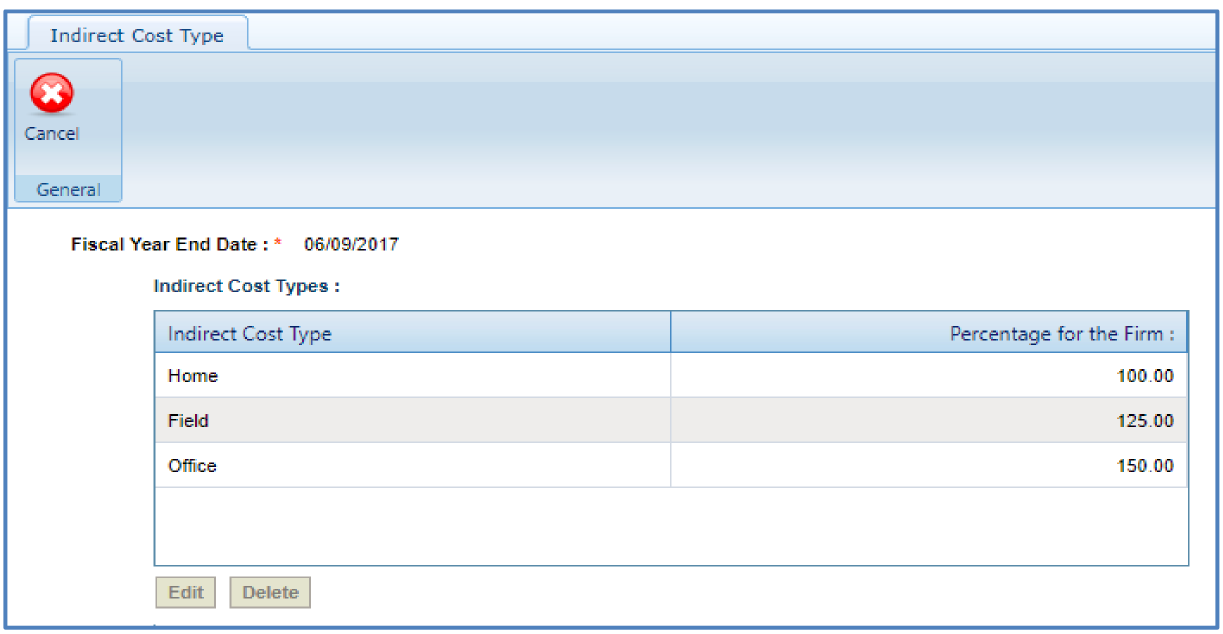
Steps:

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**.



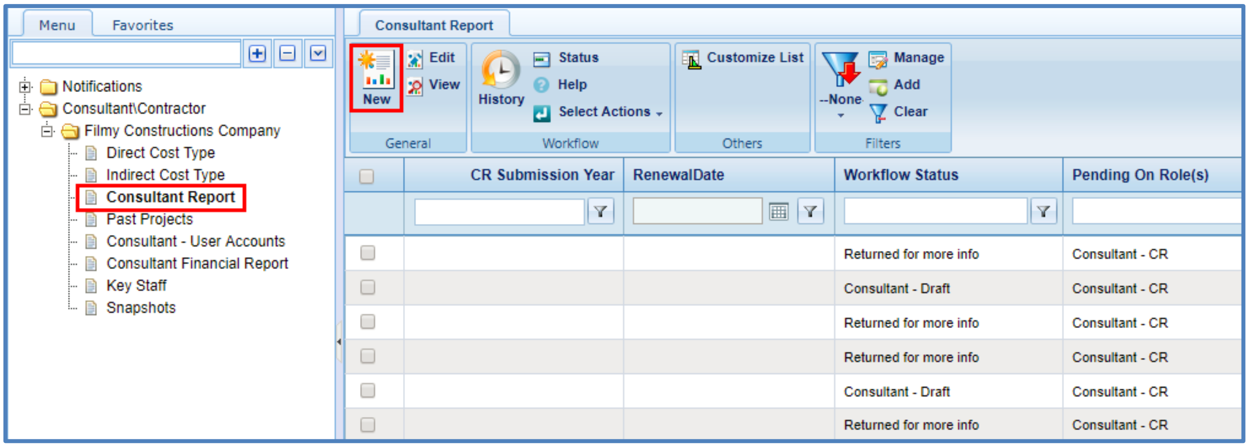
The Indirect Cost Type page is displayed.



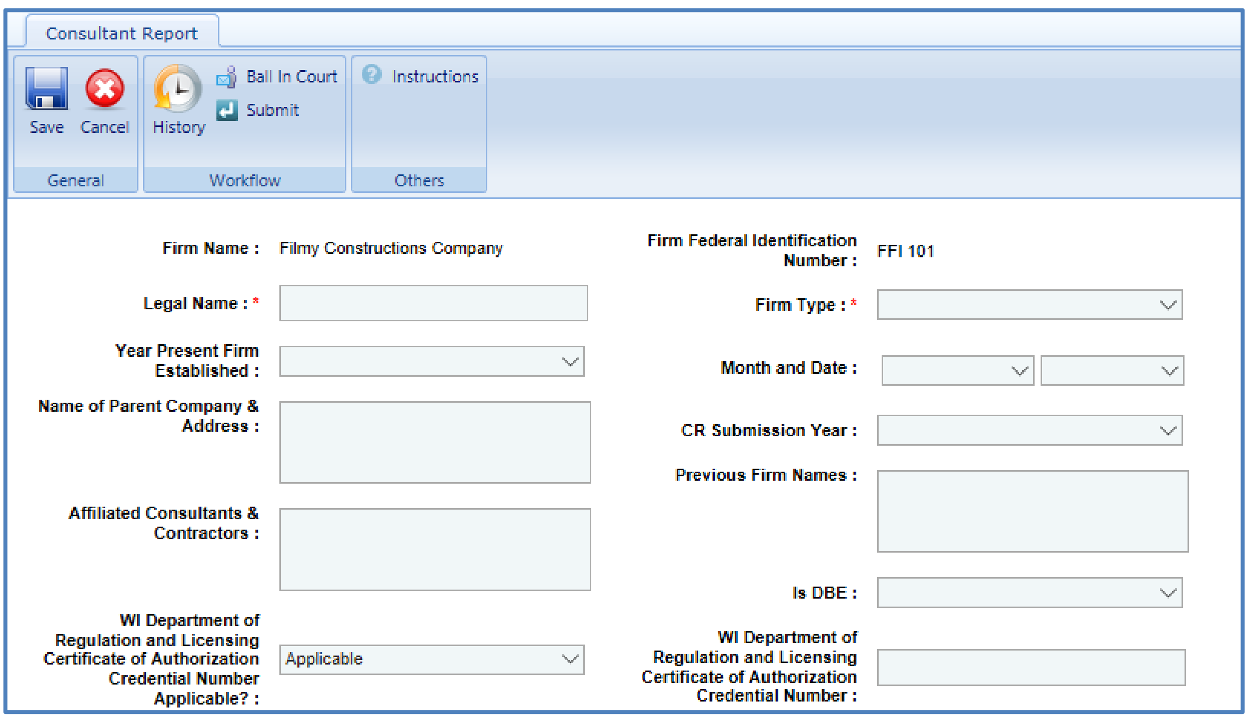
2.3 Creating Consultant Report

To create the consultant report, perform the following steps:

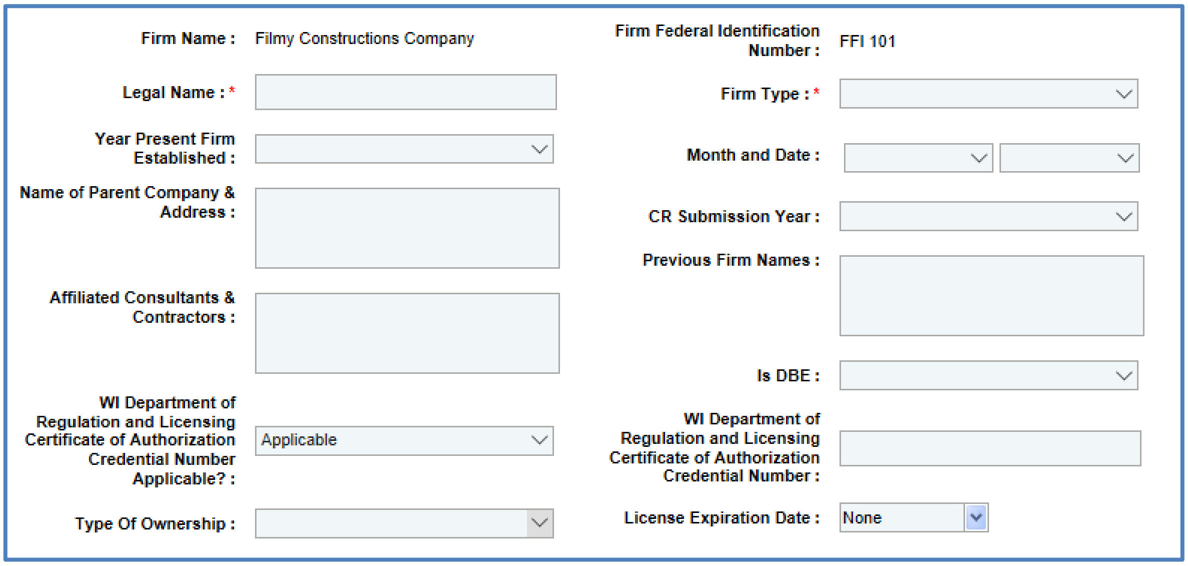
1. In the navigation pane, click **Consultant Report**.
   The **Consultant Report** list page is displayed.



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



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



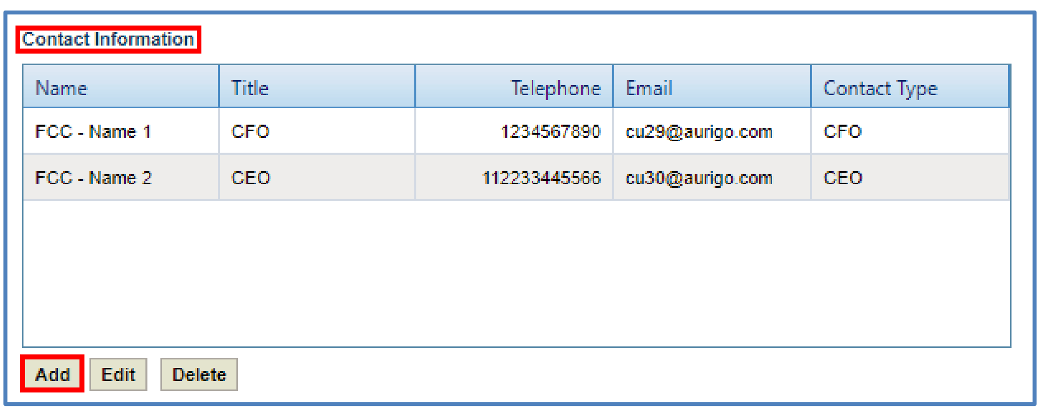
Field	Mandatory / Non-mandatory	Description
Firm Name	–	The consultant firm name is displayed.
Firm Federal Identification Number	–	The Federal Identification Number of the firm is displayed.
Legal Name	Mandatory	Enter the legal name.
Firm Type	Mandatory	From the drop-down list, select the firm type. The list of options is defined in the **Firm Type** catalog of the library.
Year Present Firm Established	Non-mandatory	From the drop-down list, select the year of establishment of the present firm. The list of options is defined in the **Years** catalog of the library.
Month and Date	Non-mandatory	From the drop-down list, select the month and date of establishment of the present firm.
Name of Parent Company & Address	Mandatory	Enter the name and address of the parent company.
CR Submission Year	Mandatory	From the drop-down list, select the year of CR Submission.
***Note**: You can create only one Consultant Report for a given CR Submission year.*		
Previous Firm Names	Non-mandatory	Enter the previous firm names.

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

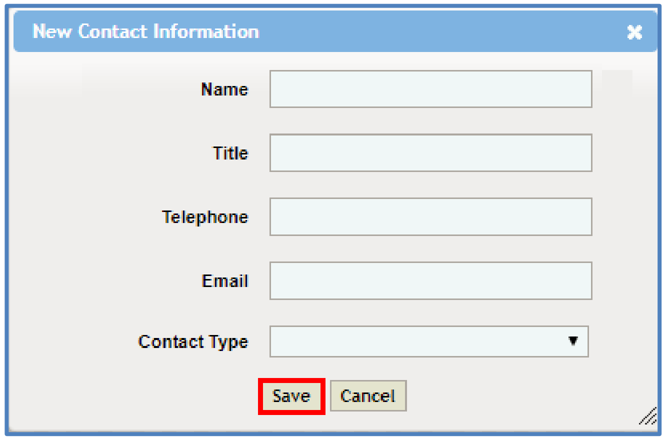
4. To add the contact information of the consultant firm:

   a. Click **Add**.

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



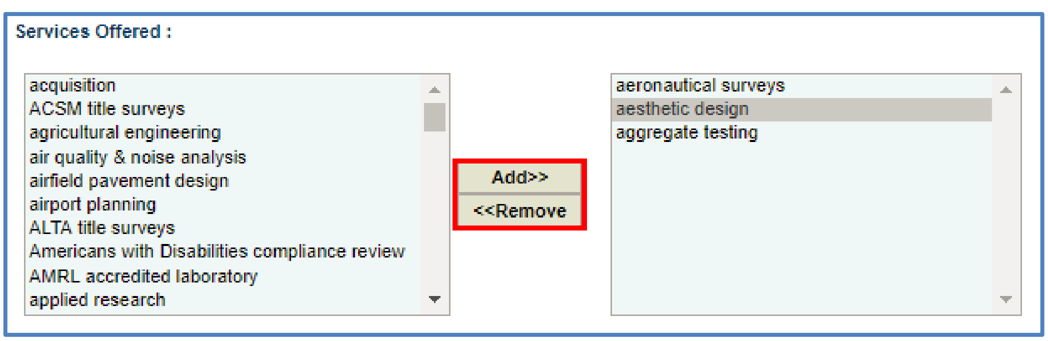
b. Enter information in the required fields. The fields are described in the following table.

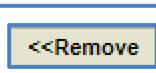
Field	Mandatory / Non-mandatory	Description
		
Name	–	Enter the name of the contact.
Title	–	Enter the title.
Telephone	–	Enter the telephone number of the contact.
Email	–	Enter the email address of the contact.
Contact Type	–	From the drop-down list, select the appropriate option. The list of options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



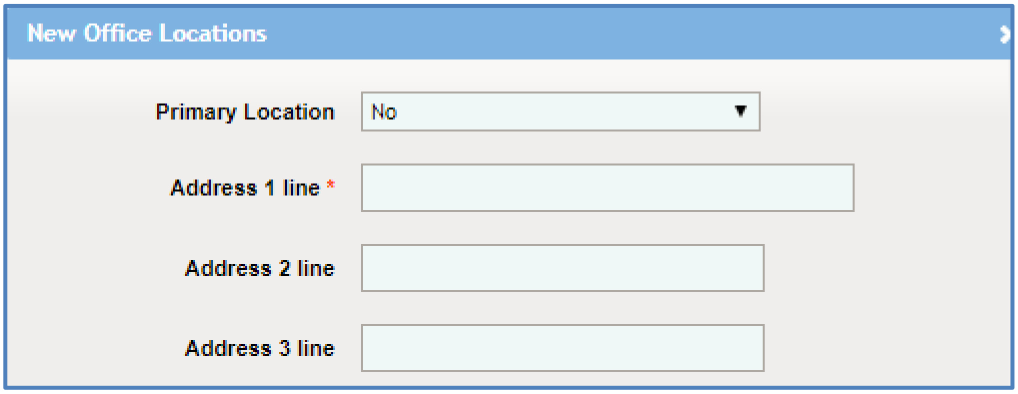
Note: You can click  to remove an added service.

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



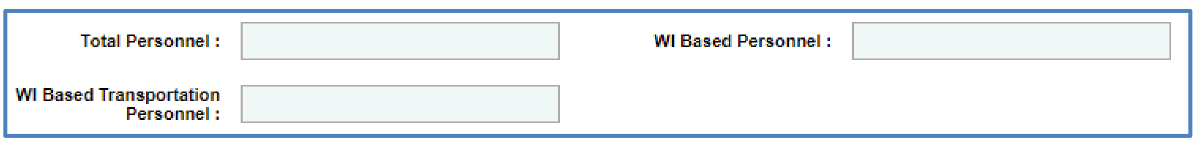
Field	Mandatory / Non-mandatory	Description
Primary Location	Non-mandatory	Select 'Yes' to set the location of the consultant firm as the primary location.
Note: You can set only one location as the primary location for the consultant firm.		
Address 1 line	Mandatory	Enter the address of the new office location.
Address 2 line	Non-mandatory	
Address 3 line	Non-mandatory	

Field	Mandatory / Non-mandatory	Description
City	Mandatory	To select the city where the office is located: 1. Click . The **City** dialog box is displayed.

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

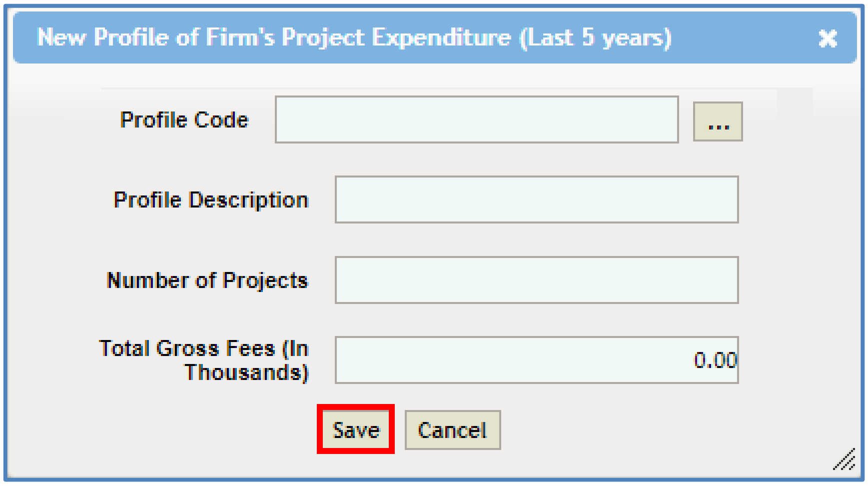
c. Click **Save** to save the details.

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

Field	Mandatory / Non-mandatory	Description
		
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.

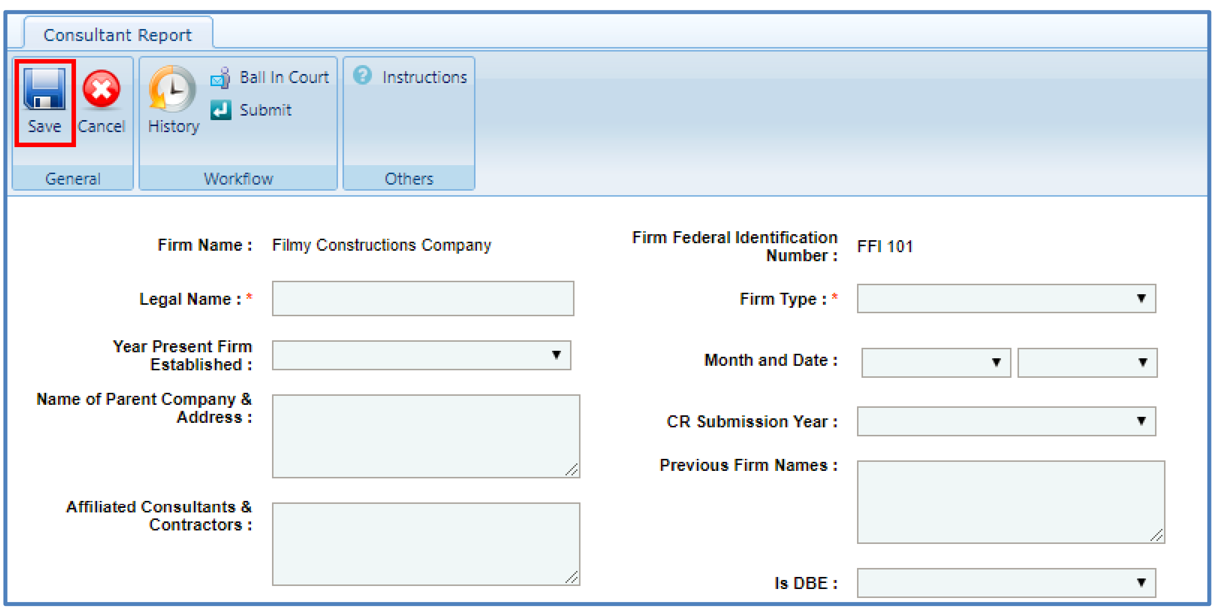
      ii. Select the profile code and then click **Select**.
      The **Profile Description** is auto-populated.

   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:*

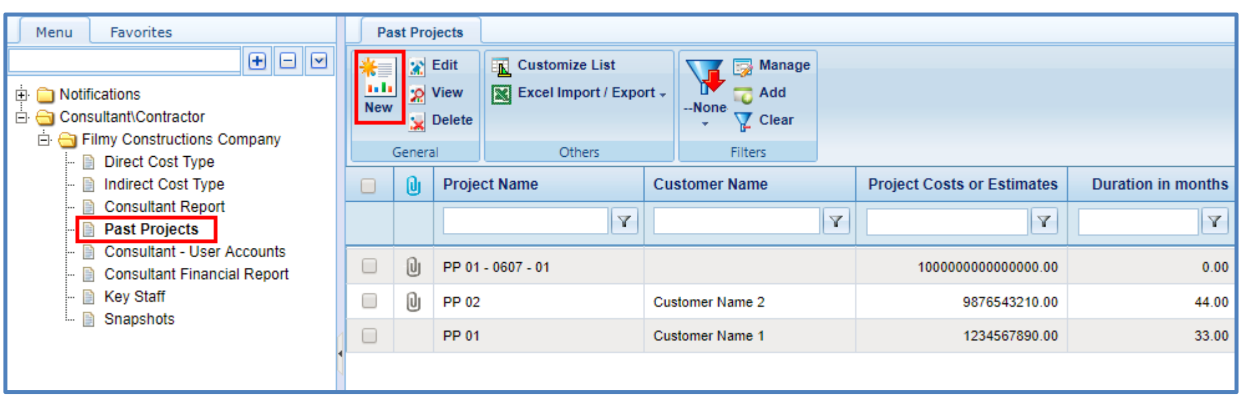
- ***Legal name***
- ***Firm type***
- ***Year Present Firm Established***
- ***Month and Date***
- ***CR Submission Year***
- ***Name of Parent Company and Address***
- ***Previous Firm Names***
- ***Affiliated Consultants and Contractors***
- ***WI Department of Regulation and Licensing Certificate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

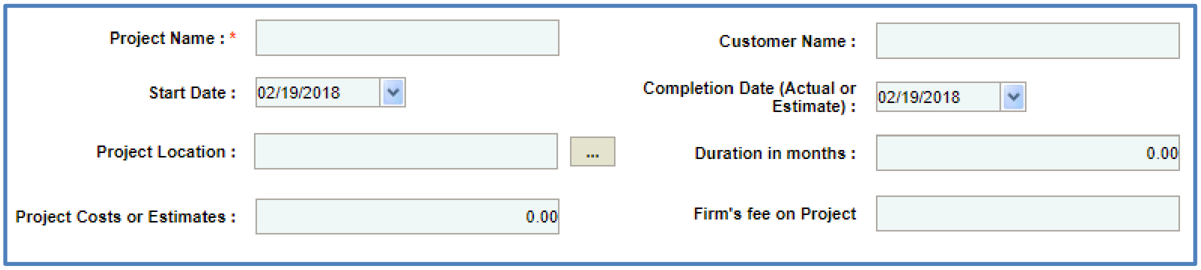
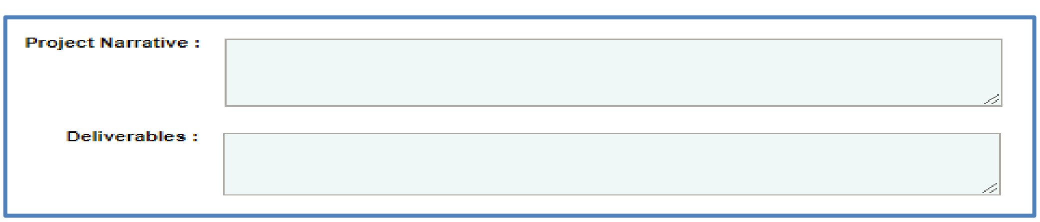
To record the past project details, perform the following steps:

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



2. Click **New**.
   The **Past Projects** details page is displayed.

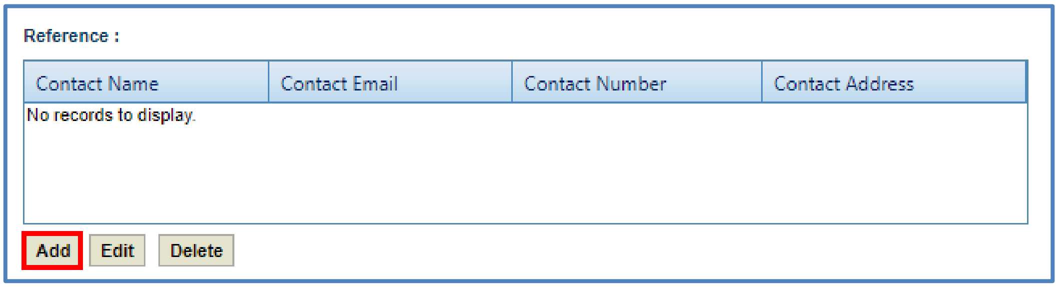
3. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Project Name	Mandatory	Enter the project name.
Customer Name	Non-mandatory	Enter the customer name.
Start Date	Non-mandatory	From the drop-down calendar, select the start date.
Completion Date (Actual or Estimate)	Non-mandatory	From the drop-down calendar, select the completion date.
Project Location	Non-mandatory	To select the project location: 1. Click .... The **Project Location** dialog box is displayed. For availability of options in the dialog box, location must be defined in the **City-Town-Village** catalog of the library. 2. Select a location code and click **Select**.
Duration in months	Non-mandatory	Enter the duration in months.
Project Costs or Estimates	Non-mandatory	Enter the project costs or estimates.
Firm's fee on Project	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.

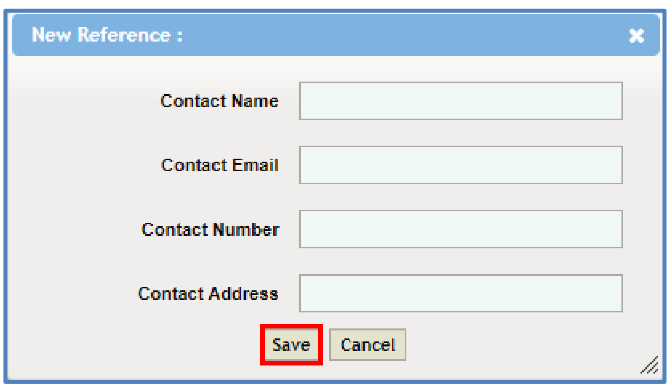
4. In the **Reference** section, to add a reference:

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



   b. Enter the details as below:

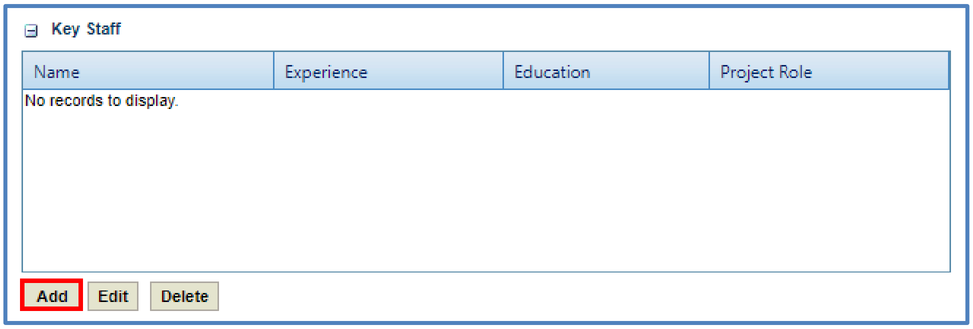
   - Contact Name – Enter the contact name.
   - Contact Email – Enter the contact email.
   - Contact Number – Enter the contact number.
   - Contact Address – Enter the contact address.



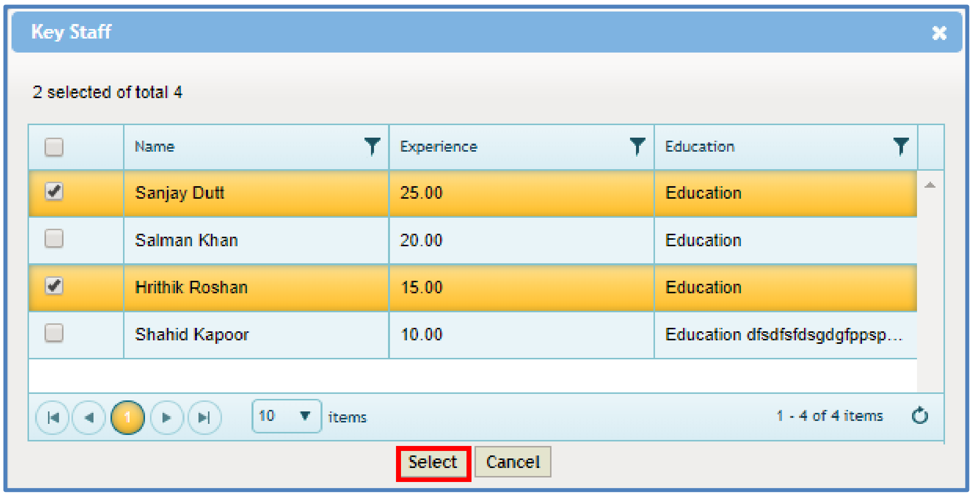
   c. Click **Save** to save the details.

5. In the **Key Staff** section, to add the key staff details:

    a. Click **Add**.
    The **Key Staff** dialog box is displayed.



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



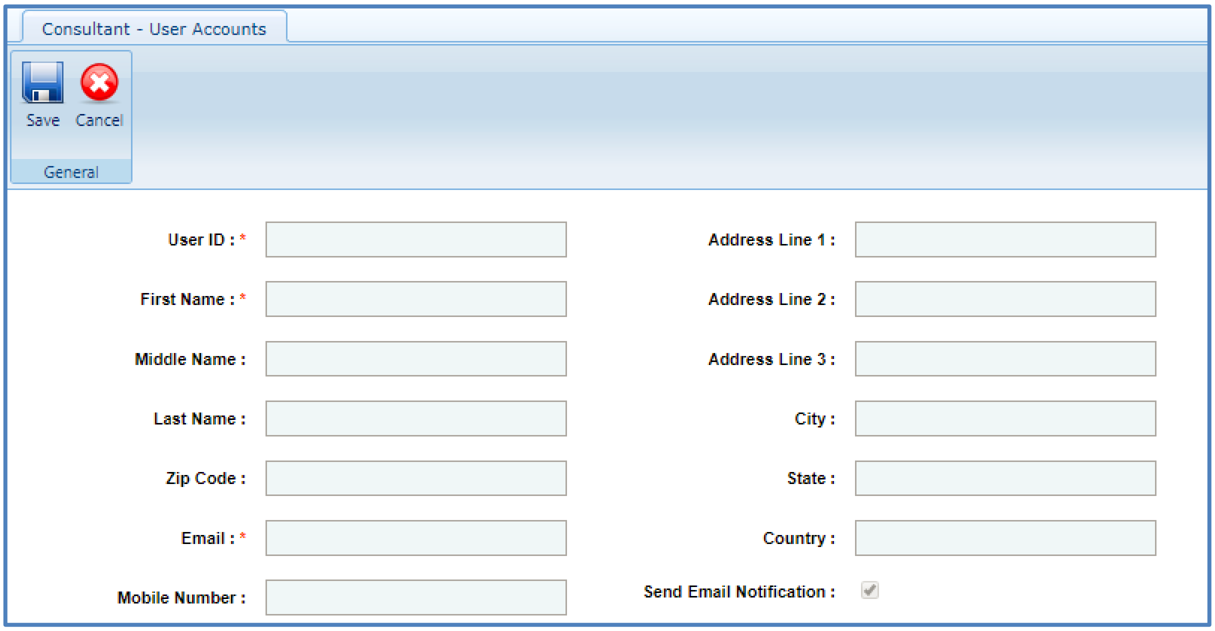
6. Expand **Attachments** to upload images and files relevant to the project. For information on attachments, refer *Attachments*.

7. Click **Save**.

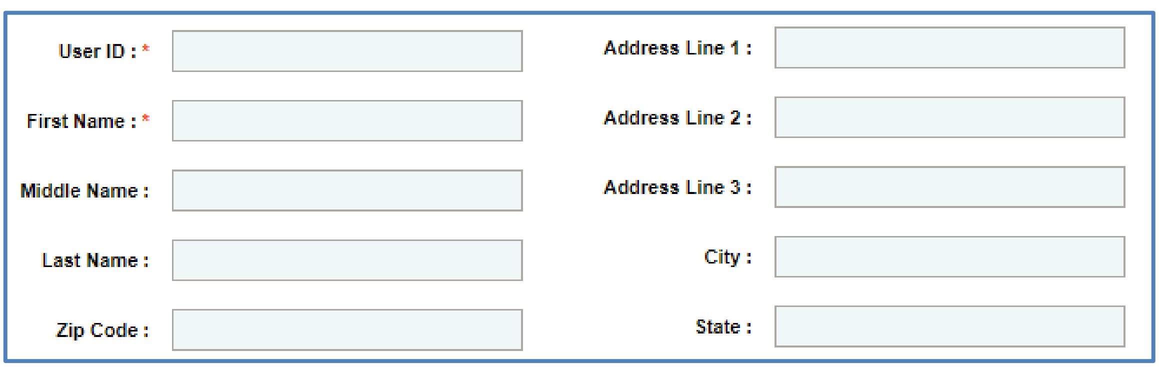
2.5 Creating Consultant – User Accounts

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

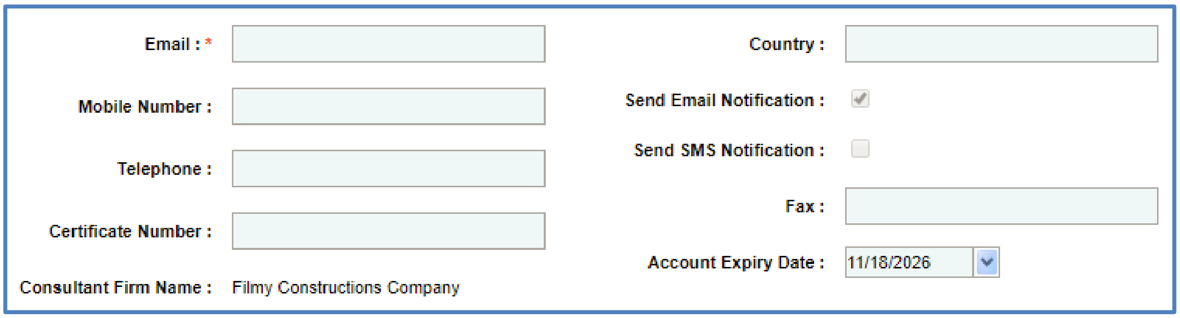
1. In the navigation pane, click **Consultant – User Accounts**.
   The **Consultant – User Accounts** list page is displayed.
2. Click **New**.
   The **Consultant – User Accounts** details page is displayed.



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

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

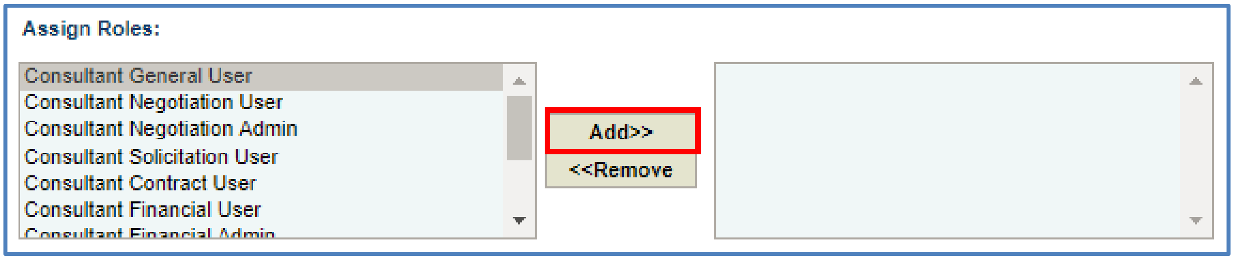
Field	Mandatory / Non-mandatory	Description
City	Non–mandatory	Enter the name of the city in which the user resides.
Zip Code	Non–mandatory	Enter the five digit zip code of the city.
State	Non–mandatory	Enter the name of the state to which the residing city of the user belongs.



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.

4. 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.

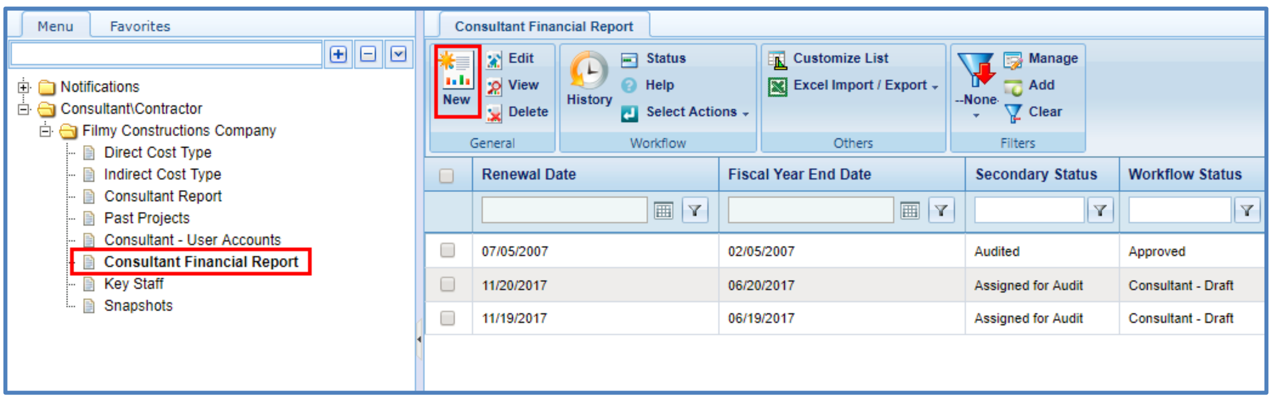


5. Click **Save**.

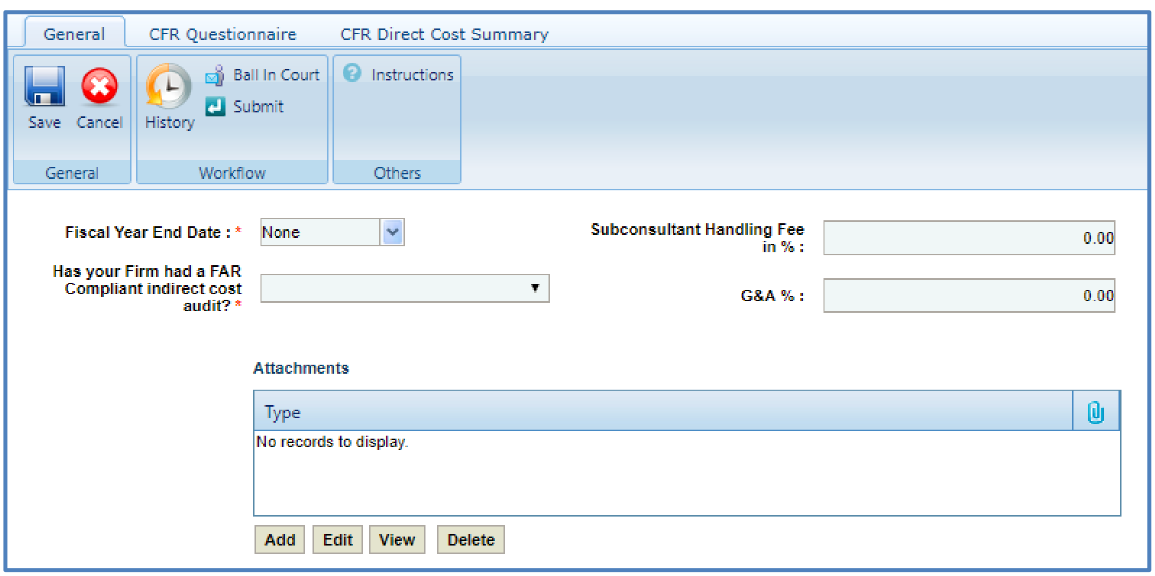
2.6 Creating Consultant Financial Report

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

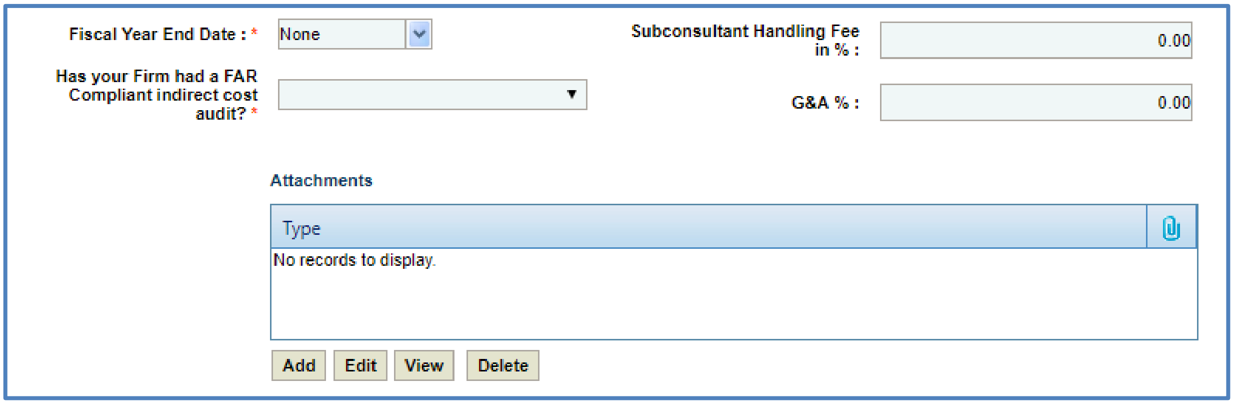
1. In the navigation pane, click **Consultant Financial Report**.
   The **Consultant Financial Report** list page is displayed.



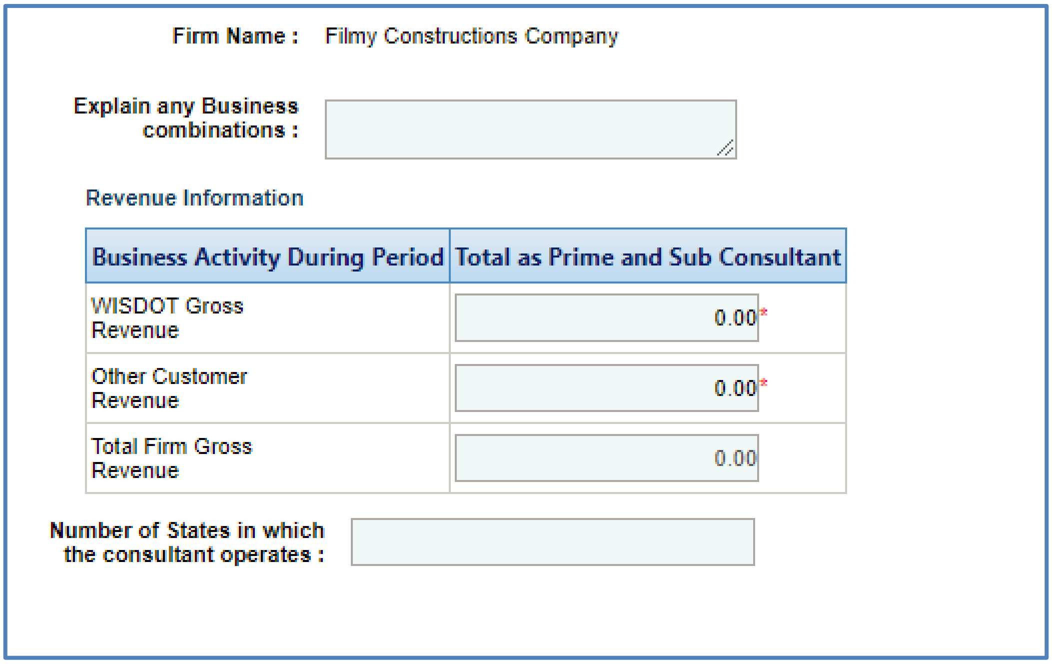
2. Click **New**.
   The Consultant Financial Report details page is displayed.



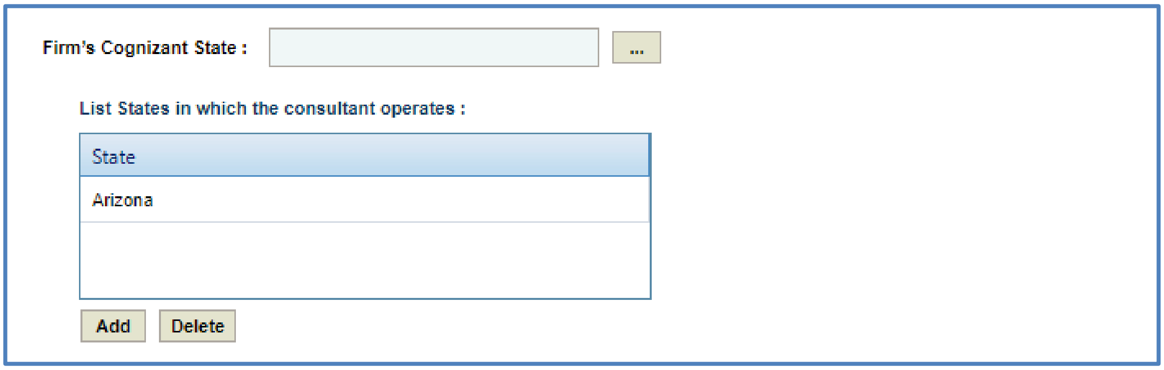
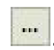
3. In the **General** tab, provide the following information:

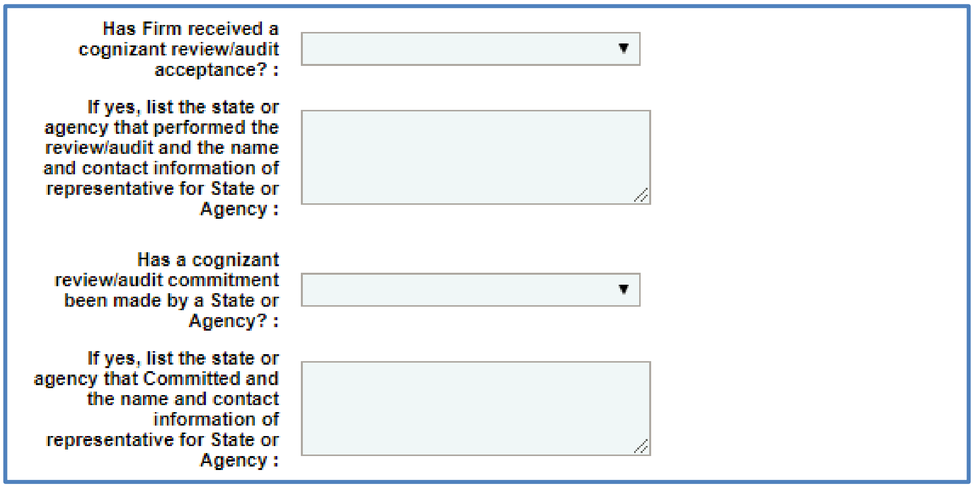
Field	Mandatory / Non-mandatory	Description
		
Fiscal Year End Date	Mandatory	From the drop-down calendar, select the fiscal year end date.
Subconsultant Handling Fee in %	Non–mandatory	Enter the percentage of subconsultant handling fee.
Has your Firm had a FAR Compliant indirect cost audit?	Mandatory	From the drop-down, select ‘Yes’ if the firm had a FAR Compliant Indirect Cost Audit.
G&A %	Non–mandatory	Enter the G&A percentage.
Attachments	Non–mandatory	To attach documents: 1. Click **Add**. The **New Attachments** dialog box is displayed. 2. Click ... and select the type of document to be attached. 3. Click **Upload Document** to upload relevant images and files. For information on form attachments, refer *Attachments*.

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



Field	Mandatory / Non-mandatory	Description
Firm Name	–	The consultant firm name is displayed.
Explain any Business combinations	Non–mandatory	Enter the details of any business combinations.
WISDOT Gross Revenue	Mandatory	Enter the total value of WISDOT Gross Revenue including Prime and Sub consultant during the business activity period.
Other Customer Revenue	Mandatory	Enter the total value of Other Customer Revenue including Prime and Sub consultant during the business activity period.
Total Firm Gross Revenue	Non–mandatory	The total value of the firm gross revenue during the business activity period is displayed.
Number of States in which the consultant operates	Non–mandatory	Enter the number of states in which the consultant operates.

Field	Mandatory / Non-mandatory	Description
 		
Firm's Cognizant State	Non–mandatory	To select the firm's cognizant state: 1. Click . The **State and Country** dialog box is displayed. For availability of options in the dialog box, state must be defined in the **State and Country** catalog of the library. 2. Select a State and click **Select**.
List States in which the consultant operates	Mandatory to submit the form	To add the state to the list: 1. Click **Add**. The **State and Country** dialog box is displayed. For availability of options in the dialog box, state must be defined in the **State and Country** catalog of the library. 2. Select a state and click **Select**.

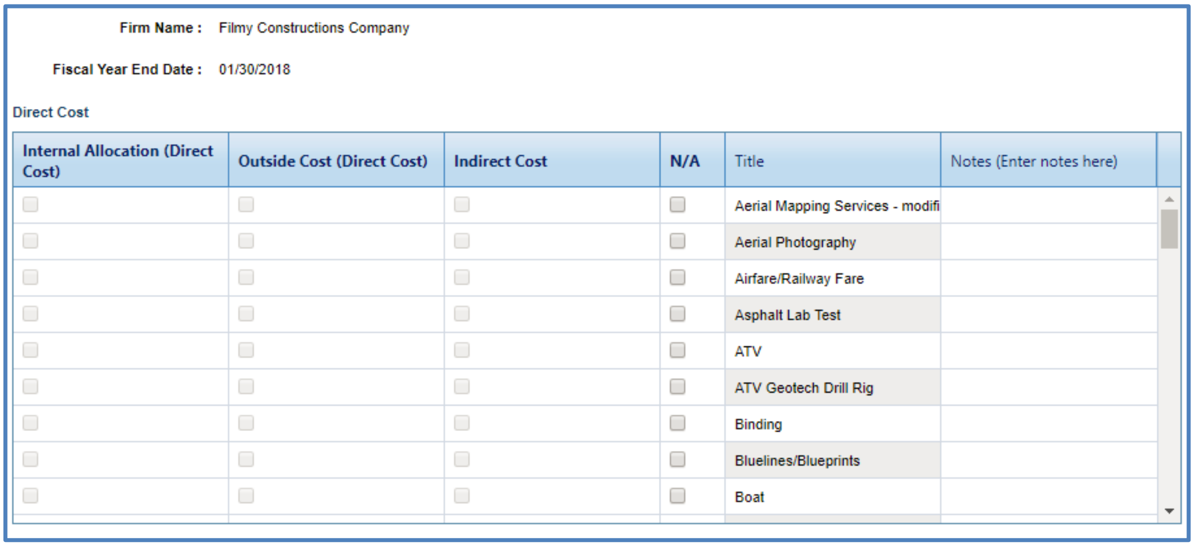
<table>
<tr><th>Field</th><th>Mandatory / Non-mandatory</th><th>Description</th></tr>
<tr><td colspan="3">


</td></tr>
<tr><td>Has Firm received a cognizant review/audit acceptance?</td><td>Non–mandatory</td><td>From the drop-down, select ‘Yes’ if the firm has received a cognizant review/audit acceptance.</td></tr>
<tr><td>If yes, list the state or agency that performed the review/audit and the name and contact information of representative for State or Agency</td><td>Non–mandatory</td><td>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.</td></tr>
<tr><td>Has a cognizant review/audit commitment been made by a State or Agency?</td><td>Non–mandatory</td><td>From the drop-down, select ‘Yes’ if the firm has a cognizant review/audit commitment been made by a State or Agency.</td></tr>
<tr><td>If yes, list the state or agency that Committed and the name and contact information of representative for State or Agency</td><td>Non–mandatory</td><td>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.</td></tr>
</table>

5. 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)
☐	☐	☐	☐	Aerial Mapping Services - modifi	
☐	☐	☐	☐	Aerial Photography	
☐	☐	☐	☐	Airfare/Railway Fare	
☐	☐	☐	☐	Asphalt Lab Test	
☐	☐	☐	☐	ATV	
☐	☐	☐	☐	ATV Geotech Drill Rig	
☐	☐	☐	☐	Binding	
☐	☐	☐	☐	Bluelines/Blueprints	
☐	☐	☐	☐	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:
   a. Select the Consultant Financial Report in the **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 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:

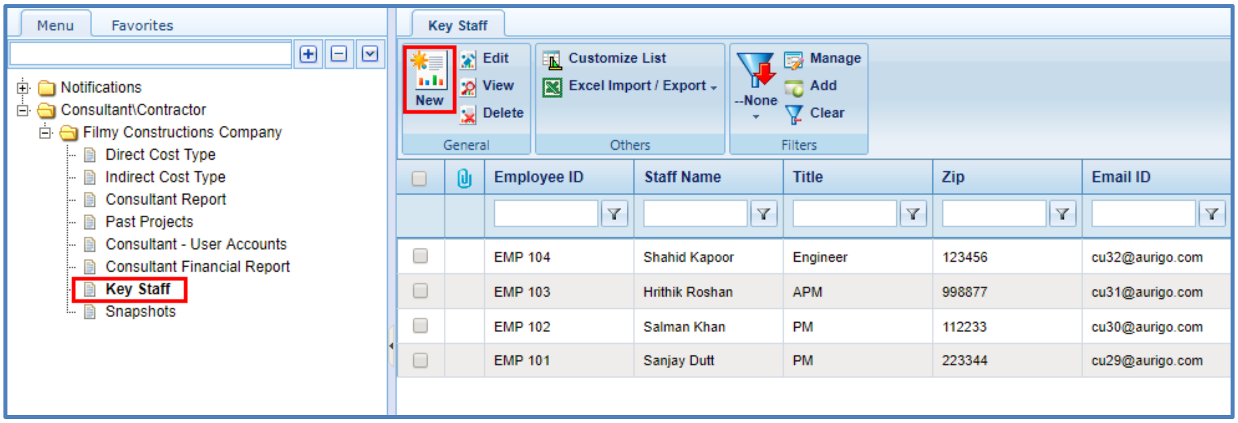
***Note:** When a Consultant Financial Report is 'returned for more info', the attachment of type 'Management Representation & Certification' document will be deleted. To resubmit the Consultant Financial Report, upload a new 'Management Representation & Certification' document.*

   a. Select the Consultant Financial 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 Financial Report is submitted for review to WisDOT.

2.7 Creating Key Staff

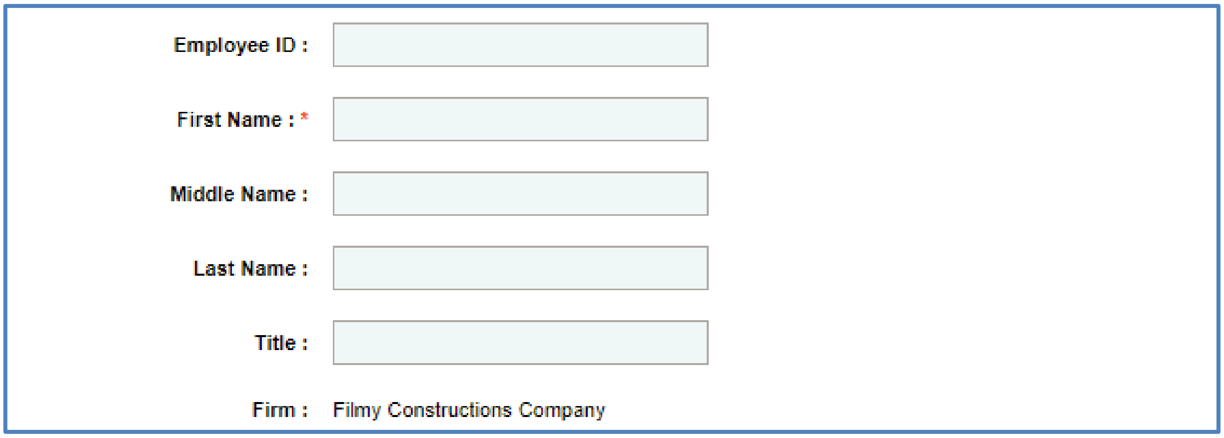
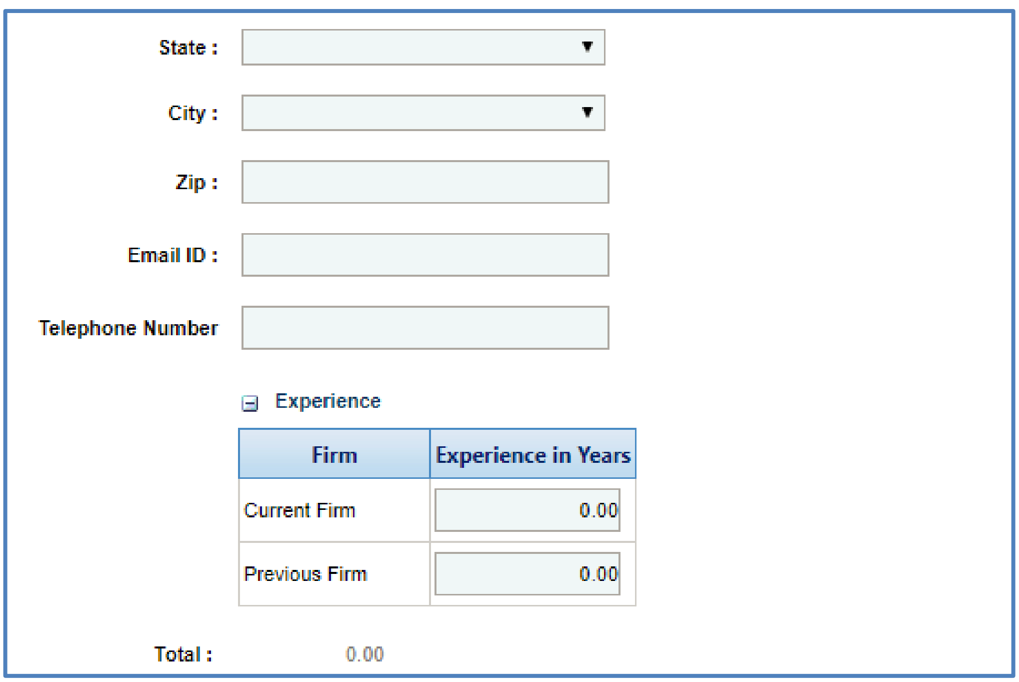
To create the key staff, perform the following steps:

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

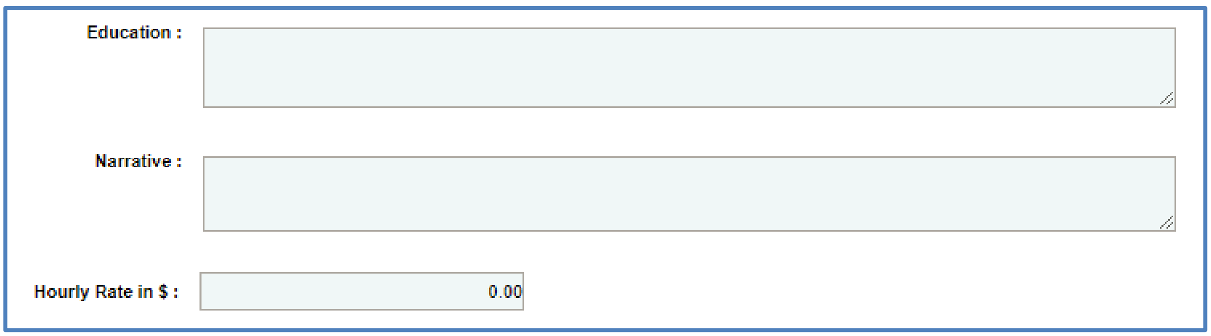


2. Click **New**.
   The **Key Staff Details** page is displayed.

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

Field	Mandatory / Non-mandatory	Description
		
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.
		
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.

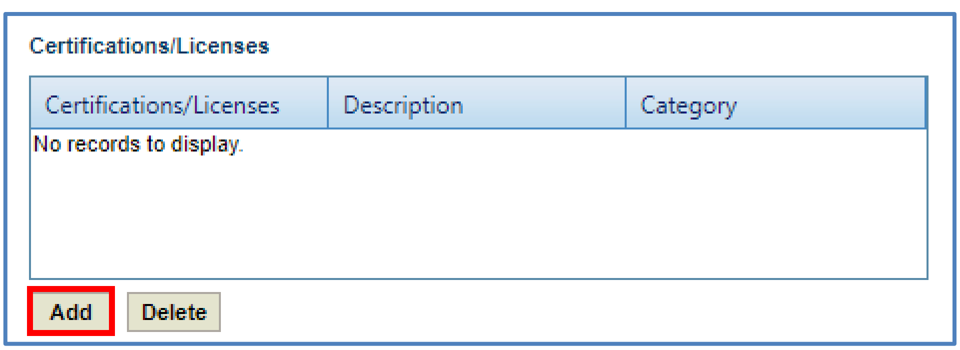
Field	Mandatory / Non-mandatory	Description
Email ID	Non–mandatory	Enter a valid e-mail address of the user for communication.
Telephone	Non–mandatory	Enter the contact telephone number of the user.
Current Firm (Experience in Years)	Non–mandatory	Enter the work experience of the staff in current organization.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



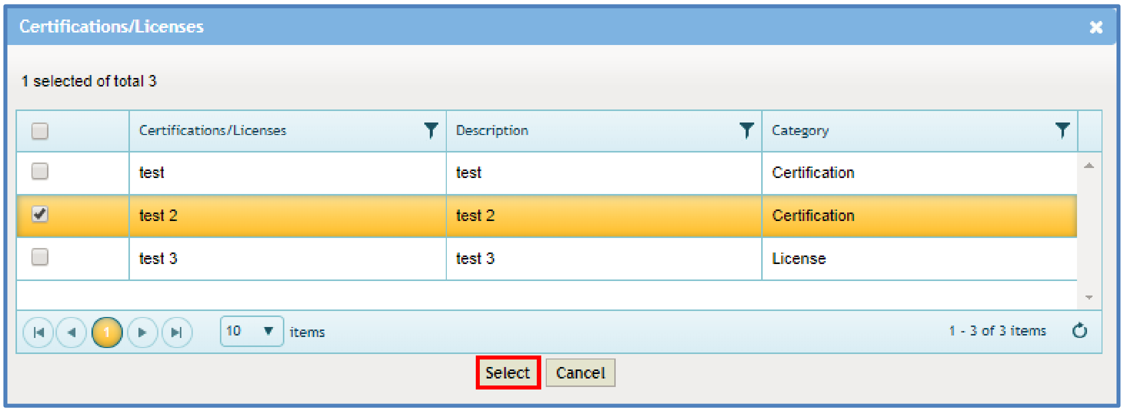
Education	Non–mandatory	Enter the education details of the staff.
Narrative	Non–mandatory	Enter the details of the narrative.
Hourly Rate in $	Non–mandatory	Enter the hourly rate in $.

4. In the **Certifications/Licenses** section:

    a. Click **Add**. The **Certifications/Licenses** dialog box is displayed.



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*.

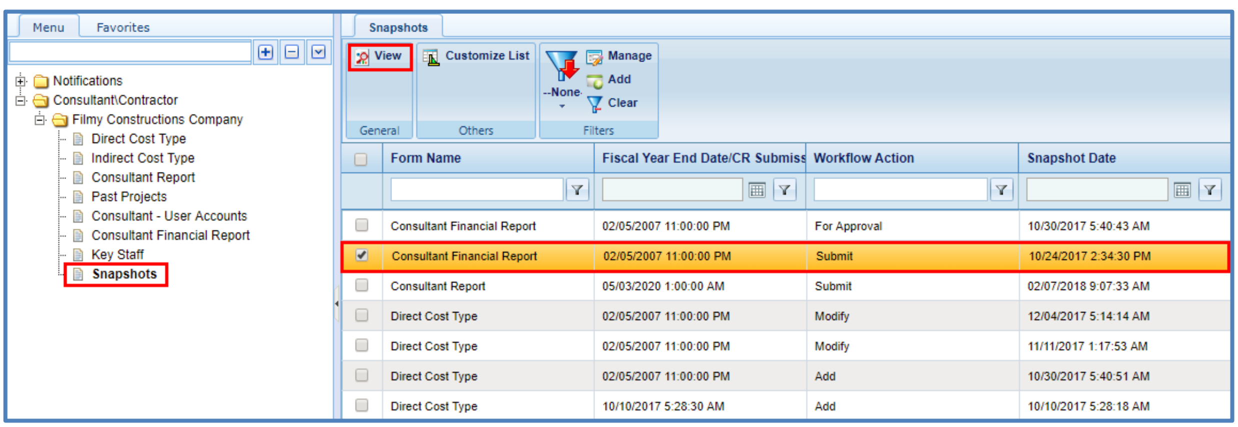
6. Click **Save**.

2.8 Viewing Snapshots

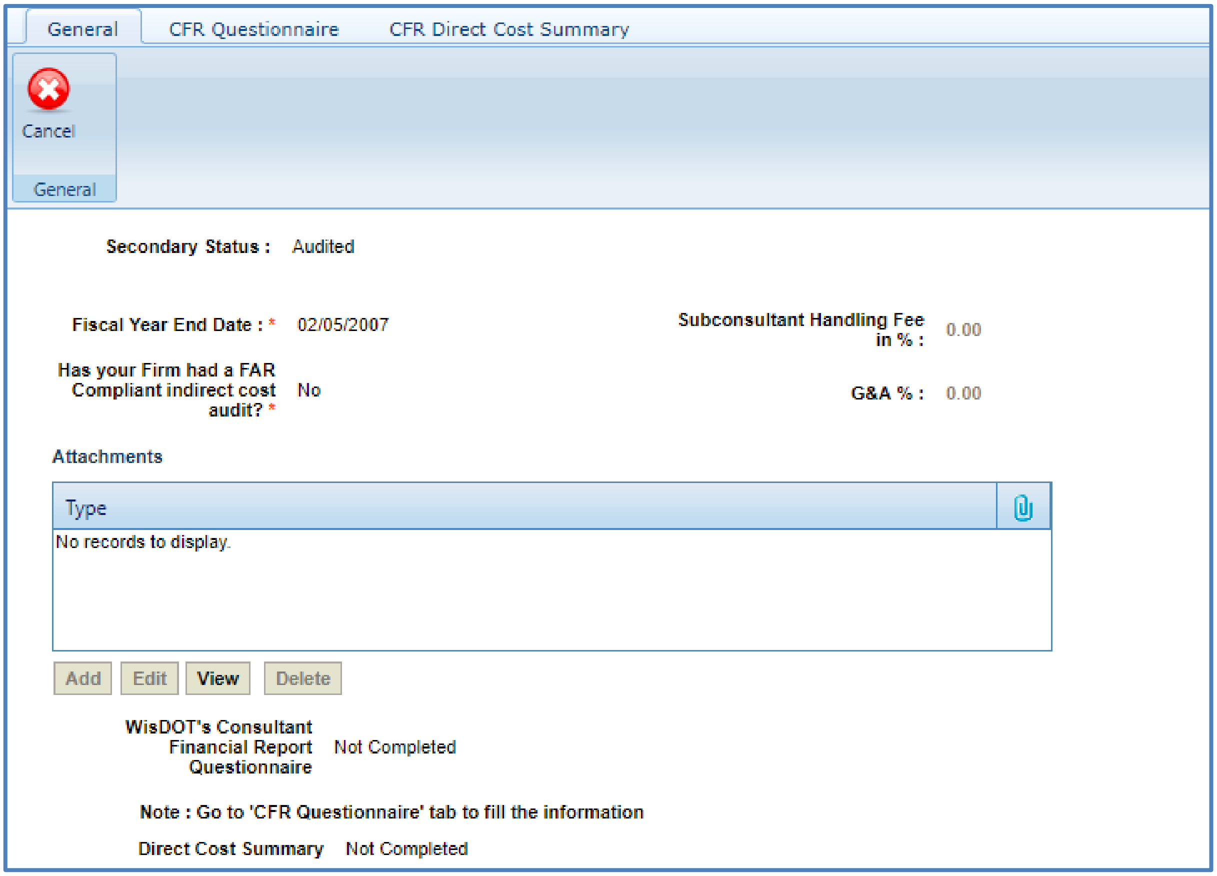
While performing workflow actions, snapshots of the Consultant forms are created and stored in the Snapshots form in the **Consultant\Contractor** folder.

Steps:

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



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



3 Bimonthly Solicitation

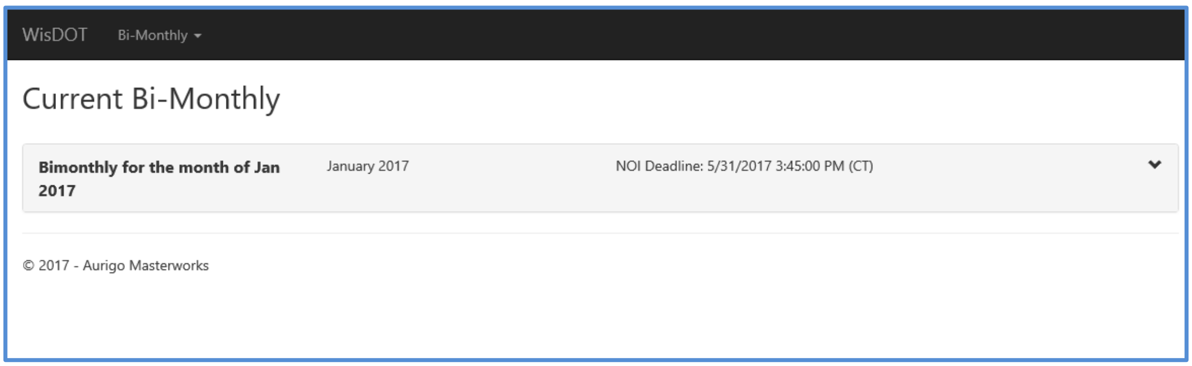
The system allows you to express your interest in a solicitation by responding to the Notice of Interest (NOI) of the solicitation associated with current bimonthly solicitation. You can also raise queries regarding the solicitations and receive appropriate answers.

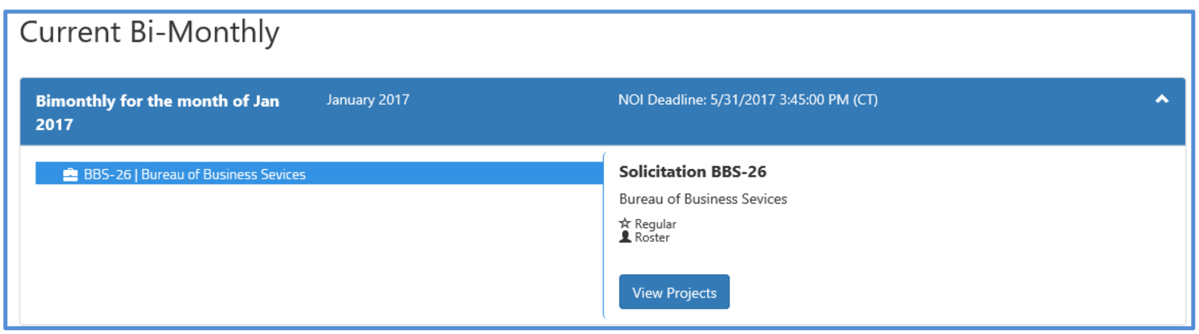
The Bimonthly Solicitations can be viewed in the application or in the public portal.

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.

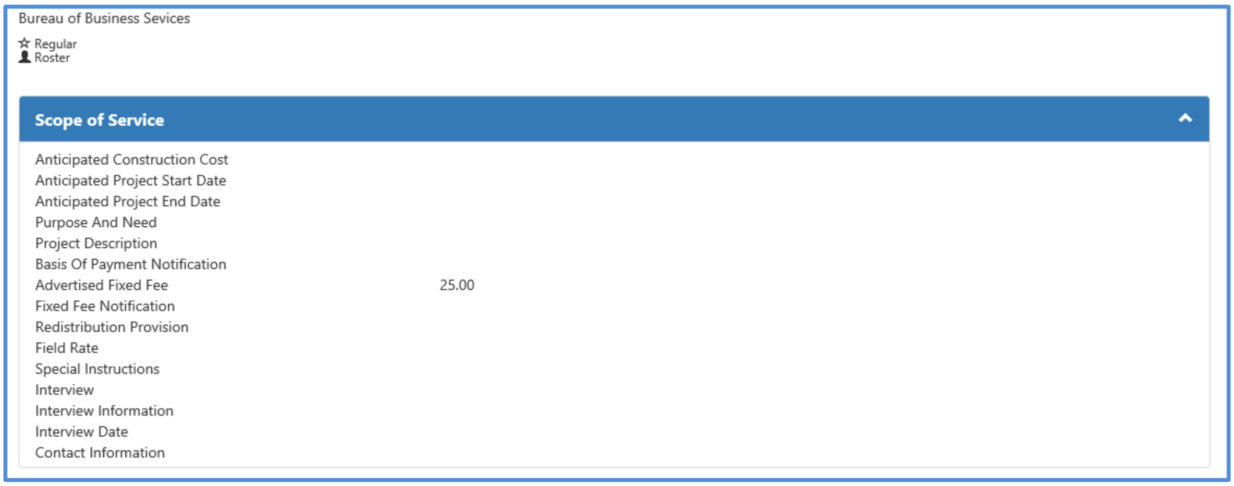
Steps:

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.
   

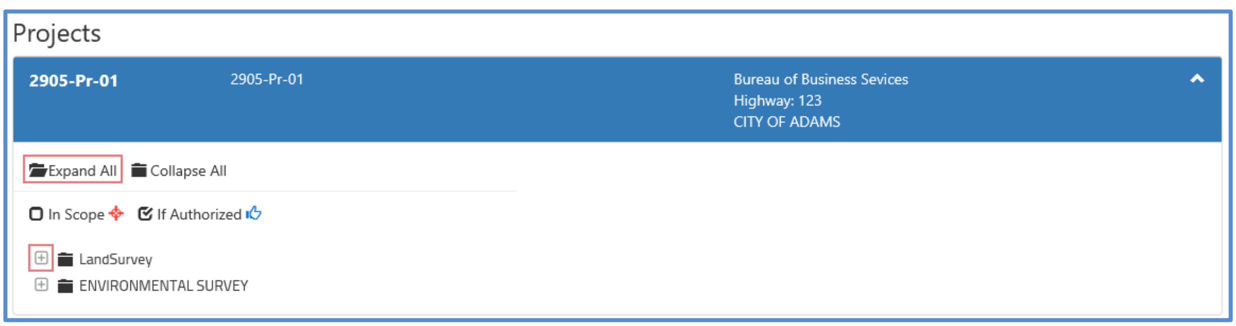
3. Click the bimonthly solicitation record to view the solicitations associated with the bimonthly solicitation. The solicitations associated with the bimonthly solicitation is displayed.
   

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

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



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



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

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

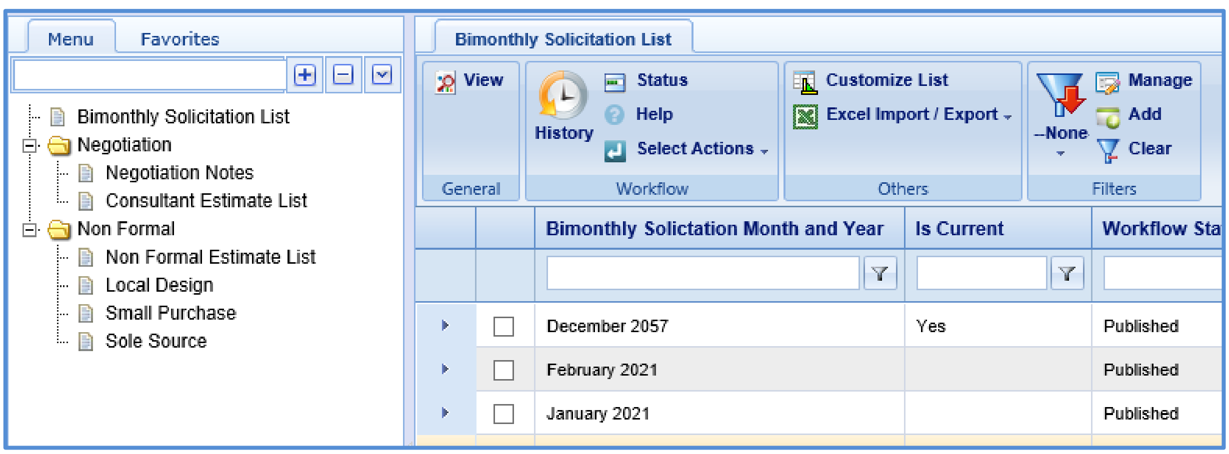
3.2 Questions and Responses

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:

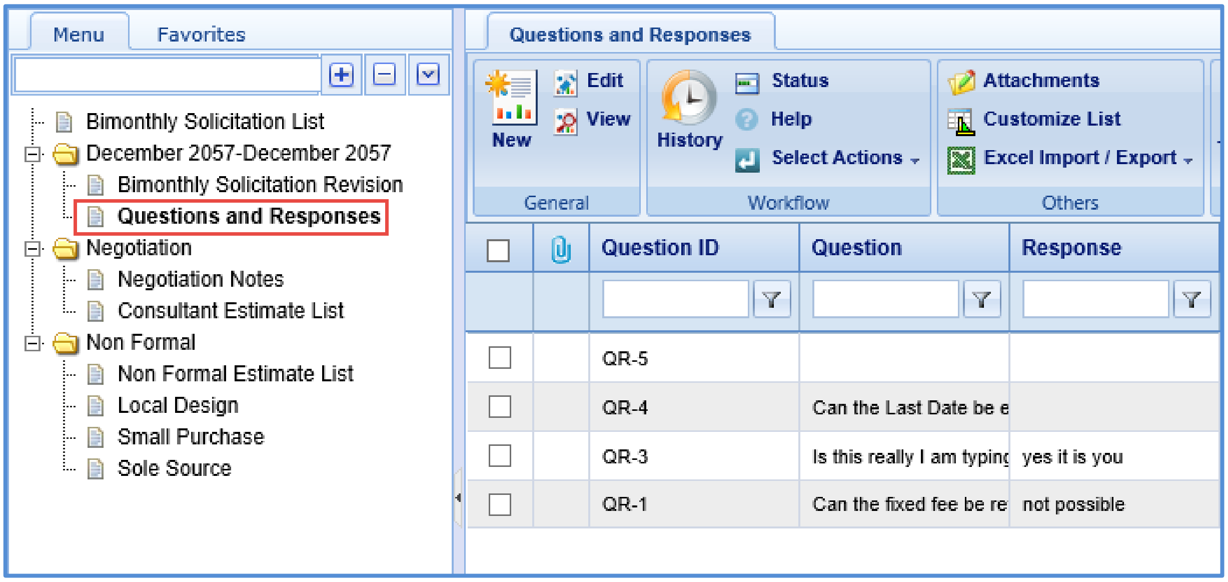
Prerequisite: The last date of question submission has not expired.

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

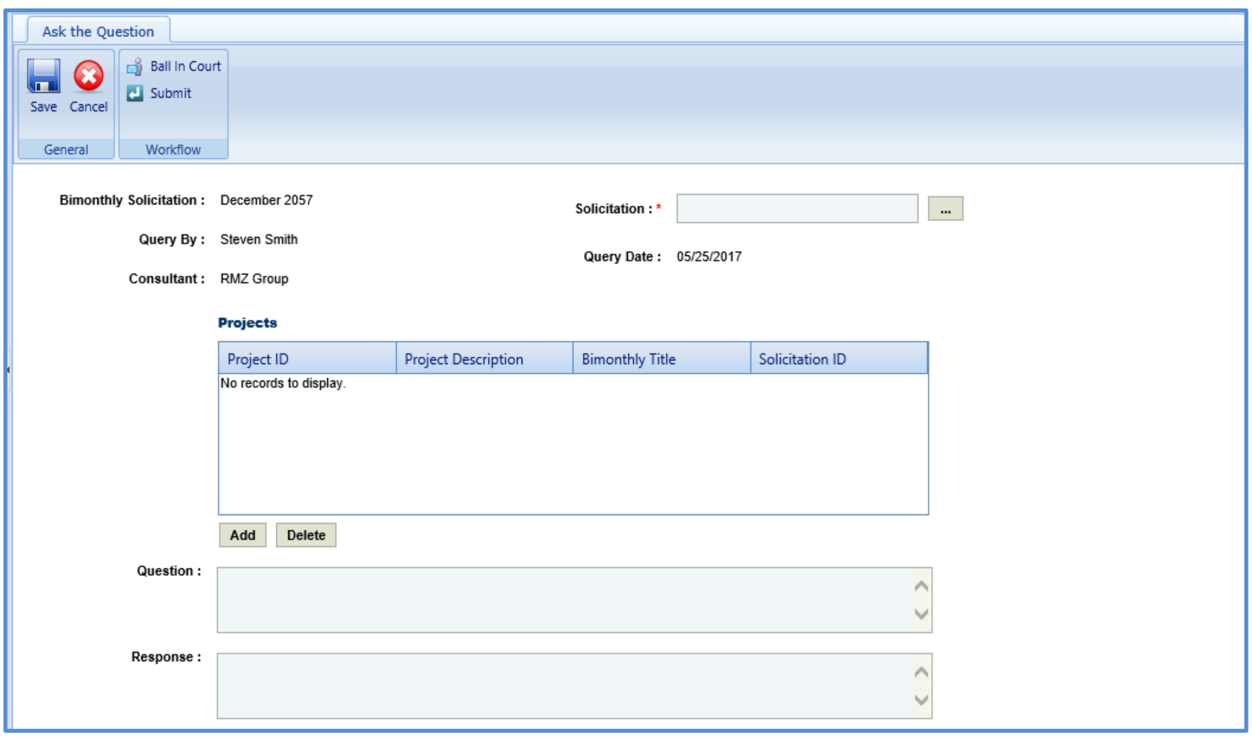


2. Select the **Bimonthly Solicitation** record, which is in 'Published' status, and then click **View**.
   The **Bimonthly Solicitation Details** page is displayed.

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



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



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

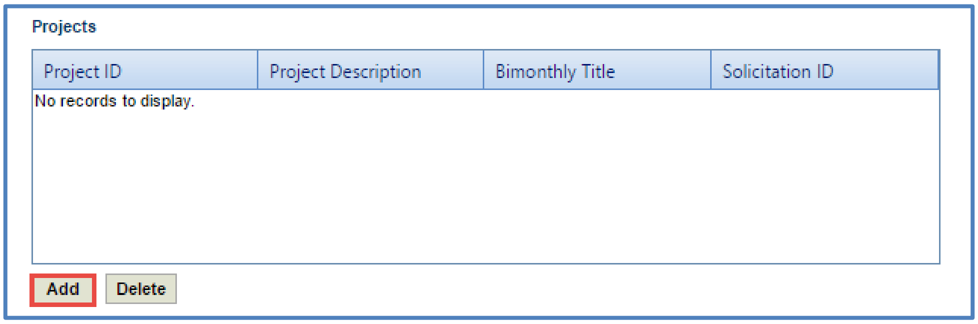
5. In the **Solicitation** field, perform the following steps to select solicitations for which the question is raised:

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

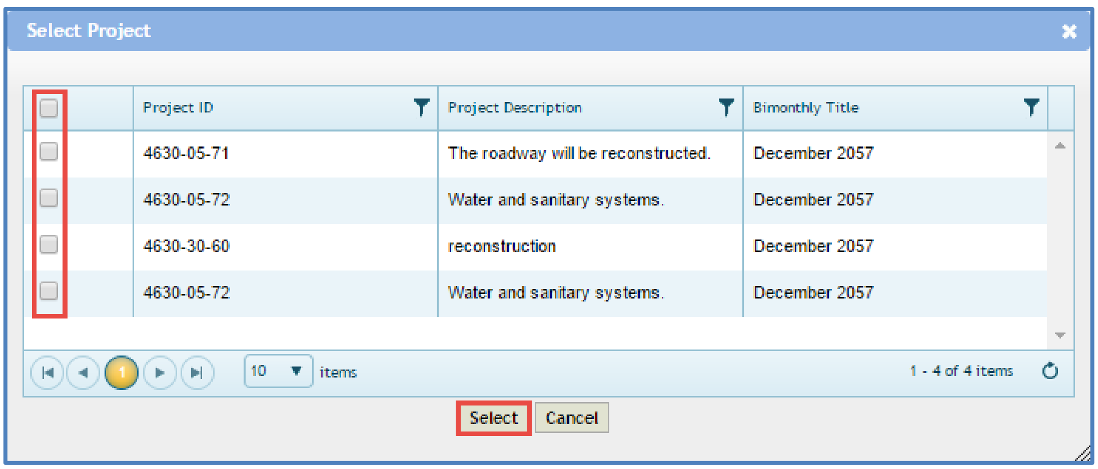
b. Select the solicitations for which the question is raised and then click **Select**.

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

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



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



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

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

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

Field	Description
Question	Enter the question.
Response	The response for the question is auto-populated in this field when it is published by WisDOT.
Notes	This section will be enabled for WisDOT User. Enter any notes about the question.

8. In the **Attachments** section, upload relevant images and files. For information on form attachments, refer *Attachments*.
9. Click **Save**. The **Questions and Responses** record is in the **Draft** workflow status.
10. Select the **Questions and Responses** record and in the **Workflow** group, click **Select Actions**.
11. Click **Submit**. The **WisDOT Masterworks** 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)

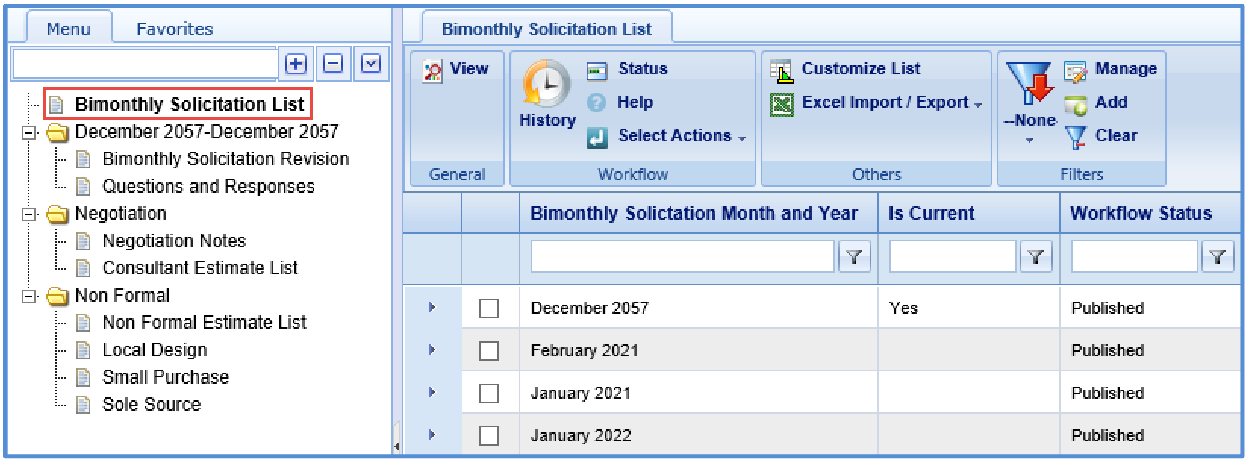
The system allows you to view the solicitation details and express your interest in the solicitation by submitting the duly filled-in NOI to WisDOT.

4.1 Viewing the Solicitation Details

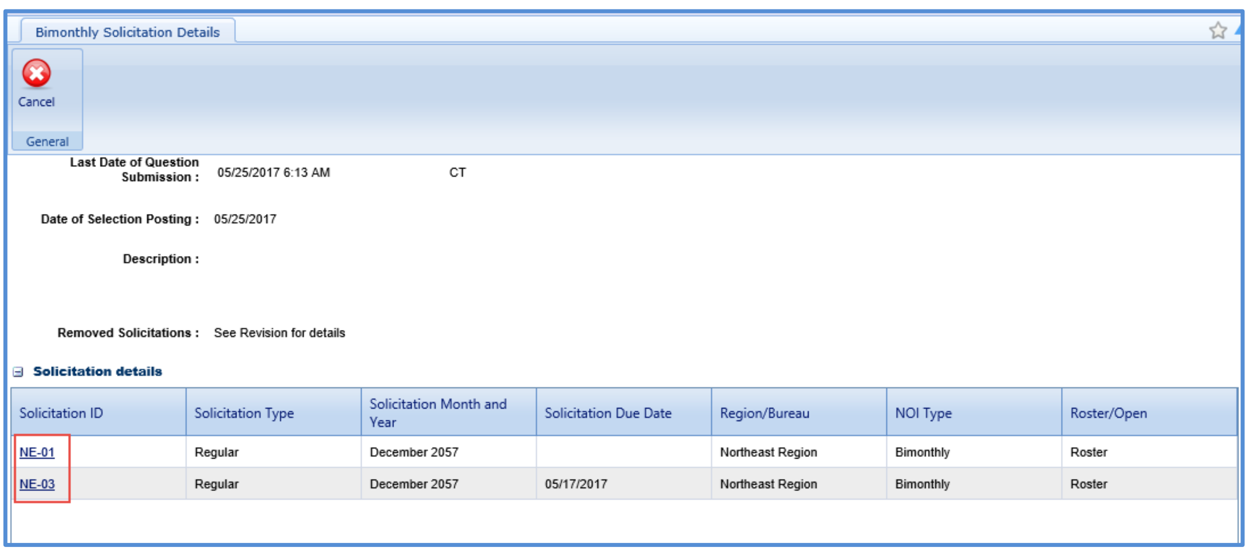
The system allows you to view the solicitation details such as projects associated with the solicitation, scope of service, and tasks associated with the solicitation.

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.



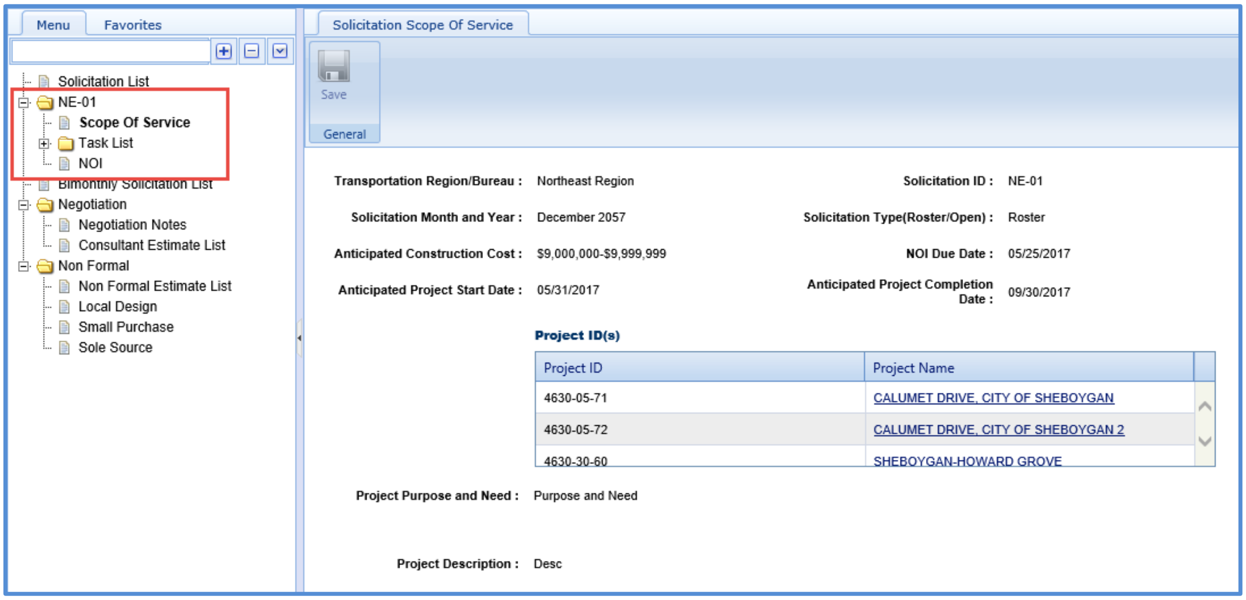
3. Select the required Bimonthly Solicitation record, and then click **View**.
   The selected **Bimonthly Solicitation Details** page is displayed.



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

   The **Solicitation** details page is displayed.

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

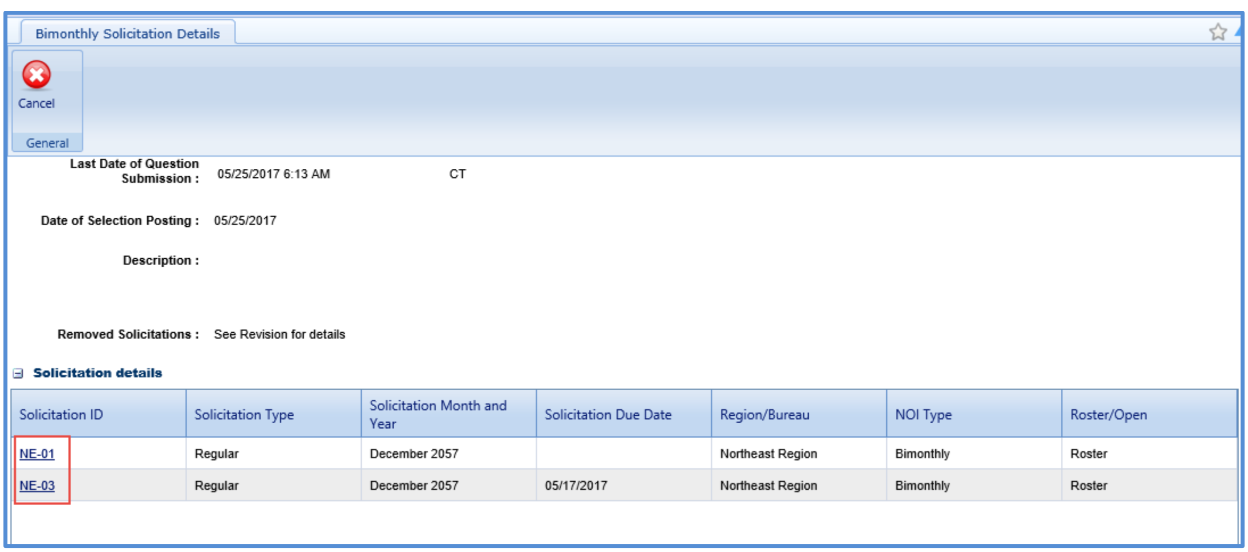


4.2 Submitting the Notice of Interest

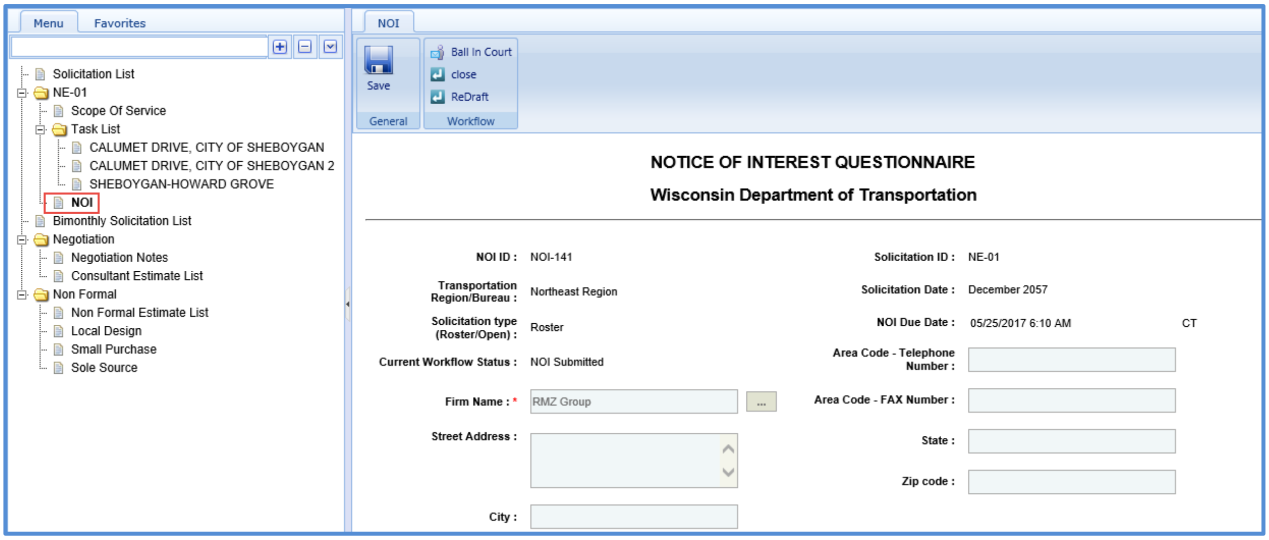
The system allows you to duly fill in the NOI and submit to WisDOT.

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

2. Select the required **Bimonthly Solicitation** record, which is in Marked as "Is Current", and then click **View**.
   The selected **Bimonthly Solicitation Details** page is displayed.



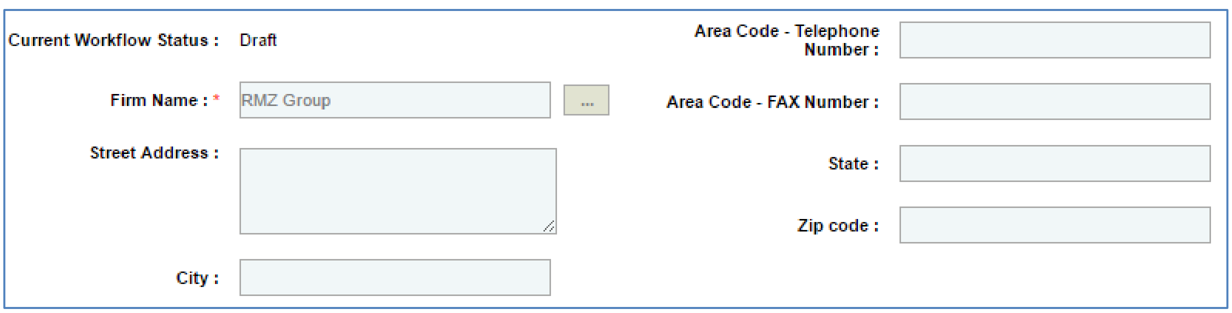
3. In the **Solicitation details** section, click the **Solicitation ID** link for which you want to submit the NOI. The **Solicitation** details page is displayed.
4. In the navigation pane, expand the solicitation folder, and click **NOI**. The **NOI** page is displayed.



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

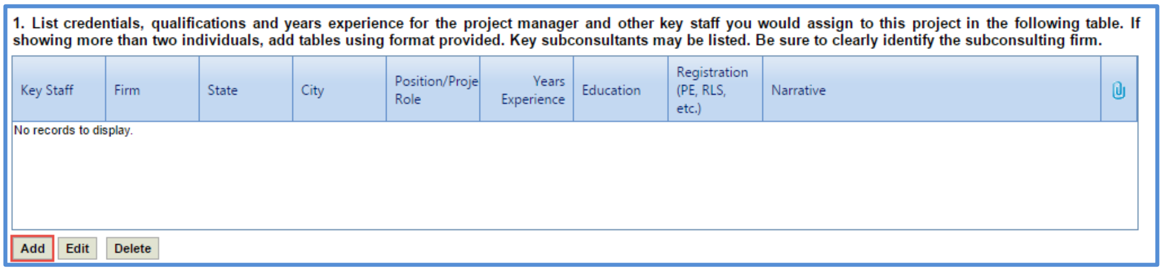
5. Enter information in the required fields. The fields are described in the following table.

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

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

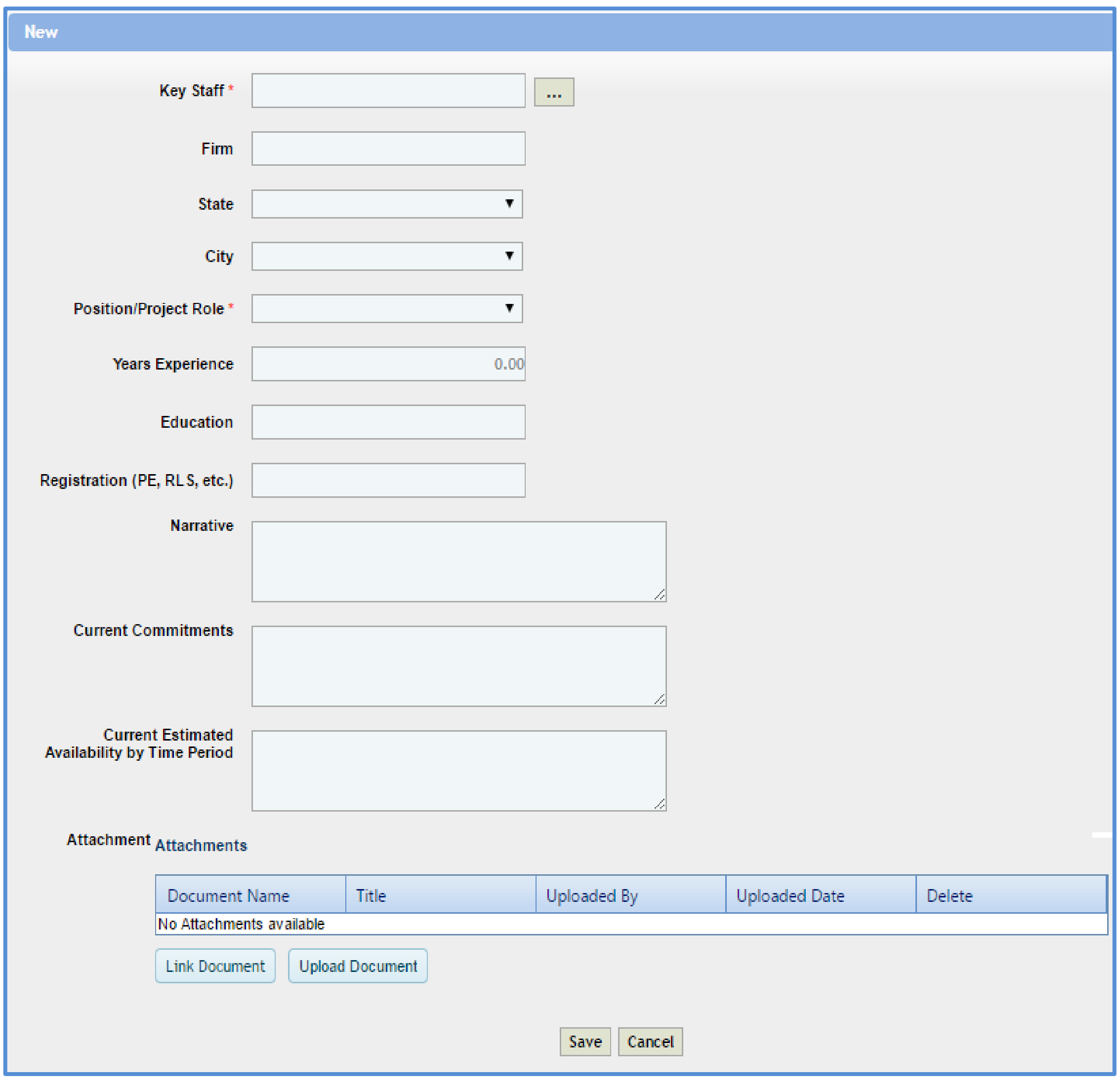
6. For factor 1, perform the following steps to add key staff details:

   a. Click **Add**.



   The **New** dialog box is displayed.

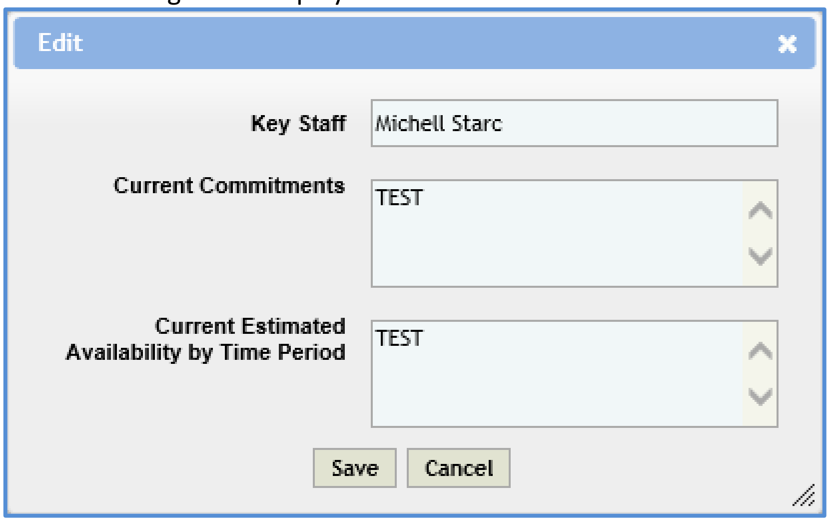
   b. Enter information in the required fields. The fields are described in the following table.

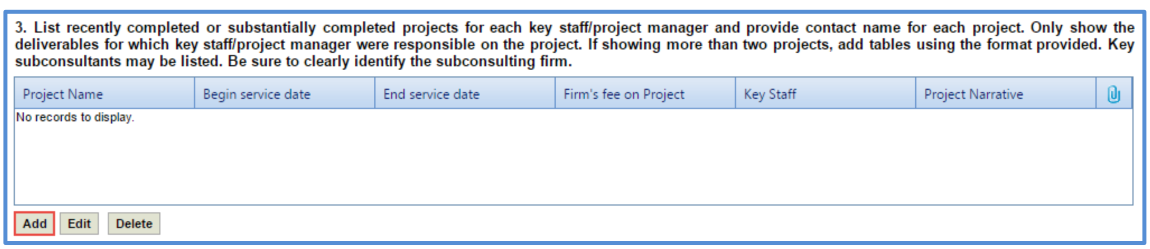
Field	Mandatory / Non-mandatory	Description
		
Key Staff	Mandatory	To select key staff:

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

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

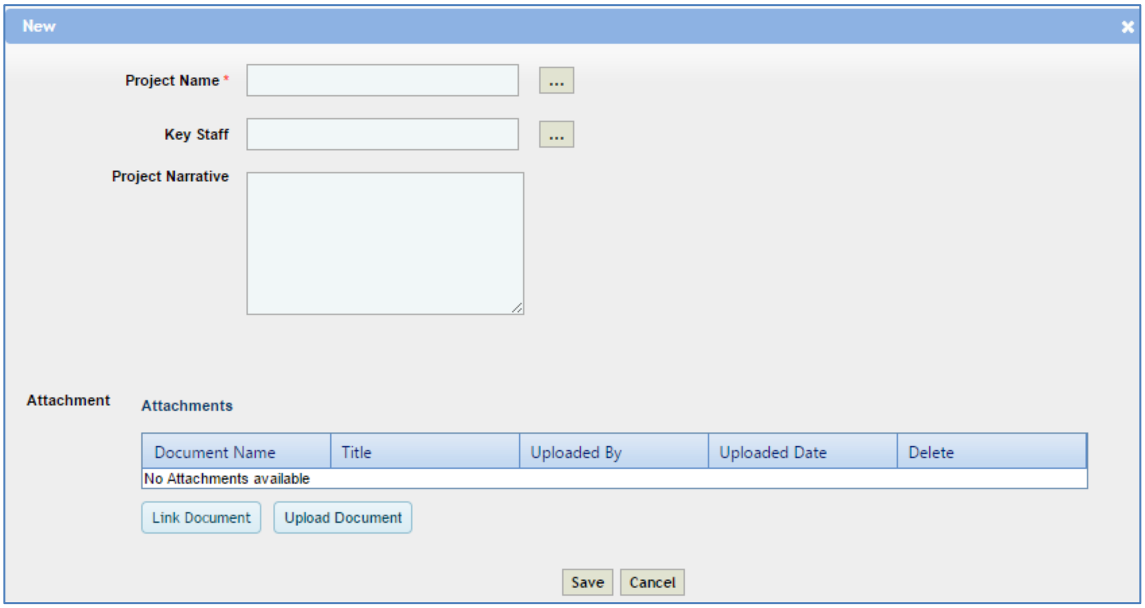
d. Click **Save**.

7. For factor 2, perform the following step to edit workload capacity details of the selected key staff: *Note: The key staff details added in the factor 1 is auto-populated in the table.*
    a. In the section, select the required key staff for whom the workload capacity details have to be edited and then click **Edit**.
    The **Edit** dialog box is displayed.
    

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

    The **New** dialog box is displayed.

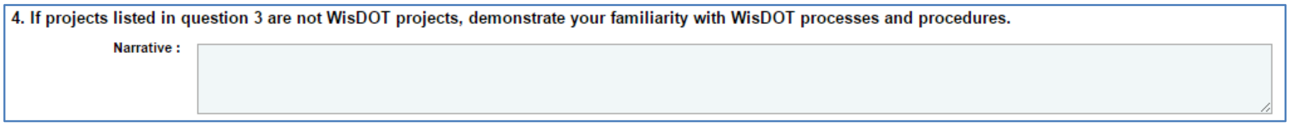
b. Enter information in the required fields. The fields are described in the following table.

<table>
<tr><th>Field</th><th>Mandatory / Non-Mandatory</th><th>Description</th></tr>
<tr><td colspan="3">
</td></tr>
<tr><td>Project Name</td><td>Mandatory</td><td>To select a project:
a. Click .
The Select Project dialog box is displayed listing all the past projects of the consultant firm.
b. Click the required project, and then click Select.</td></tr>
<tr><td>Key Staff</td><td>-</td><td>To select key staff:
a. Click .
The Select Key Staff dialog box is displayed listing all the key staffs of the selected project.
b. Select the required key staff options, and then click Select.
The selected key staff options are added.</td></tr>
<tr><td>Project Narrative</td><td>-</td><td>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.</td></tr>
</table>

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

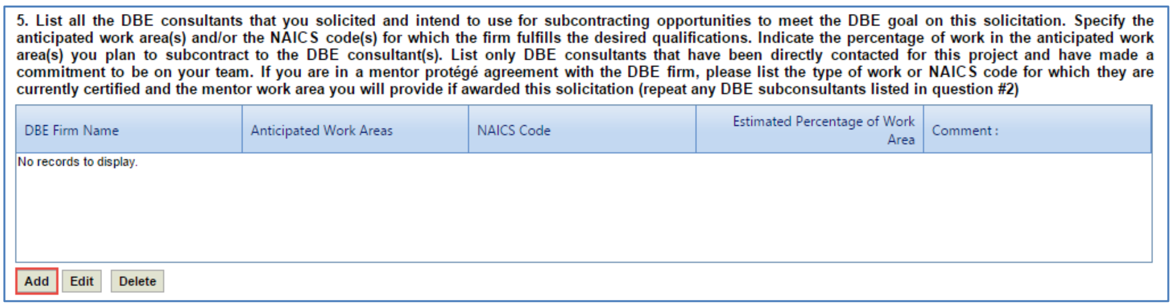
d. Click **Save**.

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



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

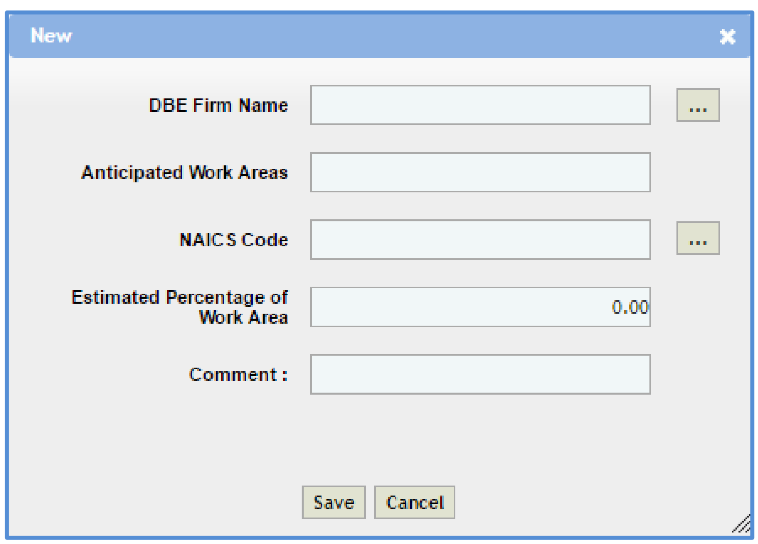
a. Click **Add**.



The **New** dialog box is displayed.

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

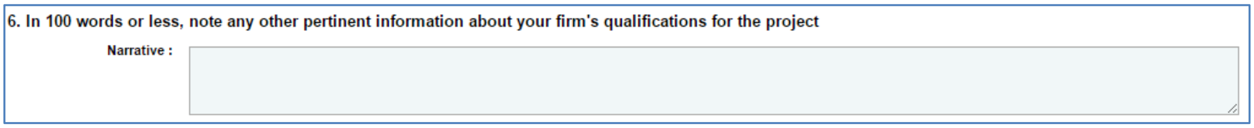
Note*: All the fields described in the below table are non-mandatory fields.*

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

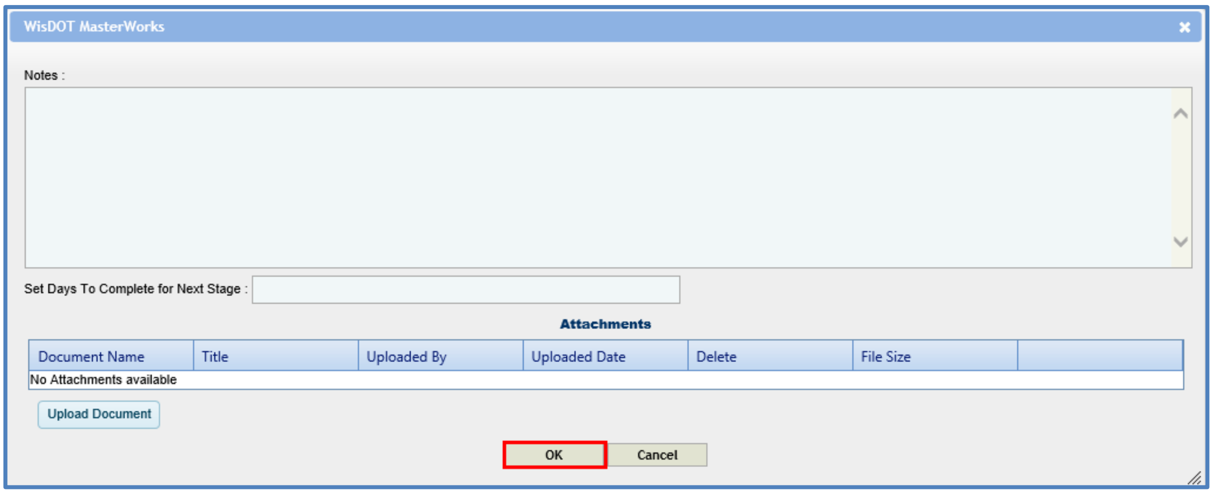
Field	Description
Anticipated Work Areas	Enter the details of the expected work areas for the firm.
NAICS Code	To select the NAICS code: a. Click ... . The **NAICS** dialog box is displayed. b. Select the required code, and then click **Select**.
Estimated Percentage of Work Area	Enter the percentage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

    c. Click **Save**.

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



12. Click **Save**.
13. In the **Workflow** group, click **Submit**.
    The **WisDOT Masterworks** dialog box is displayed.



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

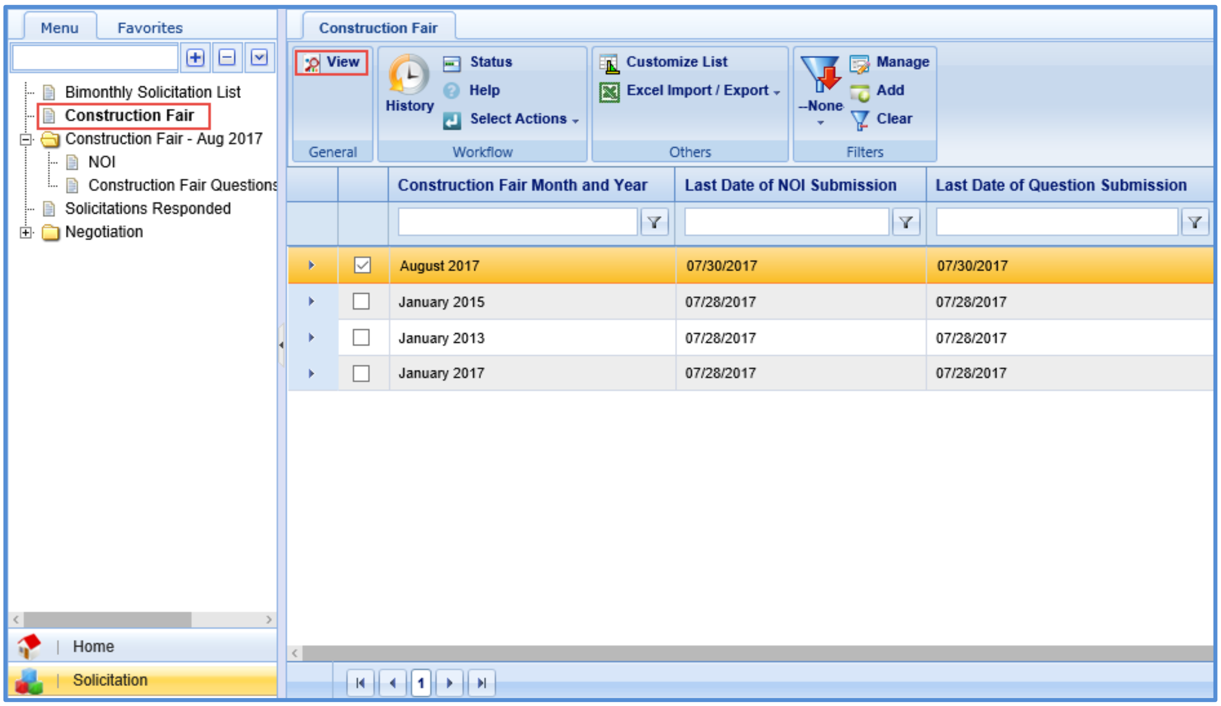
The system allows you to express your interest in a construction fair by submitting the Notice of Interest (NOI) for the current construction fair. Prior to submitting NOI, you can also raise queries regarding the construction fair and receive appropriate answers.

5.1 Viewing Construction Fair Details

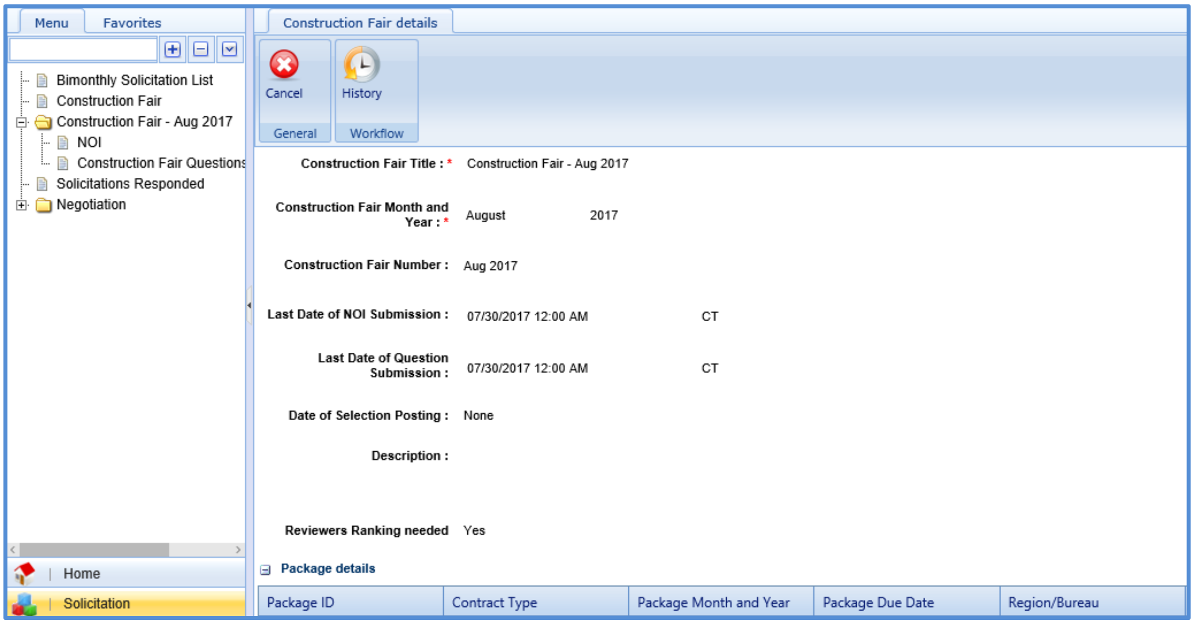
The system allows you to view the construction fair details including construction fair packages associated with the construction fair.

The procedure to view the construction fair details is described.

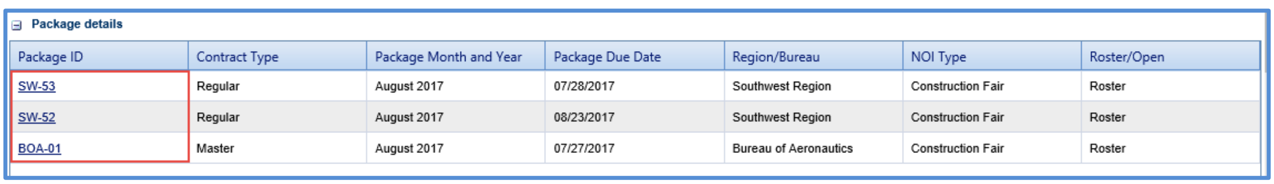
1. In the module menu, click **Solicitation**.
2. In the navigation pane, click **Construction Fair**.
   The **Construction Fair** list page is displayed.



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



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 details

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

5.2 Questions and Responses

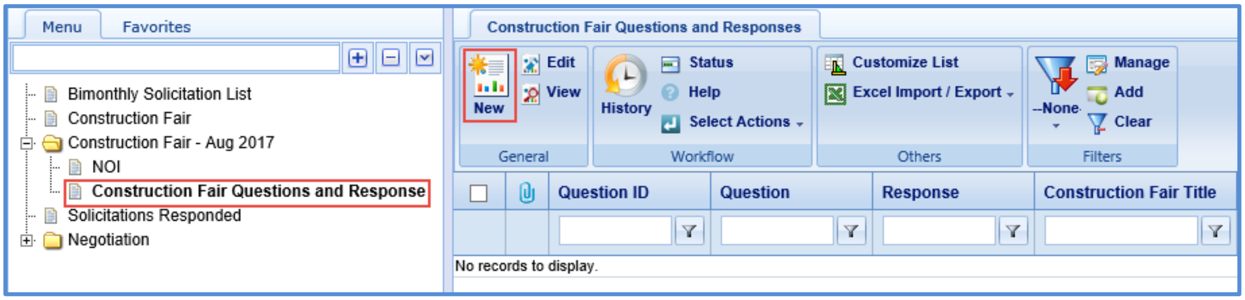
The system allows you to submit questions regarding the construction fair. The questions have to be submitted before the expiry of the last date of question submission, which is defined on the **Construction Fair details** page. WisDOT will publish relevant answers to the questions submitted.

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

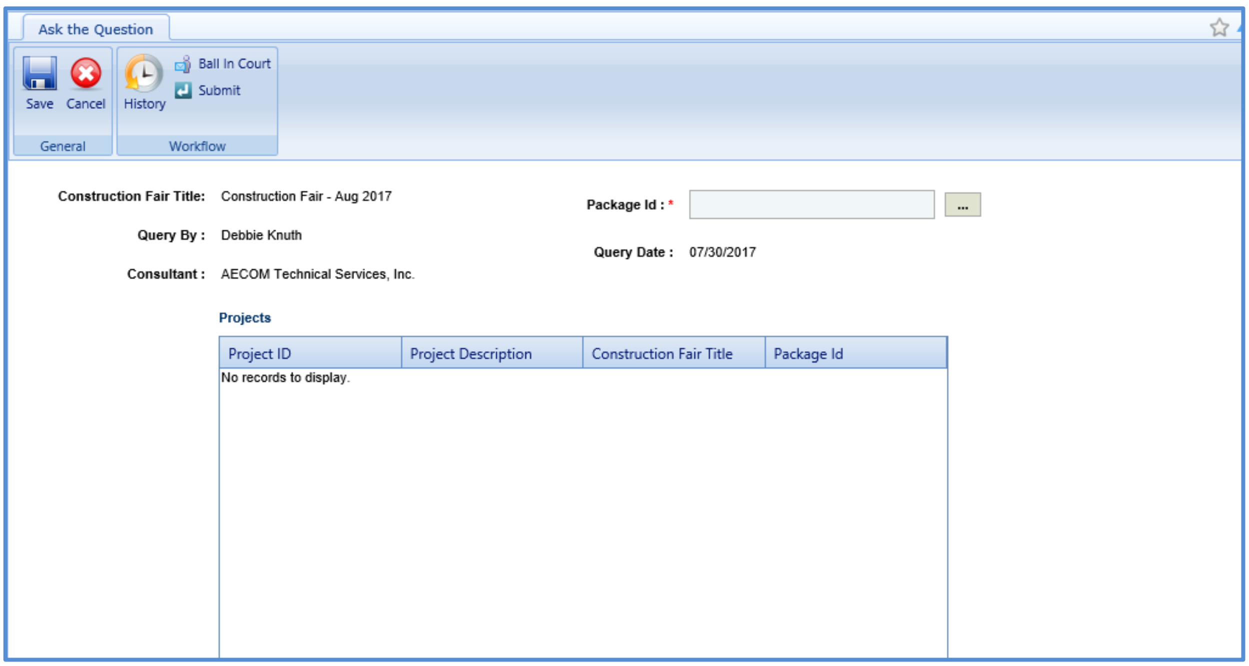
Prerequisite: The construction fair has to be in the **Construction Fair Published** status and marked as current construction fair. The last date of question submission has not expired.

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.



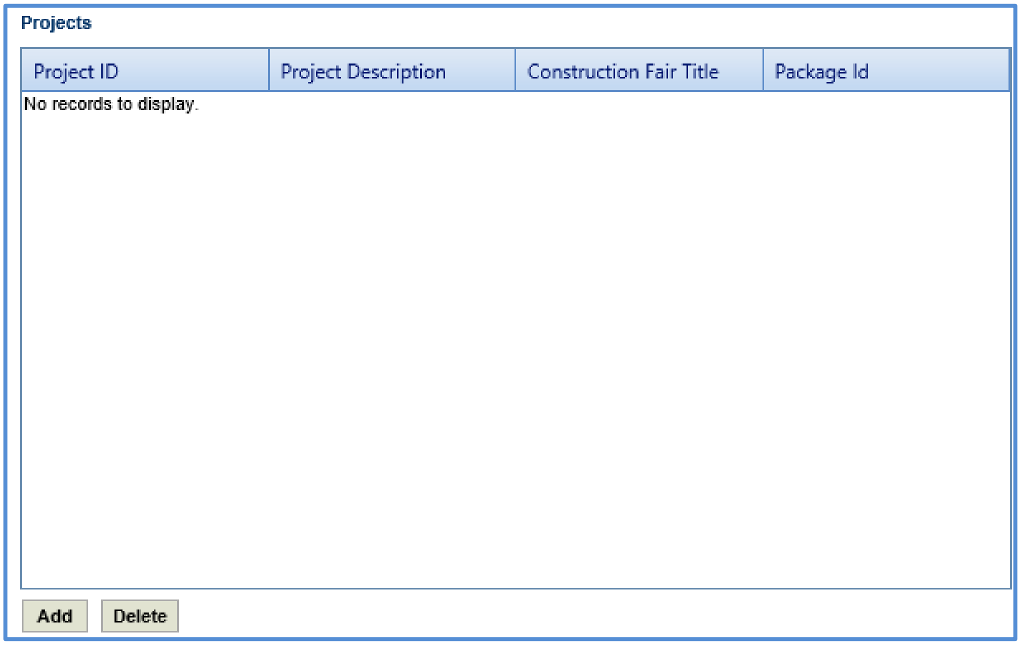
The values in the **Construction Fair Title**, **Query By**, **Consultant**, **Query Date** fields are auto-populated.

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:



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

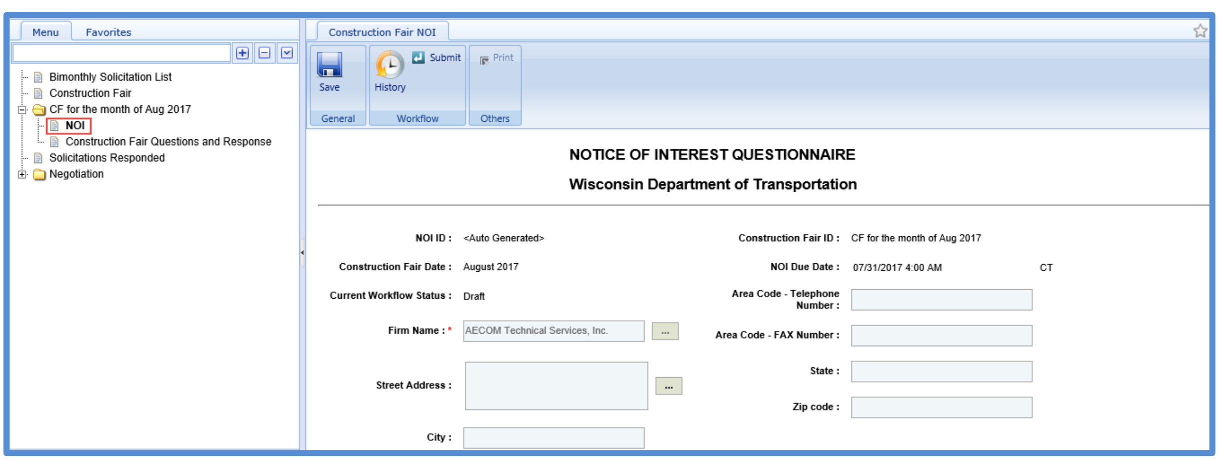
The system allows you to view the construction fair details and express your interest in the current construction fair by submitting the duly filled-in NOI to WisDOT.

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.

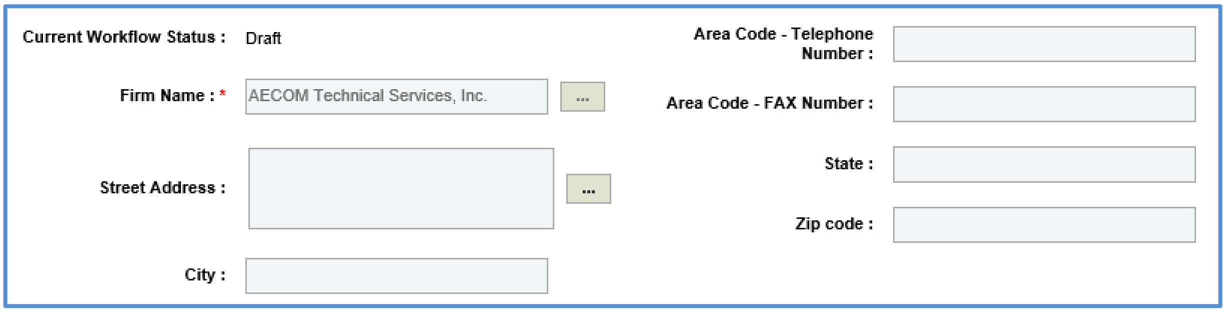
4. In the navigation pane, expand the construction fair folder, and click **NOI**. The **Construction Fair NOI** page is displayed.



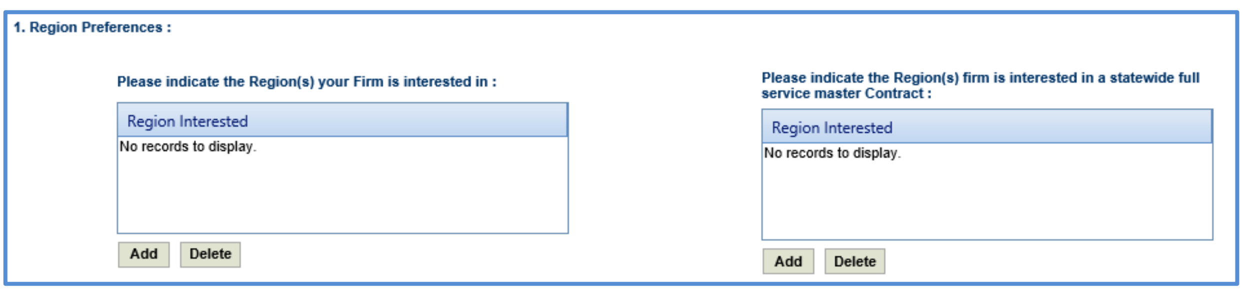
***Note**: The values in the **NOI ID, Construction Fair ID, Construction Fair Date, NOI Due Date, Current Workflow Status,** and **Firm Name** are auto-populated.*

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

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

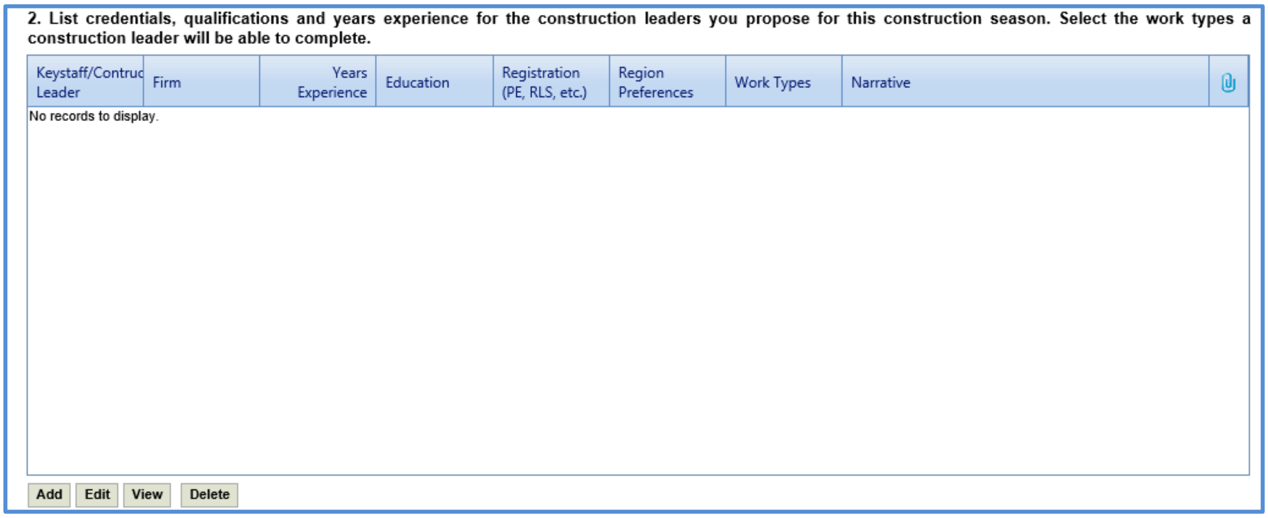
Field	Description
	
Street Address	Enter the street address of the consultant firm.
City	Enter the city of the consultant firm.
Area Code - Telephone Number	Enter the telephone number with the area code of the consultant firm.
Area Code - FAX Number	Enter the fax number with the area code of the consultant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

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

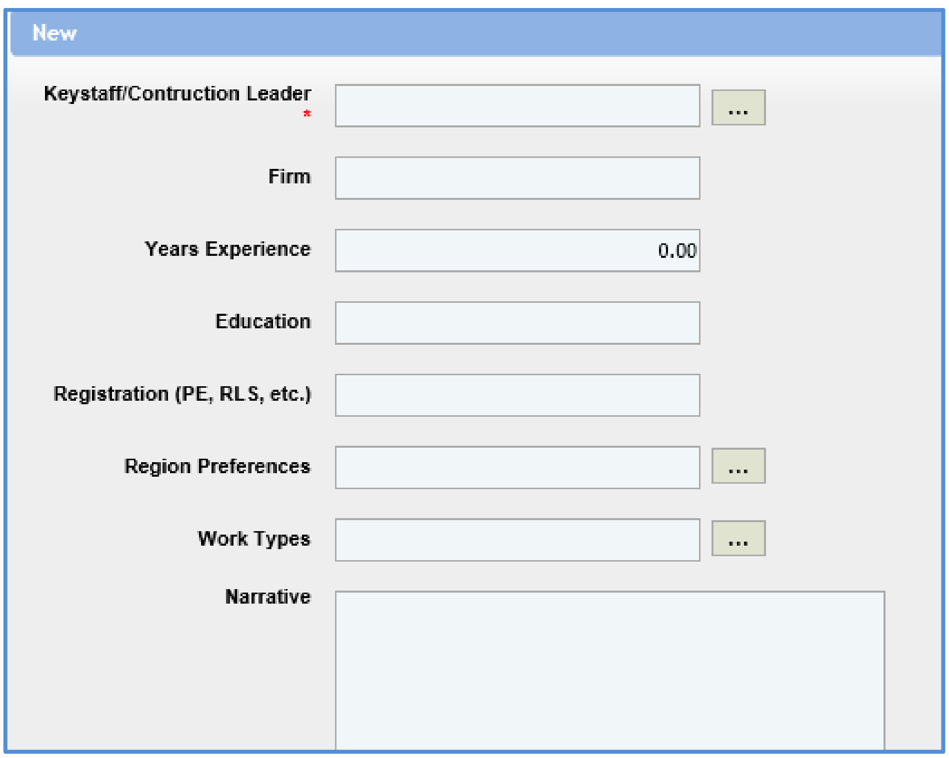


- To add regions of interest:
  a. Click **Add**. The **Region/Bureau** dialog box is displayed listing the regions.
  b. Select the required regions and then click **Select**.
- To add regions of interest in a statewide full service master contract:
  a. Click **Add**. The **Region/Bureau** dialog box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

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



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



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

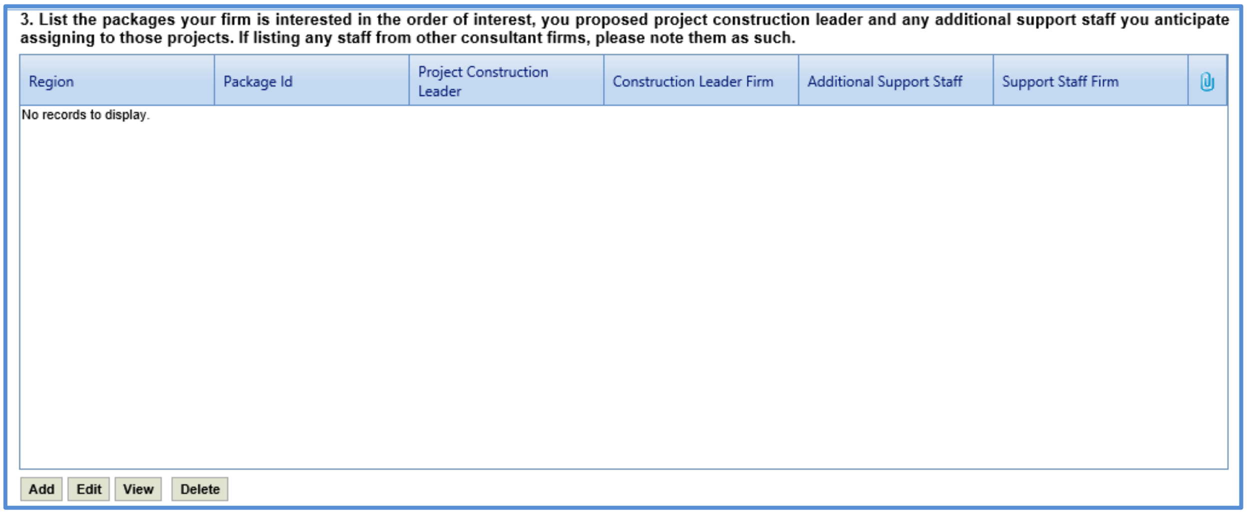
Field	Mandatory / Non-mandatory	Description
Key Staff/Construction Leader	Mandatory	To select key staff/construction leader: a. Click ... . The **Select Key Staff** dialog box is displayed listing all the key staffs of the consultant firm.

Field	Mandatory / Non-mandatory	Description
		b. Select the required key staff/construction leader, and then click **Select**. The values in the **Firm**, **Years Experience**, and **Education** fields auto-populated.
Firm	-	The firm to which the key staff/construction leader belongs is auto-populated.
Years Experience	-	The years of experience of the selected key staff/construction leader is auto-populated.
Education	-	Enter the education details of the selected key staff/construction leader.
Registration (PE, RLS, etc.)	-	Enter the registration details of the key staff/construction leader.
Region Preferences	Non-mandatory	To select region preferences of the key staff/construction leader: a. Click ... . The **Region/Bureau** dialog box is displayed listing all the regions selected in Factor 1. b. Select the required regions and then click **Select**.
Work Types	Non-mandatory	To select work types of the key staff/construction leader: c. Click ... . The **Select Work Type** dialog box is displayed listing all the work types. d. Select the required worktypes and then click **Select**.
Narrative	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.

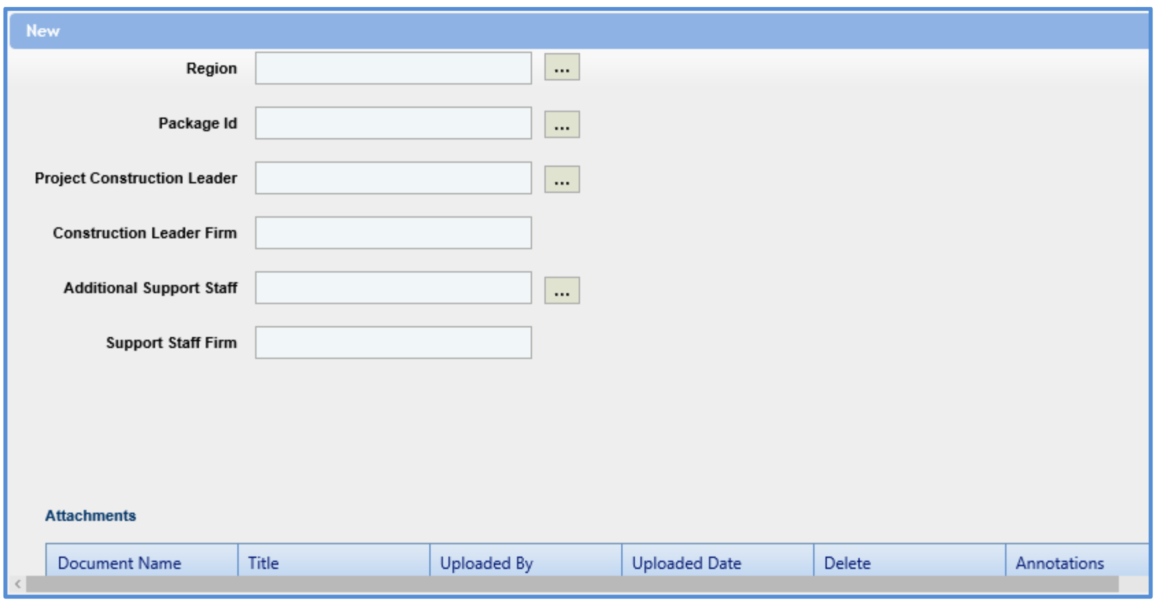
c. In the **Attachments** section, upload relevant images and files. For information on form attachments, refer *Attachments*.

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:



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



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

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

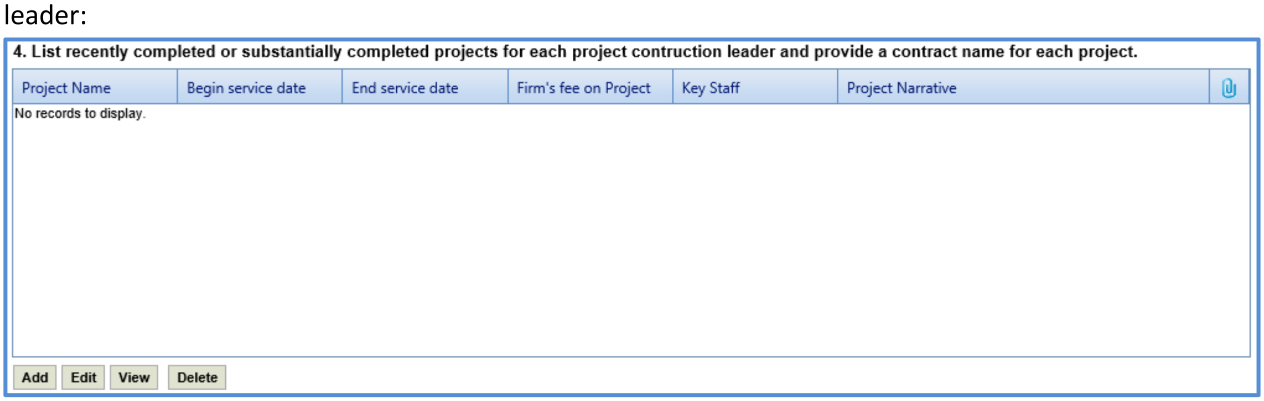
Field	Description
Region	To select region: a. Click . The **Region/Bureau** dialog box is displayed listing all the regions selected in Factor 1. b. Select the required key staff/construction leader, and then click **Select**.

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

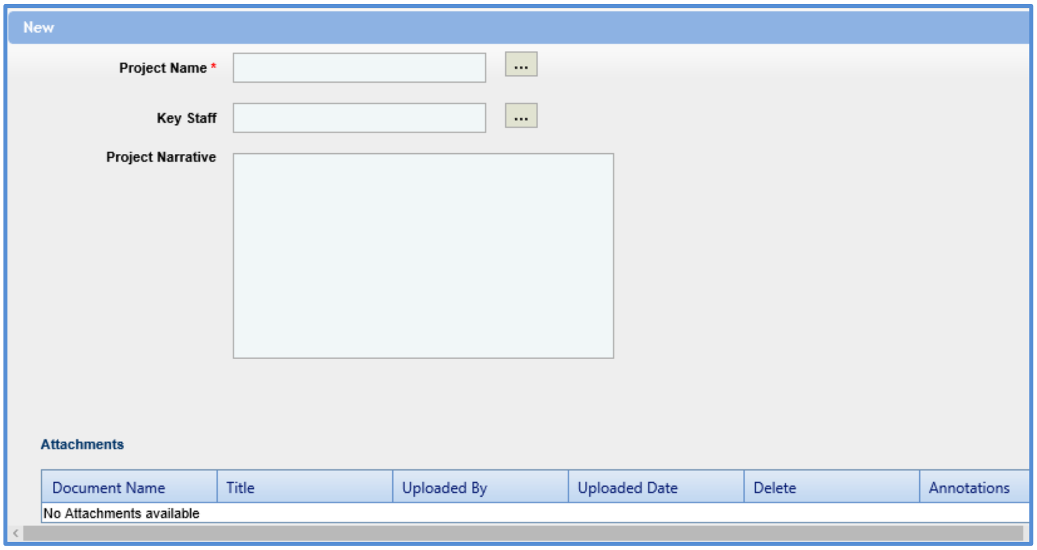
c. In the **Attachments** section, upload relevant images and files. For information on form attachments, refer *Attachments*.

d. Click **Save**.

9. For factor 4, perform the following steps to add the past completed project details of the construction leader:



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



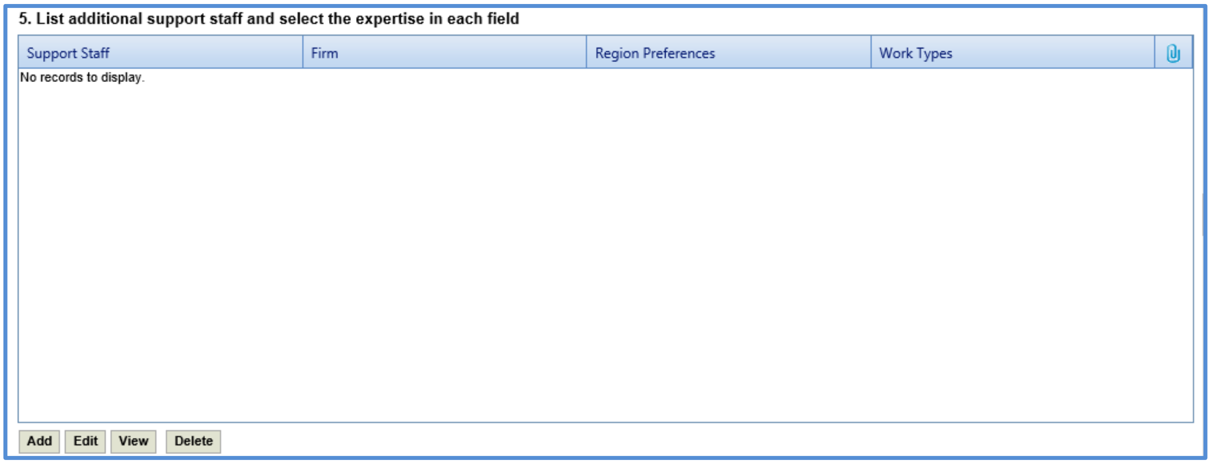
b. Enter information in the required fields. The fields are described in the following table.

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

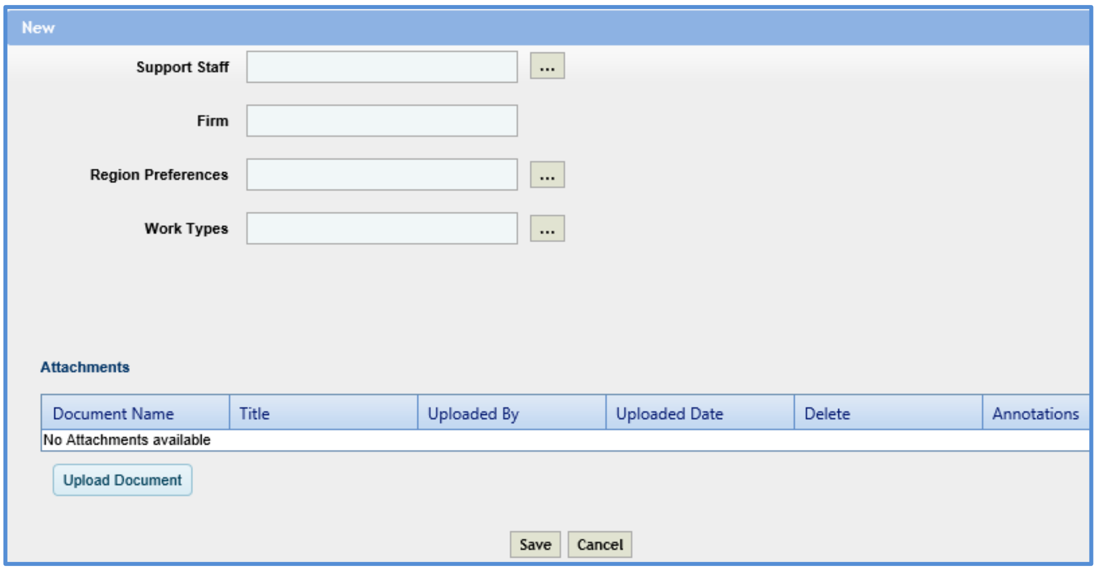
c. In the **Attachments** section, upload relevant images and files. For information on form attachments, refer *Attachments*.

d. Click **Save**.

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



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



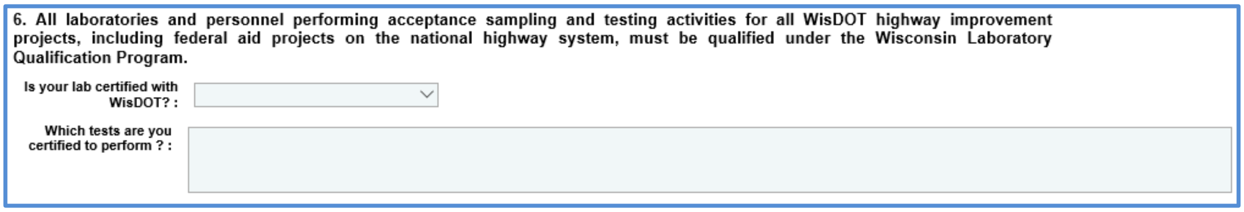
b. Enter information in the required fields. The fields are described in the following table.
Note: All fields in the below table are non-mandatory fields.

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

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

d. Click **Save**.

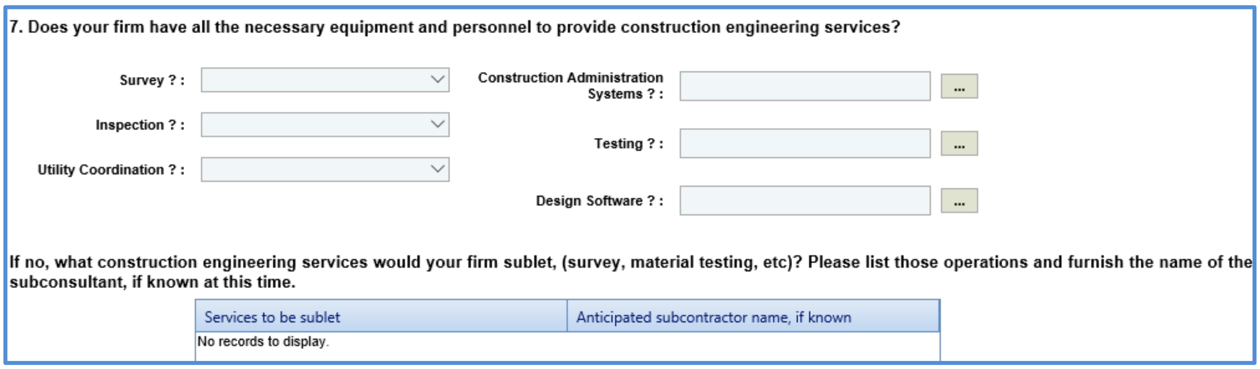
11. For factor 6, perform the following steps to record laboratory certification and testing activities related details:



   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.

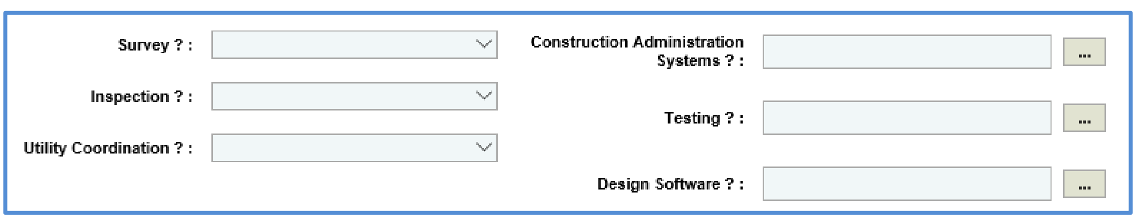
   b. If the lab is certified with WisDOT, then in the **Which tests are you certified to perform ?** field enter details about the test certified.

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



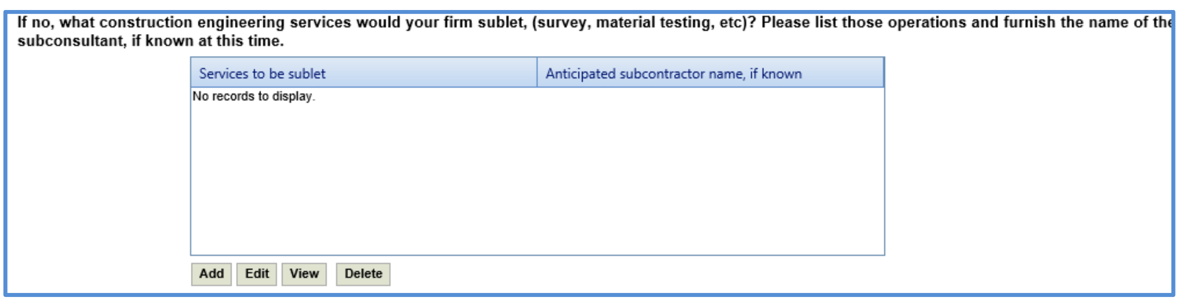
   a. Enter information in the required fields. The fields are described in the following table.

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

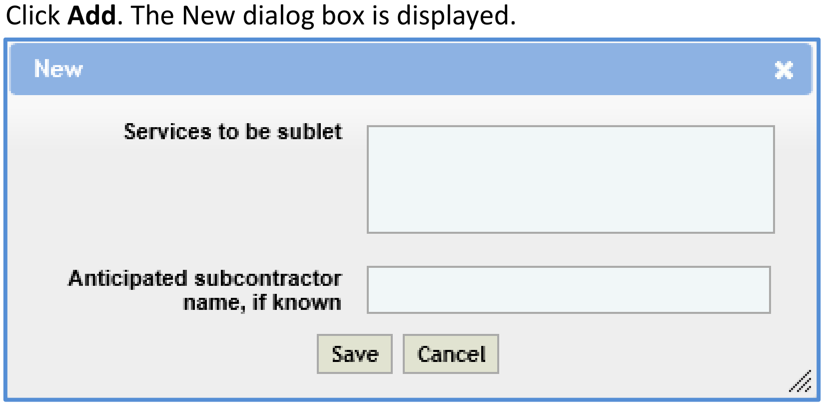
Field	Description
	
Survey ?	From the drop-down list, select **Yes** if all the equipment and personnel required for the survey of construction fair are available or select **No** if all the equipment and personnel required for the survey of construction fair are not available.
Construction Administration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

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

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



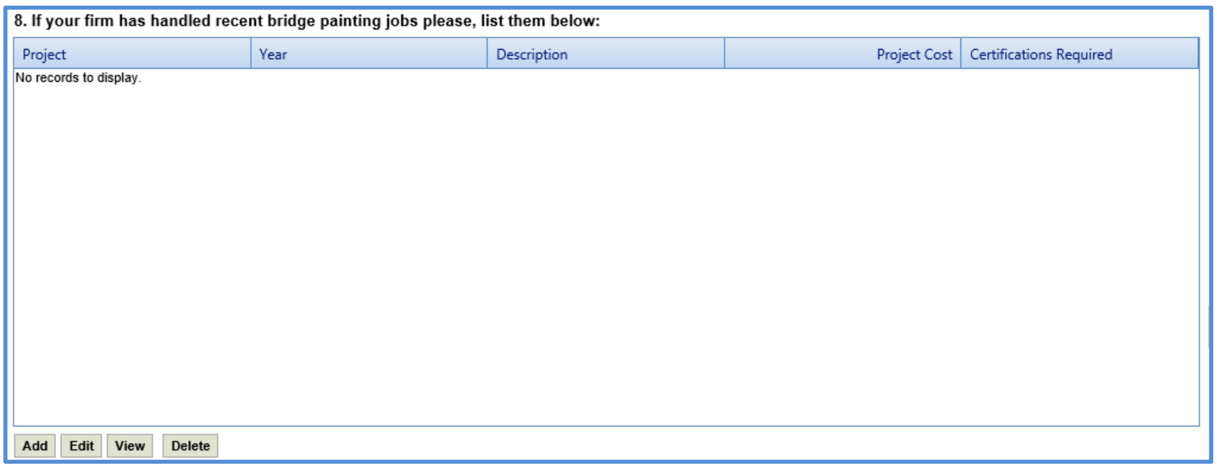
i. Click **Add**. The New dialog box is displayed.



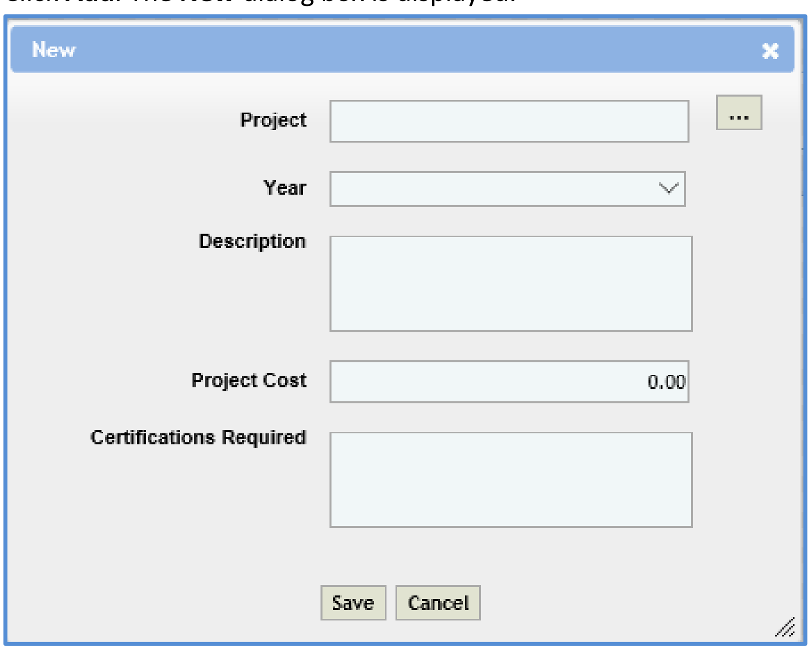
ii. Enter information in the required fields. The fields are described in the following table.
Note*: The fields described in the below table are non-mandatory fields.*

Field	Description
Services to be sublet	Enter details about the services that will be sublet for construction fair.
Construction Administration Systems ?	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.



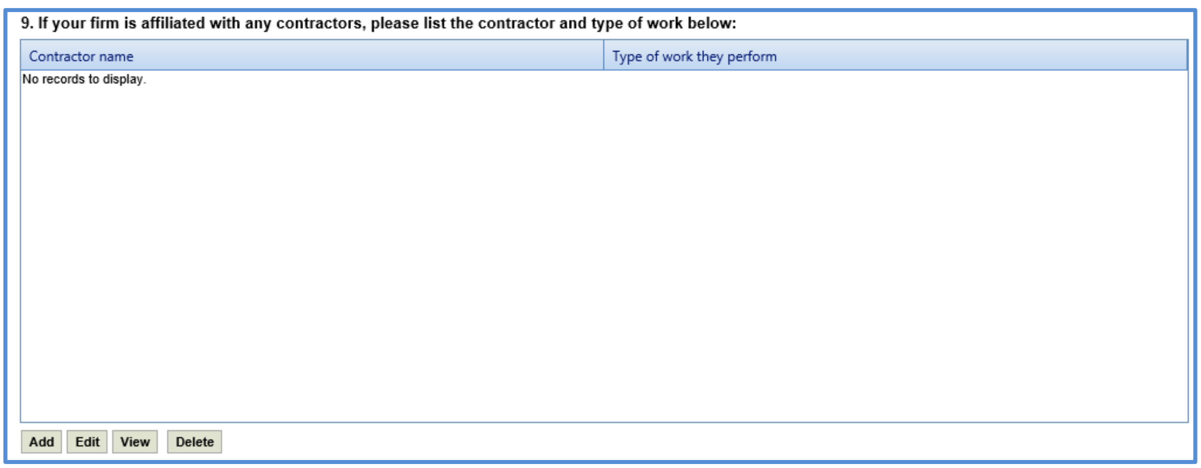
a. Click **Add**. The **New** dialog box is displayed.



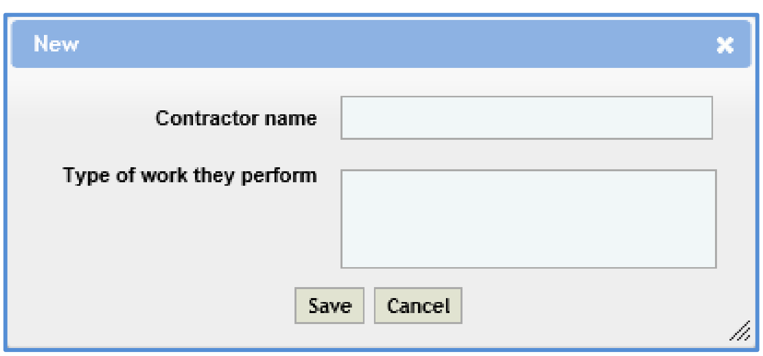
b. Enter information in the required fields. The fields are described in the following table.

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

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



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

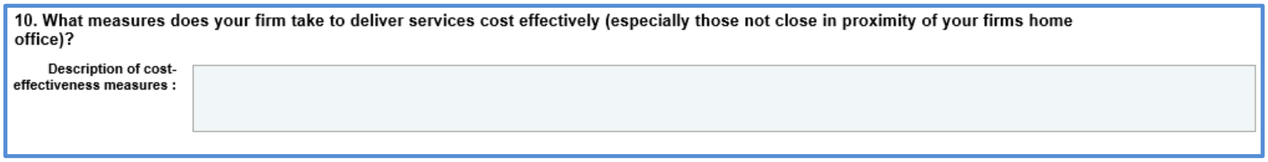


b. Enter information in the required fields. The fields are described in the following table.

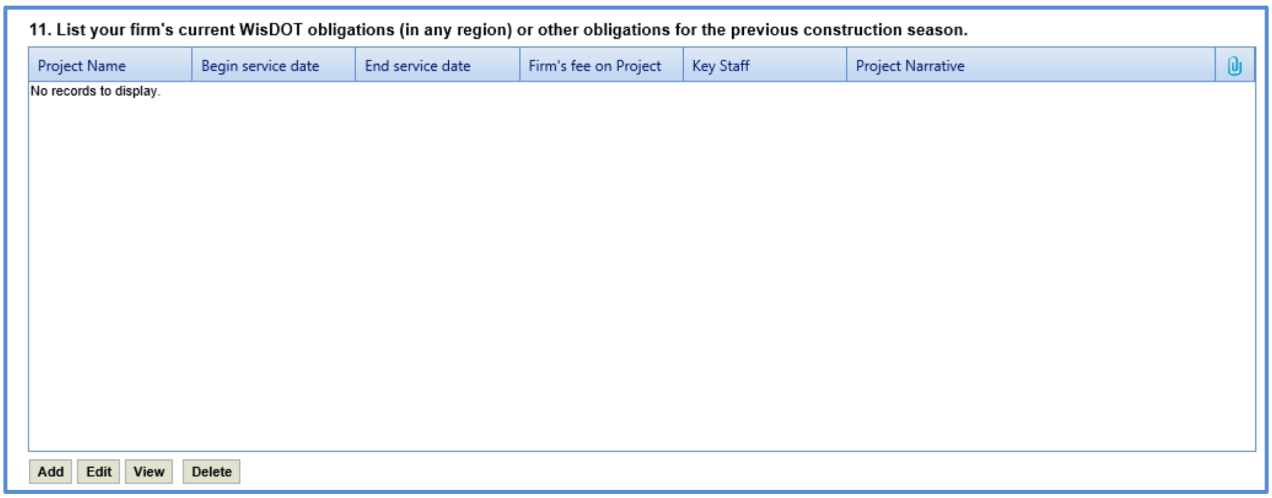
***Note**: The fields described in the below table are non-mandatory fields.*

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.

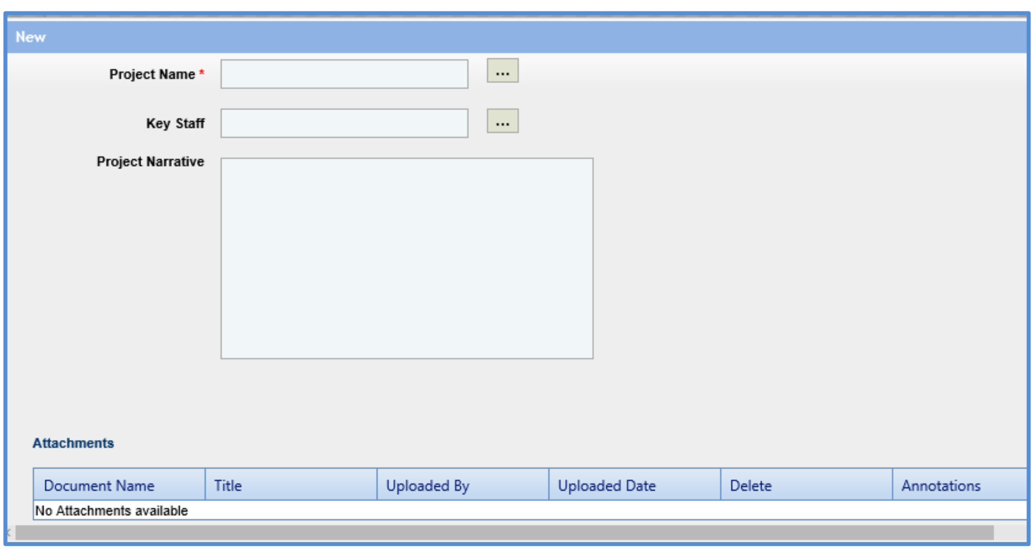
6. For factor 10, in the **Description of cost-effectiveness measures** field, enter details about the cost effective measures that will be executed by the firm for the construction fair.



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



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



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

Field	Mandatory / Non-mandatory	Description
Project Name	Mandatory	To select project: a. Click ···. The **Select Project** dialog box is displayed listing all the projects. b. Select the required project and then click **Select**.
Key Staff	Non-mandatory	To select key staff for the construction fair: a. Click ···. The **Select Key Staff** 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 **Select**.
Project Narrative	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.
    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 and click **Save**.
    d. In the **Workflow** group, click **Submit**.
       The **WisDOT Masterworks** dialog box is displayed.
    e. Enter the required information and then click **OK**.
       The construction fair NOI is resubmitted to WisDOT.

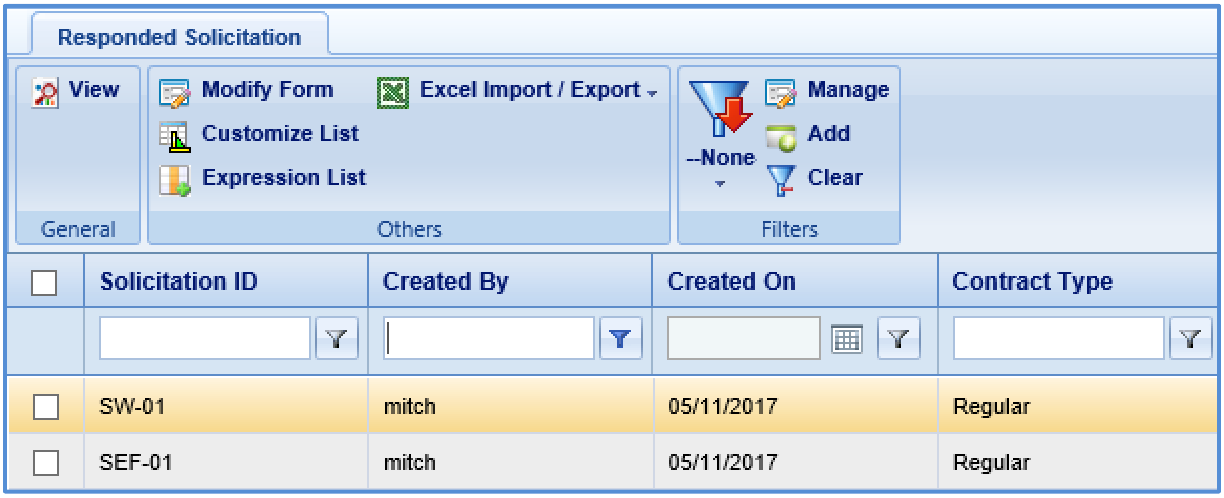
Note: *Once you click **ReDraft**, the submitted construction fair NOI record is deleted from the WisDOT records and the construction fair NOI has to be resubmitted to WisDOT.*

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.



   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

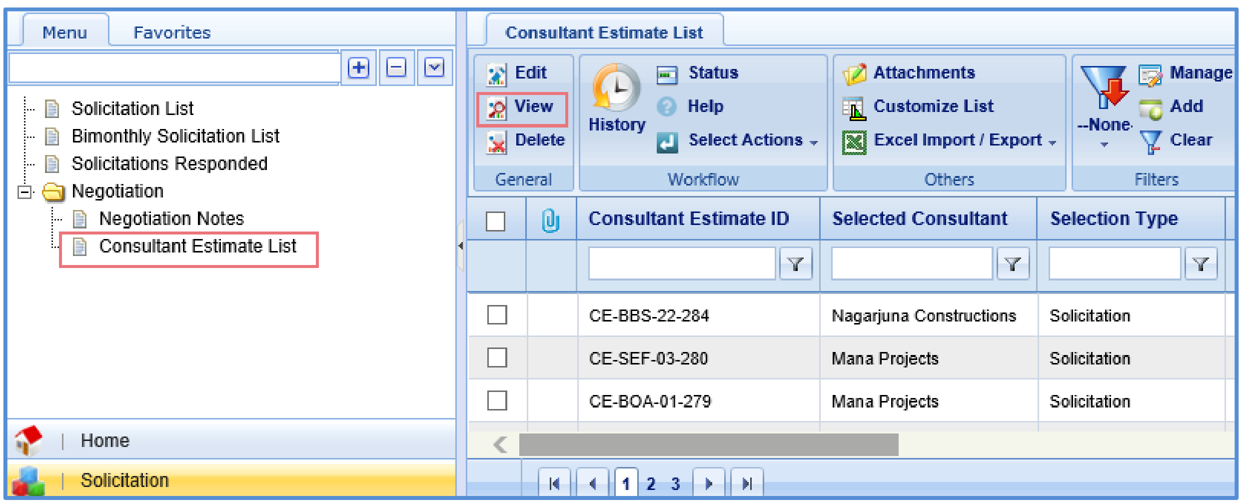
The system allows primary consultants to provide an estimate for the tasks assigned to them for negotiation purposes. If required, the primary consultants can sublet these tasks to other consultant firms and receive their estimation. Similarly, the sublet firms can further sublet the tasks to other consultant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



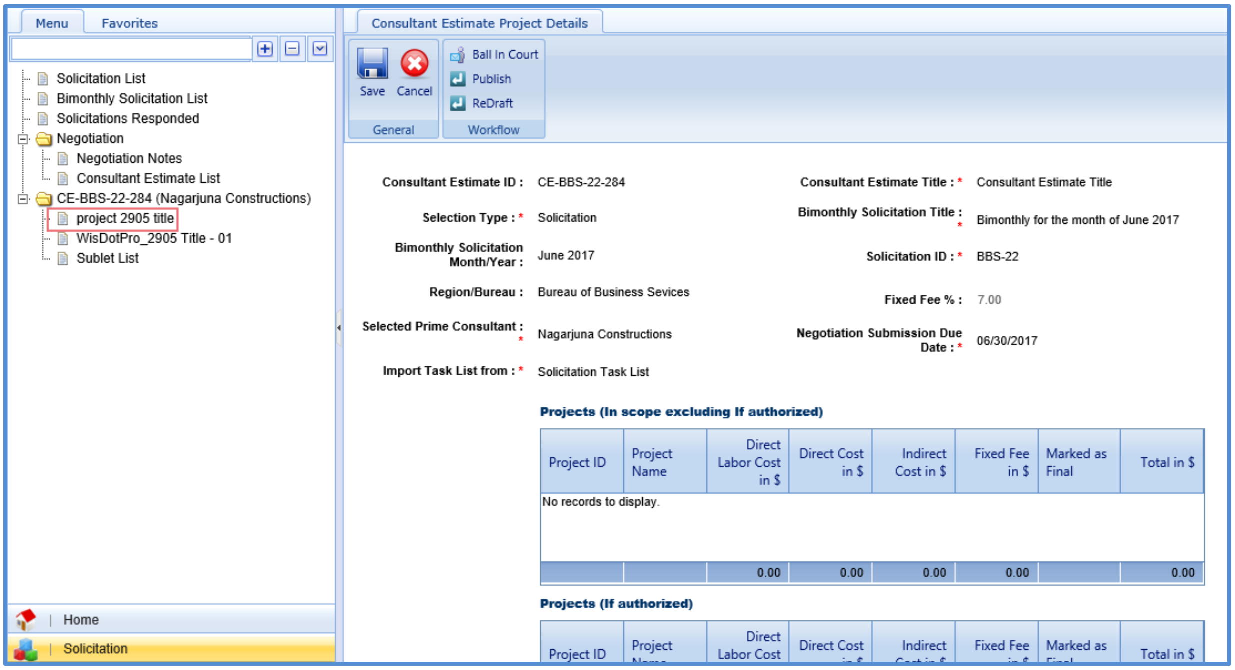
3. Select a consultant estimate record and click **View**. The **Consultant Estimate Project Details** page is displayed.

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

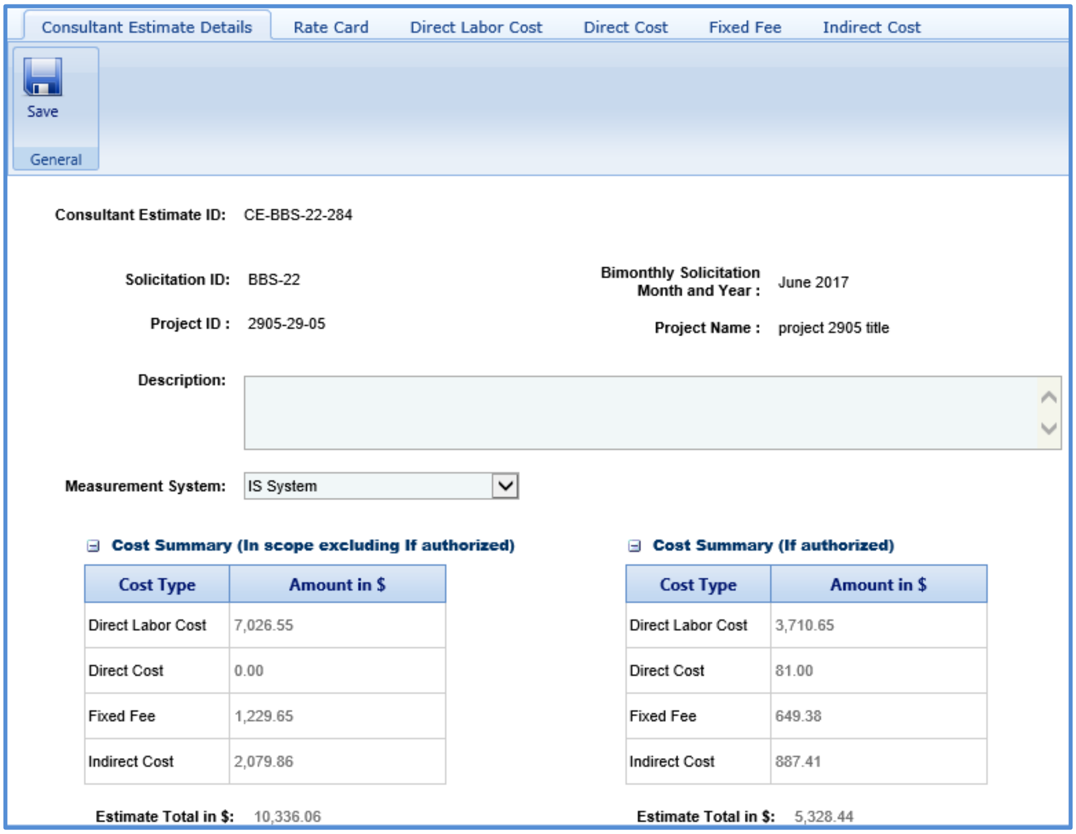
8.2 Adding Consultant Estimation

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.



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

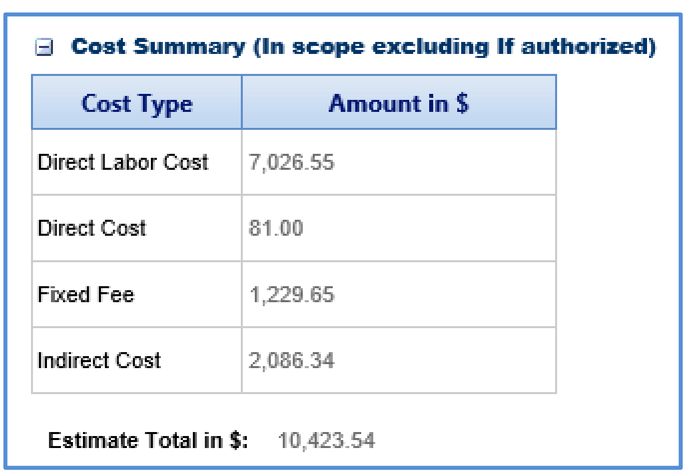


***Note**: The values in the **Consultant Estimate ID, Solicitation ID, Bimonthly Solicitation Month and Year, Project ID, Project Name,** and **Region/Bureau** fields are auto-populated.*

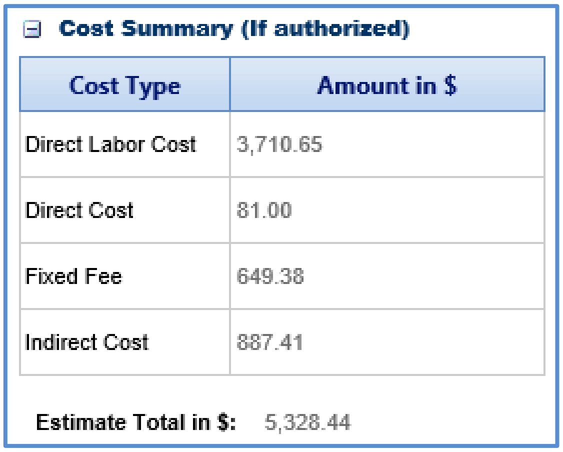
5. In the **Description** field, enter description about the consultant estimate for negotiation.

***Note**:*

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



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



Cost Summary (If authorized)

Cost Type	Amount in $
Direct Labor Cost	3,710.65
Direct Cost	81.00
Fixed Fee	649.38
Indirect Cost	887.41

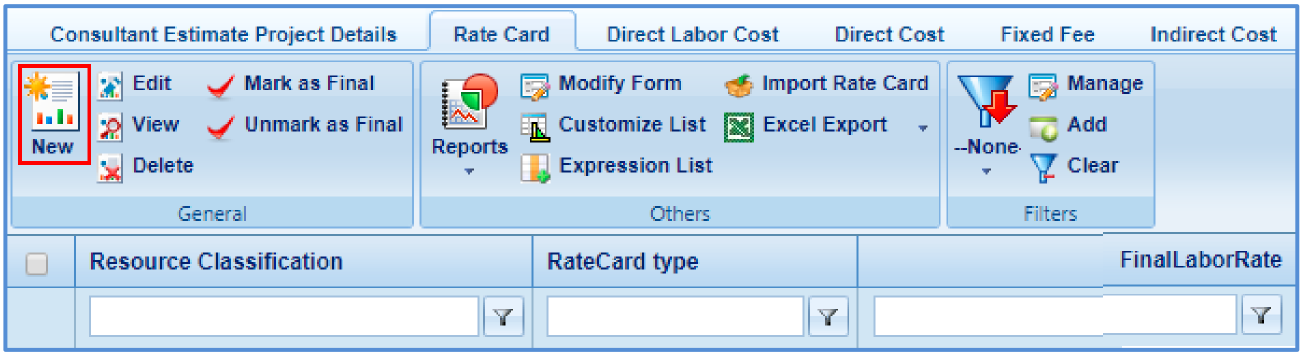
Estimate Total in $: 5,328.44

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

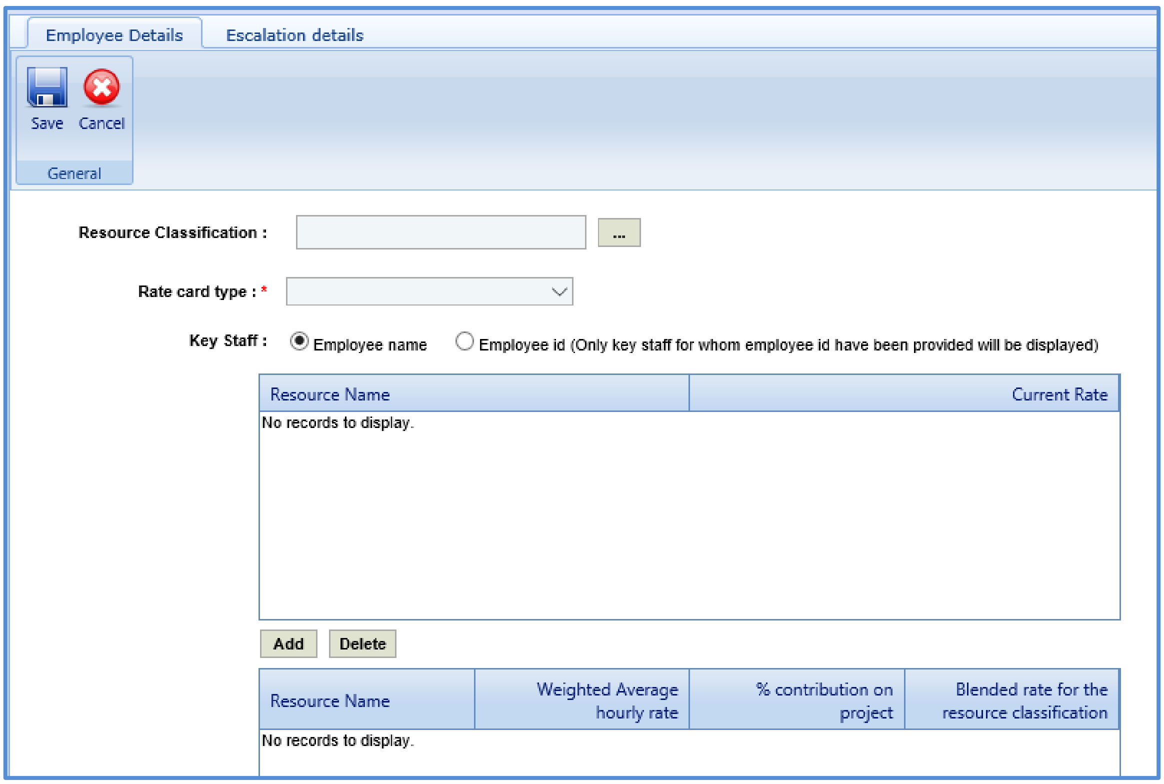
8.2.1 Creating Rate Card

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*.

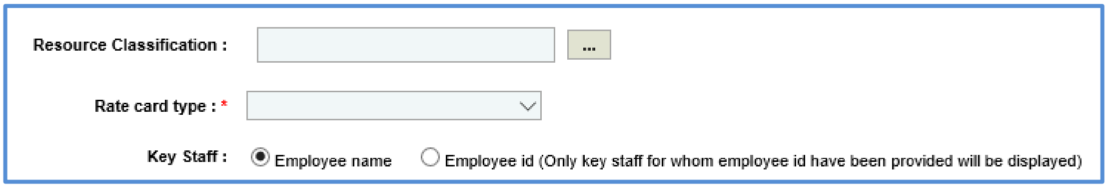
1. Click the **Rate Card** tab and perform the following steps to enter employee rate details and finalize the rate card for the estimate.



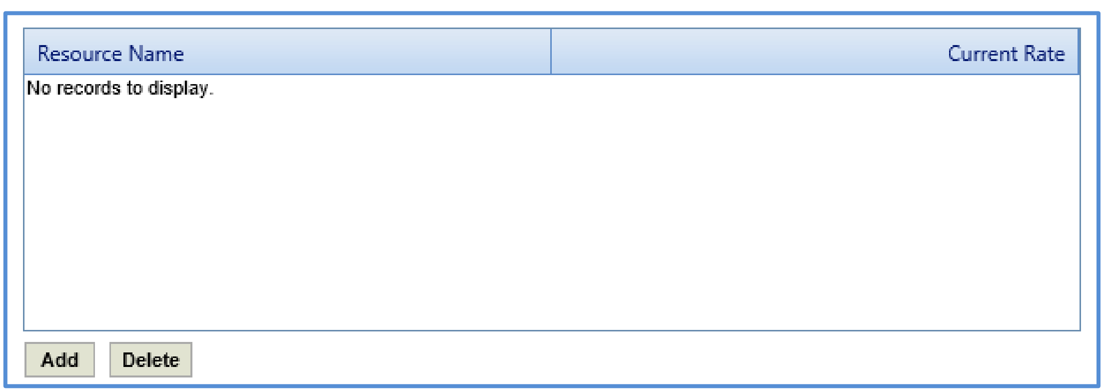
   a. Click **New**. The **Employee Details** page is displayed.



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

Field	Mandatory/ Non-mandatory	Description
		
Resource Classification	Mandatory	To select the classification of the resource: 1. Click ... . The **Resource Classification** dialog box is displayed. 2. Select the required resource classification and click **Save**.
Rate Card type	Mandatory	From the drop-down list, select one of the below options: • **Individual Wage**: Select this option for actual cost and lump sum basis of payments. • **NA**: Select the option for cost per unit basis of payment. • **Specific Rate**: Select this option for specific rate basis of payment.
Key Staff	Non-mandatory	• **Employee name:** Click this option to select key staff based on employee name. • **Employee id (Only key staff for whom employee id have been provided will be displayed):** Click this option to select key staff based on the employee ID.

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



i. Click **Add**. The **Key Staff** dialog box is displayed. The dialog box lists the names or employee IDs of the key staff based on the option selected in the **Key Staff** field.

ii. Select the required key staff record and click **Select**. The record is displayed in the table.

iii. Corresponding to a key staff record, click in the **Current Rate** column and enter the current rate of the resource.

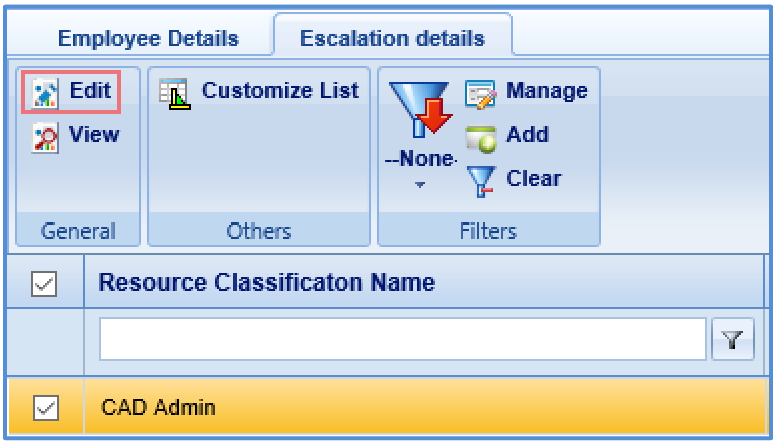
8.2.1.1 Adding Escalation Details

You can add escalation details for a key staff record.

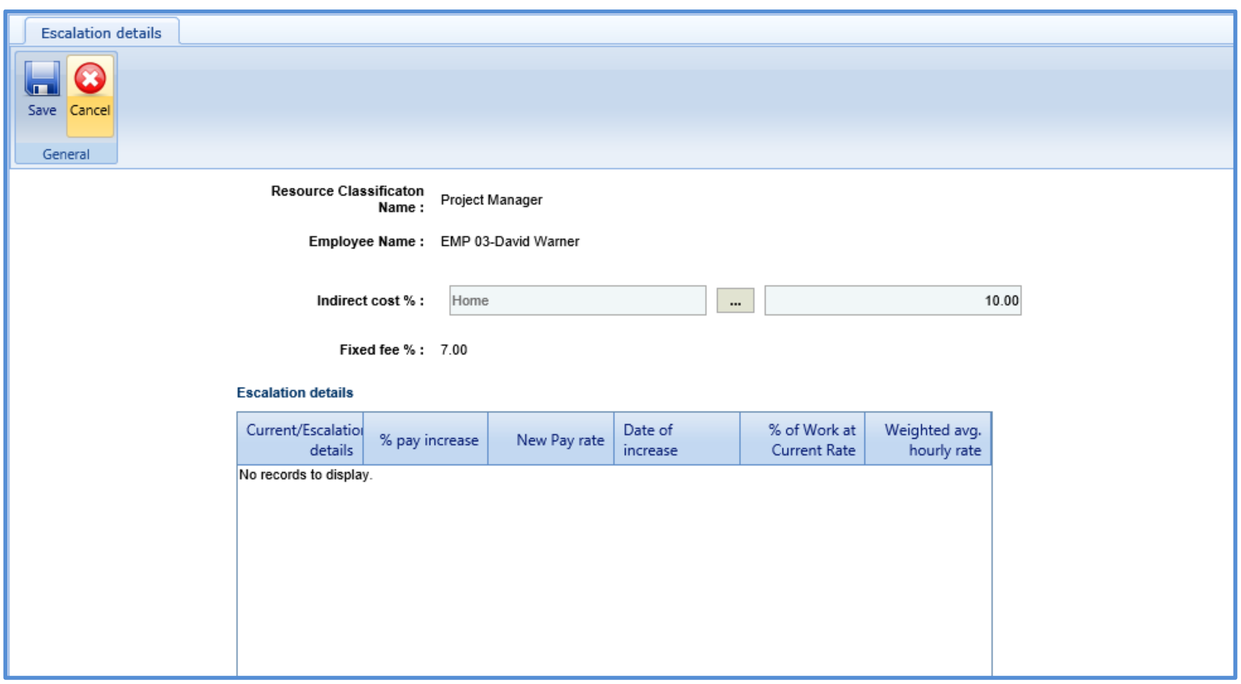
Pre-requisite: The key staff records are added in the **Employee Details** tab of the rate card in the consultant estimate**.**

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.

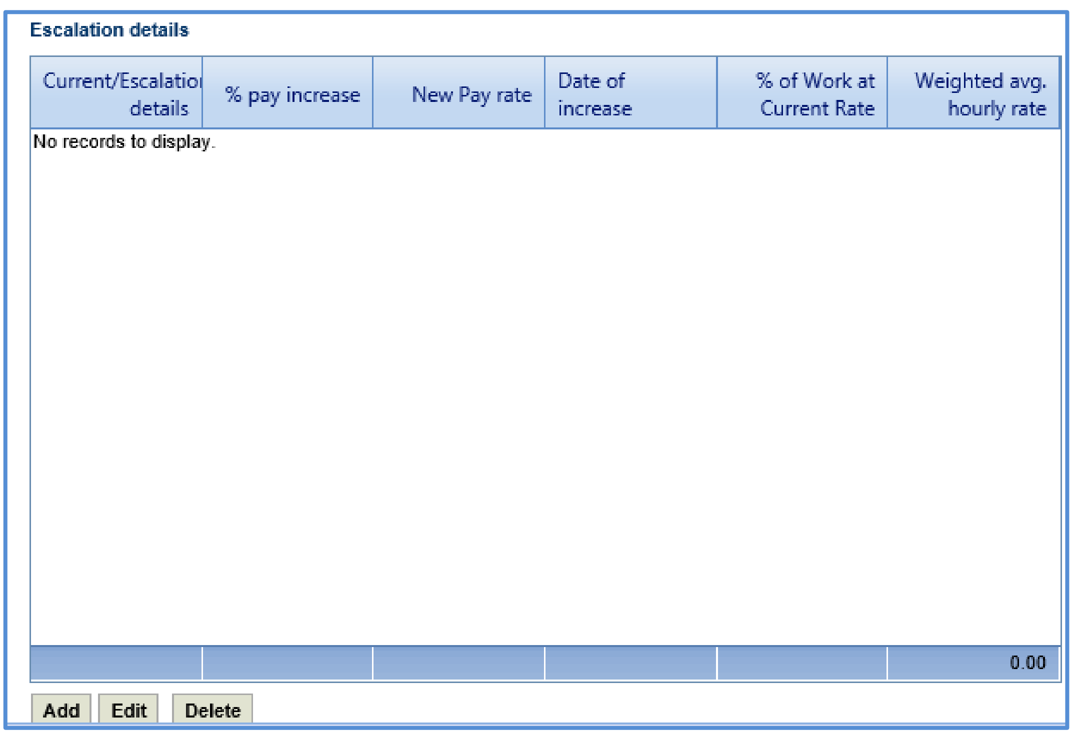


3. Enter information in the required fields. The fields are described in the following table.

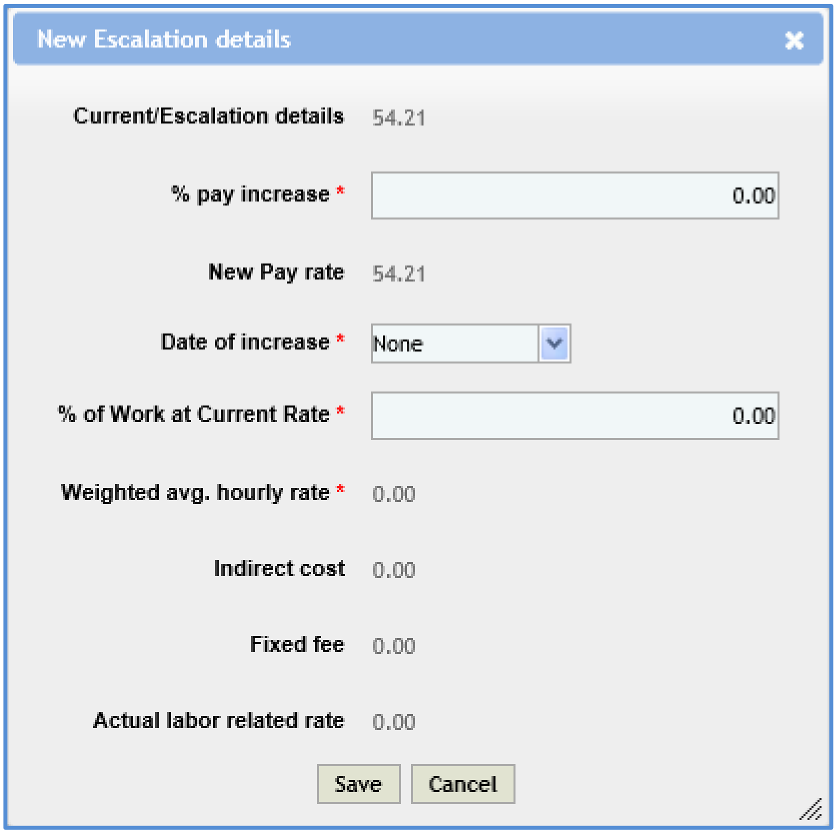
   ***Note**: All the fields described in the below table are non-mandatory fields.*

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

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



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



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

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

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

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

__Note__: Ensure that the sum of the __% of work at current rate__ field for all the records together must be equal to 100%.

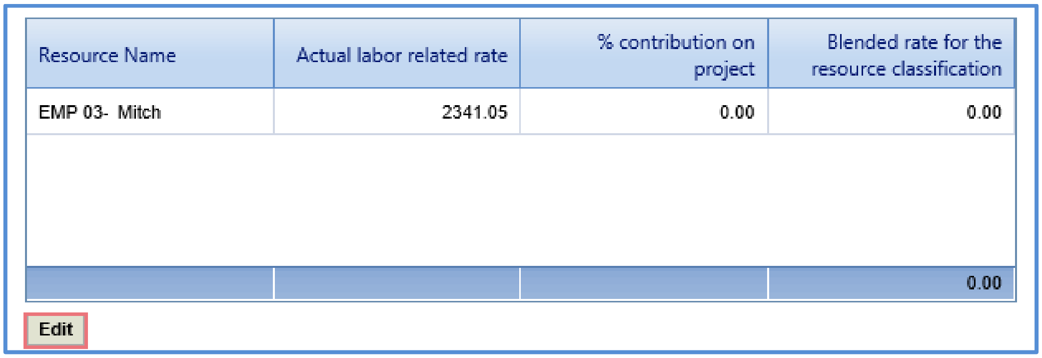
5. On the **Escalation Details** page, click **Save.** The defined escalation details are displayed on the **Employee Details** tab.
6. Click the **Employee Details** tab, in the second table, the key staff record with the actual labor related rate is displayed.

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:

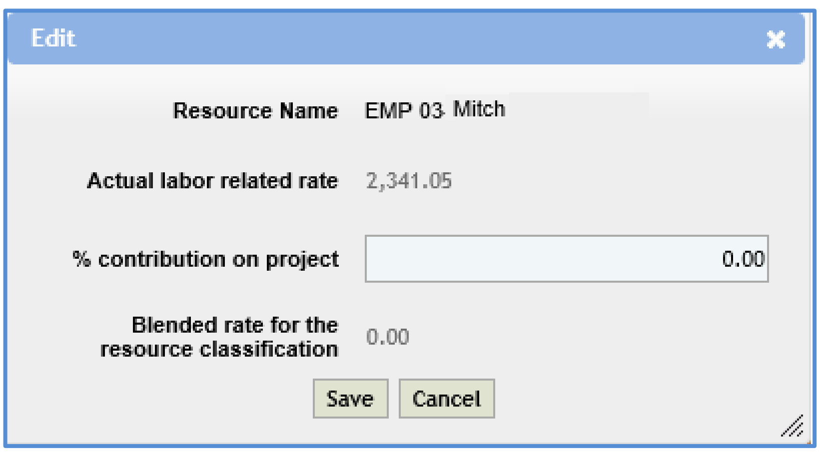
   a. Select the record for which you want to add the percentage contribution and blended rate for the resource classification.



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

d. Click **Save**.

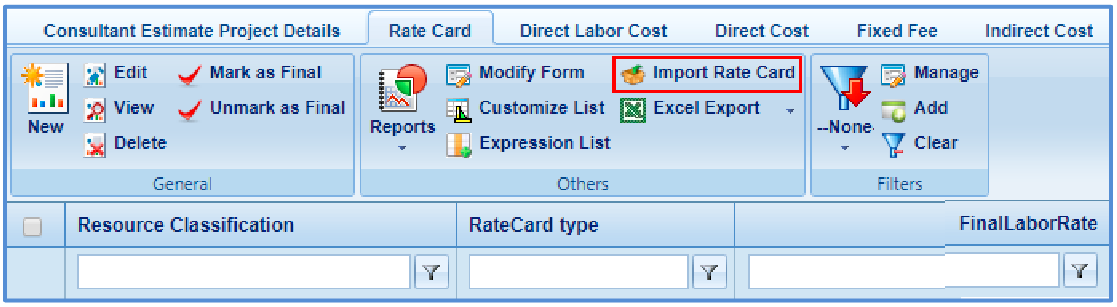
***Note**: Ensure that the sum of the **% contribution on project** field for all the records together must be equal to 100%.*

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

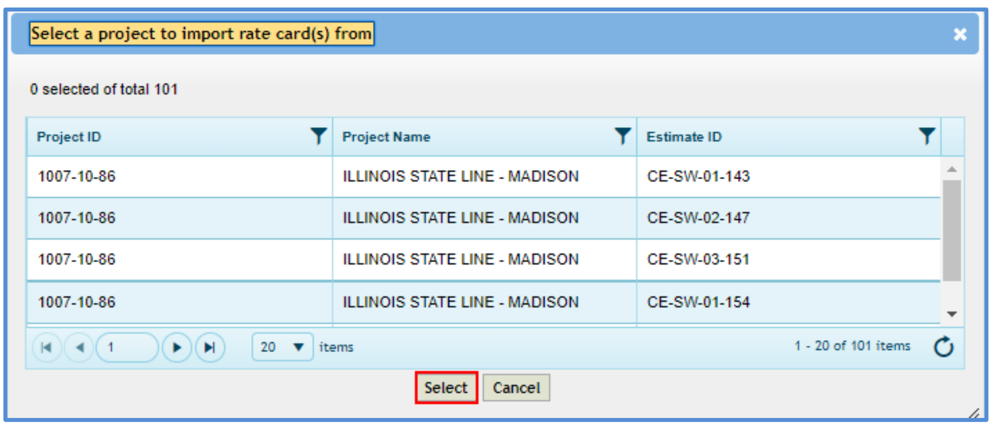
8.2.1.2 Importing Rate Card

Steps:

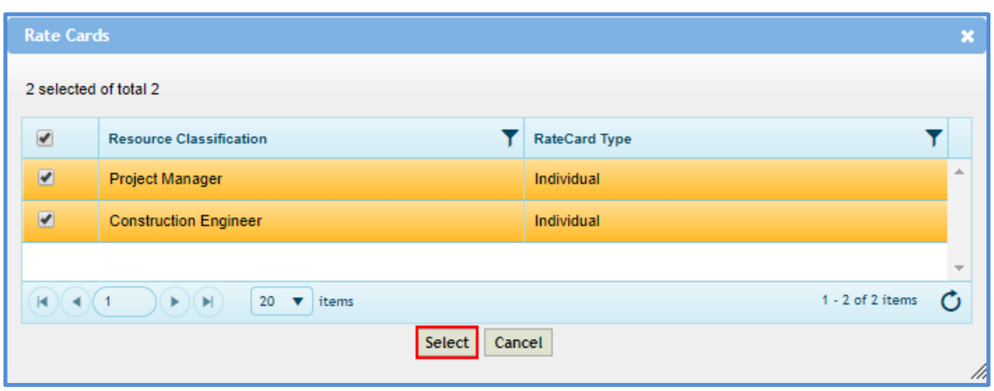
1. On the **Rate Card** page, in the **Others** group, click **Import Rate Card**.



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

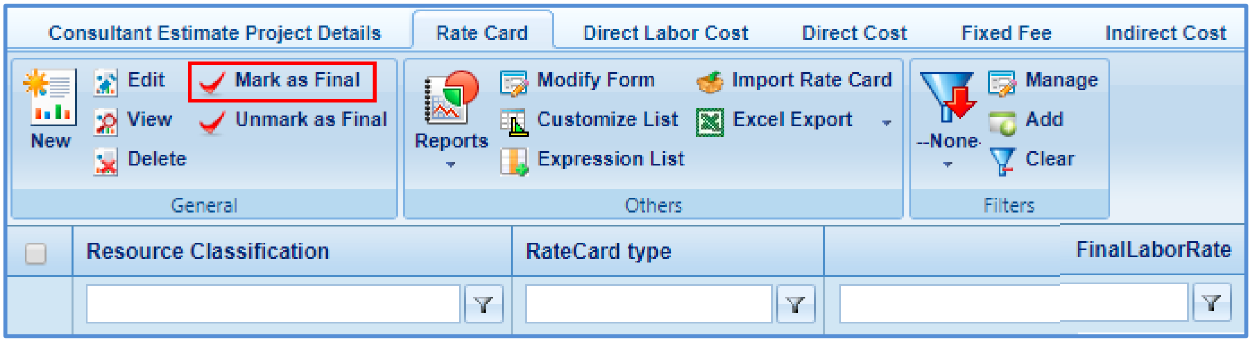


3. Select the rate card and click **Select**. The rate card details are added in Rate Card list page.



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:

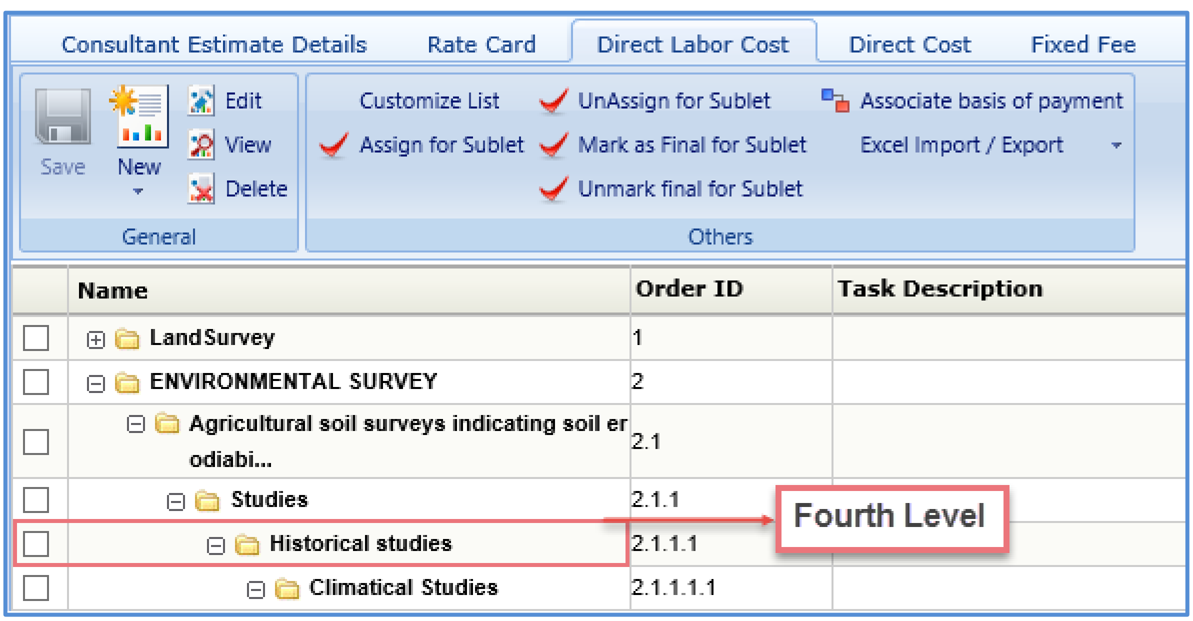
   - *Multiple rate card records can be marked as final.*
   - *To unmark a marked final record, click the rate card record marked as final.*

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:

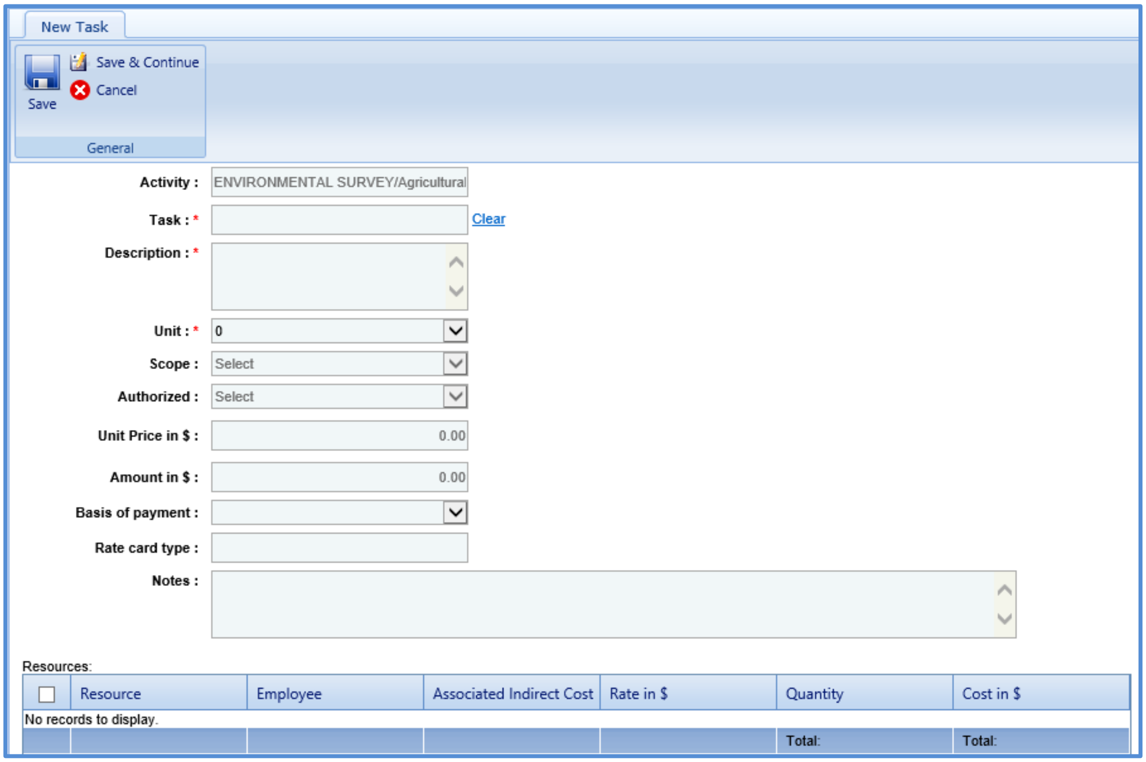
   - Define basis of payment, rate card type, and add resources for the existing tasks that are displayed. For more information to define the basis of payment, rate card type, and add resources for existing tasks.
   - If required, additional direct labor cost tasks and additional activity folders can be 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.

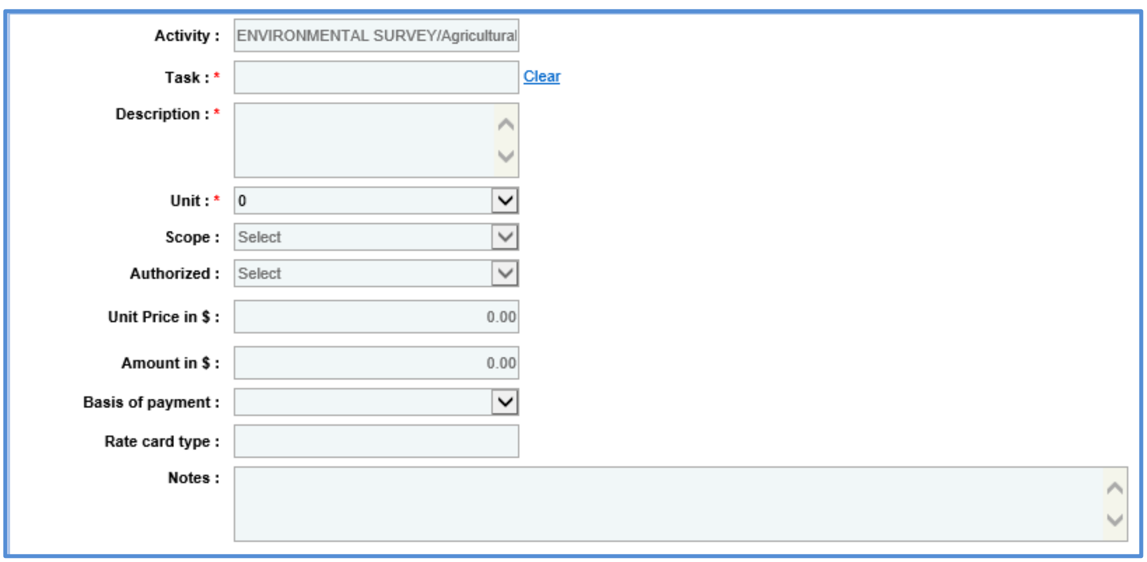


2. To add a direct labor cost task, perform the following steps:

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



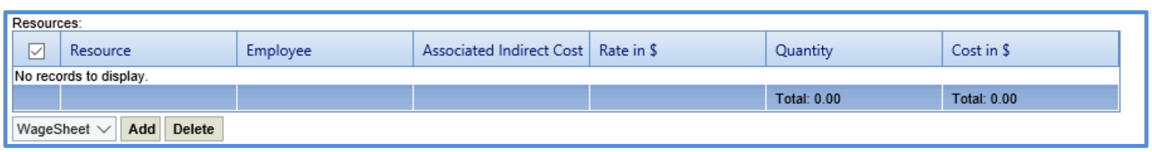
   b. Provide information in the required fields. The fields in the section are described in the following table:

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

Field	Mandatory / Non-mandatory	Description
Task	Mandatory	Enter a name for the task.
Description	Mandatory	Enter description about the task.
Unit	Mandatory	From the drop-down list, select the unit of measurement for the task.
Scope	-	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.
Unit Price in $	-	The value in this field is auto-calculated and displayed from the **Resources** section.
Amount in $	-	The value in this field is auto-calculated and displayed from the **Resources** section.
Basis of Payment	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.
Rate Card Type	-	The rate card type is auto-populated based on the selected basis of payment.
Notes	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.



i. Click **Add**. The **Resource** dialog box is displayed. The dialog box displays only those resource classifications that are associated with the rate card.

ii. Select the required resources and then click **Select**. The selected resources are displayed in the **Resources** section.

iii. Click in the **Associated Indirect Cost** column and from the drop-down list, select required type of indirect cost to associate with the resource**.**

iv. Click in the **Rate in $** column to enter or edit the rate. The value in this column is auto-populated based on the selected **Resource**.

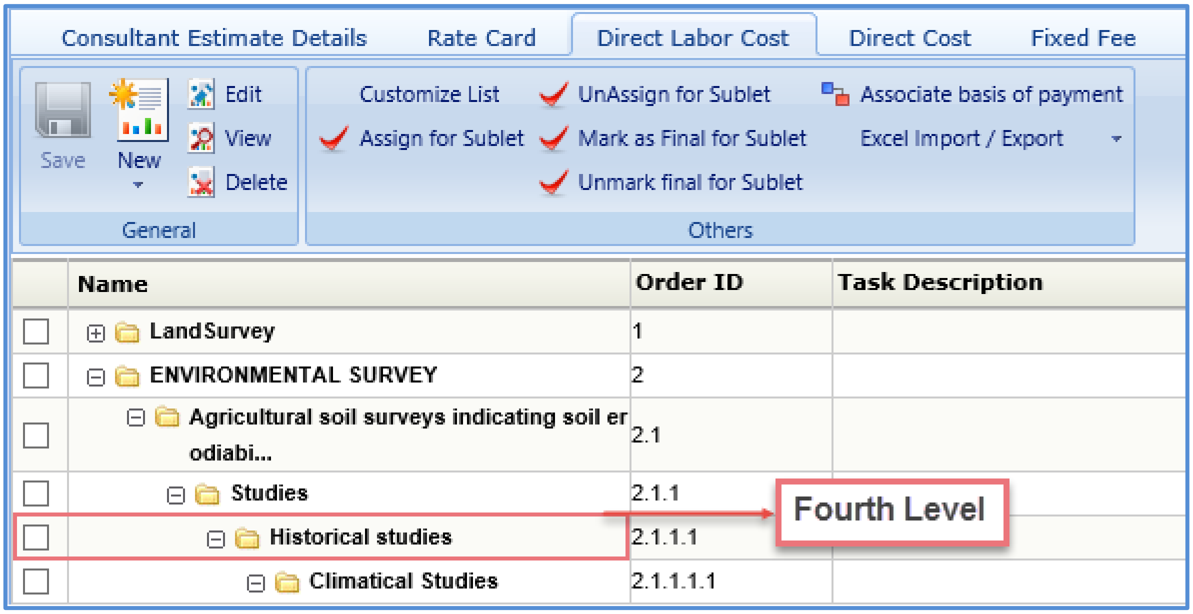
v. Click in the **Quantity** column to enter the number of hours required by the resource to complete the task. The total quantity of all the resources is auto-calculated and displayed in the column. ***Note:*** *The* ***Cost in $*** *for each resource is auto-calculated and displayed in the* ***Cost in $*** *column based on the* ***Rate in $*** *and* ***Quantity*** *values. The sum of cost in $ is also auto-calculated and displayed in the column.*

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

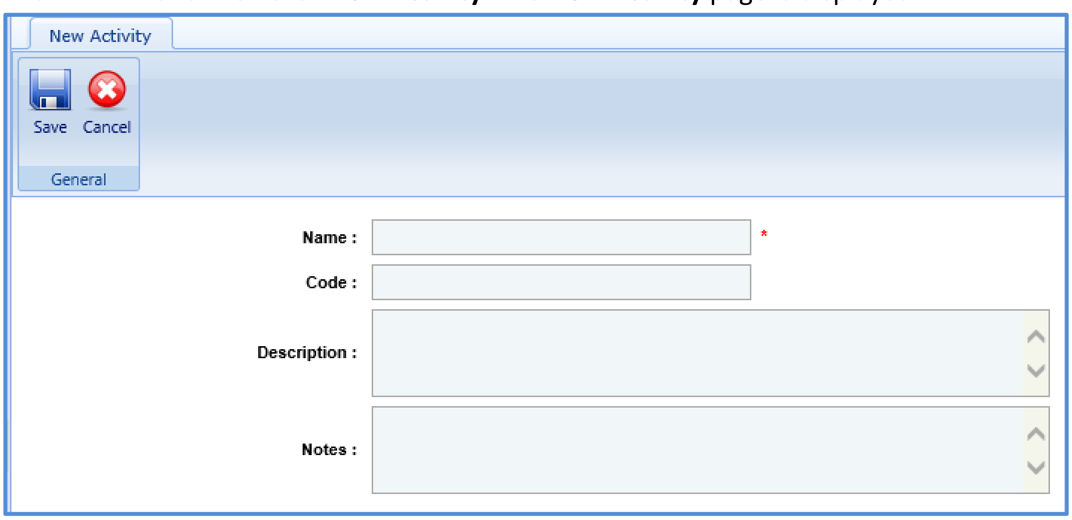
e. Click **Save**.

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.



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



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

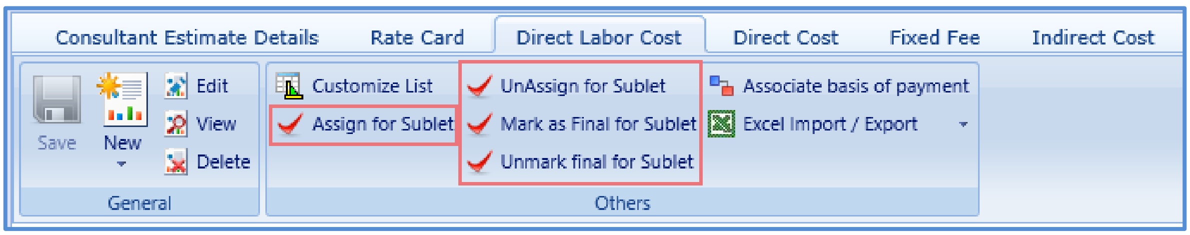
Field	Mandatory / Non-mandatory	Description
Name	Mandatory	Enter a name for the activity.
Code	Non-mandatory	Enter the activity code.
Description	Non-mandatory	Enter description about the activity.
Notes	Non-mandatory	Enter notes about the activity.

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

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**.

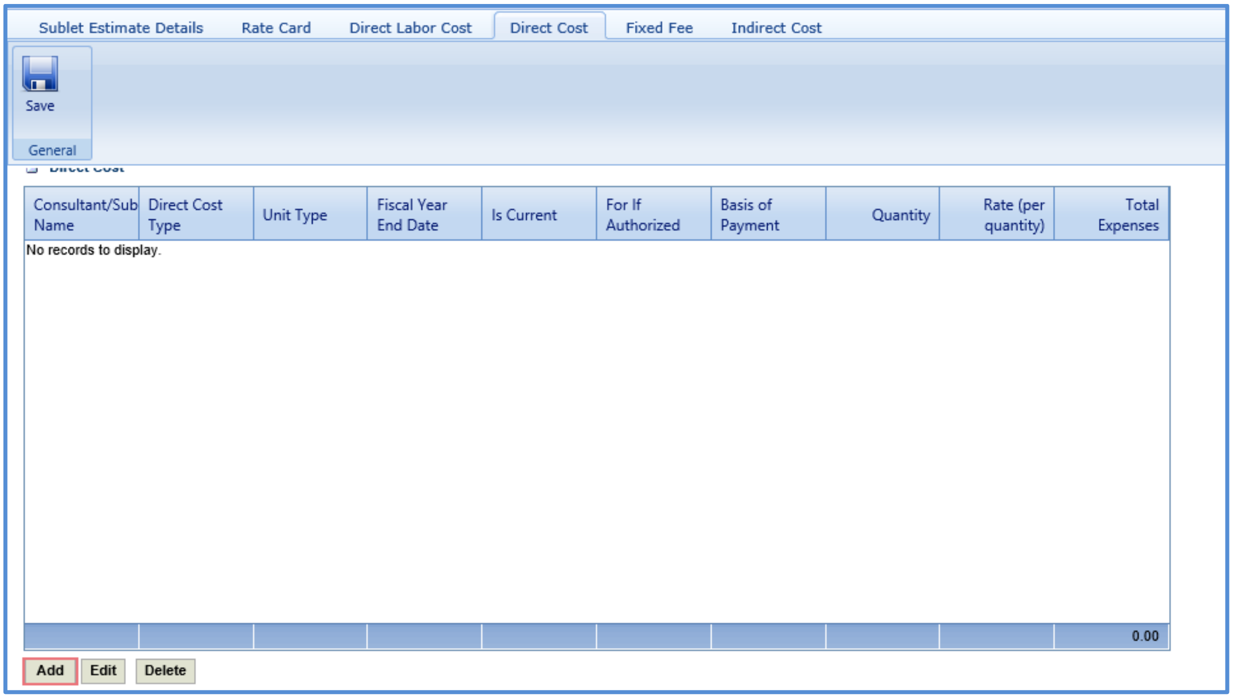
***Note**: You can unmark a task that is assigned for subletting. Select a record marked as Assign for Sublet and click **UnAssign for Sublet**.*

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

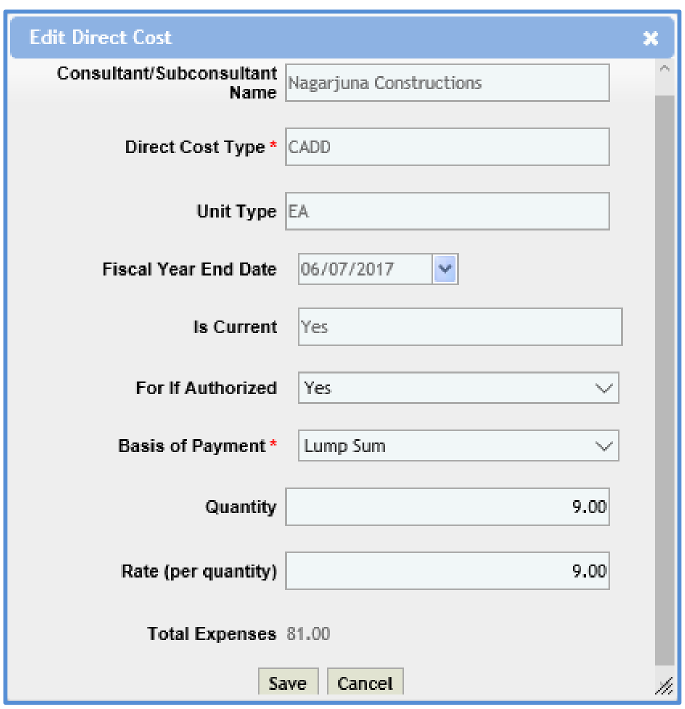
1. Click the **Direct Cost** tab to add direct costs and perform the following steps:



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

b. Select the required direct costs and click **Select**. The selected direct costs are listed in the **Direct Cost** table.

c. Select the direct cost for which you want to add/edit details, and then click **Edit**. The **Edit Direct Cost** dialog box is displayed.



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

Field	Mandatory / Non-Mandatory	Description
Consultant/Subconsultant Name	-	The name of the consultant or sub-consultant firm is auto-populated.
Direct Cost Type	-	The name of the selected direct cost type is auto-populated.
Unit Type	-	The unit type of the selected direct cost is auto-populated.
Fiscal Year End Date	-	The fiscal year end date of the direct cost is auto-populated.
Is Current	-	Indicates whether the selected direct cost is current or not.
For If Authorized	**Non-mandatory**	From the drop-down list, select **Yes** or **No** to indicate if the direct cost is authorized or not. If the selected option is **Yes**, then the cost details are available for future implementation.
Basis of Payment	**Mandatory**	From the drop-down list, select the required type of basis of payment. The drop-down list lists the basis of payment types that are associated with the solicitation.
Quantity	**Non-mandatory**	Enter quantity for the direct cost.
Rate (per quantity)	**Non-mandatory**	Enter the rate for one quantity of the direct cost.
Total Expenses	-	The total direct cost expenses based on the entered quantity and rate is auto-calculated and displayed.

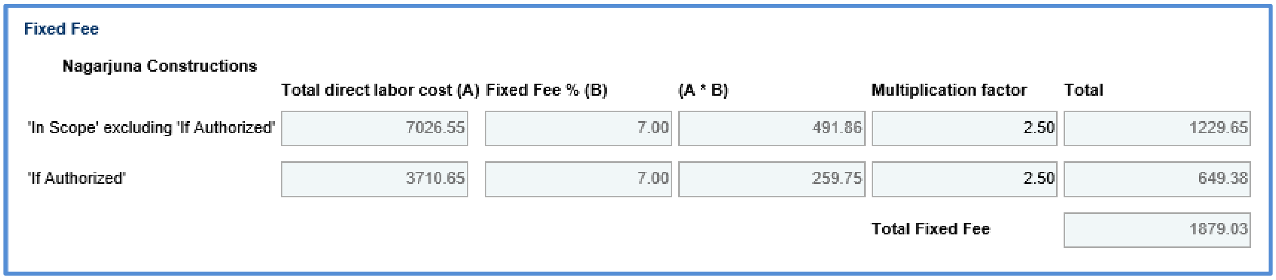
e. Click **Save**.

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.

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.



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

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

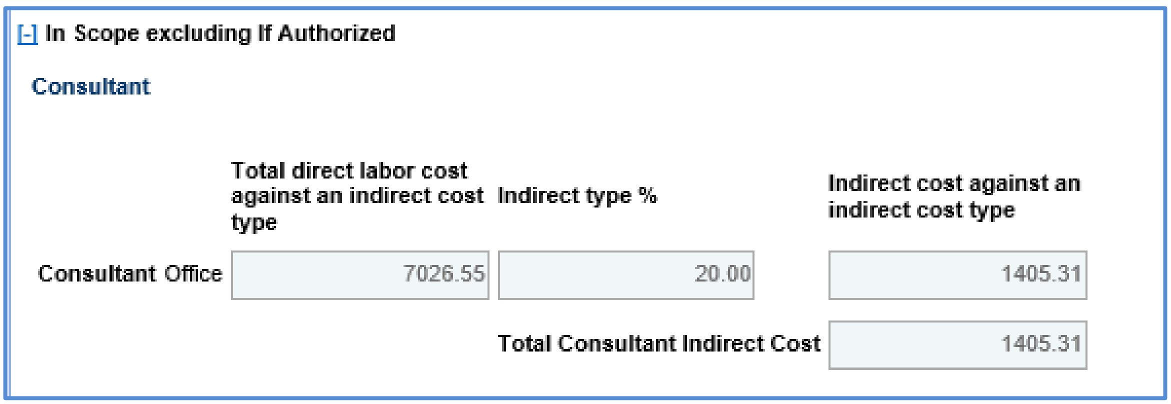
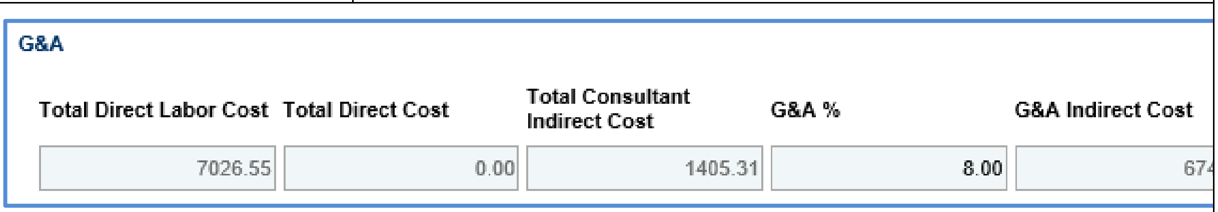
The total fixed fees is displayed in the **Cost Summary** section of the **Consultant Estimate Details** tab.

8.2.5 Viewing Indirect Cost

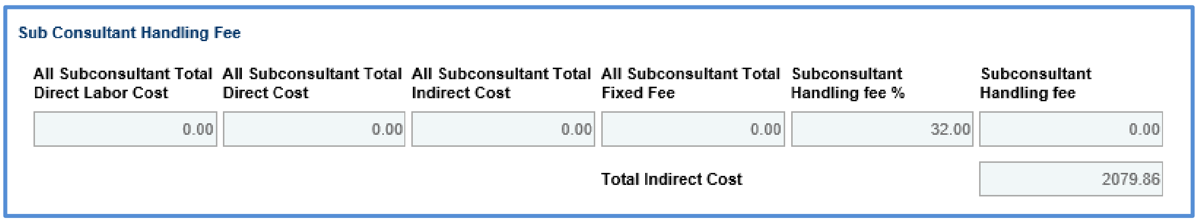
1. Click the **Indirect Cost** tab. The indirect cost details are displayed. The details that are displayed are described in the following table.

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

Field	Description
Total Direct Cost	The total direct cost for G&A is auto-populated.
Total Consultant Indirect Cost	The total consultant indirect cost for G&A is auto-populated.
G&A %	In the **In Scope excluding If Authorized** section, enter the percentage for G&A. The same percentage is auto-populated in the **G&A %** column in the **If Authorized** section.
G&A Indirect Cost	The total of the G&A indirect cost is auto-calculated and displayed.



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

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

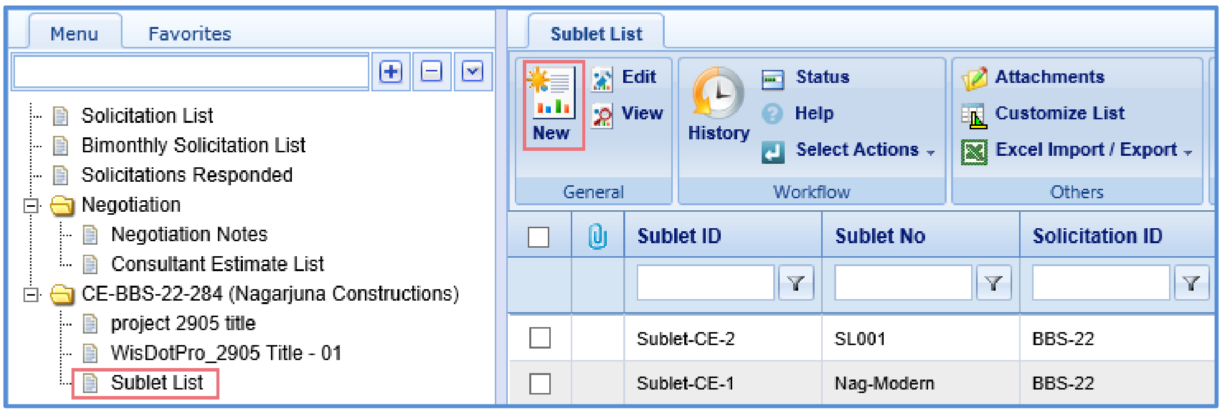
2. Click **Save**.

8.3 Finalizing Scope for Subletting

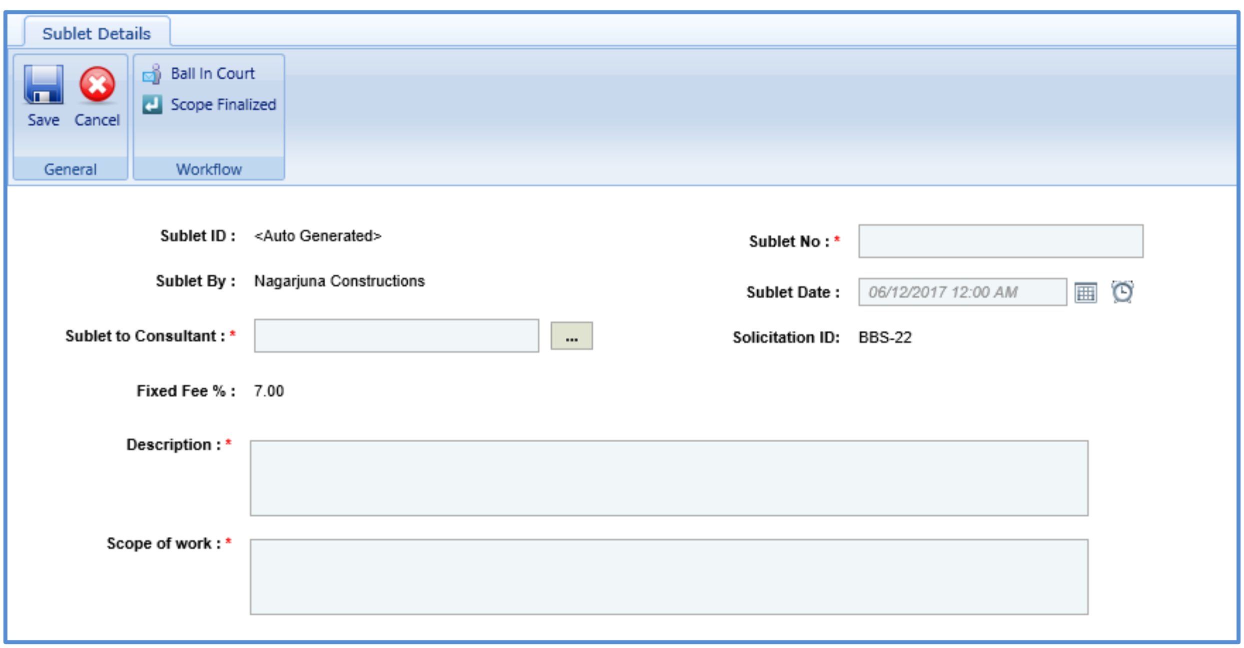
A prime consultant can sublet tasks to other consultant firms. The subconsultant can add their estimate details and publish to the prime consultant for negotiation purposes. The subconsultant can further sublet the tasks to other consultant firms.

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.



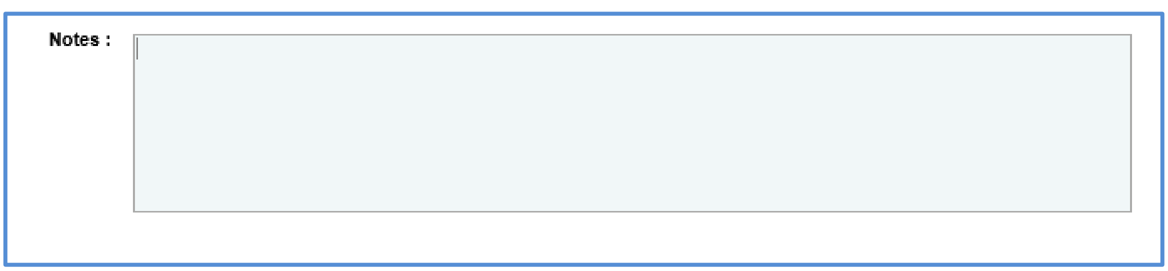
5. Click **New**. The **Sublet Details** page is displayed.



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

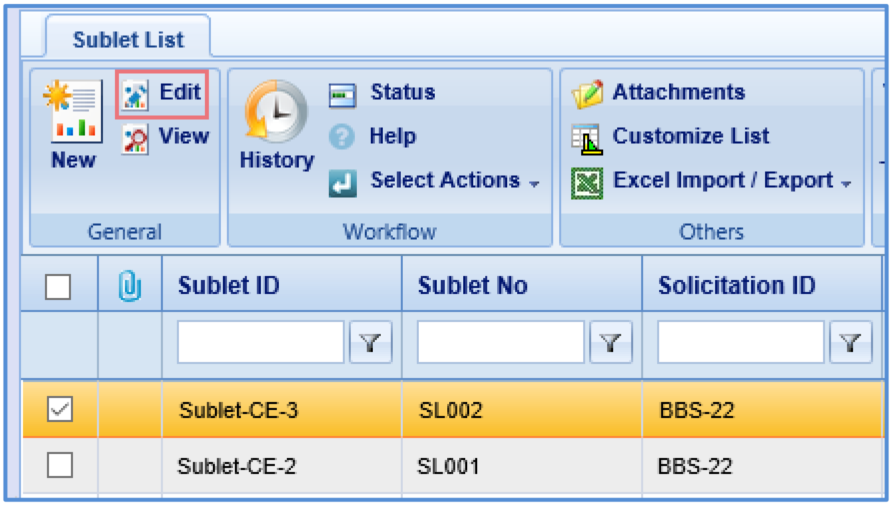
Field	Mandatory/Non-mandatory	Description
Sublet ID	-	The Sublet ID is auto-generated.
Sublet No	Mandatory	Enter a unique number for the sublet.
Sublet By	-	The name of the consultant firm who is subletting is auto-populated.
Sublet Date	Non-mandatory	Click the Calendar icon to select the date of sublet and click the Time Picker icon to select the time of sublet.
Sublet to Consultant	Mandatory	To select subconsultant for whom the task has to be sublet: 1. Click . The **Consultant Name** dialog box is displayed listing names of the consultant firms. 2. Select the required consultant firm name and click **Select.**
Solicitation ID	-	The solicitation ID is auto-populated.
Fixed Fee %	-	The fixed fee percentage of the consultant is auto-populated.
Description	Mandatory	Enter description about subletting.
Scope of Work	Mandatory	Enter scope of work details for subletting.

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



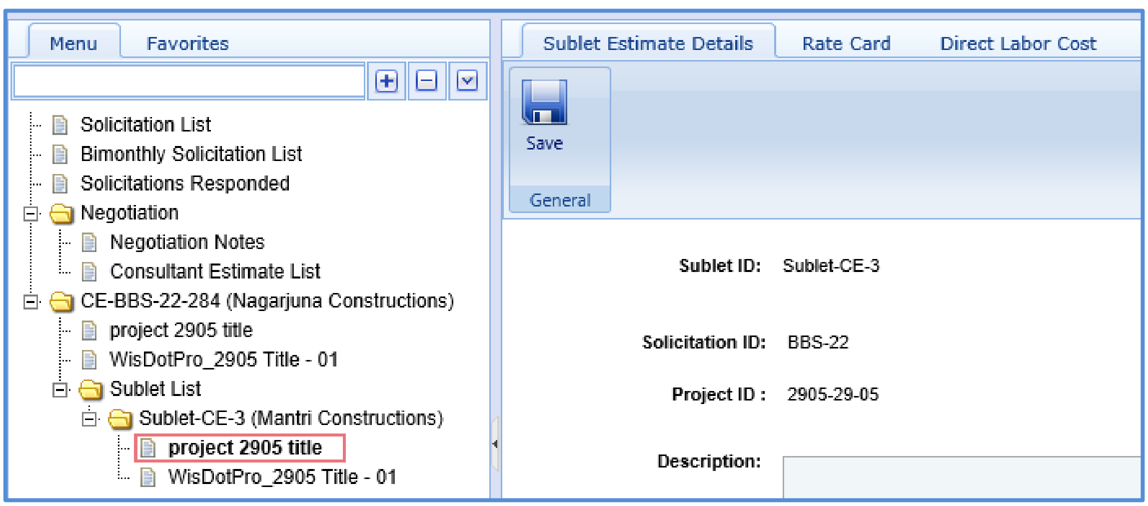
8. In the **Attachments** section, upload images and files relevant to subletting. For information on form attachments, refer *Attachments*.

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



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

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



12. Click the **Direct Labor cost** tab and then click **Add Task**. The **Select Task** dialog box is displayed. The dialog box displays all the tasks of the selected project that are marked as final for sublet.

13. Select the required tasks that are to be sublet and then click **Select**.

14. In the navigation pane, click **Sublet List.** The **Sublet List** page is displayed.

15. Select the record, in the **Workflow** group, click **Select Actions,** and then click **Scope Finalized**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The scope of work is published to subconsultants.

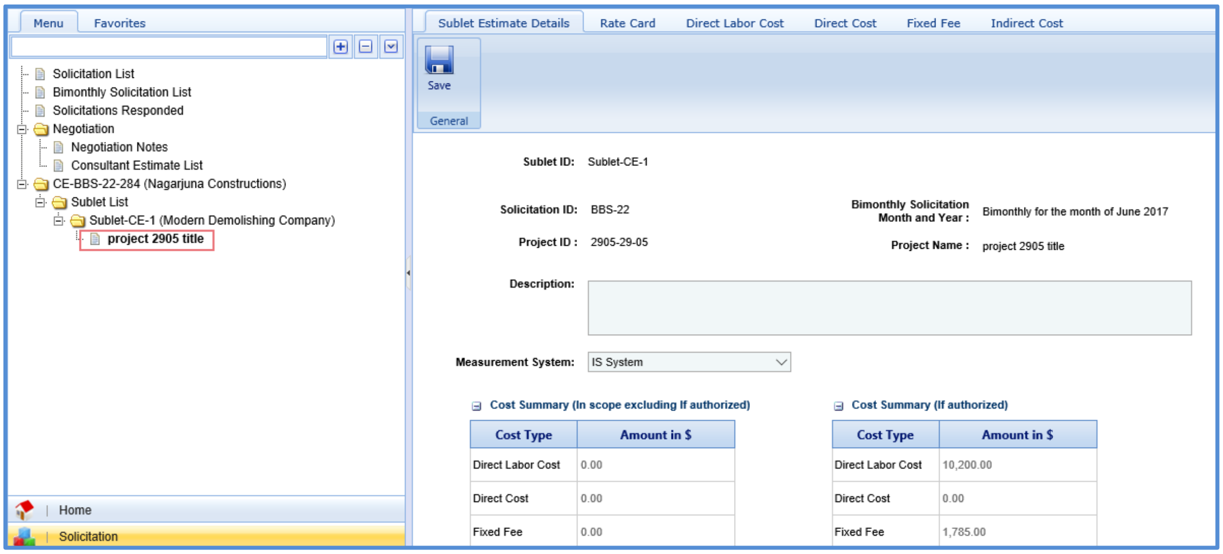
16. Optionally, in the **Workflow** group, in **Select Actions**, you can click **Close** or **ReDraft**, enter required information in the dialog box that is displayed, and then click **OK** to close or redraft the record.

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.



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

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

   Note:

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

Cost Summary (In scope excluding If authorized)

Cost Type	Amount in $
Direct Labor Cost	7,026.55
Direct Cost	81.00
Fixed Fee	1,229.65
Indirect Cost	2,086.34

Estimate Total in $: 10,423.54

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

Cost Summary (If authorized)

Cost Type	Amount in $
Direct Labor Cost	3,710.65
Direct Cost	81.00
Fixed Fee	649.38
Indirect Cost	887.41

Estimate Total in $: 5,328.44

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

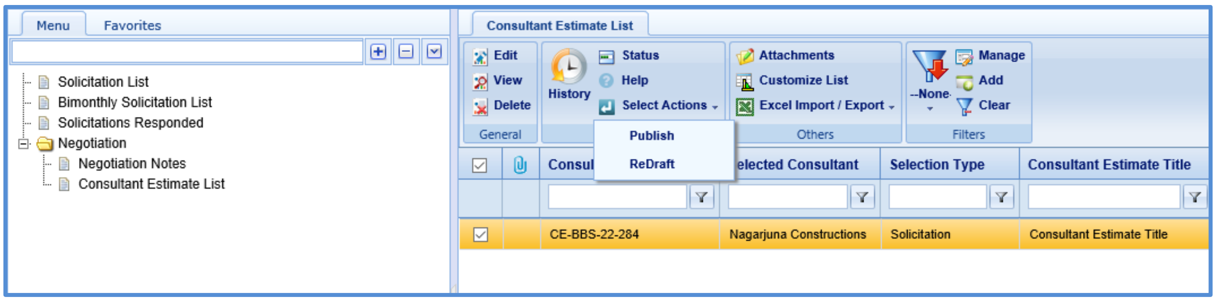
11. Click **Direct Labor Cost tab.** The tasks that are assigned to you by the Prime Consultant are displayed. If required, additional direct labor cost tasks and activity folders can be added. You can further sublet the tasks to other consultant firms. For more information on adding direct labor cost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

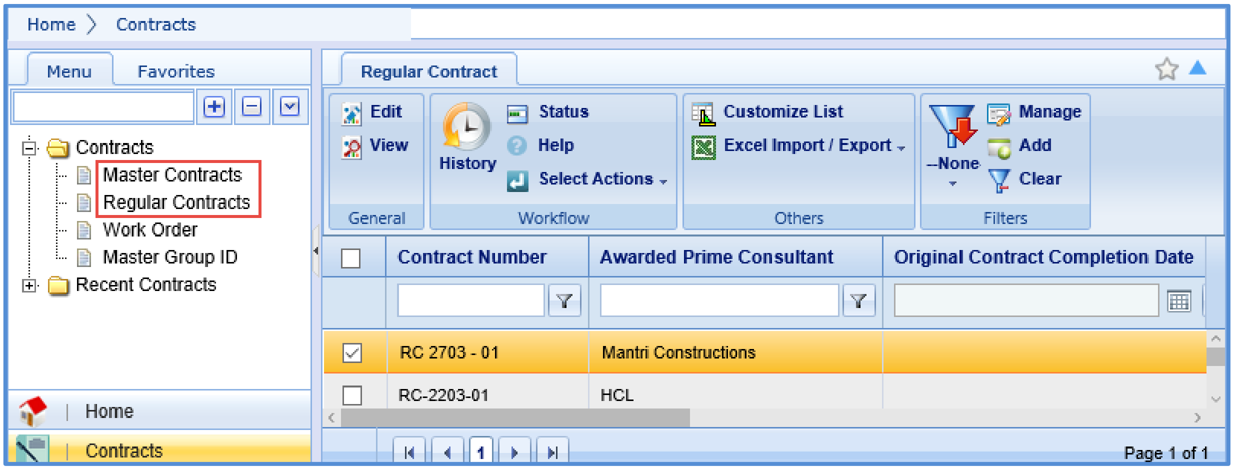
   Note: *Optionally, in the* ***Workflow*** *group, in* ***Select Actions***, *you can click* ***ReDraft***, *enter required information in the dialog box that is displayed, and then click* ***OK*** *to redraft the record.*

9 Reviewing Contracts

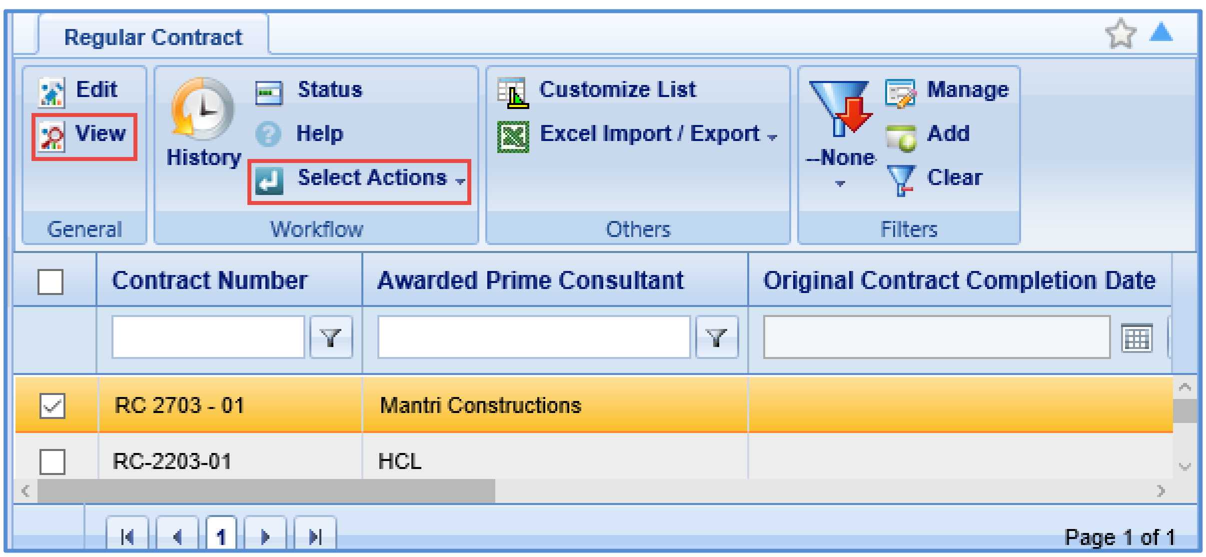
The procedure to review the contracts that have been submitted to you by WisDOT is described.

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.

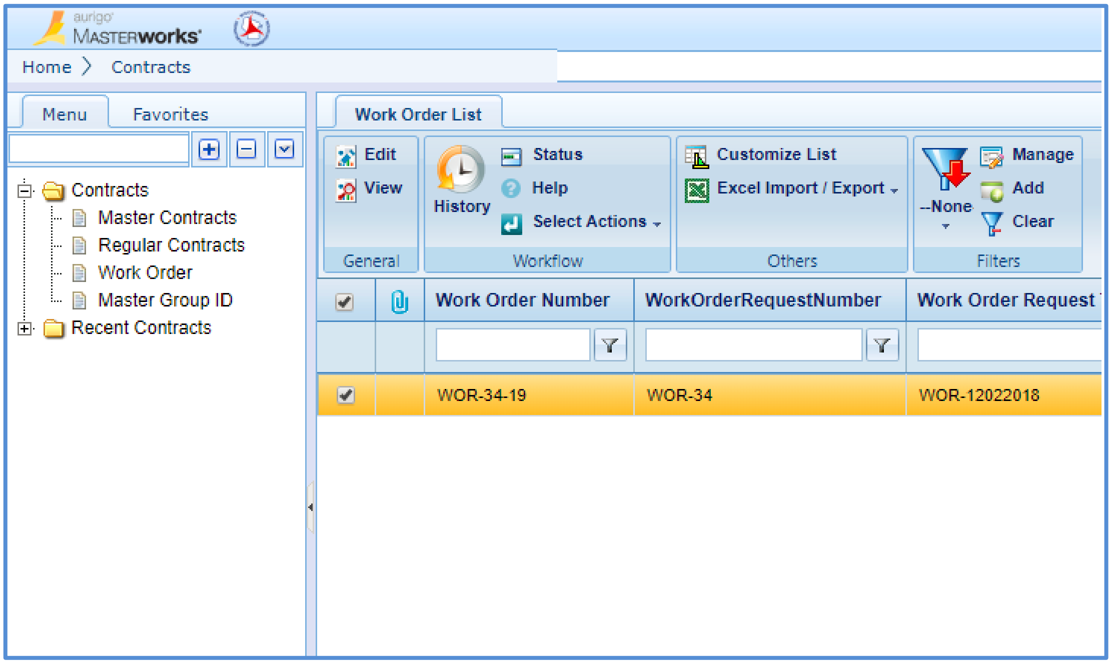
   Optionally, in the **Workflow** group, in **Select Actions**, you can click **Request to Revisit**, enter required information in the dialog box that is displayed, and then click **OK** to return the record to WisDOT to revisit the contract details.

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

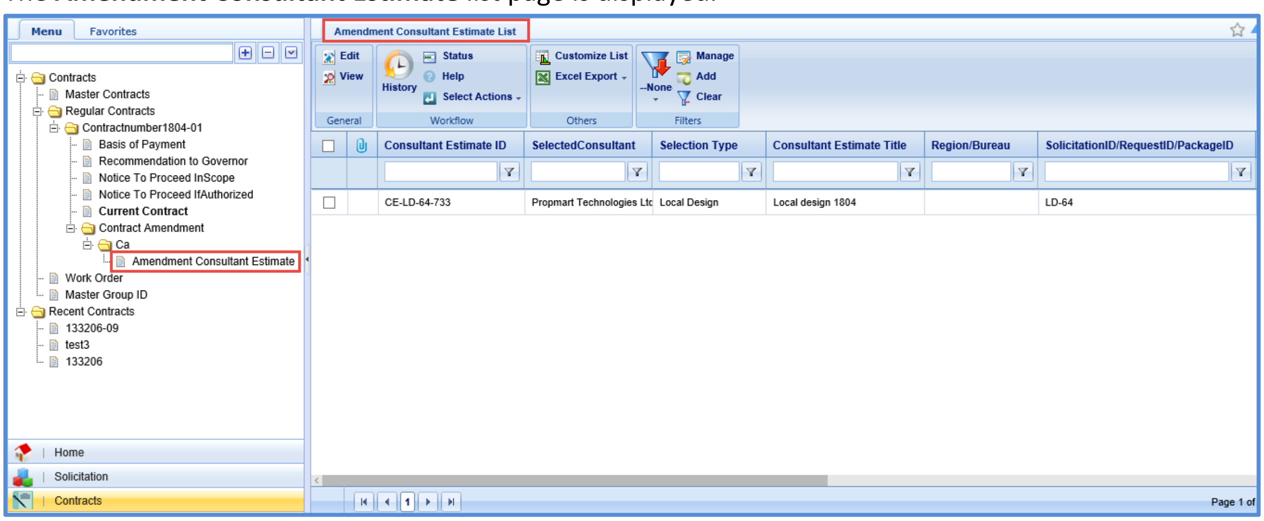
If there are changes in approved contracts, contract amendments are created by WisDOT and primary consultants have to provide an amended estimate for the tasks assigned to them for negotiation purposes. If the tasks are sublet to other consultant firms, then these consultant firms have to provide their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

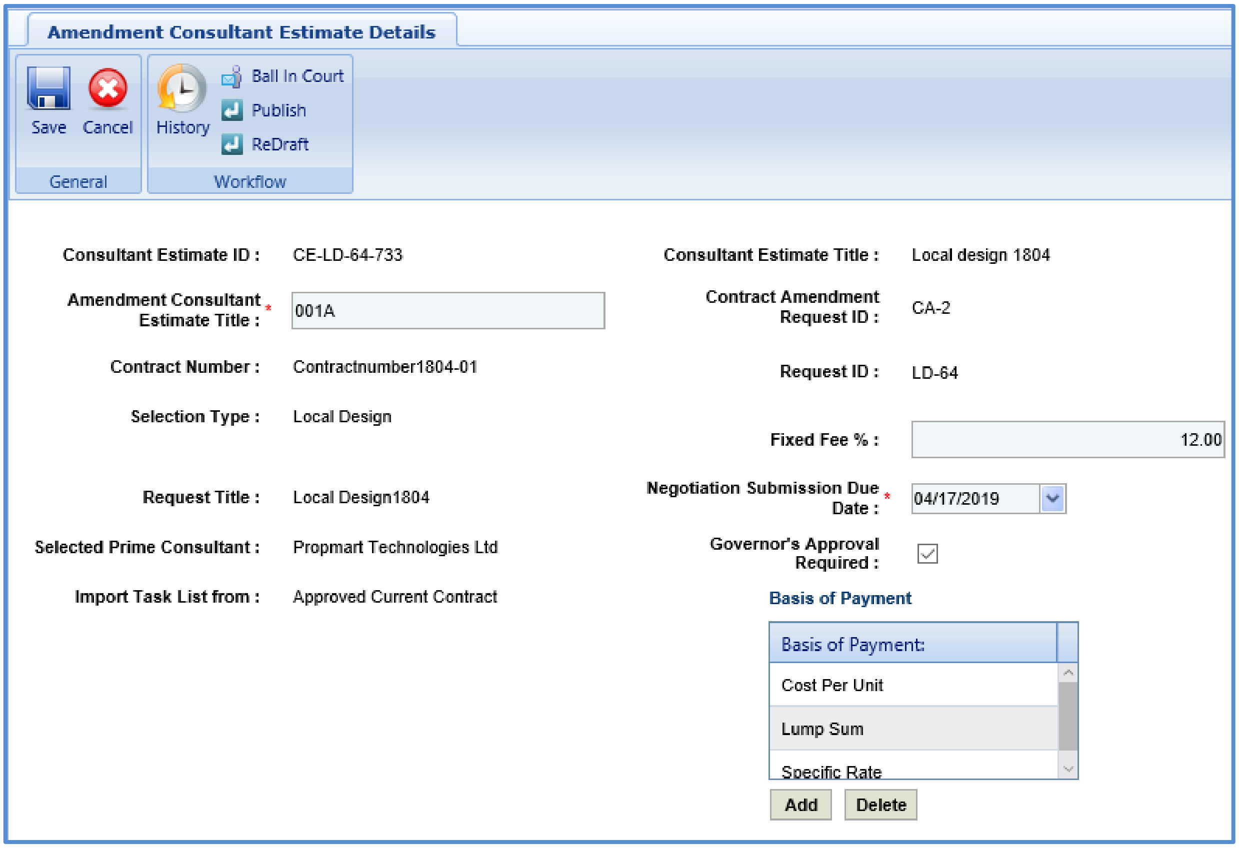
11.1 Amending Consultant Estimate for Contract Amendments

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.



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



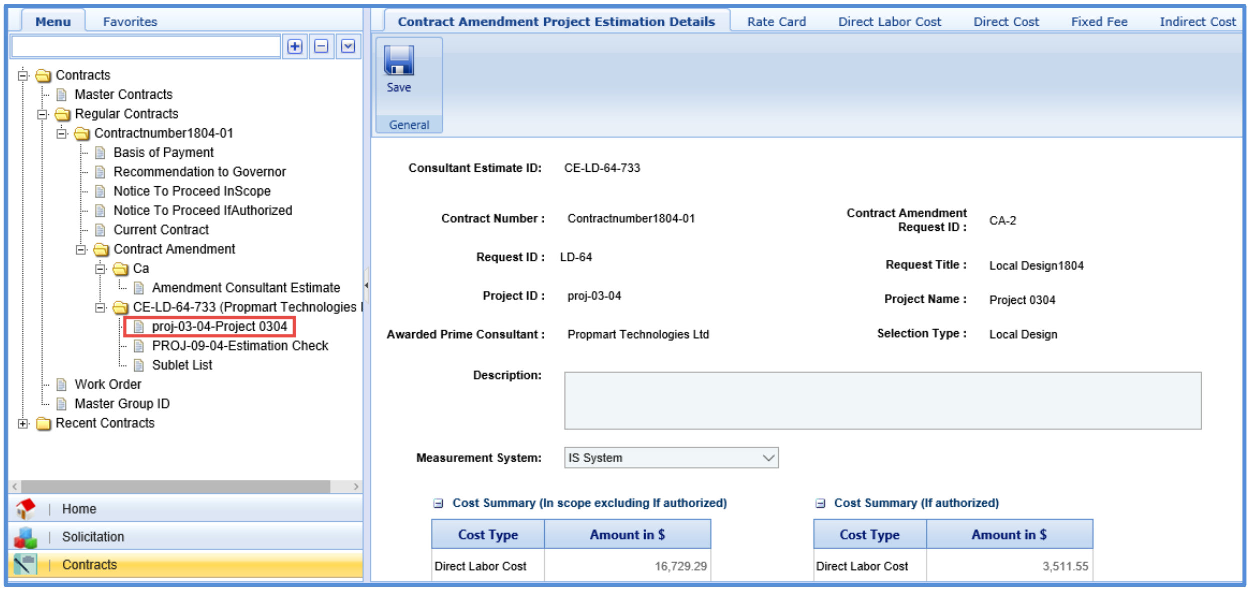
8. If required, edit the values in the following fields:
   - **Amendment Estimate Title**
   - **Fixed Fee %**
   - **Negotiation Submission Due Date**
9. Select or clear the **Governor's Approval Required** check box, if the amendment requires Governor's approval.
10. In the **Basis of Payment** section, 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.
    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****.*
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.



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.

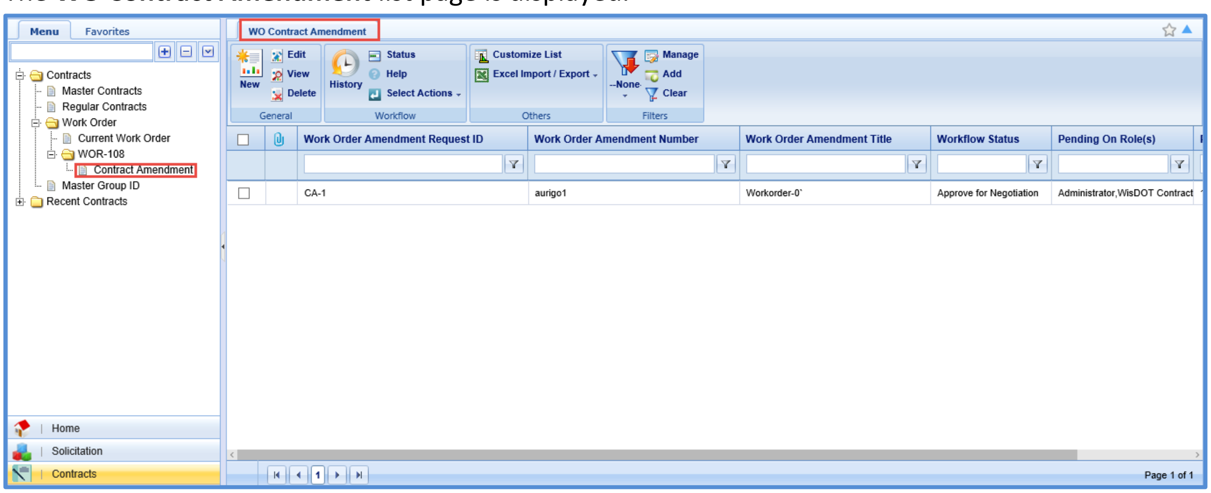
6. Click the **Direct Labor Cost** tab, add a new record or edit an existing record, and then click **Save**. You can also sublet the tasks, and mark as final. For more information, refer adding direct labor cost details.
The total of direct labor costs is displayed in the **Cost Summary** section on 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.

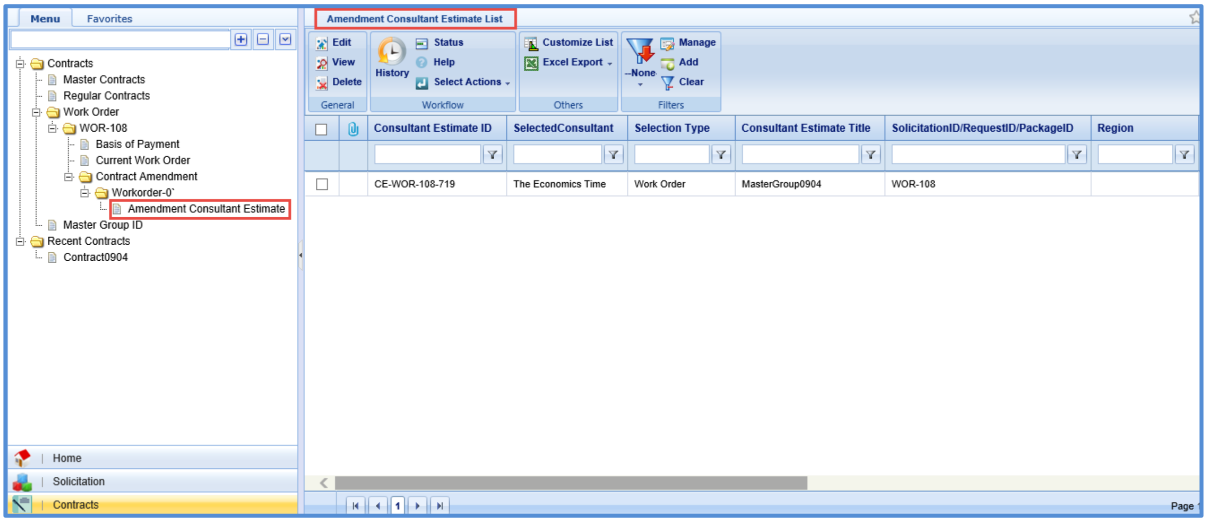
Steps:

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.

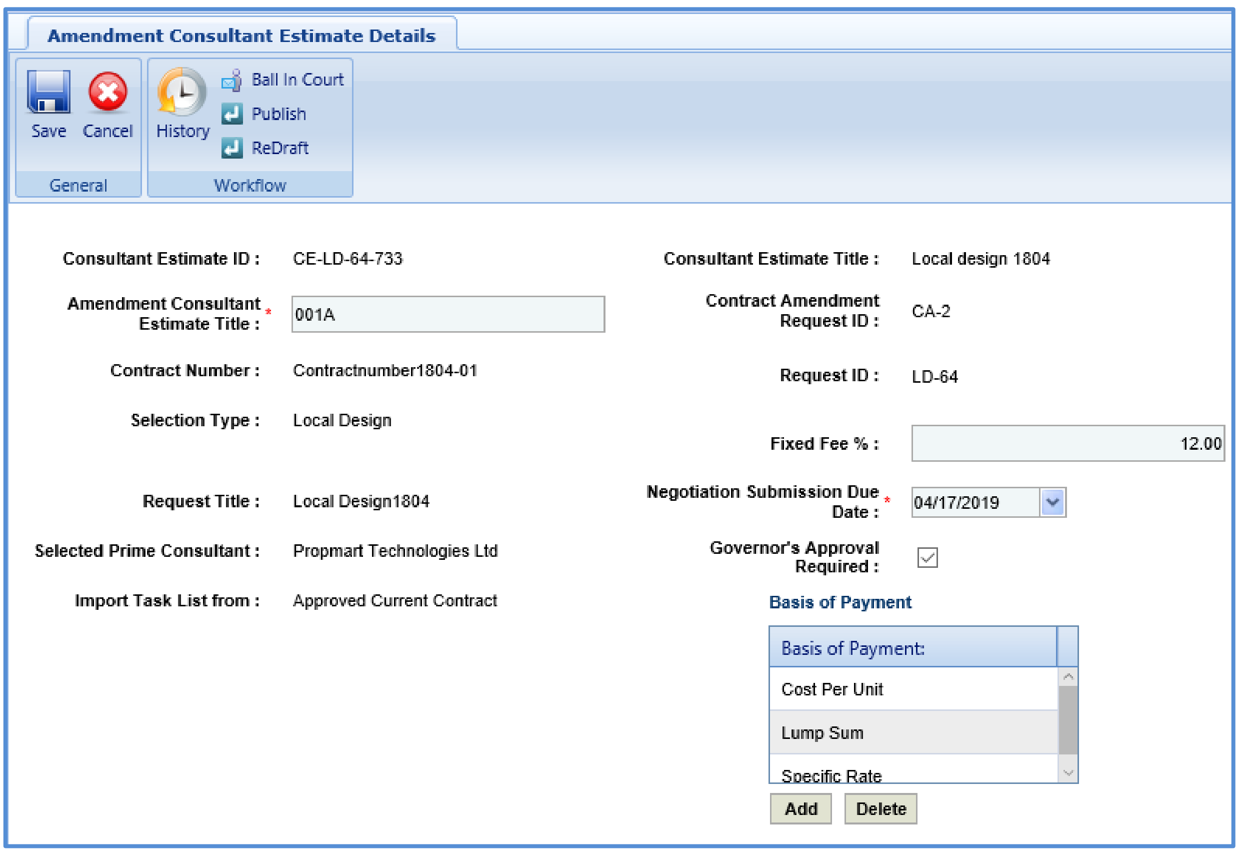


5. Select the required amendment record for which the negotiation estimate has to be amended and click **View**. The **WO Contract Amendment** details page is displayed.

6. In the navigation pane, expand the work order amendment folder, and click **Amendment Consultant Estimate**.
   The **Amendment Consultant Estimate List** page is displayed.



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



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

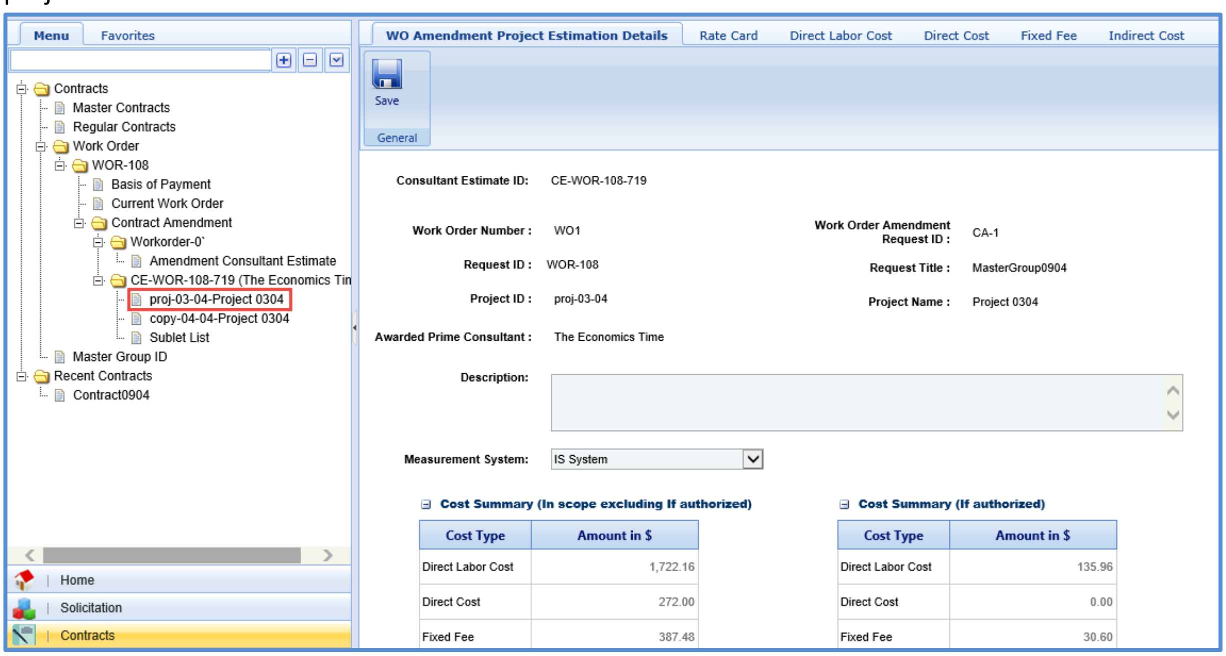
9. In the **Basis of Payment** section, you can add a new basis of payment or delete an existing basis of payment. Perform the following steps to add a new basis of payment.
    a. Click **Add**.
    The Basis of Payment will be one or more of the following: dialog box is displayed.
    b. Select the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



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.

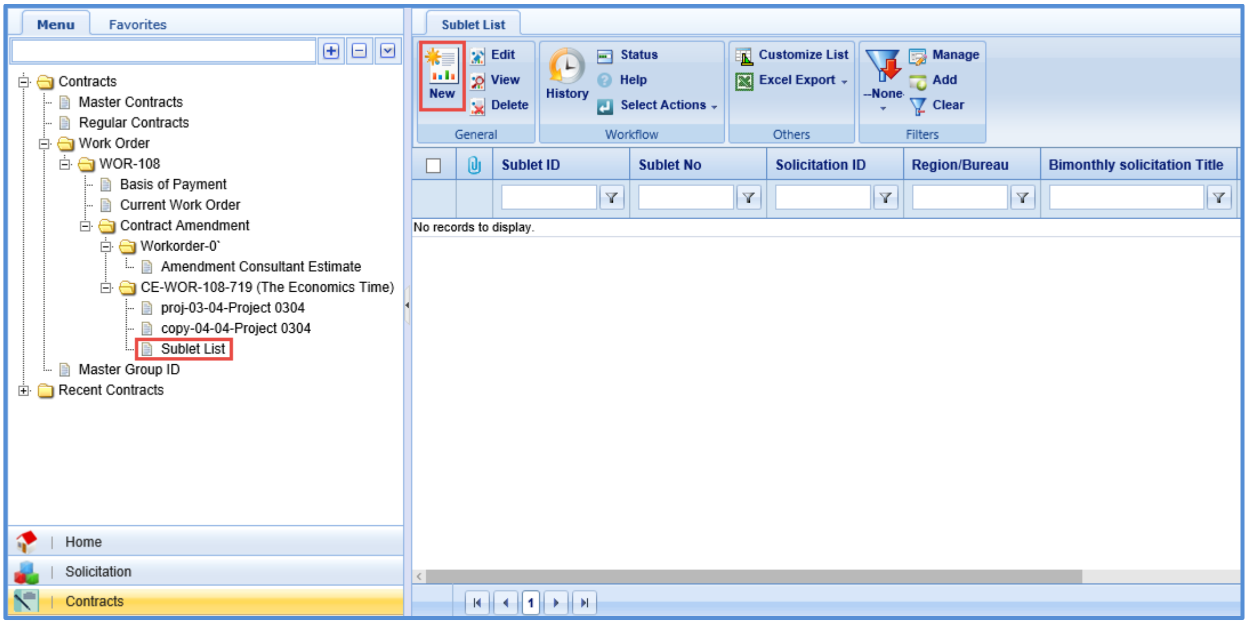
The procedure to add and finalize the scope for subletting contract amendment tasks is described.

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**.

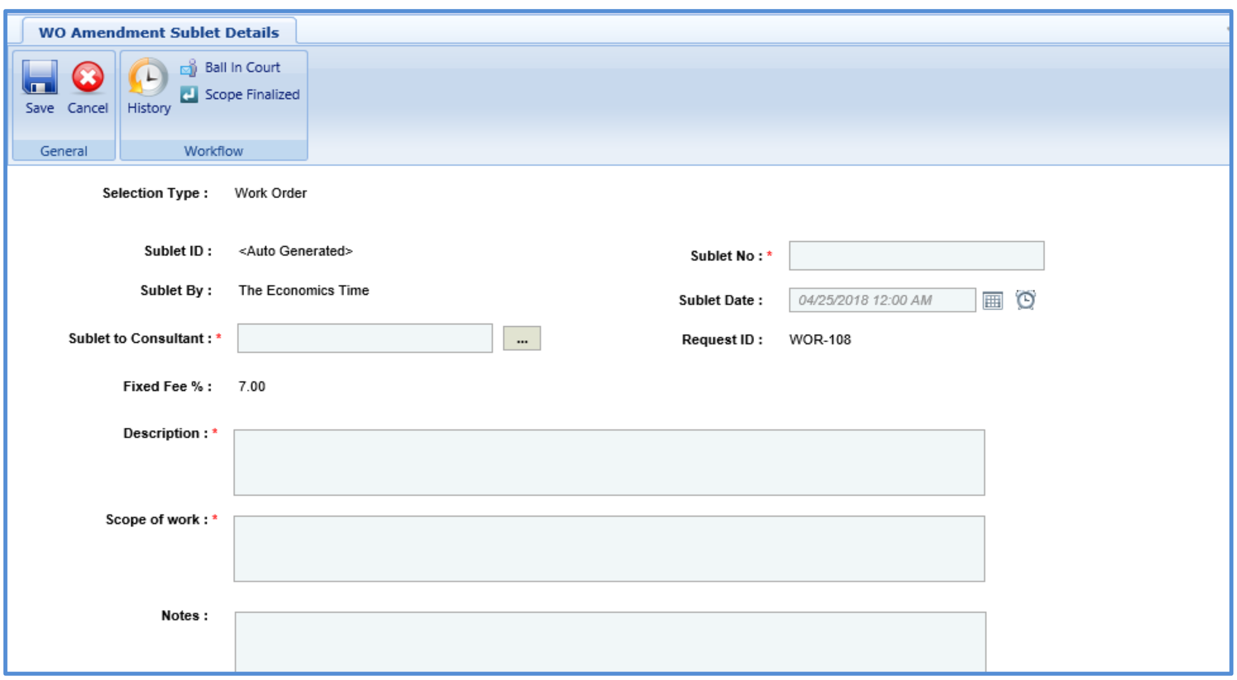
6. On the navigation pane, click **Amended Consultant Estimate List**.
   The **Amended Consultant Estimate List** page is displayed.

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.



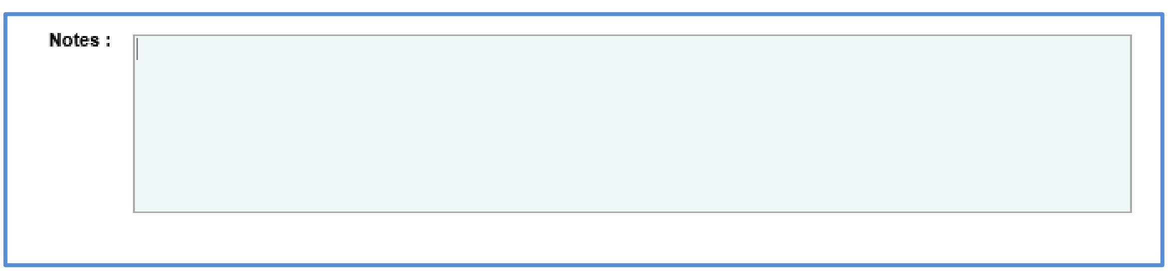
9. Click **New**. The **WO Amendment Sublet Details** page is displayed.



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

Field	Mandatory/Non-mandatory	Description
Selection Type	-	The selection type of the contract amendment is auto-populated.
Sublet ID	-	The Sublet ID is auto-generated.
Sublet No	Mandatory	Enter a unique number for the sublet.
Sublet By	-	The name of the consultant firm who is subletting is auto-populated.
Sublet Date	Non-mandatory	Click the Calendar icon to select the date of sublet and click the Time Picker icon to select the time of sublet.
Sublet to Consultant	Mandatory	To select subconsultant for whom the task has to be sublet: 1. Click . The **Consultant Name** dialog box is displayed listing names of the consultant firms. 2. Select the required consultant firm name and click **Select.**
Request ID	-	The request ID is auto-populated.
Fixed Fee %	-	The fixed fee percentage of the consultant is auto-populated.
Description	Mandatory	Enter description about subletting the contract amendment tasks.
Scope of Work	Mandatory	Enter scope of work details for subletting.

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

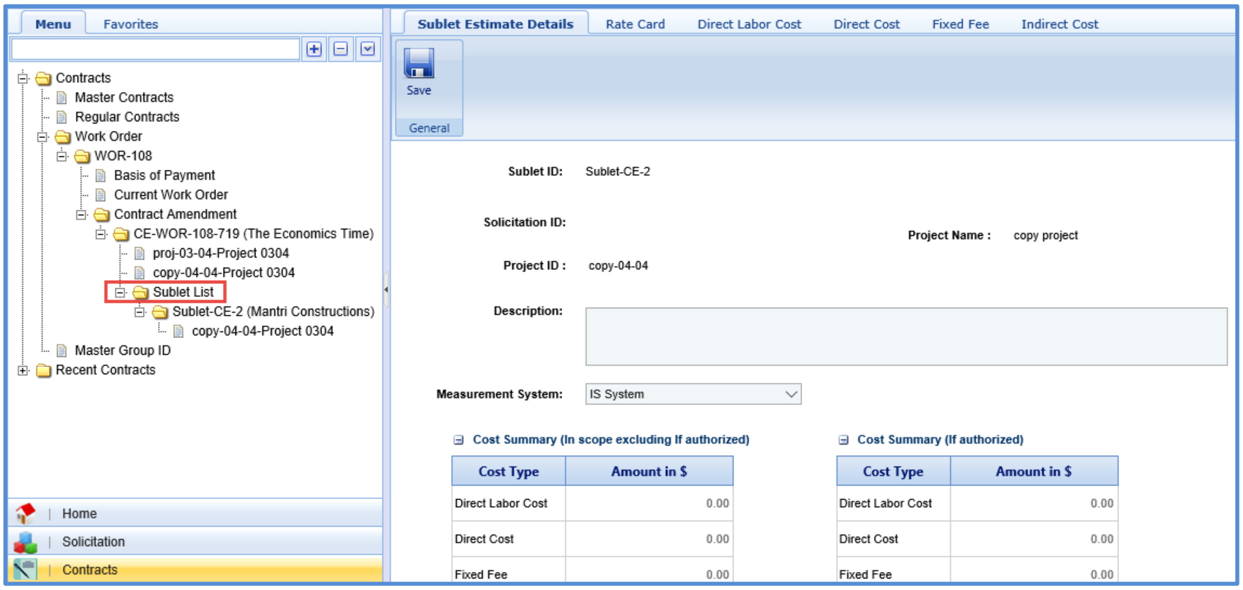


12. In the **Attachments** section, upload images and files relevant to subletting. For information on form attachments, refer *Attachments*.

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.

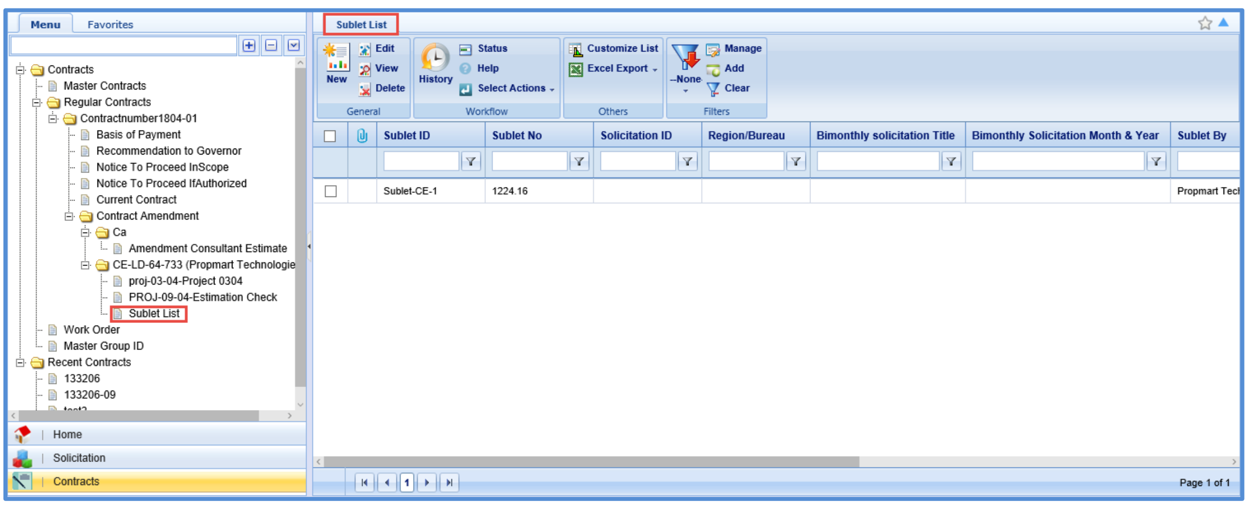
12. Click the **Direct Labor Cost** tab, add a new record or edit an existing record, and then click **Save**. For more information, refer Adding Direct Labor Cost task .
The total of direct labor costs is displayed in the **Cost Summary** section on the **Sublet Estimate Details** tab.
13. Click the **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 –**

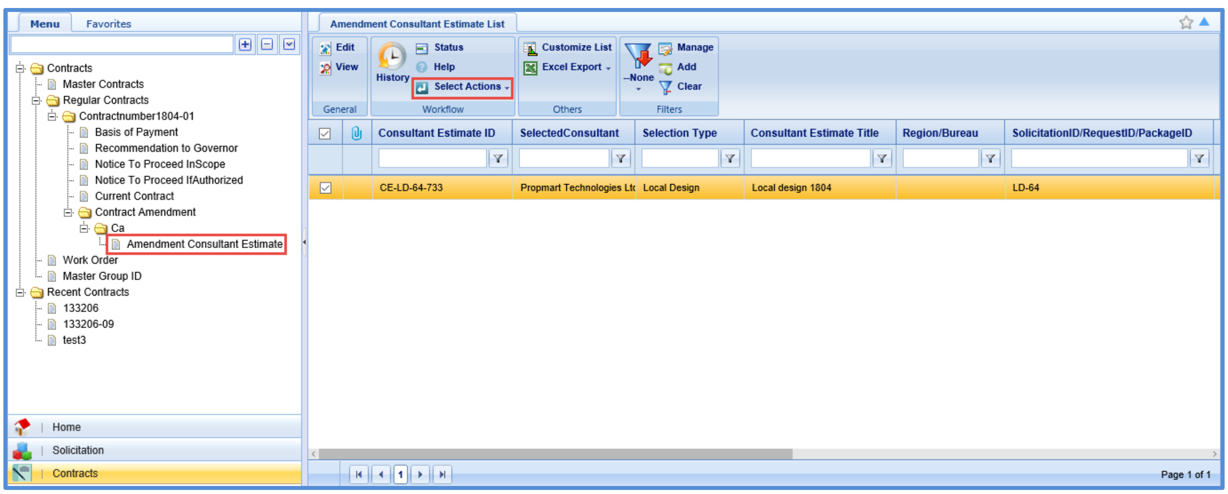
Masterworks dialog box is displayed. Enter required information and then click **OK.** The estimate is published to the prime consultant.

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.