Contract Negotiation in Masterworks

Fall 2018



Wisconsin Department of Transportation

Version 1.1

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Version Notes

Version 1.1

- Revise sectioning in section 1 and add additional content.
- Add subsection to section 3 for copying rate cards.
- Add clarifications to section 5.

1 General Masterworks Information

1.1 Consultant/WisDOT

1.1.1 Add a new task

1.1.1.1 Add a new task from the library

To add a new task from the task library, start on the **Direct Labor Cost** tab of the Consultant Estimate. In the ribbon, click **New** and then click **Add Multiple**.

Home													
Menu Favorites	С	onsultant Estimate Project Details Rate Card	Direct Labor Cost	Direct Cost Fixed Fee	Indirect Cost	☆ 🔺							
Solicitation List Bimonthly Solicitation List Construction Fair Packages Construction Fair		Image: Save New Image: Save New											
📔 Solicitations Responded		Add Multiple anagement				A							
Constitution Seguiation Notes Operation Notes		New Activity Quality											
Consultant Estimate Consultant Estimate CE-NC-01-266 (The Alpha Company) CE 3004-19-86-CTH A - CTH B CE Snapshots CE Snapshots Sublet List		🕀 🗋 890.0 Scoping Task	Includes activities directly related to managing and monitoring quality outcomes.		The Alpha Company	Yes							
		🖂 🛅 Manage Project Risks											
		🕀 🗋 894.0 Scoping Task	Includes activities related to risk planning, identification, analysis, and response/control.	Sublet	The Alpha Company	Yes							
P Home			and respondered in the										
Solicitation						-							
Contracts						•							

Select WisDOT from the dropdown list next to Standard Task list and click Add.

Home						
Menu Favorites	Add Standard Tasks					☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages Construction Fair	Save Cancel					
🗎 Solicitations Responded =- 😑 Negotiation	Standard Task list : WisDOT	🔻 🔲 Igr	nore Containers of Standard Ite	ems 💿 Use Task Groups	Use Group: Default	7
 Negotiation Notes 	Task	Description	Container	Unit	Unit Price In \$	Group Name
└─	No Data available.		• •		P	age 1 of 1, items 0 to 0 of 0.
CE Snapshots Sublet List						
💎 Home						
Solicitation						
Contracts						

Use the filter to search for the task to be added.

Home								
Menu Favorites	Add Standar	Standa	rd Items				×	☆ ▲
- Solicitation List	Save Cancel	0 select	ted of total 715			Select All R	ecords	
Bimonthly Solicitation List Gonstruction Fair Packages	Jure Cancer		Task	T Description	T	Unit Price In S 🍸	Uni	
🗎 Construction Fair	General		886.0 Scoping Level	Show items with value that:	ly related to	0.00	HF 🔺	
□ Solicitations Responded □ □ ○ Negotiation	Standard Task list :		886.1 Develop and review project c	Contains	ment betwe	0.00	HR	
Negotiation Notes Consultant Estimate	No Data available.		886.2 Define purpose and need	And 🔻	d of the pro	0.00	HR	Name
CE-NC-01-266 (The Alpha Company) 1004-19-86-CTH A - CTH B	No Data available.		886.3 Define study area and logical	Is equal to		0.00	HR	, items 0 to 0 of 0.
- CE Snapshots			886.4 Conduct field review		view photo I	0.00	HR	
🗋 📄 Sublet List			886.5 Identify and define design de	Filter Clear		0.00	HF	
			886.6 Identify design issues	A small amount of time	e is assumed	0.00	HR 🗸	
💎 Home		1					F	
🛃 Solicitation		(M)	<1 ► ► 20 ▼ ite	ems		1 - 20 of 715 item	s 🔿	
Contracts				Select Car	ncel			

Check the box next to the task(s) to be added and click **Select**. Note: multiple tasks may be selected and added at the same time.

Menu Favorites	Add Standar	Stand	tandard Items 🛛 🗙										
🕂 📄 Solicitation List		1 selec	sted of total 16		Select All R	ecords							
Bimonthly Solicitation List Gonstruction Fair Packages	Save Cancel		Task 🝸	Description	Unit Price In S 🍸	Uni							
📄 Construction Fair Packages 📄 Construction Fair	General		347.0 Collect Traffic Field Data	Conduct and review traffic counts a	0.00	HF 🔶							
🗎 Solicitations Responded =- 😋 Negotiation	Standard Task list :		347.1 Complete directional counts	ADT count data collection only (no	0.00	HF							
Negotiation Notes Consultant Estimate	Task		347.2 Complete vehicle classificatio	Vehicle class data collection for roa	0.00	HF	Name						
🗄 🛅 CE-NC-01-266 (The Alpha Company)	1		347.3 Complete speed data collection	Vehicle speed data collection for ro	0.00	HR	, items 0 to 0 of						
1004-19-86-CTH A - CTH B CE Snapshots			347.4 Turning movement counts at	Subtask	0.00	HF							
🔄 📄 Sublet List			347.4.1 Automated turning movem	Assumes counts are collected and	0.00	HF							
			347.4.2 Manual turning movement	Assumes intersection turning move	0.00	HF							
陀 Home		√				+							
Solicitation			 ▲ 1 ▶ ▶ 20 ▼ items 	5	1 - 16 of 16 item	s 🖒							
Contracts				Select Cancel									

Click **Save** to add the task to the task list.

Home							
Menu Favorites	Ad	ld Standard Tasks					☆ ▲
Solicitation List Bimonthly Solicitation List Construction Fair Packages Construction Fair Solicitations Responded Geogramma Solicitations		General	v Ign	ore Containers of Standard Ite	ems 💿 Use Task Groups	s 🔾 Use Group: Default 🕇	•
- Degotiation Notes		Task	Description	Container	Unit	Unit Price In \$	Group Name
Consultant Estimate		347.0 Collect Traffic Field D	Conduct and review traffic c	Collect Traffic Field Data	HRS	0.00	
104-19-86-CTH A - CTH B 104-19-86-CTH A - CTH B 10 CE Snapshots 10 Sublet List		1				Pi	age 1 of 1, items 1 to 1 of 1.
🛟 Home							
ali Solicitation							
Contracts							

The task has now been added to the task list.

Menu Favorites	С	onsultant Estimate F	Project Details	Rate Card	Direct Labor Co	ost	Direct Cost	Fixed	Fee Indir	ect Cost		☆ ▲
Solicitation List Bimonthly Solicitation List Construction Fair Packages	Sav			gn for Sublet 🤘	UnAssign for Sublet Mark Final Unmark Final		sociate basis of pa sociate Indirect Co					
Orostruction Fair Solicitations Responded Negotiation Negotiation Notes Ocnsultant Estimate		General ⊕ 🗋 894.	0 Scoping Task	Others	related to risk planning, identification, analysis, and response/control.		Sublet		The Alpha Company	Yes	•	
Consultant Estimate Consultant Estimate CE-NC-01-266 (The Alpha Company) I 004-19-86-CTH A - CTH B		🖃 🚞 Preliminary a	nd Final Design									
- CE Snapshots		🗆 🚞 Traffic Op	erations									
Sublet List		🖯 🚞 Collec	t Traffic Field Dat	3								
		⊕ 🗋 347.	0 Collect Traffic Fie	ld Data		traffic	uct and review counts and other data collection			The Alpha Company	Yes	
Y Home												
Solicitation												-
Contracts	•											•

1.1.1.2 Create a new task

In some cases, a new task that does not exist in WisDOT's library needs to be created. Standard tasks should be used whenever possible. An example of when a new task needs to be created is when entering in a cost per unit.

Please coordinate with WisDOT before creating a new task.

Select the task that will become the parent task, click **New** in the ribbon and click **New** in the dropdown.

Home							
Menu Favorites	Co	onsultant Estimate Project Details Rate Card 🚺	Direct Labor Cost	Direct Cost Fixed Fee	Indirect Cost	5	☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages Construction Fair	Save	New View Reports	Assign for Sublet 📑 Asso ark Final 🏾 🖶 Asso mark Final Others	ociate basis of payment ociate Indirect Cost			
Constitutions Responded Solicitations Responded Generation Negotiation Consultant Estimate		Add Multiple New Activity Task	to risk planning, identification, analysis, and response/control.	Sublet	The Alpha Company	Yes	•
E CE-NC-01-266 (The Alpha Company)		🖃 🛅 Preliminary and Final Design					
📄 1004-19-86-CTH A - CTH B 📄 CE Snapshots		🗆 🛅 Traffic Operations					
Sublet List		🖃 🛅 Collect Traffic Field Data					
		347.0 Collect Traffic Field Data	Conduct and review traffic counts and other traffic data collection		The Alpha Company	Yes	
💎 Home			traffic data collection				-
Solicitation							-
Contracts	•						۱.

Click **OK** on the warning message that appears.

Any resource or cost information that has been added to that task will be deleted.

Contract Negotiation

Masterworks

Enter the new task name in the Task field. This should contain the activity code of the parent task. Enter a short description of the task, add resources and costs to the task and click **Save**. If more than one new task will be added to the activity, click **Save & Continue** to create another new task.

Home							
Menu Favorites	New Task						☆ 🔺
	📑 🔡 Save & Continue						
	Cancel						
	ave 😋 Back						
Construction Fair Packages	General						
Construction Fair Solicitations Responded				_			
	Activity :	Preliminary and Fina	I Design/Traffic Op	er			
 Negotiation Notes 	Task : *	347 Set up Traffic Co	ontrol	Clear			
🦾 📄 Consultant Estimate		Set up Traffic Contro		4			
- 1004-19-86-CTH A - CTH B	200011	Set up Hume Sonne	-				
- 📔 CE Snapshots				4			
🛄 📄 Sublet List	Unit : *	HRS	1	7			
	In Scope :	Yes	1	7			
	If Authorized :	Select		,			
1							
	Unit Price in \$:		0.0	00			
	Amount in \$:		0.0	00			
	Basis of payment :			•			
	Rate card type :						
	Notes :						
							11
	Complete :						
Re	esources:						
	Resource	Employe	e	Associated Indirect Cost	Rate in \$	Quantity (Hrs)	Cost in \$
📌 Home	No records to display.					Total:	Total:
Solicitation	VageSheet ▼ Add Del	lete				iotal.	Total.
Contracts	Aud Del						

1.2 Consultant

1.2.1 Add key staff

Click the **Consultant\Contractor** link, check the box next to the firm in the middle of the page and click **View**.

Home											
Menu Favorites	ConsultantiContractor										
Notifications Consultant/Contractor) [1] 2년 V										
Documents	Gen	eral Others	Filters								
l l		Firm Name	Legal Name	Is DBE	Roster	City	State	FEIN			
		4	Y	γ	•	Y	Y	Y			
📌 Home	V	The Alpha Company	The Alpha Company	No	N			0000001			
🚑 Solicitation											
Contracts								Page 1 of 1			

Expand the folders for Consultant\Contractor and the consultant firm. Click on the **Key Staff** link and click **New**.

Home																
Menu Favorites	Ke	y Staff														
Notifications Consultant/Contractor The Alpha Company	* New	- <u>×</u>	View Delete	ew Excel Import / Ex		None	i Manage ☐ Add ↓ Clear									
- 📄 Direct Cost Type		Genera		Oth	ers		Filters							_		
- 📄 Indirect Cost Type		U	Emplo	yee ID	Staff Name		Title		State		City		Zip		mail ID	
📄 Consultant Report 📄 Past Projects				Y		Y		Y		Y		7	2	r	A	-
Consultant - User Accounts Onsultant Financial Report					TEST											
- 📄 Key Staff			Ayres s	ub	George Wash	hington										
In Snapshots ⊕ Cocuments					Cost per unit	task										
			0003		Alpha Three		Engineer		Wisconsin		Madison		53707	alp	phathree@alphaco	orp
			0002		Alpha Two											
💎 Home			0001		Alpha One											
🝶 Solicitation	4															•
Contracts		K	• 1	► H											Page 1 of	f1

Fill out the employee information and click **Save**.

Home		
Menu Favorites	Key Staff Details	☆ 🔺
Notifications ConsultantiContractor The Alpha Company Direct Cost Type Indirect Cost Type Consultant Report Past Projects Consultant - User Accounts Consultant Financial Report Snapshots Documents	Employee ID : First Name : Image: State : Title : Image: State : V City :	
💎 Home	Zip :	
Solicitation	Email ID :	
Contracts		
ast of RA to S "wa Tec' for In	Alla Marina Vice 10.8	\181 \36 .1

2 Consultant Estimate – WisDOT

2.1 Start a Negotiation

Navigate to the **Solicitation** module, expanding the **Negotiation** folder in the left navigation and clicking **Consultant Estimate**. Click **New**.

Home > Solicitation													
Menu Favorites	Co	Consultant Estimate List										☆ 🔺	
Image: Solicitation List Image: Bimonthly Solicitation List Image: Bimonthly Solicitation List	* 1.1. New	2	Edit View Delete	History Status Bistory Select A	ctions -	Customize		-None Clear					
Construction Fair Packages Construction Fair		Gener	ral	Workflow		Others		Filters					
Negotiation		U	Cons	ultant Estimate ID	Selecte	dConsultant	Sele	ection Type	Co	onsultant Estimate Title	Region/Bureau	Project ID(s)	Solicitatio
				Y		Y		Y		Y	Y	5	
Consultant Estimate Onsultant Estimate			CE-W	DR-108-336	The Alph	a Company	Wor	k Order Request	Те	st CE for Adam	Bureau of Project Deve	7777-77-77	WOR-108
Home			CE-W	DR-47-335	Patoka C	onsulting, LLC	Wor	k Order Request	Со	nsultant Estimate Adam	Bureau of Technical Se	1007-10-86	WOR-47
Projects			CE-W	DR-26-334	Patoka C	onsulting, LLC	Wor	k Order Request	Te	sttest sub	Bureau of Business Se	1007-10-86	WOR-26
Solicitation			CE-BE	15.01.333	The Gan	ima Comnany	Solir	ritation	hh	e_pet	Rureau of Rusiness Se	2017_10_02	RRS_01
Contracts		K	4 1	2345678	9 10	• • •							Page 1 of 17

Pick the **Selection Type** from the dropdown menu. This will change the autofill fields.

Home												
Menu Favorites	Consultant Estimate De	tails										☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages Construction Fair		l In Court ope Finalized low										
 Negotiation Negotiation Notes Negotiation Notes WisDOT Estimate 	Consultant Estimate ID :	<auto gene<="" th=""><th>erated></th><th></th><th></th><th>Consulta</th><th>nt Estimate T</th><th>ïtle : *</th><th></th><th></th><th></th><th>^</th></auto>	erated>			Consulta	nt Estimate T	ïtle : *				^
🔄 📄 Consultant Estimate	Selection Type : *	Selection Type : *										
		Fixed Fee % :								0.00		
	Selected Prime Consultant *											
	Import Task List from : *			~]							
	Contract Function :											
		Projects (I	n scope exc	cluding If au	(thorized)							
💎 Home		Project	Project	Direct	Direct	Indirect	Fixed Fee	Marked	Total			
Projects		ID	Name	Labor Cost in \$	Cost in \$	Cost in \$	in \$	as Final	Hours	Total in \$		
Solicitation		No records f	o display.									\sim
Contracts	<											>

If beginning a negotiation for a bimonthly solicitation package proceed to section 2.2 *Bimonthly Solicitation*. If beginning a negotiation for a construction fair package proceed to section 2.3 *Construction Fair*.

2.2 Bimonthly Solicitation

Add a **Consultant Estimate Title**. Use the ellipses to select the **Bimonthly Solicitation Title**, which is the month and year of the solicitation. Use the ellipses to select the **Solicitation ID**, this is also known as the package ID. Use the ellipses to select the **Selected Prime Consultant**; this should be the number one ranked consultant from the shortlist, unless permission has been given to go to the next ranked consultant. Select Solicitation Task List from the dropdown in the **Import Task List from** field. Choose a **Negotiation Submission Due Date**; this is a date for a check in.

Home							
Menu Favorites	Consultant Estimate Det	ails					☆ 🔺
Solicitation List Description Solicitation List Onstruction Fair Packages Construction Fair	Save Cancel General	e Finalized			l.		
Pegotiation Pegotiation Pegotiation Notes Pegotiation Notes Pegotiation Notes Pegotiation Notes	Consultant Estimate ID :	<auto generated=""></auto>		Consultant Estimate Title :	* March 2015 SW-01	×	^
·	Selection Type : *	Solicitation	~	Bimonthly Solicitation Title	March 2015		
E Non Formal	Bimonthly Solicitation Month/Year :	March 2015		Contract Function :			
4	Region/Bureau :	Southwest Region		Solicitation ID : *	SW-01		
	Selected Prime Consultant *	The Delta Company		Fixed Fee % :		7.50	
	Import Task List from : *	Solicitation Task List	~	Negotiation Submission Due Date :			
📌 Home		Projects (In scope e)	cluding If authorized)				
Projects		Project Nar Direct Lat	Direct Cost Indirect Co	Fixed Fee in Marked as Tot	al Hour: Total in \$ li	imit	
Solicitation		ILLINOIS S [°] 0.00	0.00 0.00	0.00 0.0	0 0.00 C	TH N INTE	~
Contracts	<						

2.3 Construction Fair

Add a **Consultant Estimate Title**. Use the ellipses to select the **Construction Fair Title**, which is the year of the solicitation. Use the ellipses to select the **Construction Fair Package ID**. If the project leader (consultant/WisDOT) has changed, update the **Fixed Fee %**. Use the ellipses to select the **Selected Prime Consultant**; this should be the number one ranked consultant from the shortlist, unless permission has been given to go to the next ranked consultant. Select Construction Fair Package from the dropdown in the **Import Task List from** field. Choose a **Negotiation Submission Due Date**; this is a date for a check in. Use the ellipses to add a contract function; in most cases this will be Construction Services.

Home		
Menu Favorites	Consultant Estimate Details	☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages Construction Fair	Save Cancel General Workflow	
Regotiation Negotiation Negotiation Notes WisDOT Estimate Ocnsultant Estimate Non Formal	Consultant Estimate ID: <auto generated=""> Consultant Estimate Title :* Con Fair 2050 SW-01 Selection Type :* Construction Fair</auto>	^
	Construction Fair Month/Year: January 2050	
	Construction Fair Package SW-01	
	Region/Bureau : Southwest Region Negotiation Submission Due : 10/31/2018	
	Selected Prime Consultant * The Della Company	
	Import Task List from : * Construction Fair Package	
	Contract Function : Construction Services	
📌 Home	Projects (In scope excluding If authorized)	
Projects	Project Nat Direct Labo Direct Cost Indirect Co Fixed Fee in Marked as Total Hours Total in \$ limit	
Solicitation	ILLINOIS S 0.00 0.00 0.00 0.00 0.00 0.00 CTH N INTE	\sim
Contracts		>

2.4 Add Tasks to the Scope

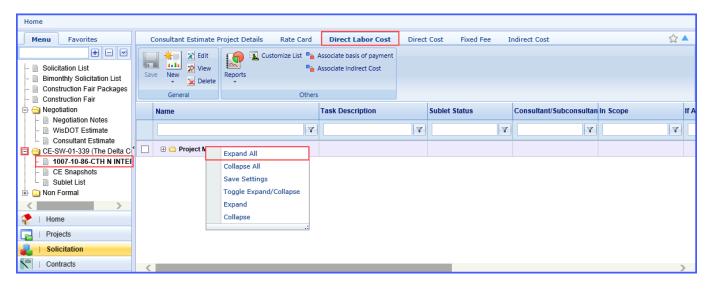
If a task needs to be added to the scope before the negotiation is sent to the consultant click **Save**.

Menu Favorites		etails Il In Court				☆ ▲
Solicitation List	Save Cancel History	ope Finalized				
Bimonthly Solicitation List Construction Fair Packages						
- 📄 Construction Fair	General Work	flow				
🖻 😋 Negotiation						/
Provide the second	Consultant Estimate ID :	<auto generated=""></auto>		Consultant Estimate Title : *	Con Fair 2050 SW-01	i
Consultant Estimate	Selection Type :	* Solicitation	\checkmark	Bimonthly Solicitation Title :		
🗄 🚞 Non Formal				solicitation file.	March 2015	
nter Home	Bimonthly Solicitation Month/Year :	March 2015				
				Contract Function :	Design Services	
Projects	Region/Bureau :	Southwest Region				
Solicitation		_		Solicitation ID : *	SW-01	·
Contracts	<					>

Check the box next to the negotiation in the Consultant Estimate list. Click Edit.

Home > Solicitation															
Menu Favorites	Co	nsultar	ıt Estim	ate List											
Solicitation List Bimonthly Solicitation List Construction Fair Packages	Image: Status Image: Status					u-									
Construction Fair		General		Workflow		Othe			Filters						_
🗄 🔁 Negotiation		0	Consu	Itant Estimate ID	Selecte	dConsultant	Selection Ty	/pe	Consultant	Estimate Title	Region/Bureau	Pro	oject ID(s)	Solicitati	0
Negotiation Notes WisDOT Estimate				Y		Y		Y		Y		7	Y		
Consultant Estimate On Formal			CE-SW	/-01-339	The Del	ta Company	Solicitation		Con Fair 205	50 SW-01	Southwest Regio	n 10	07-10-86	SW-01	,
			CF-CE-	-SW-01-338	The Alph	ha Company	Construction I	Fair	testalkdsjikd		Southwest Regio	n 100	07-10-86	SW-01	
The Home			CE-SW	-01-337	The Delf	ta Company	Solicitation		March 2015	SW-01	Southwest Regio	n 100	07-10-86	SW-01	1
Projects			CE-WC	R-108-336	The Alph	ha Company	Work Order R	equest	Test CE for A	Adam	Bureau of Project	Deve 77	77-77-77	WOR-108	
Contracts			•••	2345678	9 10									Page 1 of	17

Expand the folder in the left navigation pane. Click on the link with the project ID. Click on the **Direct Labor Cost** tab on the top of the screen. Right click on the folder(s) in the middle of the screen and click **Expand All** to view all tasks currently under negotiation.



Use the New to add task(s) as outlined in section Add a New Task in this guide.

Home		
Menu Favorites	Consultant Estimate Project Details Rate Card Direct Labor Cost	Direct Cost Fixed Fee Indirect Cost 🏠 🔺
Solicitation List Bimonthly Solicitation List Onstruction Fair Packages Construction Fair	Image: Save Imag	t
🖃 🔄 Negotiation	Ni 🗊 Add Multiple	Task Description Sublet Status Consultant/Subconsul In Scope
Begotiation Notes WisDOT Estimate Openautrat Estimate	New Activity	Y Y Y
E Consultant Estimate	🔹 🔲 😑 Project Management	
- 1007-10-86-CTH N INTER CE Snapshots	🗌 🗆 🗁 Scope, Schedule and Change Management	
- D Sublet List	🗌 🗆 🗁 Manage Project Scope and Schedule	
Non Formal Home Projects	🗌 🕀 🗋 887.0 Scoping Task	Includes processes for establishing the policies, procedures, and documentation needed to plan, develop, manage, execute, and control
Solicitation		the project schedule and scope.
Contracts		>

2.5 Send the Negotiation to the Consultant

If no changes needed to be made to the task list click Scope Finalized.

Home			
Menu Favorites	Consultant Estimate Details	☆	۸ ۲
Solicitation List Bimonthly Solicitation List Onstruction Fair Packages Construction Fair	Save Cancel General Workflow		
□ □ Negotiation □ □ Negotiation Notes □ □ WisDOT Estimate	Consultant Estimate ID: CE-SW-01-339	Consultant Estimate Title : * Con Fair 2050 SW-01	^
E Donsultant Estimate CE-SW-01-339 (The Delta C CE-SW-01-339 (The Delta C CE-SW-01-339 (The Delta C)	Selection Type : * Solicitation Bimonthly Solicitation Month/Year : March 2015	Bimonthly Solicitation Title : March 2015	
Home	Region/Bureau : Southwest Region	Contract Function : Design Services Solicitation ID :* SW-01	
Projects Solicitation Contracts	Selected Prime Consultant * The Delta Company	Fixed Fee % : 7.50	~

If changes were made to the task list, or if the estimate was saved in Draft status before being submitted return to the Consultant Estimate list. Check the box next to the negotiation and click **Select Actions** and **Scope Finalized**.

Home > Solicitation								
Menu Favorites	Consulta	ant Estimate List						☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages	New 👷		Actions - Coports	None	Clear			
- 🗎 Construction Fair	Genera			hers	Filters			
Negotiation		Consultant Estimate ID	SelectedConsultant	Selection Type	Consultant Estimate Title	Region/Bureau	Project ID(s)	Solicitatio
- Degotiation Notes		Y	Y	Y	Y	Y	Y	
Consultant Estimate Image: I		CE-SW-01-339	The Delta Company	Solicitation	Con Fair 2050 SW-01	Southwest Region	1007-10-86	SW-01
_		CF-CE-SW-01-338	The Alpha Company	Construction Fair	testalkdsjlkd	Southwest Region	1007-10-86	SW-01
💦 Home		CE-SW-01-337	The Delta Company	Solicitation	March 2015 SW-01	Southwest Region	1007-10-86	SW-01
Projects		CE-WOR-108-336	The Alpha Company	Work Order Request	Test CE for Adam	Bureau of Project Deve	7777-77-77	WOR-108
Solicitation	<							>
Contracts	K	4 1 2 3 4 5 6 7 8	9 10 🕨 🕨					Page 1 of 17

Click **OK** on the acknowledgement screen. No additional notes are needed.

Home					
Menu Favorites	Consultant Estimate Details				☆▲
+					
- 📄 Solicitation List	WisDOT Masterworks Staging				
🛛 📄 Bimonthly Solicitation List	Notes :				
- 📄 Construction Fair Packages	1				
Construction Fair					
Negotiation Negotiation Notes					
WisDOT Estimate					
🗎 Consultant Estimate					
🗄 📋 CE-SW-01-337 (The Delta C	2				
🗄 🧰 Non Formal					
	Set Days To Complete for Next Stage :				
	L. L		Attachments		
	8				
	Document Name	Title	Uploaded By	Uploaded Date	File Size
	No Attachments available				
<pre></pre>	Upload Document				
📌 Home			OK Cancel		
Projects	Proje	ct Direct Inc	lirect Fixed Fee Marked	Total	
Solicitation	Nam			Hours Total in \$ limit	
Contracts					

A red warning message will be displayed in the upper right corner of the screen indicating that the system was unable to send a message to the consultant. Please notify the consultant that it has a new negotiation to begin.

Home										
Menu Favorites	Consultant Estimate Det	ails								₩ ▲
Solicitation List Bimonthly Solicitation List		In Court pe Finalized					9	Please contac Scope is Final	t the consultant that the lized.	• *
Construction Fair Packages Onstruction Fair	General Workfle	w								
□ Construction 1 an										
Negotiation Notes Nisport Estimate	Consultant Estimate ID :	CE-SW-01-337		Co	onsultant Estim	nate Title : *	March 2015 SW-01			
Consultant Estimate CE-SW-01-337 (The Delta C	Selection Type : *	Solicitation		Bim	onthly Solicita	tion Title :	March 2015			
🗄 🧰 Non Formal	Bimonthly Solicitation Month/Year :	March 2015				_				
	Region/Bureau :	Southwest Region		Contract Function : Solicitation ID : *			Design Services SW-01		1	
	Selected Prime Consultant *	The Delta Company		Fixed Fee % :			: 7.50			
	Import Task List from : *	Solicitation Task List	~	Neg	otiation Submi	ssion Due \star Date :	10/31/2018 🗸]		
		Projects (In scope ex	cluding If a	(thorized)						
Reference Home			cluding if at	itilonizeu)						
Projects		Project Direct	Direct	Indirect		Marked	Total Total in	n \$ limit		
Solicitation		Name Cost in \$	Cost in \$	Cost in \$	in \$	as Final	Hours			\sim
Contracts	<				1					>

3 Consultant Estimate - Consultant

3.1 Finding the Negotiation

3.1.1 Prime Consultant

Navigate to the **Solicitation** module, expand the **Negotiation** folder in the left navigation and clicking **Consultant Estimate**.

Home > Solicitation													
Menu Favorites	Co	onsulta	ant Estir	nate List									☆
Solicitation List Bimonthly Solicitation List Construction Fair Packages	* III New	2	Edit View Delete	History Statu Select	s t Actions 🗸		ustomize List xcel Export 👻	None	Manage Clear				
Construction Fair Packages Construction Fair		Genera	al	Workflor	v	Oth	ers		Filters				
- 📄 Solicitations Responded		U	Cons	ultant Estimate ID	Selecte	dConsultant	Selection Ty	ре	Consultant	Estimate Title	Project ID(s)	Region/Bureau	Solicitati
E 🔄 Negotiation				٦		Y		Y		Y	Y	Y	
📄 Consultant Estimate			CE-SV	V-01-291	The Del	ta Company	Solicitation		March 2015	SW-01	1007-10-86	Southwest Region	SW-01
		U	CE-NO	0-01-242	The Alp	ha Company	Solicitation		18 05 16		1004-19-86	North Central Region	NC-01
📌 Home			CE-SV	V-03-189	The Alp	ha Company	Solicitation		180404-03 s	ub test	1007-10-86	Southwest Region	SW-03
Solicitation	. ◄												•
Contracts		K	4										Page 1 c

Select the negotiation using the check box and click Edit.

Home > Solicitation														
Menu Favorites	Co	onsulta	int Estir	nate List										☆
Solicitation List Bimonthly Solicitation List Construction Fair Packages	* III New	8	Edit View Delete	History Elect A	ctions -		ustomize List xcel Export 👻	None	Manage Clear					
Construction Fair		Genera	il 👘	Workflow		Oth	ers		Filters					
- 📄 Solicitations Responded		U	Cons	ultant Estimate ID	Selecte	dConsultant	Selection Ty	ре	Consultant	Estimate Title	Project ID(s)		Region/Bureau	Solicitatic
⊡ Generation <a>Physical Negotiation				Y		Y		Y		Y		7	Y	
💷 📄 Consultant Estimate			CE-SI	N-01-291	The Del	ta Company	Solicitation		March 2015	SW-01	1007-10-86		Southwest Region	SW-01
		U	CE-NO	01-242	The Alph	na Company	Solicitation		18 05 16		1004-19-86		North Central Region	NC-01
🏫 Home			CE-SV	V-03-189	The Alph	a Company	Solicitation		180404-03 s	ub test	1007-10-86		Southwest Region	SW-03
🛃 Solicitation														•
Contracts		K	• 1	► H										Page 1 of

The solicitation information is displayed on the top half of the screen.

Menu Favorites	Consultant	t Estimate Deta	ails		☆ ·
Solicitation List Bimonthly Solicitation List Construction Fair Packages	Save Cancel	History ReD	ish		
Construction Fair Fackages Construction Fair	General	Workflow			
- Solicitations Responded					
Negotiation Image: Second state Image: Second state	Consultan	t Estimate ID :	CE-SW-01-291	Consultant Estimate Title : *	March 2015 SW-01
🗎 Consultant Estimate 🔹	Se	election Type : *	Solicitation	Bimonthly Solicitation Title :	March 2015
⊕ 📋 CE-SW-01-291 (The Delta C	Bimonth	ly Solicitation Month/Year :	March 2015	Contract Function :	Design Services
	Re	gion/Bureau :	Southwest Region	Solicitation ID : *	SW-01
	Selected Prir	ne Consultant *	The Delta Company	Fixed Fee % :	7.50
Home Solicitation	Import Ta	ask List from : *	Solicitation Task List	Negotiation Submission Due _* Date :	10/01/2018
Contracts	•				•

A summary of the negotiation cost is displayed. Any attachments included in the negotiation are included at the bottom. If the negotiation contains multiple projects, a separate line and subtotal will be displayed for each project.

Attachments made at this level will be visible to the prime consultant and all subconsultants.

Home												
Menu Favorites	Consultant Estimate Del	ails										
Solicitation List Bimonthly Solicitation List Construction Fair Packages	Save Cancel	Praft										
Construction Fair	General Workflow											
Solicitations Responded Solicitation		Projects (In s	cope exclud	ing If authori	zed)							
Negotiation Notes Onsultant Estimate Ce-SW-01-291 (The Delta Co		Project Name	Direct Labor Cost in \$	Direct Cost in \$	Indirect Cost in \$	Fixed Fee in \$	Marked as Final	Total Hours	Total in \$	limit		
		ILLINOIS S	0.00	0.00	0.00	0.00		0.00	0.00	CTH N INTE		
			0.00	0.00	0.00	0.00		0.00	0.00			
		Projects (If a	uthorized)									
		Project Name	Direct Labor Cost in \$	Direct Cost in \$	Indirect Cost in \$	Fixed Fee in \$	Marked as Final	Total Hours	Total in \$	Limit		
		ILLINOIS S	0.00	0.00	0.00	0.00		0.00	0.00	CTH N INTE		
			0.00	0.00	0.00	0.00		0.00	0.00			
	Notes :											
	Attachments											
	8 🖻 🛓											
	Document Name	Url/Link		Title			Uploaded B	/	Upload	ded Date	File Siz	:e
P Home	No Attachments available											
Solicitation	Link Document Upload Doc	ument										
Contracts	4											

Expand the folder with the Negotiation ID in the left navigation and click on the link with the project ID. A summary of project costs is displayed.

Home				
Menu Favorites	Consultant Estimate Project Details	Rate Card Direct Labor Cost Di	rect Cost Fixed Fee Indir	ect Cost 🔗
Solicitation List Solicitation Fair Construction Fair Solicitation List Construction Fair Solicitations Responded Solicitations Notes Consultant Estimate Consultant Estimate CE-SW-01-291 (The Delta C Other 1007-10-86-CTH N INTE CE Snapshots Sublet List	Consultant Estimate ID: CE-SW-01-29 Solicitation ID: SW-01 Project ID : 1007-10-86 Description:	Bimonthly Month	Solicitation March 2015 and Year : MLINOIS STATE LINE	
	Measurement System: IS System	▼ g If authorized) ⊡ Cost Sur	nmary (If authorized)	
	Cost Type Amount	in \$ Cost Ty	pe Amount in \$	
	Direct Labor Cost 0.00	Direct Labor	Cost 0.00	
	Direct Cost 0.00	Direct Cost	0.00	
	Fixed Fee 0.00	Fixed Fee	0.00	
	Indirect Cost 0.00	Indirect Cost	0.00	_
4	Estimate Total in \$: 0.00 Estimate Total Hours: 0.00 Attachments	Estimate Total A		-
🌪 Home	Document Name Url/Link	Title	Uploaded By Up	bloaded Date File Size
Solicitation	No Attachments available			
Contracts	4			•

3.1.2 Subconsultant

Navigate to the Solicitation module, expanding the Negotiation folder in the left navigation and clicking

Consultant Estimate.

Menu Favorites	Co	nsulta	nt Estimate	List										☆ ▲
Solicitation List Bimonthly Solicitation List Construction Fair Packages	New		/iew	Status G Help Select Av	ctions -		_	ustomize List kcel Export 👻		Manage Add Clear				
Construction Fair		Genera		Workflow			Othe	ers		Filters				
Solicitations Responded		U	Consultar	nt Estimate ID	Selecte	dConsulta	nt	Selection Ty	pe	Consultant	Estimate Title	Region/Bureau	Project ID(s)	Solici
 Negotiation Negotiation Notes 			02-311-01-	Y			Y	Joincitation	Y	1001	Y	Zoutimest region	Y	511-01
🦾 📄 Consultant Estimate			CE-BTS-01			ia Company		Solicitation		CE - Solicitat	ion - I	-	1000-02-07, 1009-03-4	
			CE-WOR-1	68-295	The Alph	a Company		Work Order Re	equest	Test of Sub o	f Sub	Bureau of Project Deve	1234-55-55	WOR-1
			CE-BPD-01	1-294	The Alph	a Company		Solicitation		Sub Sub test		Bureau of Project Deve	1021-00-06, 1021-00-0	BPD-0
			CE-SW-01-	-291	The Delt	a Company		Solicitation		March 2015	SW-01	Southwest Region	1007-10-86	SW-01
			CE-NC-01-	266	The Alph	a Company		Solicitation		asdf		North Central Region	1004-19-86	NC-01
🟃 Home			CE-NC-01-	265	The Alph	a Company		Solicitation		1850706-02		North Central Region	1004-19-86	NC-01
Solicitation	4		05 000 or	000	TEL 81-1			e.e.e.e			•	D	4004 40 00 4007 40 0	

Check the box next to the negotiation and click **Edit**.

Home > Solicitation												
Menu Favorites	Cor	nsulta	nt Estimate List									☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages	* III New	<u>8</u> v	idit iew History Elete	ctions -	Reports			Manage Add Clear				
Construction Fair	G	eneral	Workflow			Others		Filters				
- 📄 Solicitations Responded		0	Consultant Estimate ID	Selecte	edConsultan	t Selection	Туре	Consultant	Estimate Title	Region/Bureau	Project ID(s)	Solici
⊡ ⊖ Negotiation <a>Physical Regional Provided Interview Provided Interview			Y			7	Y		Y	Y	Y	
L. D Consultant Estimate			CE-BTS-01-296		ha Company	Solicitation		CE - Solicitat	iion - I	Bureau of Technical Se	1000-02-07, 1009-03-4	BTS-0
			CE-WOR-168-295	The Alp	ha Company	Work Orde	r Request	Test of Sub o	of Sub	Bureau of Project Deve	1234-55-55	WOR-1
			CE-BPD-01-294	The Alp	ha Company	Solicitation	1	Sub Sub test	1	Bureau of Project Deve	1021-00-06, 1021-00-0	BPD-0
			CE-SW-01-291	The Del	ta Company	Solicitatio		March 2015	SW-01	Southwest Region	1007-10-86	SW-01
			CE-NC-01-266	The Alp	ha Company	Solicitation		asdf		North Central Region	1004-19-86	NC-01
💎 Home			CE-NC-01-265	The Alp	ha Company	Solicitation		1850706-02		North Central Region	1004-19-86	NC-01
Solicitation	•		OF 888 43 303	The Al-		C.8.9.9.		11 470705	*	D	4004 40 00 4007 40 0	·
Contracts		K	< 1 → H								P	age 1 of 1

Expand the folder with the negotiation title and click Sublet List. Check the box next to negotiation and click Edit.

Home											
Menu Favorites	Su	iblet Lis	st							z	☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages	* New	· · · ·		History E Sta History E Se		Customize L	None Z Clear				
- Donstruction Fair		General		Work	flow	Others	Filters				
- 📄 Solicitations Responded		U	Subl	et ID	Sublet No	Solicitation ID	Sublet By	Region/Bureau	Pending On Role(s)	Pending On User(s)	Bimo
🗄 😋 Negotiation 🖷 📄 Negotiation Notes				Y	Y	Y	Y	Y	Y	Y	
🔄 📄 Consultant Estimate			Suble	t-CE-1	291-01	SW-01	The Delta Company	Southwest Region	Administrator, Consultant Ne	Adam Sellin,Administrator A	Marci
Sublet List	1										
🛟 Home											
🔒 Solicitation	•										÷
Contracts		K	• 1							Page	1 of 1

Expand the folders with the in the left navigation and click on the link with the project ID. A summary of project costs is displayed.

Home							
Menu Favorites	Sublet Estimate Details	Rate Card	Direct Labor Cost	Direct Cost	Fixed Fee	Indirect Cost	☆ 🔺
- 📄 Solicitation List							
Bimonthly Solicitation List	Save						
Construction Fair Packages	General						
Construction Fair Solicitations Responded							
Gilden Strengthered	Sublet ID:	Sublet-CE-1					
Regotiation Notes							
🗎 Consultant Estimate	Solicitation ID:	SW-01					
📋 🔄 CE-SW-01-291 (The Delta Comp ⁴	Solicitation ID.	311-01		P	Project Name :	ILLINOIS STATE LINE - MADISON	
🔁 🔄 Sublet List	Project ID :	1007-10-86					
Sublet-CE-1 (The Gamma 1007-10-86-CTH N IN	,						
SE Snapshots	Description:						
	Decemption						
•							
📌 Home	Measurement System:	IS System	•				
Solicitation							
Contracts	Cost Summary (In s	cope excluding If	authorized)	🖃 Cost S	Summary (If auti	horized)	· · · · · · · · · · · · · · · · · · ·

3.2 Create a Rate Card

3.2.1 Create a new rate card

Click on the Rate Card tab and click New.

Home > Solicitation										
Menu Favorites	Co	nsultant Estimate Project Details	Rate	Card Dire	ct Labor Cost Dir	ect Cost	t Fixed Fee	Indirect Cost	٢	☆
Solicitation List Bimonthly Solicitation List Construction Fair Packages		Edit View Unmark as Final View Unmark as Final	🥳 Im	stomize List port Rate Card cel Export 🗣	None Clear					
Construction Fair		General		Others	Filters					
- 📄 Solicitations Responded		Resource Classification		RateCard ty	pe			FinalLaborRate	RateCard Status	
🖻 😋 Negotiation			Y			Y		Y		5
Consultant Estimate Ce-SW-01-291 (The Delta C Ce-SW-01-291 (The Delta C Ce-Snapshots Ce-Snapshots Sublet List List List List List List List List	No reco	rds to display.								
Contracts									Page	ge 1 of

Click on the ellipses next to the **Resource Classification** field.

Home				
Menu Favorites	Employee Details	Escalation details		☆ 4
Solicitation List Bimonthly Solicitation List	Save Cancel			
Construction Fair Packages Construction Fair	General			
Solicitations Responded Solicitation Megotiation Megotiation	Resource Classificatio	on :*		
🔤 🗋 Consultant Estimate	Rate card typ	pe:* 🔻		
 CE-SW-01-291 (The Delta C 1007-10-86-CTH N INTEL CE Snapshots 		aff: Employee name Employee id (Only key staff	for whom employee id have been provided will be displayed)	
🗎 Sublet List		Resource Name	Current Rate	
		No records to display.		
💎 Home				
Solicitation				
Contracts				

Use the filter to narrow the list of options, select the Resource Classification and click **Select**.

Home					
Menu Favorites	Employee Details	Resource Classification		×	
Elimental y Solicitation List Bimonthly Solicitation List	Save Cancel	1 selected of total 5	7		
Construction Fair Packages		Resource Classification Name	Resource Classification Description		
Construction Fair	General	Construction Engineer	Performs professional engineering work in the construction of	^	
Solicitations Responded Solicitation	Resource Class	Construction Specialist/Professional	Performs senior level paraprofessional engineering work in th		
Negotiation Notes Operation		Construction Technician	Performs construction functions; normally assisting higher lev		
E G CE-SW-01-291 (The Delta C	Rate c	Construction Project Manager	Overall project lead in developing, managing, monitoring and		
📄 1007-10-86-CTH N INTEF 📄 CE Snapshots	•	Construction Engineer - Mid			
🔤 📄 Sublet List					
•					
💎 Home				-	
Solicitation		1 1 20 V items	1 - 5 of 5 items	Ċ	
Contracts		Select	Cancel		

Select the **Rate Card Type** from the dropdown menu. Use Individual Wage when the basis of payment will be actual cost plus fixed fee or lump sum, NA when the basis of payment will be cost per unit and Specific Rate when the basis of payment will be specific rate of compensation.

Home				
Menu Favorites	Employee Details E	scalation details		☆ -
Solicitation List Bimonthly Solicitation List Construction Fair Packages Construction Fair	Save Cancel General			
Solicitations Responded Solicitation	Resource Classification	n :* Construction Engineer - Mid		
Pegotiation Notes Onsultant Estimate CE-SW-01-291 (The Delta C	Rate card type	e: [≖] ▼		
📄 1007-10-86-CTH N INTEF 📄 CE Snapshots	Key Staf	ff: Employee name Employee id (Only key staff	for whom employee id have been provided will be displayed)	
Sublet List		Resource Name	Current Rate	
<		No records to display.		
📌 Home				
🝶 Solicitation				
Contracts				

Choose the option to include employee names in the contract or only employee IDs.

Home				
Menu Favorites	Employee Details Escala	ation details		☆ .
Solicitation List Description Solicitation List Onstruction Fair Packages Onstruction Fair	Save Cancel General			
Bolicitations Responded Bolicitations Responded Bolicitation Bolicitation Bolicitation Notes Bolicitation Notes Bolicitation State Bolicitatio Bol	Resource Classification : * Rate card type : *	Construction Engineer - Mid		
🔤 🗎 1007-10-86-CTH N INTER	Key Staff :	Employee name Employee id (Only key staff for whom	m employee id have been provided will be displayed)	
- D CE Snapshots		source Name records to display.	Current Rate	
📌 Home				
Solicitation				
Contracts	Ad	dd Delete		

Click **Add** underneath the first table to select employees that will be part of this resource classification. On the pop up box that opens us the checkboxes to select one or more employees and click **Select**.

Home								
Menu Favorites	Employee Details Escalation details	Key Staff		×				
- Solicitation List	Save Cancel							
Bimonthly Solicitation List Gonstruction Fair Packages	Save Cancel		Resource Name	T				
Construction Fair Construction Fair	General	V	0001-Delta One	A				
 Solicitations Responded G Augotiation 	Resource Classification : * Construction Engineer		0002-Delta Two					
Negotiation Notes Consultant Estimate	Rate card type : * Individual Wage		0003-Delta Three					
E: 🔁 CE-SW-01-291 (The Delta C 1007-10-86-CTH N INTER								
CE Snapshots Sublet List	Resource Name							
	No records to display.			÷				
			20 🔻 items	1 - 3 of 3 items 💍				
			Select Cancel	7/.				
Home	Add Delete							
Solicitation	Resource Name	Weighted Average hourly rate	% contribution on Blended rate for the project resource classification					
Contracts	No records to display.							

Double click in the box next to each employee in the column Current Rate and enter the current pay rate for each employee.

Home										
Menu Favorites	Employee Details Es	scalation details		公 4						
Solicitation List Bimonthly Solicitation List Construction Fair Packages Construction Fair	Save Cancel General									
🗎 Solicitations Responded	Resource Classification	Construction Engineer - Mid								
Negotiation Notes Consultant Estimate	Rate card type	Rate card type : * Individual Wage								
CE-SW-01-291 (The Delta C		f: Employee name Employee id (Only key staff	for whom employee id have been provided will be displayed)							
- DE Snapshots		Resource Name	Current Rate							
···· 📄 Sublet List		0001-Delta One	35							
		0002-Delta Two	30							
I Home Solicitation										
Contracts		Add Delete								

Click on the Escalation details tab, check box next to the employee and click Edit.

Home > Solicitation						
Menu Favorites	Em	ployee Details	Escalation detai	Is		☆ ▲
Solicitation List Bimonthly Solicitation List Construction Fair Package	👷 Eo	ew Reports	Customize List	-None Clear		
Construction Fair Solicitations Responded		Resource Class	sificaton Name		Employee Name	WeightedAveragehourlyrate
⊡ ⊡ Negotiation I Degotiation Notes				Y	Y	Y
🔄 📄 Consultant Estimate		Construction Engi	ineer - Mid		0002-Delta Two	
🖷 📄 1007-10-86-CTH N IN1		Construction Engi	neer - Mid		0001-Delta One	
CE Snapshots						
Home						
Solicitation Contracts			H			Page 1 of 1

3.2.2 Add Individual Wage Escalation Details

First define the period the employee will be receiving the current rate of pay. Click **Add** underneath the table. Enter 0 as the **% pay increase**, today's date as the **Date of Increase** and the estimated amount of work that will be completed at this rate as the **% of Work at Current Rate**. If the employee will not be receiving escalation in the contract period enter 100 as the % of Work at Current Rate. Click **Save**.

Hama	
Home	
Menu Favorites	Escalation details
🛨 🖃 🗹	
- 📄 Solicitation List	
- 🗎 Bimonthly Solicitation List	Save Cancel
Construction Fair Packages	General
Construction Fair Solicitations Responded	
Gillations Responded Solicitations	Resource Classificaton Name : Construction Engineer - Mid
Negotiation Notes	Employee Name: 0002-Delta Two
🛄 🗋 Consultant Estimate	
E CE-SW-01-291 (The Delta C	Escalation details
	Current/Escalatio
Bublet List	details % pay increase New Pay rate increase Current Rate hourly rate
	No records to display. New Escalation details X
	Current/Escalation details 30.00
	% pay increase * 0.00
	New Pay rate 30.00
	New roy rate 30.00
	Date of increase * 09/01/2018 v
	% of Work at Current Rate * 25.00
	% of work at current Rate =
	Weighted avg. hourly rate * 7.50
()	
💎 Home	Save
Solicitation	
Contracts	Add Edit Delete

Next, define the period the employee will be receiving the escalated rate of pay. Click **Add** underneath the table. Enter the escalation rate as the **% pay increase**, the date of increase as the **Date of Increase** and the estimated amount of work that will be completed at this rate as the **% of Work at Current Rate**. Click **Save**.

The escalation rate should not exceed the amount published on WisDOT's Consultant Notices webpage.

		_
Home		
Menu Favorites	Escalation details	
Solicitation List Dismonthly Solicitation List Construction Fair Packages Construction Fair	Save Cancel General	
Solicitations Responded	Resource Classification Name : Construction Engineer - Mid	
Geotiation Megotiation Notes Description Consultant Estimate Geotection	Employee Name : 0002-Delta Two	
- 1007-10-86-CTH N INTER		
🗎 CE Snapshots	Current/Escalatio details % pay increase New Pay rate Date of % of Work at Weighted avg. increase Current Rate hourly rate	
🛄 📄 Sublet List		
	30.00 0.00 3 New Escalation details X	
	Current/Escalation details 30.00	
	% pay increase * 1.70	
	New Pay rate 30.51	
	Date of increase * 01/01/2019	
	% of Work at Current Rate * 70.00	
	Weighted avg. hourly rate * 21.36	
💎 Home	Save Cancel	
Solicitation		
Contracts	Add Edit Delete	

If the employee will be receiving multiple wage escalations during the contract period, define additional records as necessary. When all escalation records are complete click **Save**.

The % of Work at Current Rate must sum to 100.

Home								
Menu Favorites	Escalation details							
Solicitation List Solicitation List Solicitation List Construction Fair Packages Solicitations Responded Negotiation Negotiation Megotiation Notes Consultant Estimate CesSW-01-291 (The Delta C	Save Cancel General	Resource Cla Employ Escalation details	Name : Cons	struction Engineer - I 2-Delta Two	Mid			
 B 1007-10-86-CTH N INTER CE Snapshots 		Current/Escalatio details	% pay increase	New Pay rate	Date of increase	% of Work at Current Rate	Weighted avg. hourly rate	
🦾 📄 Sublet List		30.00	0.00	30.00	09/01/2018	25.00	7.50	
		30.00	1.70	30.51	01/01/2019	75.00	22.88	
Home								
Solicitation							30.38	
Contracts		Add Edit De	elete					

3.2.3 Add Specific Rate Escalation Details

If specific rate rate card will be completed using market rates (no indirect cost or fixed fee,) please contact WisDOT to remove these costs.

Click on the ellipses next to the **Indirect Cost** % field. Select the indirect cost rate type from the popup box and click **Select**. The current indirect cost rate will be added

Home				
Menu Favorites	Escalation details		Indirect Cost	×
· · · · · · · · · · · · · · · · · · ·	Save Cancel		1 selected of total 4	
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Construction Fair	General		Field Office	115.75
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Negotiation Notes Consultant Estimate	Employee Name :	0002-Delta Two	Subcontract Handling	20.00
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CE Snapshots	Fixed fee % :	7.50		
	Multiplication Factor	2.50		
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Solicitation		w Pay Date of Work at avg. Ir		1 - 4 of 4 items
Contracts	details increase	rate increase Current hourly Rate rate	Select	Cancel //

Contract Negotiation

Masterworks

First define the period the employee will be receiving the current rate of pay. Click **Add** underneath the table. Enter 0 as the **% pay increase**, today's date as the **Date of Increase** and the estimated amount of work that will be completed at this rate as the **% of Work at Current Rate**. If the employee will not be receiving escalation in the contract period enter 100 as the % of Work at Current Rate. Click **Save**.

Home												
Menu Favorites	Escalation details						New Esca	alation details			×	
- Solicitation List	Save Cancel						Curren	nt/Escalation details	30.00			
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Negotiation Image: Second state Image: Second state		Current/Esc	% pay	New Pay	Date of	% of V Work at		Date of increase *	09/01/2018	v		
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								Fixed fee	2.81			
							Actu	al labor related rate	42.35			1
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Solicitation			///	11		1000	0.00	0.00 0.00	0.00			
Contracts		Add Edit	Delete									

Next, define the period the employee will be receiving the escalated rate of pay. Click **Add** underneath the table. Enter the escalation rate as the **% pay increase**, the date of increase as the **Date of Increase** and the estimated amount of work that will be completed at this rate as the **% of Work at Current Rate**. Click **Save**.

The escalation rate should not exceed the amount published on WisDOT's Consultant Notices webpage.

Home								
Menu Favorites	Escalation details						New Escalation details	× 🌉
- Solicitation List	Save Cancel						Current/Escalation details	30.00
Bimonthly Solicitation List Construction Fair Packages	General						% pay increase *	1.70
📄 Construction Fair 📄 Solicitations Responded		Escalation det	tails				New Pay rate	30.51
 Negotiation Negotiation Notes Consultant Estimate 		Current/Esc details	% pay	New Pay rate	Date of increase	% of V Work at Current	Date of increase *	01/01/2019
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		30.00	0.00	30.00	09/01/2018	50.00	Weighted avg. hourly rate *	15.26
							Indirect cost	24.96
							Fixed fee	2.86
							Actual labor related rate	43.08
							Sa	Cancel
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Solicitation		1///					15.00 24.54 2.81	42.35
Contracts		Add Edit	Delete					

3.2.4 Weight Employee Contributions

When the escalation has been completed for all employees click **Employee Details**.

Home > Solicitation										
Menu Favorites	En	Employee Details Escalation details								
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Solicitation List	<u>%</u> v	View Reports	-None Z Add							
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- Construction Fair	Gen		Filters	Freedows News						
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E Consultant Estimate		Construction Engineer - Mid		0002-Delta Two	30.38					
1007-10-86-CTH N IN1		Construction Engineer - Mid		0001-Delta One	35.45					
- D CE Snapshots										
🌪 Home										
Solicitation										
Contracts					Page 1 of 1					

The escalated wages are brought back to the Employee Details page and the contribution of each employee to the contract must be defined. Select the first employee and click on **Edit**. In the pop up box enter the employee's estimated contribution to the contract within this classification in the **% contribution to project** and click **Save**.

Contract Negotiation

Home						
Menu Favorites	Employee Details Es	calation details				会 (
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 Solicitations Responded Solicitation 	Resource Classification	:* Construction Engine	er - Mid			
Negotiation Notes Onsultant Estimate	Rate card type	:* Individual Wage				
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		0002-Delta Two		Weighted Ave	rage hourly rate 30.38	
l				% contribution	n on project	40.00
				Blended resource cl	rate for the 12.15	
		Add Delete		<u> </u>	Save Cancel	1.
		Resource Name	Weighted Average hourly rate	% contribution on project	Blended rate for the resource classification	
		0002-Delta Two	30.38	0.00	0.00	
		0001-Delta One	35.45	0.00	0.00	
Home						
Solicitation					0.00	
Contracts		Edit				

Complete the weighting for the remaining employee(s).

The % contribution to project must sum to 100.

Home						
Menu Favorites	Employee Details E	scalation details				
Solicitation List Solicitation List Onstruction Fair Packages Solicitations Fair Solicitations Fair	Save General					
🕂 😋 Negotiation	Resource Classification	n:* Construction Engineer	- Mid			
Negotiation Notes Onsultant Estimate	Rate card type	e:* Individual Wage				
E- CE-SW-01-291 (The Delta C 	Key Staf	f: Employee name 	Employee id (Only key staff	for whom employee id have be	en provided will be displayed)	
📄 CE Snapshots 📄 Sublet List		Resource Name			Current Rate	
		0001-Delta One			35.00	
		0002-Delta Two			30.00	
		Add Delete				
		Resource Name	Weighted Average hourly rate	% contribution on project	Blended rate for the resource classification	
		0002-Delta Two	30.38	40.00	12.15	
		0001-Delta One	35.45	60.00	21.27	
•						
💎 Home						
Solicitation					33.42	
Contracts		Edit				

3.2.5 Import a Rate Card

A rate card may also be imported from a previous negotiation. To import a rated card click Import Rate Card. In the pop up box select a negotiation and click **Select**.

Menu Favorites	Co	onsultant Estimate Project Details	Rate	Card Direc	t Labor	Cost Direct C	Cost	Fixed Fee Indirect Cost			5
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Negotiation Notes Onsultant Estimate		Construction Engineer - Mid		Individual		1007-10-86	IL	LLINOIS STATE LINE - MADISON	CE-SW-01-339		
CE-SW-01-291 (The Delta C 1007-10-86-CTH N INTER						1007-10-86	IL	LLINOIS STATE LINE - MADISON	CE-SW-03-189-Sublet-CE-2		
D CE Snapshots						1004-19-86	A	Amherst - Stevens Point	CE-NC-01-242-Sublet-CE-2		
🔄 Sublet List						1004-19-86	A	Amherst - Stevens Point	CE-NC-01-266-Sublet-CE-2		
thome											-
Solicitation)(•	▶ ▶ 20 ▼ items	1 - 5 of 5 items	Ċ	,
Contracts								Select Cance	•1		

In the next pop up box that appears check the box next to the rate card to be imported and click Select.

Home > Solicitation					
Menu Favorites	Consultant Estimate Project Details	Rate Card Dire	ect Labor Cost D	Direct Cost Fixed Fee Indirect Cost	☆▲
	👫 💽 Edit 🖌 Mark as Final	Customize List	Manag	Rate Cards	× 4
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Solicitations Responded	Resource Classification	RateCard ty	pe	Project Manager Individual	· //
🖻 😋 Negotiation		Y			Y
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DO7-10-86-CTH N INTER CE Snapshots Sublet List Home				 Image: A state of the state of	ns 🕐
Solicitation				Select Cancel	4
Contracts					/// 1 of 1

3.2.6 Complete the Rate Card

Mark the rate card final by selecting it using the checkbox and clicking Mark as Final.

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📔 Construction Fair Package 📄 Construction Fair		General	(Others	Filters					
📄 Solicitations Responded		Resource Classification		RateCard t	уре			FinalLaborRate	RateCard Status	
Negotiation Image: magent state Imagent state Imagent state Imagent state Imagen	1		Y			Y		Y		Y
-		Construction Engineer - Mid		Individual				33.42	Not Final	
1007-10-86-CTH N IN CE Snapshots Sublet List										
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🚜 Solicitation										
Contracts										Page 1 of 1

Click **OK** on the warning message that appears.

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1007-10-86-CTH N IN CE Snapshots Sublet List Home Solicitation										
Contracts		4 4 1 →)4]							Page 1 of 1

The RateCard Status should now show Final.

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- Construction Fair		General		Others	Filters					
- 🗈 Solicitations Responded		Resource Classification		RateCard ty	pe			FinalLaborRate	RateCard Status	
🖻 😁 Negotiation			Y			Y		Y		Y
Consultant Estimate Great CE-SW-01-291 (The Delta		Construction Engineer - Mid		Individual				33.42	Final	
CE Snapshots CE Snapshots Sublet List										
Contracts										Page 1 of 1

3.3 Direct Labor Cost

3.3.1 Entering Direct Labor

Click on the Direct Labor Cost tab. Right click on the folders that appear and click Expand All.

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💎 Home					Collapse							
Solicitation							1					
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Check the box next to the first task and click Edit.

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Solicitation		# 🗄 884.	0 Manage Change						The Delta Company	Yes	
Contracts	4	⊟ 🗀 Quality an	nd Risk Management								

A description of the task will be displayed. Select **Yes** or **No** from the dropdown for field If Authorized. Select the Basis of Payment from the dropdown menu. Notes may be added to include any assumptions made.

In most cases the field for If Authorized should be set to No. This indicates that the task will be part of the initial contract authorization.

Menu Favorites Edit Task Image: Construction Fair Billion Nutsions Responded Solicitations Responded Activity: Project Management/Scope. Schedule at Solicitations Responded Activity: Project Management/Scope. Schedule at Image: Construction Fair Solicitations Responded Negolistion Activity: Project Management/Scope. Schedule at Construction Fair Solicitations Responded Activity: Project Management/Scope. Schedule at Consultant Estimate Description: Ninter Image: Project Scope and Schedule at Image: Project Scope and Schedule at C CE SW0-01-201 (The Delta C Image: Project Scope and Schedule at Image: Project Scope and Schedule at Description: * Image: Project Scope and Schedule at Image: Project Scope and Schedule at Sublet List Unit * HHRS V Unit * frice in S : 0.00 Image: Project Scope at Image: Project Scope at Sublet List Notes : 0.00 Image: Project Scope at Image: Project Scope at Monumet in S : 0.00 Secope at Image: Project Scope at Image: Project Scope at Monumet in S : 0.00 Secope at Image: Project S	Home			
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Click on the **Add** button beneath the Resources table. Check the box next to the resource(s) that will be working on the task and click **Select**.

Home											
Menu Favorites	Edit Task		Resource X								
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- 📄 Construction Fair Packages	General			Resource Y	Employee T						
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Solicitation	WageSheet V Add Dele	ete		Select Ca	incel						
Contracts					1.						

Double click in the cell in the **Associated Indirect Cost** column and select an indirect cost rate type from the dropdown. Double click in the cell in the **Quantity (Hrs)** column and enter the estimated number of hour this resource will take to complete the task.

Home							
Menu Favorites	Edit Task						☆ 🔺
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	Complete :						
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Contracts	WageSheet V Add Delete						

Click outside of the yellow cell so that red triangles appear in the upper left corners. Click **Save** and then click **Back** to return to the task list.

Home							
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Solicitation							
Contracts							•

Complete the rest of the task in the task list as above.

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Contracts							•	•

Additional tasks may be added to the task list as outlined in section <u>Add a New Task</u> in this guide. Please discuss with your WisDOT contact before adding additional tasks.

3.3.2 Creating a Sublet

A single task may not be performed by more than one consultant. If a task will be performed by more than one consultant add the same task to the task list twice. See <u>Add a New Task</u> in this guide.

To create a sublet check the box next to the task to be given to the subconsultant and click **Assign for Sublet**.

Home							
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Contracts							•

Click on Sublet List in the left navigation pane and click on New.

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Contracts		K	1 🕨	H									Page 1	of 1

Enter the **Sublet No** as the negation number with a dash and sequence number (ex 291-01.) Use the ellipses to select **Sublet to Consultant**. Enter **Description** and **Scope of Work** narratives. Us the ellipses to select the **Contract Function** of the sublet. Click **Save**.

Home					
Menu Favorites	Sublet Details				☆ 🔺
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Solicitations Responded Solicitation Solicitation Solicitation Solicitation	Selection Type :	Solicitation			
📄 Consultant Estimate	Sublet ID :	<auto generated=""></auto>	Sublet No : *	291-01	
CE-SW-01-291 (The Delta C		The Delta Company S	Sublet Date :	10/15/2018 12:00 AM	
🗎 Sublet List	Sublet to Consultant : *	The Gamma Company Sol	olicitation ID:	SW-01	
	Fixed Fee % :	7.50			- 1
	Description : *	Sublet to manage changes in the contract.			
				12	
	Scope of work : *	The subconsultant will monitor changes as they arise			
↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	Contract Function :	Construction Services			
Solicitation		Projects (In scope excluding If authorized)			-
Contracts	4				•

Check the box next to the newly created sublet and click **Edit**.

Home													
Menu Favorites	Su	blet Li	ist									☆	
Solicitation List Bimonthly Solicitation Lis Construction Fair Packag	New	20 V 20 V	View Delete	Status Help Select Actions -	-	Customize List	None	Clear					
Construction Fair Solicitations Responded		Genera	Sublet ID	Sublet No		Others Solicitation		Filters Sublet By		Region/Bureau	Pending On Role(s)	Pending On User(s)	Ві
 Hegotiation Negotiation Notes 			Y		Y		Y		Y	Y	Y	Y	j C
E: Consultant Estimate			Sublet-CE-1	291-01		SW-01		The Delta Co	mpany	Southwest Region	Administrator, Consultant N	Adam Sellin,Administrator	r) M
1007-10-86-CTH N IN CE Snapshots Sublet List													
📌 Home													
Solicitation	•												•
Contracts		K										Page 1 o	of 1

Expand the folder in the left navigation pane and click on the link with the project ID. Click on the **Direct Labor Cost** tab.

Home					
Menu Favorites	Sublet Estimate Details Rate Card	Direct Labor Cost	Direct Cost Fixed Fee	Indirect Cost	☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages Construction Fair	Save New Delete General	nize List 🖷 Associate basis o sk 📲 Associate Indirec Others			
- 📄 Solicitations Responded	Name	Order ID	Task Description	Accounting In Scope	If Authorized
Negotiation Negotiation Negotiation Notes Cossultant Estimate OCS-SW-01-291 (The Delta C OCS napshots Sublet List Sublet List OCS napshots OCS napshots ODS Sublet CE-11 (The Gan OT-10-86-CTH N		Y	Y	Y	Y
Solicitation Contracts	4				,

Click **Add Task**. In the pop up box check the box next to the task to be assigned to the subconsultant and click **Select**.

Home					
Menu Favorites	Sublet Estimate Details Rate Card D Control Control C	Select Task Direct Cast Eive	d Enn Indianat Cant		×
Construction Fair Packages Construction Fair	General	🖉 Order ID 🝸	Task Name	Task Description	
- 🗎 Solicitations Responded	Name	2	884.0 Manage Change	Includes processes for identifying, HR	A B
Negotiation Negotiation Negotiation Notes Ocnsultant Estimate OC-SW-01-291 (The Delta C OC-SW-01-291					-
↓		•		•	
💎 Home		[◀ ◀ 1 ► ► 20 ▼ item		1 - 1 of 1 items	5
Solicitation Contracts			Select Cancel		11.

The task will now show up in the subconsultant's task list.

Home												
Menu Favorites	9	Sublet Estimate Detail	s Rate Card Direct L	abor Cost	Dir	rect Cost Fixed Fee	Ind	irect Cost			2	3
Solicitation List Bimonthly Solicitation List Construction Fair Packages Construction Fair	Sav		Reports	Associate Indirect								
- Solicitations Responded		Name		Order ID		Task Description		Accountin	In Scope	If Authorized	Ba	asis of
Negotiation Negotiation Notes Onsultant Estimate			Y		7		7	Y	Y	Y		
E 🔄 CE-SW-01-291 (The Delta C		🗆 🚞 Project Manag	jement	1								
1007-10-86-CTH N INTEF CE Snapshots		🗆 🧰 Scope, Sc	hedule and Change Managemen	1.1								
🗄 😋 Sublet List		🖂 🚞 884 Ma	anage Change	1.1.1								
➡ ➡ SE Snapshots		⊕ 🗋 884.0) Manage Change	1.1.1.1		Includes processes for identifyin monitoring, and controlling chan on a project.	- · ·		Yes			
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💎 Home												
Solicitation												
Contracts												•

Click on **Sublet List** in the left navigation pane. Check the box next to the sublet. Click on **Select Actions** and **Scope Finalized**.

Home														
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- 📄 Solicitations Responded - 🔄 Negotiation		0 9	ublet ID		Sublet No		Solicitation I	D	Sublet By		Region/Bureau	Pending On Role(s)	Pending On User(s)	Bimo
- 🗎 Negotiation Notes				Y		Y		Y		Y	Y	Y	A	
E G CE-SW-01-291 (The Delta C	2	5	ublet-CE-1		291-01		SW-01		The Delta Co	mpany	Southwest Region	Administrator, Consultant N	Adam Sellin,Administrator	March
- Digital 1007-10-86-CTH N INTEF														
↓ →														
🌪 Home														
Solicitation														•
Contracts		K	1→	M									Page	1 of 1

Click **OK** on the acknowledgement screen. The subconsultant can now begin work on its negotiation.

Home				
Menu Favorites	WisDOT Masterworks Staging			
Solicitation List				
Bimonthly Solicitation List Gonstruction Fair Packages				
Construction Fair				
Solicitations Responded Solicitation				
- 🖹 Negotiation Notes				
⊡ Consultant Estimate ⊡ G1-291 (The Delta C4	Set Days To Complete for Next Stage :			
- 1007-10-86-CTH N INTER		Attachment	3	
📄 CE Snapshots 📄 Sublet List	0			
	Document Title	Uploaded By	Uploaded Date	File Size
	No Attachments available			
4 · · · · · · · · · · · · · · · · · · ·	Upload Document			
💎 Home		ОК	Cancel	
Solicitation				
Contracts				Page 1 of 1

3.3.3 Completing Direct Labor Cost

Once all tasks have been completed click Mark Final.

A basis of payment must be associated to every task to complete this action.

Home											
Menu Favorites	(Consultant Estimate P	Project Details Rate Card Dire	ect I	Labor Cost Direct Cost	st Fix	ed Fee Ind	rect Cost		z	לא צ
Solicitation List Bimonthly Solicitation List Construction Fair Packages Construction Fair	Sav		Reports Assign for Sublet Mark F	inal	nal		t				
Solicitations Responded		Name			Sublet Status	Consulta	ant/Subconsulta	in In Scope		Basis of Payment	-
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1007-10-86-CTH N INTE CE Snapshots		🖃 🚞 Project Manag	gement								
📄 Sublet List		🗆 🛅 Scope, Sc	chedule and Change Management								
		🖂 🤤 887 M	anage Project Scope and Schedule								
		··· 🗎 887.	0 Manage Project Scope and Schedule			The Delta	a Company	Yes		Actual plus fixed fee	
		🖂 🧰 884 M	anage Change								
∢ →		⊕ 🗋 884.	0 Manage Change			The Delta	Company	Yes			
📌 Home		🗆 🚞 Quality ar	nd Risk Management								
🚜 Solicitation		🗆 🗀 890 M	anage Project Quality								-
Contracts											۶.

A success message will appear.

Home									
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- 🗎 Construction Fair		General	Others		_		1	1	
Solicitations Responded		Name			5	Sublet Status	Consultant/Subconsultar	In Scope	Basis of Payment
Garage Megotiation Megotiation Notes				Y]	Y	Y	Y	
E G Ce-SW-01-291 (The Delta C		🖯 🗀 Proje	ect Management						
1007-10-86-CTH N INTER		0 🗀 :	Scope, Schedule and Change Managemen	t					
- 📄 CE Snapshots 📄 Sublet List		Θ	🚞 887 Manage Project Scope and Schedu	le	Ι				
4			887.0 Manage Project Scope and Scher	dule			The Delta Company	Yes	Actual plus fixed fee
Home		Θ	🛅 884 Manage Change						
Solicitation			🕀 🗋 884.0 Manage Change				The Delta Company	Yes	Actual plus fixed fee
Contracts	•		0						•

3.4 Add Direct Costs

To add direct costs, click on the **Direct Cost** tab and click **Add** below the Direct Cost table.

Home												
Menu Favorites	Consultant Es	timate Project D)etails R	Rate Card	Direct Labor Co	st Direct	Cost Fi	ked Fee Ind	direct Cost			☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages Solicitations Responded	Save General											4
CE-SW-01-291 (The Delta Column 1007-10-86-CTH N INTER	Consultant/Su Name	Direct Cost Type	Description	Unit Type	Fiscal Year End Date	Is Current	For If Authorized	Basis of Payment	Quantity	Rate (per quantity)	Total Expenses	
CE Snapshots Sublet List	No records to disp	olay.										
 ↓ ↓ Home 												
Solicitation	Add Edit	Delete									0.00	

In the pop up box check the box(es) next to direct cost type(s) that will be part of the contract. Click **Select** to add the types to the table. Multiple types may be added at once. Direct cost types may be duplicated, for example meals for lunch and meals for dinner.

Menu Favorites	Consultant Estimate Project Det	ails R	ate Ca	rd Direct Labo	r Cost Direct Cost Fixed Fe	ee Indirect Co	st		2					
Solicitation List Bimonthly Solicitation List	Save		Direct Cost											
Construction Fair Packages Construction Fair	General		1 selec	Select All Reco	ords									
Solicitations Responded Department	Direct Cost	Direct Cost		Consultant N 🍸	Direct Cost Type	Fiscal Year E 🍸	Description	Unit T						
🗉 🛅 CE-SW-01-291 (The Delta C	Consultant/Su Direct Cost Des	scription		The Delta Com	Camera	12/31/2017		EA	-					
🗎 1007-10-86-CTH N INTER	No records to display.			The Delta Com	Company Vehicle Mileage	12/31/2017		EA						
🛄 🔝 Sublet List				The Delta Com	Concrete Coring	12/31/2017		EA						
•					The Delta Com	Concrete Testing/Equipment	12/31/2017		EA					
				The Delta Com	Conference Calls/Video/Web	12/31/2017		EA						
				The Delta Com	Data Research/Services/Materials	12/31/2017		EA						
				The Delta Com	Employee Vehicle Allowance	12/31/2017		EA						
			-					L L						
			(20 🔻 items			1 - 20 of 69 items	Q					
•					Select	Cancel								
🐤 Home														
Solicitation				10000	000000000		00000	0.00						

Click on one of the direct types so that it turns orange and click Edit.

Home												~ •
Menu Favorites Image: Solicitation List Image: Solicitation List Image: Solicitation Solicitation List Image: Solicitation Solicitation List Image: Solicitation Solicitations	Consultant E	stimate Projec	t Details F	Rate Card	Direct Labor Co	Direct	Cost Fixe	d Fee Indir	ect Cost			☆ ▲
Generation Generation Sector Notes Generation Notes Generation Notes	Consultant/Su Name	Direct Cost Type	Description	Unit Type	Fiscal Year End Date	Is Current	For If Authorized	Basis of Payment	Quantity	Rate (per quantity)	Total Expenses	
CE-SW-01-291 (The Delta C	The Delta Com	Company Vehi	Miles to and from site	EA	12/31/2017	Yes	No	Actual Plus Fix	3,500.00	0.545	1907.50	
DE Snapshots	The Delta Com	Meals		EA	12/31/2017	Yes	No		0.00	0	0.00	
	The Delta Com	Meals		EA	12/31/2017	Yes	No		0.00	0	0.00	
► Home												
											1,907.50	
Solicitation											1,007.00	

Enter an additional **Description**. For If Authorized defaults to No, this should not be changed unless it will be part of a future contract authorization. Select a **Basis of Payment**. Enter the estimated **Quantity** of the item and the **Rate (per quantity)**. Click **Save**.

The basis of payment for direct costs should match the basis of payment for direct labor cost.

Home					
Menu Favorites	Consultant Estimate Project Detai	Edit Direct Cost		× 44	
Solicitation List Bimonthly Solicitation List Construction Fair Packages	Save	Description	Meals for lunch	•	
📄 Construction Fair 📄 Solicitations Responded	General Direct Cost	Unit Type	EA		
	Consultant/Su Name Type Descr	Fiscal Year End Date	12/31/2017	Rate (pe quantity	
Consultant Estimate	The Delta Com Company Vehit Miles from s	Is Current	Yes	0.54	
D CE Snapshots	The Delta Corr Meals	For If Authorized * Basis of Payment *	No Actual Plus Fixed Fee		0 0.00
•	The Delta Com Meals	Quantity	175.00		0 0.00
		Rate (per quantity)	10.00		
		Total Expenses	1,750.00		
			Save Cancel	-	
 ↓ ↓ Home 					1,907.50
Solicitation	Add Edit Delete				
Contracts	In Scope excluding if authorized: 1,907.				

Contract Negotiation

Masterworks

After all items have been completed click **Save**.

Home												
Menu Favorites	Consultant E	stimate Projec	t Details 🛛 F	Rate Card	Direct Labor Co	ost Direct	Cost Fixe	d Fee Indir	ect Cost			☆
Solicitation List Bimonthly Solicitation List Construction Fair Packages Construction Fair	Save											
Solicitations Responded Gamma Responded	Direct Cost											
Generation Megotiation Megotiation Notes Gonsultant Estimate	Consultant/Su Name	Direct Cost Type	Description	Unit Type	Fiscal Year End Date	Is Current	For If Authorized	Basis of Payment	Quantity	Rate (per quantity)	Total Expenses	
CE-SW-01-291 (The Delta C	The Delta Com	Company Vehi	Miles to and from site	EA	12/31/2017	Yes	No	Actual Plus Fix	3,500.00	0.545	1907.50	
📄 CE Snapshots 📄 Sublet List	The Delta Com	Meals	Meals for lunch	EA	12/31/2017	Yes	No	Actual Plus Fix	175.00	10.00	1,750.00	
4	The Delta Com	Meals	Dinner	EA	12/31/2017	Yes	No	Actual Plus Fix	50.00	20.00	1,000.00	
Home											4,657.50	
Solicitation	Add Edit	Delete										
Contracts	In Scope	excluding if authorized:	4.657.50									

3.5 Fixed Fee

Click on the Fixed Fee tab to review the amount of fixed fee included in the contract. There is no user entry on this screen.

Menu Favorites	Consultant Estimate Project	Details Rate Card	Direct Labor Cost Dir	ect Cost Fixed Fee	Indirect Cost	☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages Construction Fair	Save General					
□ Solicitations Responded □ □ □	Fixed Fee The Delta Company	Total direct labor cost (A)	Fixed Fee % (B)	(A * B)	Multiplication factor	Total
🖻 🔂 CE-SW-01-291 (The Delta C	'In Scope' excluding 'If Authorized'	3342.00	7.50	250.65	3.00	751.95
📄 1007-10-86-CTH N INTER 📄 CE Snapshots 📄 Sublet List					Total Fixed Fee	751.95
📌 Home						
Solicitation						
Contracts						

3.6 Indirect Cost

Click on the Indirect Cost tab to review the indirect cost added to the contract.

Home							
Menu Favorites	Consultant Estimate	Project Details Rate C	ard Direct Labor Cost	Direct Cost	Fixed Fee	Indirect Cost	☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages Construction Fair	Save General						
📄 Solicitations Responded	[-] In Scope excluding If A	uthorized					<u>^</u>
🖻 😋 Negotiation	Consultant						
Consultant Estimate Ge-SW-01-291 (The Delta Construction of the Delta Construction of t		Total direct labor cost against an indirect cost type	Indirect type %	Indirect cost agair indirect cost type			
CE Snapshots Sublet List	Consultant Home Office	3342.00	163.59		5467.18		
			Total Consultant Indirect Cos	t	5467.18		
📌 Home							
Solicitation							
Contracts							-

The **Indirect type %** field may be edited as part of negotiations.

At this time, the indirect cost rate may only be edited down. If the consultant is expecting an increase in an indirect cost rate please contact WisDOT prior to beginning negotiations.

Home							
Menu Favorites	Consultant Estimate	Project Details Rate (Card Direct Labor Cost	Direct Cost F	Fixed Fee	Indirect Cost	☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages	Save						
Construction Fair Solicitations Responded	General [-] In Scope excluding If A	uthorized					
E 🔁 Negotiation	Consultant						
Consultant Estimate GE-SW-01-291 (The Delta C M) 1007-10-86-CTH N INTER		Total direct labor cost against an indirect cost type	Indirect type %	Indirect cost against indirect cost type	t an		
- 📄 CE Snapshots	Consultant Home Office	3342.00) 163.59	ţ	5467.18		
			Total Consultant Indirect Cos	it :	5467.18		
📌 Home							
Solicitation							
Contracts							-

3.7 Publishing the Estimate

3.7.1 Accepting Subconsultant Negotiations

If any sublets have been made, the higher tier consultant must accept before the negotiation may be published back to WisDOT.

Click on **Sublet List** in the left navigation pane. Check the box next to the negotiation. Click on **Select Actions** and **Negotiation Completed** to accept the subconsultants estimate. If revisions are needed choose **ReDraft** and then click on **Select Actions** and **Scope Finalized**.

Home														
Menu Favorites	S	ublet Li	st											
+ - •	*		Edit 🚺	🖃 Status	6	Customize	List		i Manage					
- 📄 Solicitation List	New		View 🛛 🍋	/ 🕜 Help		Excel Expo	rt 🗸		DbA 👦					
Bimonthly Solicitation List	New	ا 👱 ا	Delete	Select A	ctions 🗸			None	V Clear					
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Negotiation Negotiation Notes				ReDraf	t			Y		Y	Y	Y	A	ar
Consultant Estimate			0.000			0111.04	-	,	The Delle 0		Continued Desire		Adam Callin Administration	
🖻 🔂 CE-SW-01-291 (The Delta	2		Sublet-CE-1	291-0	1	SW-01			The Delta Co	ompany	Southwest Region	Administrator, Consultant N	Adam Sellin,Administrato	or / IV
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📌 Home														
Solicitation	•													÷
Contracts		K	∢ 1 →	H									Page 1	of 1

Click **OK** on acknowledgement screen.

Home				
Menu Favorites	Sublet List			☆▲
+ - •	WisDOT Masterworks Staging			
- 📄 Solicitation List				
Bimonthly Solicitation List Gonstruction Fair Package	Set Days To Complete for Next Stage :			
- 🗎 Construction Fair		Attachment	s	
Solicitations Responded	0			
🗄 😋 Negotiation				
- 🗎 Negotiation Notes	Document Title	Uploaded By	Uploaded Date	File Size
🔤 🗋 Consultant Estimate	No Attachments available			
🗄 😋 CE-SW-01-291 (The Delta				
📔 1007-10-86-CTH N IN	Upload Document			
🗎 CE Snapshots				
Sublet List		ОК	Cancel	
✓				
💎 Home				
Solicitation				×
Contracts				Page 1 of 1

3.7.2 Publishing the Prime's Estimate

After reviewing project costs click on **Consultant Estimate** in the left navigation pane. Check the box next to the negotiation. Click **Select Actions** and then click **Publish**. This returns the negotiation to WisDOT and moves the process forward. Selecting ReDraft will return the negotiation to WisDOT for revisions.

Menu Favorites	Co	onsulta	nt Estimate List										☆ 🖌
Solicitation List Bimonthly Solicitation List Construction Fair Packages Construction Fair	* New	Genera	View History	Status Help Select Action ReDraft	F		ustomize List ccel Export + ers	None-	Manage Add Clear Filters				
- Dicitations Responded		U	Consultant Es	Publish	C C	Consultant	Selection Ty	pe	Consultant	Estimate Title	Region/Bureau	Project ID(s)	Solicitatio
Constraintion Constraintion Constraintion				Y		7		Y		Y	Y	Y	
📄 Consultant Estimate			CE-SW-01-337	т	he Delta (Company	Solicitation		March 2015	SW-01	Southwest Region	1007-10-86	SW-01
			CE-SW-01-291	т	he Delta	Company	Solicitation		March 2015	SW-01	Southwest Region	1007-10-86	SW-01
陀 Home		U	CE-NC-01-242	т	he Alpha	Company	Solicitation		18 05 16		North Central Region	1004-19-86	NC-01
						Company	Solicitation		180404-03 s		Southwest Region	1007-10-86	SW-03

Click **OK** on the acknowledgement screen.

Home > Solicitation				
Menu Favorites	Consultant Estimate List			☆▲
÷ ∈ ∨	WisDOT Masterworks Staging			
Solicitation List	Set Days To Complete for Next Stage :			
Bimonthly Solicitation List Donstruction Fair Packages		Attachment	\$	
Construction Fair Solicitations Responded	0			
🗄 😋 Negotiation	Document Title	Uploaded By	Uploaded Date	File Size
Negotiation Notes Consultant Estimate	No Attachments available			
	Upload Document			
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🏫 Home	CE-SW-03-189 The Alpha	Company Solicitation 180404-0	3 sub test Southwest Region	1007-10-86 SW-03 -
Solicitation		Company Sonchaiton 100404-0	Souriwest Region	1007-10-00 SW-05
Contracts				Page 1 of 1

3.7.3 Publishing a Sublet

After reviewing project costs click on the **Sublet List** link in the left navigation pane. Check the box next to the negotiation. Click **Select Actions** and then click **Publish**.

Home																	
Menu Favorites	Su	blet Li	st														☆ 🔺
	*				_	atus		Custo			Man						
- 🗎 Solicitation List	New		/iew	-	🕜 He	lp		Excel	Export	-	Nopo 🔂 Add						
- 📄 Bimonthly Solicitation List	New	👷 (Delete	History	🛃 Se	lect Actio	ons 🗸				None 🝸 Clea						
Construction Fair Packages Onstruction Fair	(Genera	I		Р	ublish		Oth	ers		Filters						
📄 Solicitations Responded		U	Suble	et ID	R	eDraft		Solicitatio	n ID	Sut	blet By		Region/Bureau		Pending On Role(s)	Pending On User(s)	Bimor
🖹 🚖 Negotiation					Y		Y		Y		7	-	Y	a l	Y	Y	
- 🗎 Negotiation Notes													¥		¥	¥	
🔤 📄 Consultant Estimate	~		Sublet	LCE-1		291-01		SW-01		The	e Delta Company		Southwest Region		Administrator Consultant Ne	Adam Sellin, Administrator	March
🚊 🔁 CE-SW-01-291 (The Delta Comp			Subict	-02-1		201-01		501-01		The	e Dena Company		Southwest Region		Administrator, Consultant No	Addin Schin, Administratory	Waren
📄 Sublet List																	
<																	
💎 Home																	
🚜 Solicitation	•																F
Contracts		K	• 1]											Pag	e 1 of 1

Click **OK** on the warning message that appears

MASTER works '						sterworkslive.c	om says Direct Cost,Risk and \	/alidated	Gamma Consultant 🔻					
Menu Favorites	* •••• New	2 👳 V	idit View Delete	other c		1 C C C C C C C C C C C C C C C C C C C	OK				Y			
- 📄 Solicitations Responded	1	U	Sublet ID	F	ReDraft	Solicitation ID	Sublet By	Region/Bureau		Pending On Role(s)	Pending On User(s)	Bimor		
 — Negotiation 				Y	Y	Y	Y		7	Y	Y			
└── 📄 Consultant Estimate ⊡· 😋 CE-SW-01-291 (The Delta Comp			Sublet-CE-	1	291-01	SW-01	The Delta Company	Southwest Region	n	Administrator,Consultant Ne	Adam Sellin,Administrator A	March		
Subjet List Home Solicitation Contracts	4	- 14	< 1 >								Page	▶ e 1 of 1		

Click **OK** on the acknowledgement screen.

Home				
Menu Favorites	Sublet List			
	WisDOT Masterworks Staging			
- 🗎 Solicitation List	Set Days To Complete for Next Stage :			
Bimonthly Solicitation List Donstruction Fair Packages		Attachmer	ts	
Construction Fair Solicitations Responded	8			
🗄 😋 Negotiation	Document Title	Uploaded By	Uploaded Date	File Size
	No Attachments available Upload Document			
Sublet List		ОК	Cancel	
💎 Home				
🏭 Solicitation				K
Contracts				Page 1 of 1

The negotiation has now been returned to WisDOT. Please let your WisDOT contact know the estimate is ready for review.

4 Review Estimate – WisDOT

After the consultant has published the estimate, WisDOT may begin its review.

4.1 Negotiation Reports

To view reports, navigate to the solicitation module. Click on Consultant Estimate. Check the box next to the negotiation. Click on the Reports button and select one of the reports form the menu.

Home > Solicitation											
Menu Favorites	Co	nsultant Es	timate List								☆ 🔺
	* III New	👷 Edit 👷 View 📡 Delete	History Elect A	ctions -		ustomize List xcel Export + None	Manage 🔂 Add				
Construction Fair Packages Construction Fair		General	Workflow		🤏 Full Nego	tiation Report			-		
🖃 🔄 Negotiation		() Con	sultant Estimate ID	Selecte	t 🤏 Details Re	eport		stimate Title	Region/Bureau	Project ID(s)	Solicitati
Degotiation Notes			Y		🤏 List Page			Y	Y	Y	
Consultant Estimate Ons I Consultant Estimate		CE-I	.D-21-292	El Seif E	r	nt Estimate Summary)1	Bureau of Structures	proj-12-11	LD-21
	\checkmark	CE-	SW-01-291	The Delf	a company	onsultant Estimate Sun	mary	<i>v</i> -01	Southwest Region	1007-10-86	SW-01
💎 Home		CE-\	VOR-167-290	The Alph	a Company	Work Order Request	Test for DT25		Bureau of Project Deve	1517-07-13	WOR-167
Projects		CE-I	VE-01-289	El Seif E	ngineering Co LT	Solicitation	Test CE_Khan		Northeast Region	proj-12-11	NE-01
🚜 Solicitation	<	1							1		>
Contracts		K	1 2 3 4 5 6 7 8	9 10	► H						Page 3 of 17

- The Full Negotiation Report contains all negotiation information.
- The Details Report contains a summary of prime consultant costs.
- The List Page Report lists all negotiations displayed on the screen.
- The Consultant Estimate Summary contains a summary of costs by type and task.
- The Project Consultant Estimate Summary contains a summary of direct labor cost by task.

4.2 Reviewing Estimate Costs

Navigate to the **Solicitation** module, expand the **Negotiation** folder in the left navigation and clicking **Consultant Estimate**. Check the box next to the negotiation and click **View**.

Menu Favorites	Co	onsulta	nt Estir	nate List									☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages	New	8	View Delete	History Status Bistory Select A Workflow	ctions +		ustomize List ccel Export +	None	Manage				
Construction Fair Negotiation		U		ultant Estimate ID	Selecte	dConsultant	Selection Ty			t Estimate Title	Region/Bureau	Project ID(s)	Solicitatio
WisDOT Estimate Consultant Estimate			CE-BF	PD-01-293	I he Alph	a Company	Solicitation	Y	Conusitant c	ontract Viewer test1	Bureau of Project Deve	2645-08-90	BPD-01
Non Formal			CE-LD	-21-292	El Seif E	ngineering Co LT	Local Design		Muz_CE_LD	_001	Bureau of Structures	proj-12-11	LD-21
Home	\checkmark		CE-SV	V-01-291	The Delt	a Company	Solicitation		March 2015	SW-01	Southwest Region	1007-10-86	SW-01
Projects			CE-W	OR-167-290	The Alph	a Company	Work Order R	equest	Test for DT2	5	Bureau of Project Deve	1517-07-13	WOR-167
Solicitation	-		or		F10 7F				T 105 10				

A summary of prime consultant costs is displayed.

Home												
Menu Favorites	Consul	tant Estimate	Details									
Solicitation List Bimonthly Solicitation List Construction Fair Packages	Cancel	History										
Construction Fair	General	Workflow	ant * The Delta Co					rixea ree	%: (.50			
Geotiation Negotiation Notes Description Notes De	Impo	ort Task List fror	n : * Solicitation T Projects (In		luding If au		Negotiation	Submission Di	Due * 10/01 ate :	1/2018		
🗄 🧰 Non Formal			Project Name	Direct Labor Cost in \$	Direct Cost in \$	Indirect Cost in \$	Fixed Fee in \$	Marked as Final	Total Hours	Total in \$	limit	
>			ILLINOIS S	3,342.00	4,657.50	5,467.18	751.95	Yes	100.00	14,218.63	CTH N INTE	
🔁 Home												
Projects				3,342.00	4,657.50	5,467.18	751.95		100.00	14,218.63		
Solicitation			Projects (If									
Contracts	<		,		,							>

To view more detailed information, expand the folder in the left navigation and click on the link with the project ID. Click through the tabs on the top of the screen to see more details.

Home							
Menu Favorites	Consultant Estimate	Project Details Rate C	ard Direct Labor Cost	Direct Cost	Fixed Fee Indirect Cost		☆ 🔺
Solicitation List	Save						
Bimonthly Solicitation List Gonstruction Fair Package	5010						
Construction Fair	General						
Negotiation Image: Megotiation Image: Megotiation Notes	Measurement System	: IS System					~
- D WisDOT Estimate							
🔄 📄 Consultant Estimate	Cost Summar	y (In scope excluding If a	uthorized)	Cost Summar	y (If authorized)	1	
CE-SW-01-291 (The Delta	Cost Type	Amount in \$		Cost Type	Amount in \$		
📄 CE Snapshots	Direct Labor Cost	3,342.00		Direct Labor Cost	0.00		
Sublet List	Direct Cost	4,657.50		Direct Cost	0.00		
📌 Home	Fixed Fee	751.95		Fixed Fee	0.00		
Projects	Indirect Cost	5,467.18		Indirect Cost	0.00		
Solicitation	Estimate Total in	\$: 14.218.63		imate Total Auth in	5: 0.00		~
Contracts	Estimate l'otal in	}: 14,∠10.03	Esti	inate rotal Auth In :	5: 0.00		>

4.3 Returning the Negotiation for Revision

If the consultant needs to make changes to the estimate navigate to the Consultant Estimate list page. Check the box next to the negotiation and click **Select Actions** and **ReDraft**. Reject is an option that should only be used if negotiations have reached an impasse will not be proceeding.

Home > Solicitation																
Menu Favorites	Co	nsulta	nt Estin	nate List												☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages	New	2	View Delete	History	Status Help Select A	ctions -	Reports E	ustomize List xcel Export +	None	Manage						
Construction Fair Gonstruction Megotiation Megotiation Notes		U		ultant Es	-		ipieteu	Selection Ty		,	Estimate Title	Region/Bureau	Y F	Project ID(s)	7	Solicitati
WisDOT Estimate Consultant Estimate Non Formal			CE-BP	D-01-293		The Alph	a Company	Solicitation		Conusitant co	ontract Viewer test1	Bureau of Project		2645-08-90		BPD-01
			CE-LD	-21-292		El Seif E	ngineering Co LT	Local Design		Muz_CE_LD_	_001	Bureau of Structur	res p	proj-12-11		LD-21
			CE-SV	V-01-291		The Delt	a Company	Solicitation		March 2015 S	SW-01	Southwest Region	1	1007-10-86		SW-01
🏫 Home			CE-W0	DR-167-2	90	The Alph	a Company	Work Order R	equest	Test for DT25	;	Bureau of Project	Deve 1	1517-07-13		WOR-167
Projects			CE-NE	-01-289		El Seif E	ngineering Co LT	Solicitation		Test CE_Kha	n	Northeast Region	p	oroj-12-11		NE-01
Solicitation	<															>
Contracts		K	∢ 1	2 3 4	5678	9 10										Page 3 of 17

Click **OK** on the acknowledgement screen.

Home > Solicitation				
Menu Favorites	Consultant Estimate List			☆▲
	WisDOT Masterworks Staging			
 Solicitation List 				
Bimonthly Solicitation List Description Fair Packages	Set Days To Complete for Next Stage :			
Construction Fair		Attachmen	ts	
🖻 😋 Negotiation	8			
- Disport Estimate	Document Title	Uploaded By	Uploaded Date	File Size
📄 Consultant Estimate	No Attachments available		1	1
🗄 🚞 Non Formal	Upload Document			
		ОК	Cancel	
		UK I	cancel	
💦 Home	<			
Projects	CE-NE-01-289 El Seif Engin	eering Co LT Solicitation Test CE	_Khan Northeast Region	proj-12-11 NE-01
🔒 Solicitation	<			X
Contracts	K < 1 2 3 4 5 6 7 8 9 10			Page 3 of 17

Check the box next to the negotiation and click **Edit**.

Home > Solicitation															٦
Menu Favorites	Co	nsulta	nt Estimate List											☆ 🔺	
Solicitation List Bimonthly Solicitation List Construction Fair Packages	* New	20 V 20 V	View Delete	Status Help Select Ac	ctions +	Reports E	ustomize List ccel Export 👻	None-	Manage Add Clear						
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Negotiation Notes WisDOT Estimate				Y		Y		Y		Y	Y		7		
i iii Consultant Estimate ⊡ iii Non Formal			CE-LD-21-292		El Seif Er	ngineering Co LT	Local Design		Muz_CE_LD	_001	Bureau of Structures	proj-12-11	L	.D-21	^
	\checkmark		CE-SW-01-291		The Delta	a Company	Solicitation		March 2015	SW-01	Southwest Region	1007-10-86	s	SW-01	
			CE-WOR-167-290		The Alph	a Company	Work Order R	equest	Test for DT2	5	Bureau of Project Deve	1517-07-13	v	VOR-167	
Reference in the second			CE-NE-01-289		El Seif Er	ngineering Co LT	Solicitation		Test CE_Kha	an	Northeast Region	proj-12-11	N	IE-01	
Projects Solicitation			CE-BPD-01-288		The Alph	a Company	Solicitation		Jan 2032		Bureau of Project Deve	1021-00-06, 1021-	00-0 B	PD-01	Ĭ
Contracts		K	1 2 3 4 5	678	9 10	××							Pa	age 3 of 1	7

In the left navigation pane expand the folder with the negotiation title and click on the link with the project ID. Upload documents that are evidence of negotiations. These may include emails or notes from meetings or phone conversations. Click **Save**.

Not all details of negotiations need to be kept in masterworks. But, include a record of what was discussed in Masterworks.

Home							
Menu Favorites	Consultant Estimate P	roject Details Rate Car	d Direct Labor Cost	Direct Cost	Fixed Fee Indi	irect Cost	☆ 🔺
Solicitation List Bimonthly Solicitation List Onstruction Fair Packages Construction Fair	Save General						
📮 🔁 Negotiation	Cost Type	Amount in \$		Cost Type	Amount in	\$	~
📄 Negotiation Notes 📄 WisDOT Estimate	Direct Labor Cost	3,342.00		Direct Labor Cost	0.00		
🔄 📄 Consultant Estimate	Direct Cost	4,657.50		Direct Cost	0.00		
📄 1007-10-86-CTH N INTE	Fixed Fee	751.95		Fixed Fee	0.00		
E Constant Sublet List	Indirect Cost	5,467.18		Indirect Cost	0.00		
	Estimate Total in \$ Estimate Total Hours			mate Total Auth in \$ nte Total Auth Hours			- 1
	Attachments						
	😣 🖻 🛓						
🌪 Home	Document Name	Url/Link	Title	Uploaded B	y U	Iploaded Date	File Size
Projects	No Attachments available						_
Solicitation	Link Document Upload D	ocument					~
Contracts	<						

Return to the **Consultant Estimate** page check the box next to the negotiation and click **Select Actions** and **Scope Finalized**.

Menu Favorites	Co	nsultant l	Estimate List	1									
Solicitation List Solicitation List Orstruction Fair Packages Construction Fair	New	Edit View Dele Seneral	v 15	Status Help Select A Scope	ctions -	E	ustomize List xcel Export + ers	*	Manage Add Clear Filters				
🖃 😑 Negotiation		0 C	onsultant Es	timate ID	SelectedConsult	tant	Selection Ty	pe	Consultant	t Estimate Title	Region/Bureau	Project ID(s)	Solicitat
Negotiation Notes WisDOT Estimate				Y		7		Y		Y	Y	Y	
Consultant Estimate Non Formal		С	E-BPD-01-293		The Alpha Compar	ту	Solicitation		Conusitant o	contract Viewer test1	Bureau of Project Dev	ε 2645-08-90	BPD-01
		C	E-LD-21-292		El Seif Engineering	Co LT	Local Design		Muz_CE_LD	0_001	Bureau of Structures	proj-12-11	LD-21
🜪 Home	•	С	E-SW-01-291		The Delta Compar	iy	Solicitation		March 2015	SW-01	Southwest Region	1007-10-86	SW-01
Projects		CI	E-WOR-167-2	90	The Alpha Compar	ту	Work Order R	equest	Test for DT2	25	Bureau of Project Dev	€ 1517-07-13	WOR-167
Contracts			1 2 3 4	5678	9 10)			-					Page 3 of

Click **OK** on the acknowledgement screen.

Home > Solicitation				
Menu Favorites	Consultant Estimate List			/☆▲/
+ - •	WisDOT Masterworks Staging			
Solicitation List Bimonthly Solicitation List Solicitation List Solicitation List	Set Days To Complete for Next Stage :			
Construction Fair Construction Fair		Attachmen	ts	
🖻 😋 Negotiation	0			
🗎 WisDOT Estimate	Document Title	Uploaded By	Uploaded Date	File Size
Consultant Estimate	No Attachments available		·	
🗄 🚞 Non Formal	Upload Document			
		or	0	
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Projects	CE-NE-01-289 El Seif En	gineering Co LT Solicitation Test CE	_Khan Northeast Region	proj-12-11 NE-01
Solicitation				
Contracts	K < 1 2 3 4 5 6 7 8 9 10	H		Page 3 of 17

A red warning message will be displayed in the upper right corner of the screen indicating that the system was unable to send a message to the consultant. Please notify the consultant that it has a new negotiation to work on.

Home											
Menu Favorites	Consultant Estimate De	tails									<u>⊷</u>
Solicitation List Bimonthly Solicitation List		ll In Court ope Finalized						V	Please contac Scope is Final	t the consultant that lized.	the 🗙
Construction Fair Packages Onstruction Fair	General Work	low									
Negotiation Negotiation Notes WisDOT Estimate	Consultant Estimate ID :	CE-SW-01-337		C	onsultant Estim	nate Title : *	March 2015	5 SW-01			^
Consultant Estimate CE-SW-01-337 (The Delta C	Selection Type : * Bimonthly Solicitation	Solicitation March 2015		Bim	onthly Solicitat	tion Title :	March 2015				- 1
🗄 🧰 Non Formal	Month/Year :	March 2015			Contract I	Function :	Design Serv	rices			
	Region/Bureau :	Southwest Region			Solicita	ation ID : *	SW-01				- 1
	Selected Prime Consultant	The Delta Company			Fixe	ed Fee % :			7	.50	
	Import Task List from : *	Solicitation Task List		/ Neg	otiation Submi	ssion Due <u>*</u> Date :	10/31/2018	*			
📌 Home		Projects (In scope	excluding If a	uthorized)							
Projects		Project Dir Name Cost i	oor Cost in \$	Indirect Cost in \$		Marked as Final	Total Hours	Total in \$	limit		>
Contracts	<										>

5 Revising the Estimate – Consultant

To begin revising the estimate check the box next to the negotiation and click **Edit**.

Home > Solicitation													
Menu Favorites	Co	onsulta	int Estii	mate List									☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages	* New	8	View Delete	History Status Status Help Select A Workflow	ctions -		ustomize List xcel Export 👻	None	Clear				
Construction Fair Solicitations Responded		0		ultant Estimate ID	Selecte	dConsultant	Selection Ty		Filters Consultant	t Estimate Title	Region/Bureau	Project ID(s)	Solicitation
 · · ·				Y		Y		Y		Y	Y	Y	
📄 Consultant Estimate			CE-S\	N-01-337	The Delt	a Company	Solicitation		March 2015	SW-01	Southwest Region	1007-10-86	SW-01
			CE-SI	W-01-291	The Delt	a Company	Solicitation		March 2015	SW-01	Southwest Region	1007-10-86	SW-01
		U	CE-N	C-01-242	The Alph	a Company	Solicitation		18 05 16		North Central Region	1004-19-86	NC-01
			CE-S\	N-03-189	The Alph	a Company	Solicitation		180404-03 s	ub test	Southwest Region	1007-10-86	SW-03
📌 Home			CE-S\	N-02-182	The Delt	a Company	Solicitation		1408 SW-02		Southwest Region	1007-10-86	SW-02
Solicitation	•	_											Þ
Contracts		K	• 1										Page 1 of 1

Change may now be made to the Rated Cards, Direct Labor Cost and Direct Cost. Revise the Estimate using the steps outlined in Section 2: Consultant Estimate – Consultant

Home			
Menu Favorites	Consultant Estimate Project Details	Rate Card Direct Labor Cost Direct Cost	Fixed Fee 🛛 Indirect Cost 🛛 😭 🔺
Solicitation List Denstruction Fair Packages Construction Fair	Save General		
Solicitations Responded Solicitation Solicitation Population Negotiation Notes	Consultant Estimate ID: CE-SW-01-29	1	^
Consultant Estimate Ge-SW-01-291 (The Delta C Ge 1007-10-86-CTH N INTEF	Solicitation ID: SW-01	Bimonthly Solicitation Month and Year :	March 2015
- B CE Snapshots	Project ID : 1007-10-86	Project Name :	ILLINOIS STATE LINE - MADISON
	Description:		
I Home Solicitation			A
Contracts	Measurement System: IS System	•	• • • • • • • • • • • • • • • • • • •

If the Direct Labor Cost needs to be revised, click Unmark Final before making changes.

Home											
Menu Favorites	C	Consultant Es	stimate Project Detai	ls Rate Card	Direct Labor Cost	Direct Cost	Fixed Fee	Indirect Cost			☆ 🔺
Solicitation List Bimonthly Solicitation List	Sav		Reports	ze List 🖌 Mark Final 🚽 Unmark Fi							
Construction Fair Packages Construction Fair		General	C	thers							
Solicitations Responded		Name						Sublet Status	Consultant/Subcor	In Scope	-
Negotiation Notes							Y	Y	Y		Y
E- Consultant Estimate		🖯 🚞 Proje	ect Management								
- 1007-10-86-CTH N INTER		🗆 🧰 S	Scope, Schedule and (Change Management	t						
📄 CE Snapshots 📄 Sublet List		Ξ (🛅 887 Manage Projec	t Scope and Schedu	le						
Home			🕀 🗋 887.0 Manage Pro	ject Scope and Sched	dule				The Delta Company	Yes	
Solicitation		Θ (🛅 884 Manage Chang	e							
Contracts	4										• •

6 Complete Negotiation – WisDOT

After the final price has been agreed to the negotiation needs to be completed.

From the Consultant Estimate list page use the checkbox to select the negotiation. Click on **Select Actions** and **Negotiation Completed**.

Home > Solicitation												
Menu Favorites	Co	nsulta	ant Estimate Li	st								☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages	*	2	Edit View Delete	Help		ustomize List xcel Export 👻		Manage Clear				
Construction Fair Construction Fair		Genera	al	Negot	iation Completed	rs		Filters				
🖻 😑 Negotiation		U	Consultant	Es Reject	t	Selection Ty	pe	Consultant	Estimate Title	Region/Bureau	Project ID(s)	Solicitatio
Discrimination Notes				ReDra			Y		Y	Y	Y	
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state i Home			CE-SW-01-2	91	The Delta Company	Solicitation		March 2015	SW-01	Southwest Region	1007-10-86	SW-01
			CE-WOR-167	-290	The Alpha Company	Work Order R	equest	Test for DT2	5	Bureau of Project Deve	1517-07-13	WOR-167
Solicitation			CE-NE-01-28	9	El Seif Engineering Co LT	Solicitation		Test CE Kh	an	Northeast Region	proj-12-11	NE-01
Contracts		K	4 1 2 3	45678	9 10 🕨 🕨							Page 3 of 17

Click **OK** on the acknowledgement screen.

Home > Solicitation				
Menu Favorites	Consultant Estimate List			☆▲
+ - V	WisDOT Masterworks Staging			
- 📄 Solicitation List				
Bimonthly Solicitation List		Attachment	ts	
Construction Fair Packages Gonstruction Fair	8			
□ Construction Pair	Document Title	Uploaded By	Uploaded Date	File Size
- 📄 Negotiation Notes	No Attachments available			
WisDOT Estimate Consultant Estimate	Upload Document			
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		ОК	Cancel	
🛟 Home	<			
Projects		ompany work order Request Test for	Dizo Dureau or Project De	Ve 1317-07-13 WOR-107
Solicitation	CE-NE-01-289 El Seif Engir	eering Co LT Solicitation Test CE	Khan Northeast Region	proj-12-11 NE-01
Contracts	I I I I I I I I I I	N		Page 3 of 17

From the **Consultant Estimate** list page use the checkbox to select the negotiation. Click on **Select Actions** and **Approved for Contract**.

Home > Solicitation												
Menu Favorites	Co	nsultant	Estimate List									☆ 🔺
Solicitation List Bimonthly Solicitation List Construction Fair Packages	*	Ed	ew History	Select A	Reports E	ustomize List xcel Export +	None	Manage Clear				
Construction Fair Solution			Consultant Es			Selection Ty		1	t Estimate Title	Region/Bureau	Project ID(s)	Solicitatio
Pegotiation Notes WisDOT Estimate Consultant Estimate				ReDra	ft		Y		Y	Y	4	
Consulant Estimate		c	E-LD-21-292		El Seif Engineering Co L1	Local Design		Muz_CE_LE	D_001	Bureau of Structures	proj-12-11	LD-21
thome	\checkmark	C	CE-SW-01-291		The Delta Company	Solicitation		March 2015	5 SW-01	Southwest Region	1007-10-86	SW-01
Projects		c	E-WOR-167-2	90	The Alpha Company	Work Order R	equest	Test for DT2	25	Bureau of Project Deve	1517-07-13	WOR-167
Solicitation		c	E-NE-01-289		El Seif Engineering Co L1	Solicitation		Test CE Kh	ian	Northeast Region	proj-12-11	NE-01
Contracts		K	1 2 3 4	5678	9 10 🕨 🕨							Page 3 of 17

Click **OK** on the acknowledgement screen.

Home > Solicitation				
Menu Favorites	Consultant Estimate List			☆▲
+ - v	WisDOT Masterworks Staging			
	Set Days To Complete for Next Stage :			
Bimonthly Solicitation List Denstruction Fair Packages		Attachme	nts	
Construction Fair	8			
🖻 🔄 Negotiation	Documen Title	Uploaded By	Uploaded Date	File Size
WisDOT Estimate Onsultant Estimate	Upload Document			·
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		UK	Cancer	
P Home		company from oraci request restric	n 0120	
Projects	CE-NE-01-289 El Seif Eng	ineering Co LT Solicitation Test C	E Khan Northeast Region	proj-12-11 NE-01
Solicitation	<			<u> </u>
Contracts	I 4 1 2 3 4 5 6 7 8 9 10			Page 3 of 17

7 Create a Contract – WisDOT

To create a new contract, click on the Contracts module. Expand the Contracts folder in the left navigation pane and click on the type of contract to be created. Master Contracts are created only by Central Office. Regular Contracts include contracts from bimonthly solicitations, construction fair, small purchase and sole source. Click on the **New** button.

Home > Contracts								
Menu Favorites	Re	gular Contract						☆ 🔺
Contracts Contracts Regular Contracts	* New	View History	 Status Help Select Actions - 	Customize List	-None: Clear			
- Di Work Order	(General	Workflow	Others	Filters			
📄 Master Group ID		Contract Number	Selection Type	Solicitation ID/Request II	Region/Bureau	SelectedConsultant	Original Contract Completion Date	Crei
Contracts		Υ	7		Y Y	Y	Y III	
		1264616445615	Solicitation	BPD-01	Bureau of Project Dev	e The Alpha Company	10/31/2019 12:00:00 AM	Dan 🔨
		CE-SP-25-317	Solicitation	BBS-01	Bureau of Business S	e El Seif Engineering Co LT	10/05/2018 12:00:00 AM	eshv
💎 Home		3131	Sole Source		Bureau of Project Dev	El Seif Engineering Co LT	10/05/2018 12:00:00 AM	Muz
Projects		Contract-PAL-05/10	Construction Fair		Bureau of Highway M	a Test	10/05/2018 12:00:00 AM	Palla
💑 Solicitation	<	:						>
Contracts		K (1 2 3 4	5 🕨 🕨				Pag	ge 1 of 5

Choose the Selection Type.

Home		
Menu Favorites	Regular Contract	☆ 🔺
Contracts Recent Contracts	Save Cancel Workflow	
	CONTRACT BETWEEN	^
	THE WISCONSIN DEPARTMENT OF TRANSPORTATION	
	AND AWARDED CONSULTANT FOR	
-	Contract Number : * Selection Type : *	_
🕐 Home		
Projects	Request ID : *	
💑 Solicitation	Date of Request : None	
Contracts	Date of Request : None Awarded Prime Consultant : *	
👖 Library	Original Contract	~
🚨 Administration	Region/Bureau : Completion Date : Vone	>

Fill in the fields with the required information. Enter the **Contract Number** from CARS. Use the ellipses to select the **Construction Fair Title**. Use the ellipses to select the **Construction Fair Package ID**. Use the ellipses to select the **Awarded Prime Consultant**. Add the **Original Contract Completion Date**. Select Regular as the **Type of Contract**. Add the Account Code to the projects table. Type a short Description of Services. Add the WisDOT Representative and Consultant Representative.

Contract Negotiation

Home										
Menu Favorites	Regular Contract									7 🔺
+		Ball In Court								
🗄 😋 Contracts	Save Cancel History	Submit for Consultant	Review							
📔 Regular Contracts 📄 Work Order	General	Workflow								
🔤 🗎 Master Group ID			C		CT BETW	EEN				
Recent Contracts		-	THE WISCONSIN					אר		
			AND AV	VARDEI	DCONSU		x			_
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					Construction	Fair Package				
	Construction Fair Numbe	r:				101				
	 Region/Bureau 	u :			Awarded Prim					1
	Consultant Estimate ID				Ori Con	ginal Contract , pletion Date :	None	~		
	4				Тур	e of Contract : *			~	
	Created B					Created Date:	10/22/2018			
	Last Updated By	y:				Update Date :	10/22/2018			
	Projects									
									Contract Amo	oun
	Project ID No records to display.	Project Description	Project Limits	Route		County	Ac	count Code	Proj	ject
	no recordo to display.									
										_
	Edit Description of Services								_	
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8 Review Contract - Consultant

Navigate to the **Contracts** module and expand the folder **Contracts** which contains four links: **Master Contracts** to view master contracts, **Regular Contracts** to view contracts from bimonthly and construction fair solicitations and small purchase and sole source requests and **Work Order** to view work orders. Consultants cannot view the Master Group ID link.

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			14000023698	Solicitation		SW-02		Southwest	Region	The Alpha Company	01/01/2019 12:00:00 AM	
•			1264616445615	Solicitation		BPD-01		Bureau of F	Project Deve	The Alpha Company	10/31/2019 12:00:00 AM	
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Contracts/Work Orders requiring consultant approval have a **Workflow Status** of "Submitted for Consultant Review."

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To view the contract, check the box next to the contract and click **View**.

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Review the contract. Click **Cancel** to return to the list page.

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	Region/Bure	eau : Southwest Region	n	Awarded Prime Con	Contract	Company	
	Roster/Op	en: Roster		Completio	n Date : 01/01/2019		
	Consultant Estimate I	D:* CE-SW-02-147		Solicitatio	n Type :		
	Created	By: Mitch Patoka		Type of Co	ontract : * Special contr	racts	
	Last Updated	By: Mitch Patoka		Creat	ed Date: 10/22/2018		
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Solicitation		Contact Name	Title	Work Address	Email	Telephone	-
Contracts							•

Check the box next to the negotiation and click **Select Actions**. Clicking **Reviewed** will approve the contract. Clicking **Request to Revisit** will send it back to WisDOT for revisions.

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9 Submit Contract for Approval - WisDOT

After the contract has been approved by the consultant check the box next to the contract and click **Select Actions**. Click **Submit for Approval** to send the contract for approval in Central Office. Click **Redraft** if changes need to be made to the contract.

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Contracts		K • 1									Page 1 o	of 1

After clicking Submit for Approval send a completed DT25 to Diane Phaneuf.