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MASTERWORKS

CLOUD

WisDOT Staff Manual

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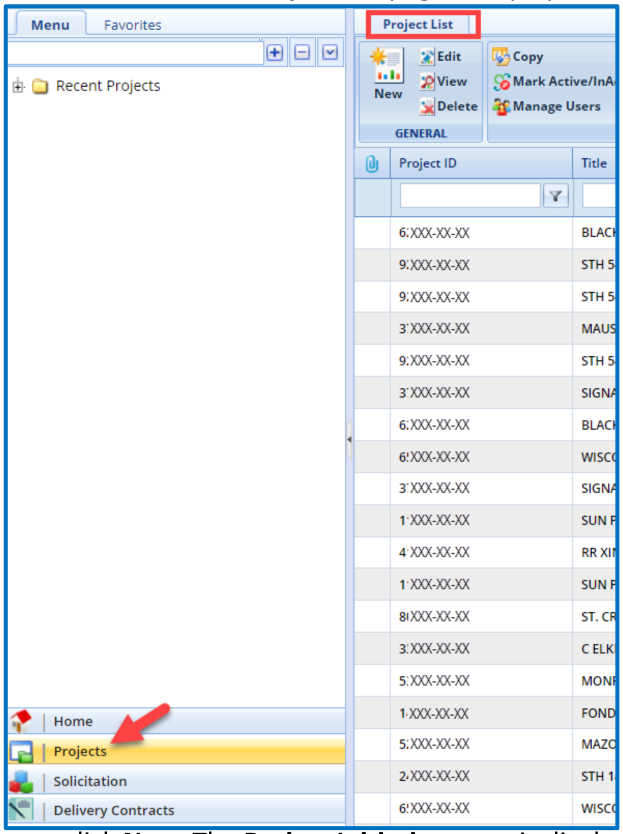
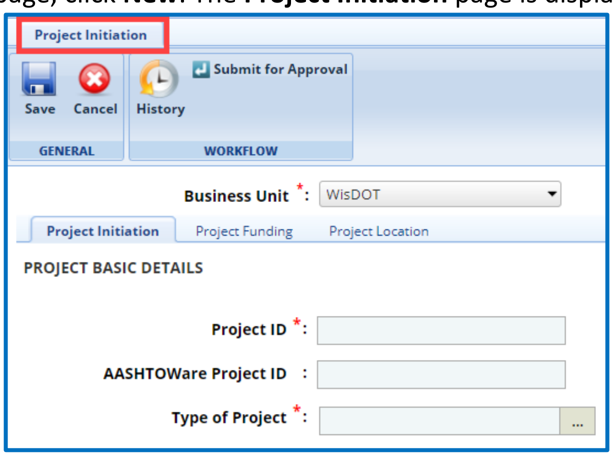
1. Initiating a Project

The procedure to initiate a project by including project basic details, project advance details, project date related details, project fund details, and project location details are described.

1. Click **Projects** in the module menu. The **Project List** page is displayed.



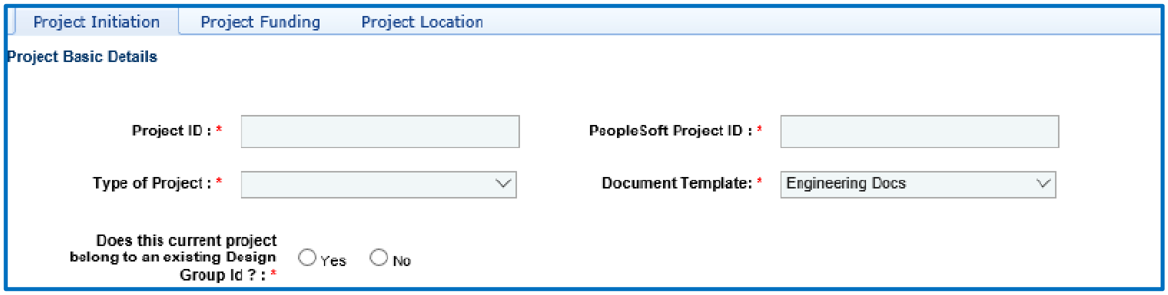
2. In the **Project List** page, click **New**. The **Project Initiation** page is displayed.



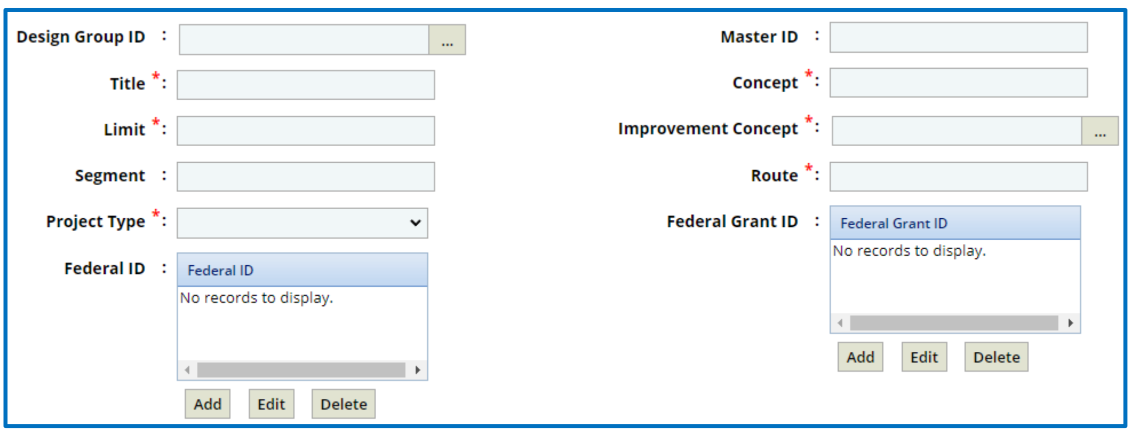
3. In the **Business Unit** drop-down list, the **WisDOT** business unit is auto populated. However, you can select the business unit to which the project belongs. The drop-down lists only those business units to which you have access.

4. In the **Project Initiation** tab, enter appropriate values in the fields of different sections as described below.
   a. The **Business Unit** field is a required field and will auto populate with WisDOT. No further adjustments are required.
   b. In the **Project Basic Details** section, provide information in the required fields. The fields in the section are described in the following table:

Field	Mandatory / Non-mandatory	Description

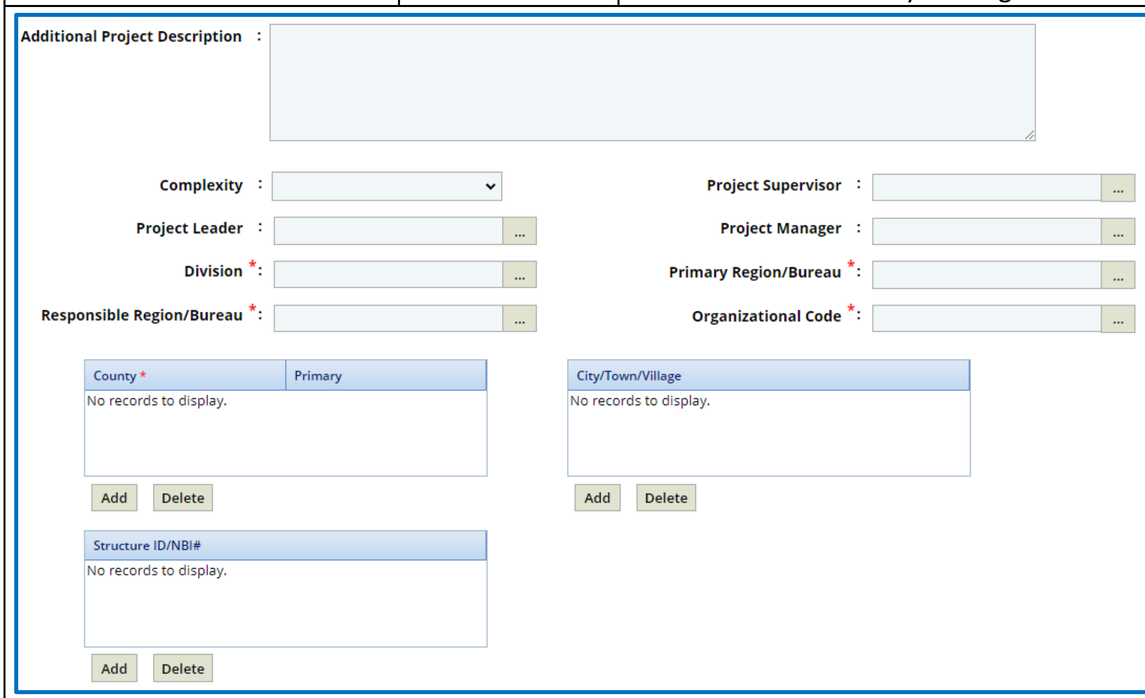


Field	Mandatory / Non-mandatory	Description
Project ID	Mandatory	Enter a unique ID for the project.
PeopleSoft Project ID	Mandatory	Enter the ID provided by PeopleSoft for the project.
Type of Project	Mandatory	From the drop-down list, select the required type of project. For availability of options in the drop- down list, project types must be defined in the **Type of Project** catalog of the library.
Document Template	Mandatory	From the drop-down list, select the required document template for the project folder. For availability of options in the drop- down list, document templates must be defined in the Document Templates catalog of the library.
Does this current project belong to an existing Design Group Id?	Mandatory	• Click **Yes** if the project belongs to an existing design group. The button for the **Design Group ID** will be available to select the **Design Group ID**. • Click **No** if the project does not belong to an existing Design Group ID.



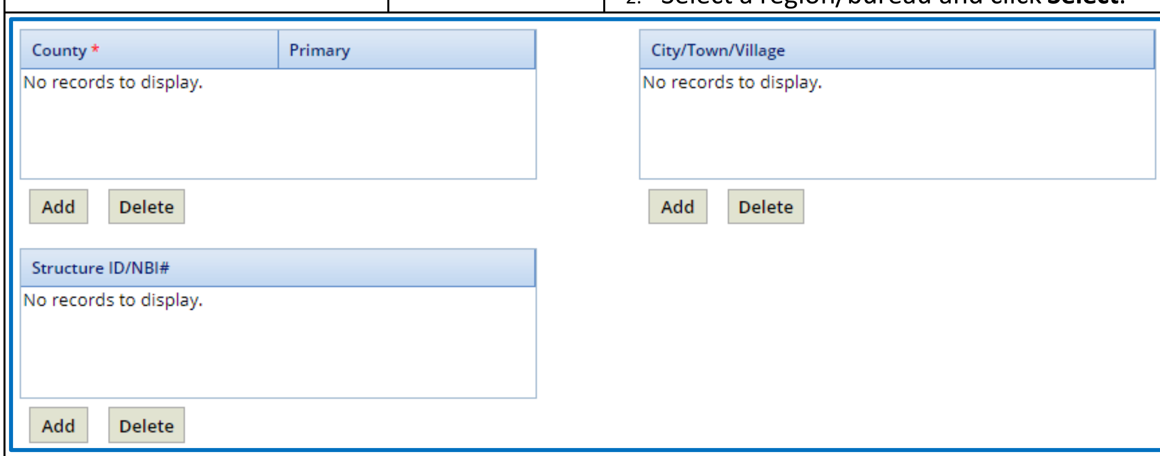
Field	Mandatory / Non-mandatory	Description
Design Group ID	Non-mandatory	If the project belongs to an existing **Design Group ID**, then select the appropriate **Design Group ID** using the following steps: 1. Click ... and the **Design Group ID** dialog box is displayed. For availability of options in the dialog box, design group IDs must be defined in the **Design Group ID- Master ID** catalog of the library. 2. Select the required **Design Group ID** and click **Select**. The **Design Group ID** is displayed in the field and the associated Master ID is also displayed in the **Master ID** field. If the project does not belong to an existing **Design Group ID**, then enter the unique ID of the design group.
Master ID	Non-mandatory	The unique **Master ID** associated with the existing **Design Group ID** is auto populated when an existing **Design Group ID** is selected. If the project belongs to a new **Design Group ID**, then enter the **Master ID** associated with the design group.

Field	Mandatory / Non-mandatory	Description
***Note**: Ensure to enter an appropriate **Master ID** when the project belongs to a new **Design Group ID**. The **Master ID** field cannot be blank.*		
Title	Mandatory	Enter a title for the project.
Concept	Mandatory	Enter concept of the project.
Limit	Mandatory	Enter limit of the project.
Improvement Concept	Mandatory	To select an appropriate **Improvement Concept** for the project: 1. Click ... and the **Improvement Concept** dialog box is displayed. For availability of options in the dialog box, improvement concepts must be defined in the **Improvement Concept** catalog of the library. 2. Select the required improvement concept and click **Select**.
Segment	Non-mandatory	Enter the segment of the project.
Route	Mandatory	Enter the route of the project.
Project Type	Mandatory	From the drop -down list, select the required option. • **Delivery** • **Non-Delivery**
Federal Grant ID	Non-mandatory	To add a new **Federal Grant ID** for the project: 1. Click **Add** and the **New** dialog box is displayed. 2. Key in the new **Federal ID** and select **Save**. This field can further be edited by clicking the **Edit** or **Delete** buttons.
Federal ID	Non-mandatory	To add a new **Federal ID** for the project: 1. Click **Add** and the **New** dialog box is displayed. 2. Key in the new **Federal ID** and select **Save**. This field can further be edited by clicking the **Edit** or **Delete** buttons.



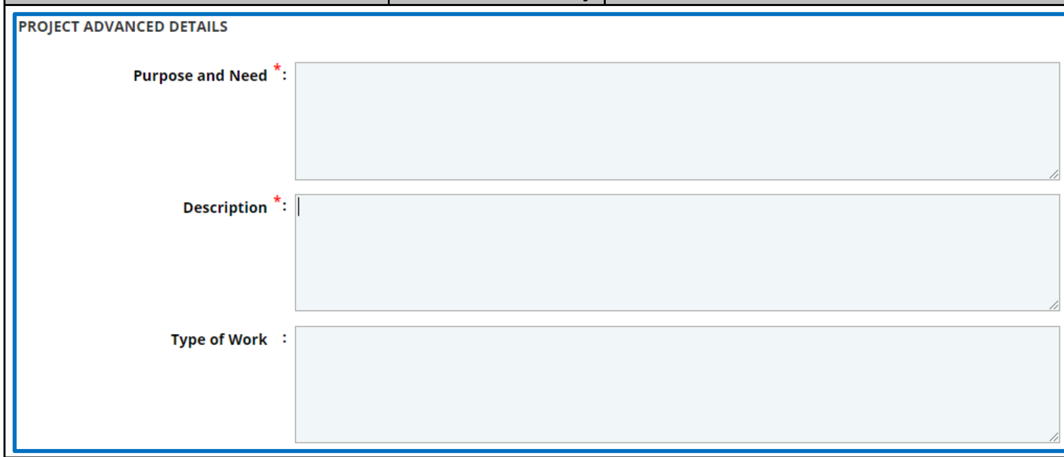
Additional Project Description	Non-mandatory	Enter additional description about the project.
Complexity	Non-mandatory	From the drop-down list, select the required option. • **High** • **Medium** • **Low** The complexity selected in this field is the default complexity for all the tasks in the project.

Field	Mandatory / Non-mandatory	Description
Project Supervisor	Non-mandatory	To select a supervisor for the project: 1. Click ... and the **Users** dialog box is displayed. The dialog box lists all active users from the list of **User Accounts** in the enterprise. 2. Select a user and click **Select**.
Project Leader	Non-mandatory	To select a project leader for the project: 1. Click ... and the **Users** dialog box is displayed. The dialog box lists all active users from the list of **User Accounts** in the enterprise. 2. Select a user and click **Select.**
Project Manager	Non-mandatory	To select a project manager for the project: 1. Click ... and the **Project Manager** dialog box is displayed. 2. Select the project manager for the contract.
Division	Mandatory	To select a division for the project: 1. Click ... and the **Division** dialog box is displayed. For availability of options in the dialog box, divisions must be defined in the **Division** catalog of the library. 2. Select a division and click **Select**.
Primary Region/Bureau	Mandatory	To select primary region/bureau for the project: 1. Click ... and the **Region/Bureau** dialog box is displayed. For availability of options in the dialog box, regions/bureaus must be defined in the **Region-Bureau** catalog of the library. 2. Select a region/bureau and click **Select**.
Responsible Region/Bureau	Mandatory	To select region/bureau responsible for the project: 1. Click ... and the **Region/Bureau** dialog box is displayed. For availability of options in the dialog box, regions/bureaus must be defined in the **Region-Bureau** catalog of the library. 2. Select a region/bureau and click **Select**.
Organizational Code	Mandatory	To select an organizational code for the project: 1. Click ... and the **Organization Code** dialog box is displayed. For availability of options in the dialog box, organizational codes must be defined in the **Organizational Code** catalog of the library. 2. Select a region/bureau and click **Select**.

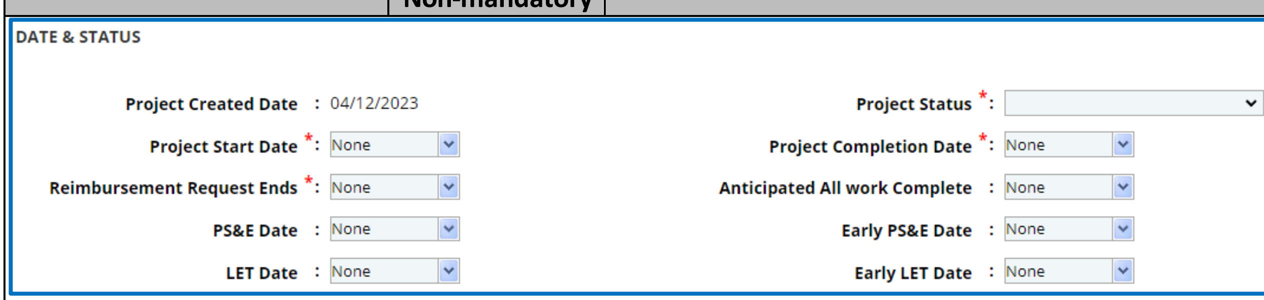


County	Mandatory	To select the counties for the project: 1. Click **Add**. The **County** dialog box is displayed. For availability of options in the dialog box, counties must be defined in the **County** catalog of the library. 2. Select the required counties and click **Select.** 3. Check the box in the **Primary** column to select the primary county where the project will be executed.
City/Town/Village	Non-mandatory	To add the desired Cities/Towns/Villages of the County: 1. Click **Add**. The **City/Town/Village** dialog box is displayed listing all the cities/towns/villages of the selected counties. For availability of options in the dialog box, cities/towns/villages must be defined in the **City-Town-Village** catalog of the library. 2. Select the required cities/towns/villages and then click **Select**.
Structure ID/NBI#	Non-mandatory	To add the Structure ID details of the project: 1. Click **Add**. The **Structure ID** dialog box is displayed. For availability of options in the dialog box, structure IDs must be defined in the **Structure ID** catalog of the library. 2. Select the required structure IDs and then click **Select**.

b. In the **Project Advanced Details** section, provide information in the required fields. The fields in the section are described in the following table:

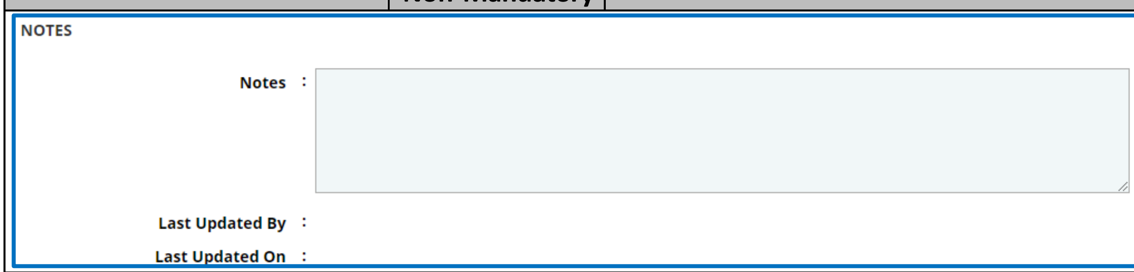
Field	Mandatory / Non-mandatory	Description
		
Purpose and need	Mandatory	Enter purpose and need details of the project.
Description	Mandatory	Enter a brief description about the project.
Type of Work	Non-mandatory	Enter details about the type of work associated with the project.

c. In the **Date & Status** section, provide information in the required fields. The fields in the section are described in the following table:

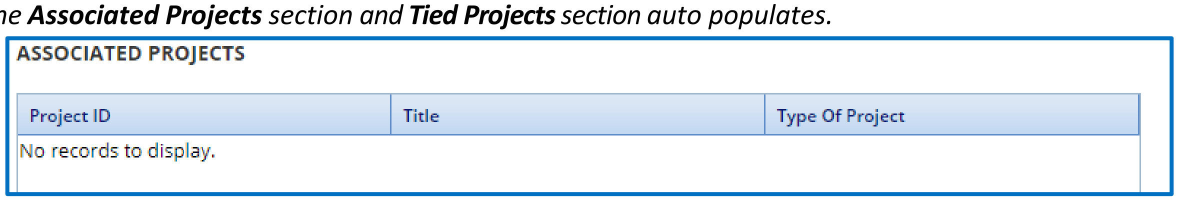
Field	Mandatory / Non-mandatory	Description
		

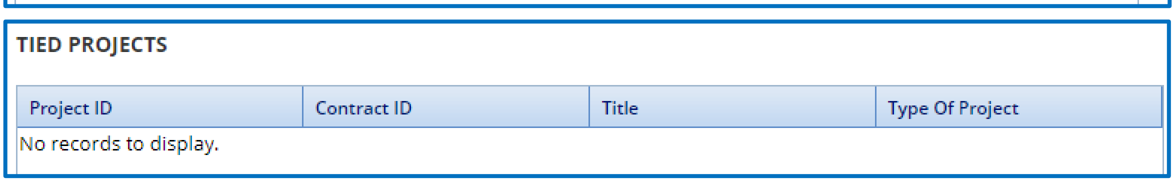
Field	Mandatory / Non-mandatory	Description
Project Created Date	Non-Mandatory	The date when the project was created is auto populated.
Project Status	Mandatory	From the **Project Status** drop-down list, select the current status of the project. For availability of options in the dialog box, project statuses must be defined in the **Project Status** catalog of the library.
Project Start Date	Mandatory	From the drop-down calendar, select the commencement date of the project.
Project Completion Date	Mandatory	From the drop-down calendar, select the completion date of the project.
Reimbursement Request Ends	Mandatory	The end date for reimbursement requests of the project is auto populated. The reimbursement request end date is 3 years from the project completion date.
Anticipated All work Complete	Non-mandatory	From the drop-down calendar, select the anticipated date for completion of all the work in the project.
PS&E Date	Non-mandatory	From the drop-down calendar, select the PS&E date of the project.
Early PS&E Date	Non-mandatory	From the drop-down calendar, select the earliest PS&E date of the project.
LET Date	Non-mandatory	From the drop-down calendar, select the date when the project will be let for construction.
Early LET Date	Non-mandatory	From the drop-down calendar, select the earliest LET date of the project.

d. In the **Notes** section, provide information in the required fields. The fields in the section are described in the following table:

Field	Mandatory/ Non-Mandatory	Description
		
Notes	Non-mandatory	Enter notes about the project.
Last updated by	-	The name of the person who has last updated the project details is auto populated.
Last updated on	-	The date and time when the project details were last updated is auto populated.

***Note**: The **Associated Projects** section and **Tied Projects** section auto populates.*

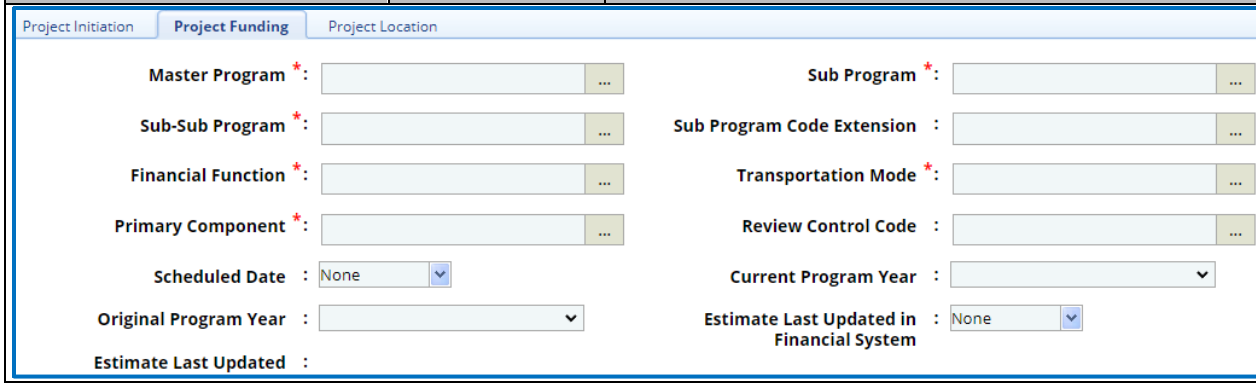


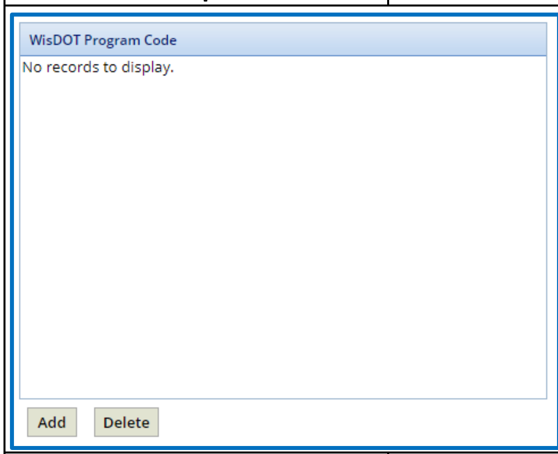


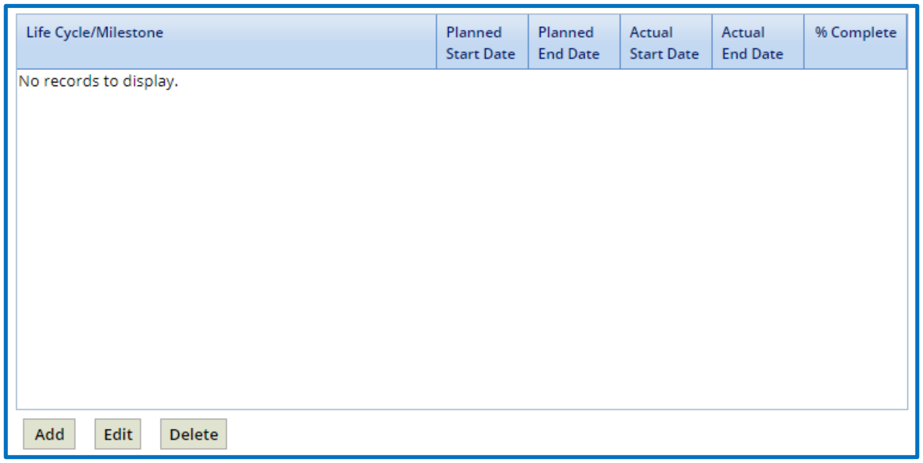
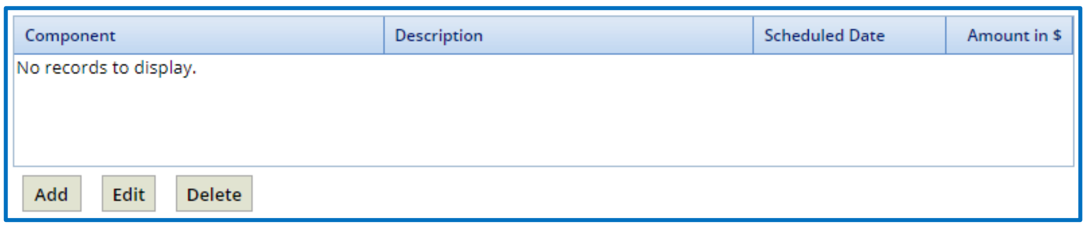
***Note:** The **MODULES** section is not in use at this time and should not be adjusted.*

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

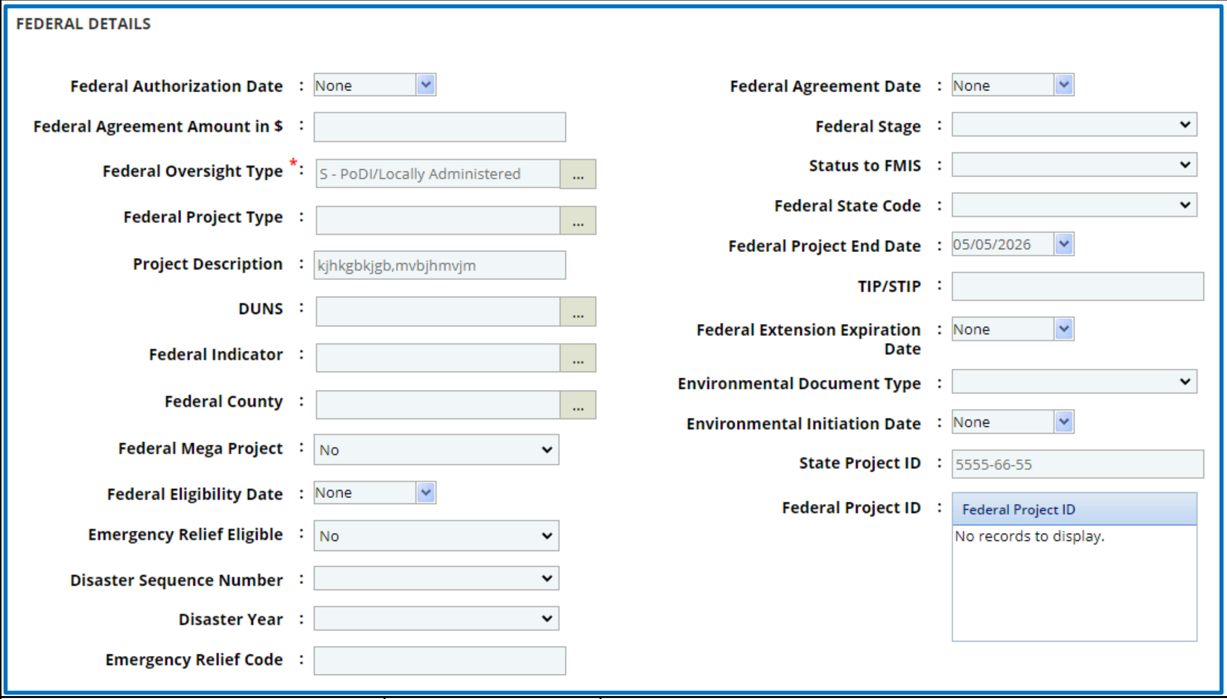
5. Click the **Project Funding** tab to enter funding details of the project.
   a. Enter the information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Master Program	Mandatory	To select a Master Program for the project: 1. Click ... and the **Master Program** dialog box is displayed. For availability of options in the dialog box, master programs must be defined in the **Master Program** catalog of the library. 2. Select a master program and click **Select**.
Sub Program	Mandatory	To select a Sub Program for the project: 1. Click ... and the **Sub Program** dialog box is displayed. For availability of options in the dialog box, sub programs must be defined in the **Sub Program** catalog of the library. 2. Select a sub program and click **Select**.
Sub-Sub Program	Mandatory	To select a Sub-Sub Program for the project: 1. Click ... and the **Sub-Sub Program** dialog box is displayed. For availability of options in the dialog box, sub-sub programs must be defined in the **Sub-Sub Program** catalog of the library. 2. Select a Sub-Sub Program and click **Select**.
Sub Program Code Extension	Non-mandatory	To select a Sub Program Code Extension for the project: 1. Click ... and the **Sub Program Code Extension** dialog box is displayed. For availability of options in the dialog box, Sub Program Code Extensions must be defined in the **Sub Program Code Extension** catalog of the library. 2. Select a sub program code extension and click **Select**.
Financial Function	Mandatory	To select a **Financial Function** for the project: 1. Click ... and the **Financial Function** dialog box is displayed. For availability of options in the dialog box, financial functions must be defined in the **Financial Function** catalog of the library. 2. Select a financial function and click **Select**.
Transportation Mode	Mandatory	To select a **Transportation Mode** for the project: 1. Click ... and the **Transportation Mode** dialog box is displayed. For availability of options in the dialog box, transportation modes must be defined in the **Transportation Mode** catalog of the library. 2. Select a Transportation Mode and click **Select**.

Field	Mandatory / Non-mandatory	3. Description
Primary Component	Mandatory	To select a **Primary Component** for the project: 1. Click ... and the **Primary Component** dialog box is displayed. For availability of options in the dialog box, primary components must be defined in the **Primary Component** catalog of the library. 2. Select a Primary Component and click **Select**.
Review Control Code	Non-mandatory	To select a **Review Control Code** for the project: 1. Click ... and the **Review Control Code** dialog box is displayed. For availability of options in the dialog box, the Review Control Codes must be defined in the **Review Control Code** catalog of the library. 2. Select a Review Control Code and click **Select**.
Scheduled Date	Non-mandatory	From the drop-down calendar, select scheduled date of the project.
Current Program Year	Non-mandatory	From the drop-down list, select the current program year.
Original Program Year	Non-mandatory	From the drop-down list, select the original program year.
Estimate Last updated in Financial System	Non-mandatory	From the drop-down calendar, select the last updated date of the project estimate in the financial system.
Life Cycle	Mandatory	To select a Life Cycle for the project: 1. Click ... and the **Life Cycle** dialog box is displayed. For availability of options in the dialog box, life cycles must be defined in the **Life Cycle** catalog of the library. 2. Select a Life Cycle and click **Select**.
Estimate Last updated	-	The last updated date of the project estimate is auto populated.
		
WisDOT Program Code	Mandatory	To select WisDOT Program Codes for the project: 1. Click **Add.** The **WisDOT Program Code** dialog box is displayed. For availability of options in the dialog box, WisDOT program codes must be defined in the **WisDOT Program Code** catalog of the library. 2. Select the required WisDOT Program Codes and click **Select**.

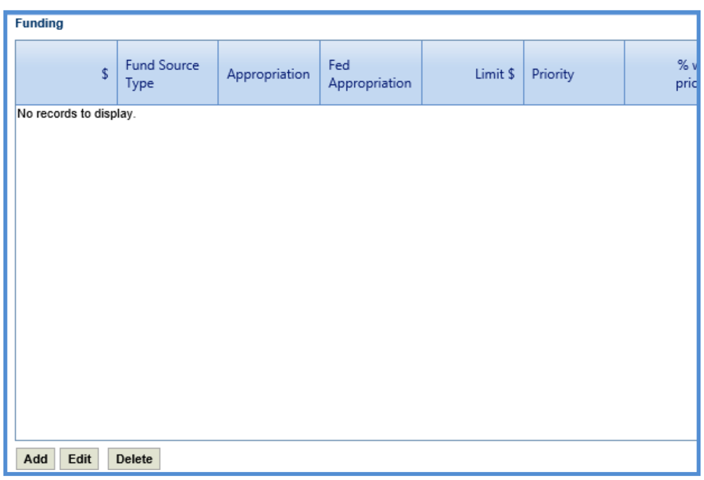
<table>
<tr><th>Field</th><th>Mandatory / Non-mandatory</th><th>Description</th></tr>
<tr><td colspan="3">
</td></tr>
<tr><td>Life Cycle/Milestone</td><td>Mandatory</td><td>To select Life Cycle/Milestone for the project:
1. Click Add. The Life Cycle dialog box is displayed. For availability of options in the dialog box, WisDOT program codes must be defined in the Life Cycle catalog of the library.
2. Select the required Life Cycle/Milestone and click Select.</td></tr>
<tr><td colspan="3">
</td></tr>
<tr><td>Component</td><td>Mandatory</td><td>To select a component for the project:
1. Click Add. The Component dialog box is displayed. For availability of options in the dialog box, components must be defined in the Component catalog of the library.
2. Select the required components and click Select. The component is added to the table.
3. Select a record and click Edit. The Edit dialog box is displayed.
4. Enter the Description, Amount, and select the Scheduled Date of the component.
5. Click Save.</td></tr>
</table>

b. In the **Federal Details** section, fill in the following fields as required.

Field	Mandatory / Non-mandatory	Description
		
Federal Authorization Date	Non-mandatory	From the drop-down, select the date that the project was federally authorized on. ***Note:*** *This field defaults to "**None**".*
Federal Agreement Date	Non-mandatory	From the drop-down, select the date that the federal agreement was exicuted for the project. ***Note:*** *This field defaults to "**None**".*
Federal Agreement Amount in $	Non-mandatory	Enter the federal agreement amount for the project.
Federal Stage	Non-mandatory	From the drop-down, select the approprate stage.
Federal Oversight Type	Mandatory	To select Federal Oversight Type for the project: 1. Click ··· The **Federal Oversight Type** dialog box is displayed. For availability of options in the dialog box, Federal Oversight Types must be defined in the **Federal Oversight Type** catalog of the library. 2. Select the required **Federal Oversight Type** and click **Select**.
Status to FMIS	Non-mandatory	From the drop-down, select the approprate financial management information system status.
Federal Project Type	Non-mandatory	To select Federal Project Type for the project: 1. Click ··· The **Federal Project Type** dialog box is displayed. For availability of options in the dialog box, Federal Project Types must be defined in the **Federal Project Type** catalog of the library. 2. Select the required **Federal Project Type** and click **Select**.
Federal State Code	Non-mandatory	From the drop-down select "**55-Wisconsin**".
Project Description	Non-mandatory	Enter a description of the project.
Federal Project End Date	Non-mandatory	From the drop-down, select the date that the project will end. ***Note:*** *This field defaults to "**None**".*
DUNS	Non-mandatory	To select a DUNS Id for the project: 1. Click ··· The **DUNS** dialog box is displayed. For availability of options in the dialog box, the DUNS ids must be defined in the **DUNS** catalog of the library. 2. Select the required **DUNS** ID and click **Select**.
TIP/STIP	Non-mandatory	Enter the TIP or STIP that is associated with the project.

Field	Mandatory / Non-mandatory	Description
Federal Indicator	Non-mandatory	To select a Federal Indicator for the project: 1. Click ... The **Federal Indicator** dialog box is displayed. For availability of options in the dialog box, the Federal Indicator must be defined in the **Federal Indicator** catalog of the library. 2. Select the required **Federal Indicator** and click **Select**.
Federal Extension Expiration Date	Non-mandatory	From the drop-down, select the date the project's federal extension with expire. ***Note:*** *This field defaults to "**None**".*
Federal County	Non-mandatory	To select a Federal County for the project: 1. Click ... The **Federal County** dialog box is displayed. For availability of options in the dialog box, the Federal County must be defined in the **Federal County** catalog of the library. 2. Select the required **Federal County** and click **Select**.
Environmental Document Type	Non-mandatory	From the drop-down, select the associated environmental document type.
Federal Mega Project	Non-mandatory	From the drop-down, select either"**Yes**" or "**No**". ***Note:*** *This field defaults to "**No**".*
Enviornmental Initiation Date	Non-mandatory	From the drop-down, select the date that the enviornmental initiation was exicuted for the project.
Federal Eligibilty Date	Non-mandatory	From the drop-down, select the date that federal eligibilty was initiated for the project. ***Note:*** *This field defaults to "**None**".*
State Project ID	Non-mandatory	Enter the associated state project id.
Emergency Relief Eligible	Non-mandatory	From the drop-down, select either"**Yes**" or "**No**". ***Note:*** *This field defaults to "**No**".*
Federal Project ID	Non-mandatory	This is an auto populated field.
Disaster Sequence Number	Non-mandatory	From the drop-down, select the disaster sequence number associated with the project.
Disaster Year	Non-mandatory	From the drop-down, select the disaster year associated with the project.
Emergency Relief Code	Non-mandatory	Enter the associated emergency relief code for the project.

c. In the **Funding** section, perform the following steps to add funding details for the project.



i. Click **Add**. The **New Funding** dialog box is displayed.
ii. Enter/Select appropriate values for the fields. The fields are described in the following table.

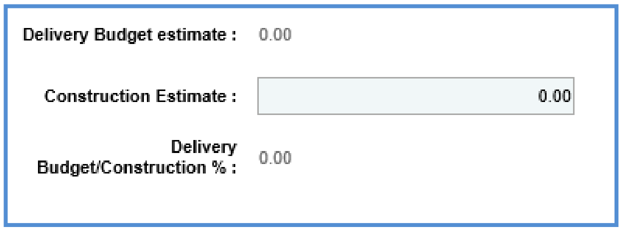
Note*: All the fields described in the below table are non-mandatory fields.*

Field	Description
Details	From the drop-down, select the associated project detail number.
$	Indicates the project fund amount that is auto populated based on the values entered in the **Limit $** and **%w/in priority** fields.
Fund Source Type	From the drop-down list, select the type of fund source for the project. For availability of options in the drop-down list, fund source types must be defined in the **Fund Source Type** catalog of the library.
Local Unit of Government	This field is not currently in use and cannot be edited.
Appropriation	To select an appropriation for the fund: 1. Click ... and the **Appropriation** dialog box is displayed. For availability of options in the dialog box, appropriations must be defined in the **Appropriation** catalog of the library. 2. Select a federal improvement type and click **Select**.
Federal Program Code	To select an appropriation for the fund: 1. Click ... and the **Appropriation** dialog box is displayed. For availability of options in the dialog box, appropriations must be defined in the **Appropriation** catalog of the library. 2. Select a federal improvement type and click **Select**.
Limit $	Enter the limit amount.
Priority	From the drop-down list, select the priority for the fund.
% within Priority	Enter the percentage of the limit amount within the priority.
Federal Improvement Type	To select a Federal Improvement Type for the fund: 1. Click ... and the **Federal Improvement Type** dialog box is displayed. For availability of options in the dialog box, federal improvement types must be defined in the **Federal Improvement Type** catalog of the library. 2. Select a federal improvement type and click **Select**.
Category Number	From the drop-down list, select the category number.
Category Description	To select a Category Description for the fund: 1. Click ... and the **Category Description** dialog box is displayed. For availability of options in the dialog box, category descriptions must be defined in the **Category Description** catalog of the library. 2. Select a **Category Description** and click **Select**.
Demonstration ID	
Federal Aid Type	
GIS Omission Justification	
Federal Prefix	
100% Safety	
Construction	
Activity Number	
Activity Description	
Supplemental Activity Description	To select a supplementary activity description for the fund: 1. Click ... and the **Supplemental Activity Description** dialog box is displayed for availability of options in the dialog box, category descriptions must be defined in the **Supplementary Activity** catalog of the library. 2. Select a **Supplemental Activity Description** and click **Select**.
Advanced Construction Funds in $	

Supplemental Category Description	To select a supplementary category description for the fund: 1. Click ... and the **Supplemental Category Description** dialog box is displayed for availability of options in the dialog box, category descriptions must be defined in the **Supplementary Category** catalog of the library. 2. Select a **Supplemental Category Description** and click **Select**.
Federal Urban Area	

iii. Click **Save**.

***Note**: The value in the **Delivery Budget estimate** field is auto populated from the current project estimate.*



***Note**: The value in the **Delivery Budget/Construction %** field is auto calculated and displayed. The value is calculated based on the values in the **Delivery Budget estimate** and **Construction Estimate** fields.*

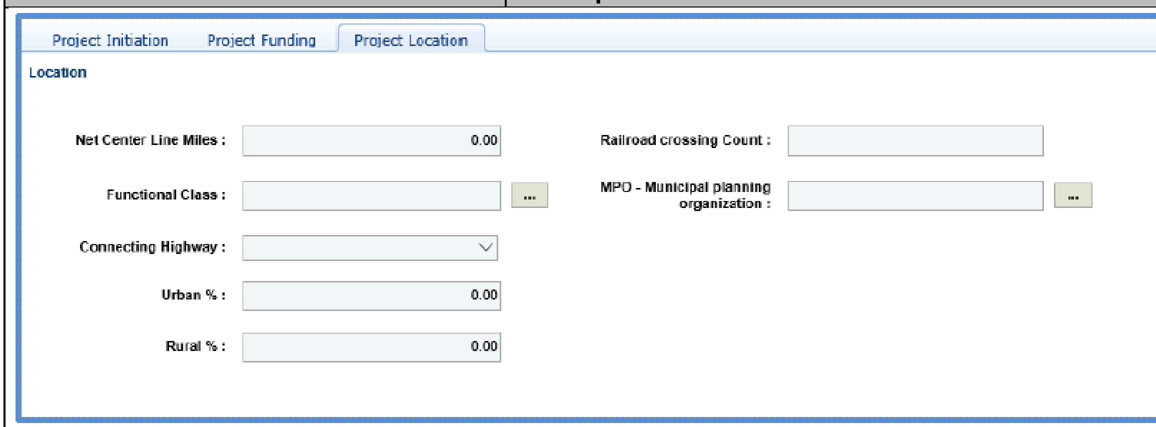
iv. In the **Construction Estimate** field, enter the estimated amount of construction.

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

6. Click the **Project Location** tab to enter location details of the project.

a. In the location section, provide required information in the fields. The fields are described in the following table.

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

Field	Description
	
Net Center Line Miles	Enter measurement of the net center line in miles.
Railroad crossing Count	Enter number of railroad crossings in the project location.
Functional Class	To select a Functional Class associated with the project: 1. Click ... and the **Functional Class** dialog box is displayed. For availability of options in the dialog box, functional classes must be defined in the **Functional Class** catalog of the library. 2. Select a Functional Class and click **Select**.
MPO - Municipal planning organization	To select a Municipal Planning Organization associated with the project: 1. Click ... and the Municipal Planning Organization dialog box is displayed. For availability of options in the dialog box, municipal planning organizations must be defined in the **Municipal Planning Organization** catalog of the library.

	2. Select a **Municipal Planning Organization** and click **Select**.
Connecting Highway	From the drop-down list, select **Yes** or **No** to indicate whether a connecting highway is associated with the project.
Urban % and **Rural %**	Enter the percentage of either the urban area in the **Urban %** field or rural area in the **Rural %** field. If the **Urban %** is entered, the **Rural %** is auto populated. If the **Rural %** is entered, then the **Urban %** is auto populated. The total of **Urban%** and **Rural%** is 100%.

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

7. Click **Save**. The project is created, and the **Project Details** tab is displayed. The created project is also available in the navigation pane.

2. Scope\Budget\Estimate\Schedule

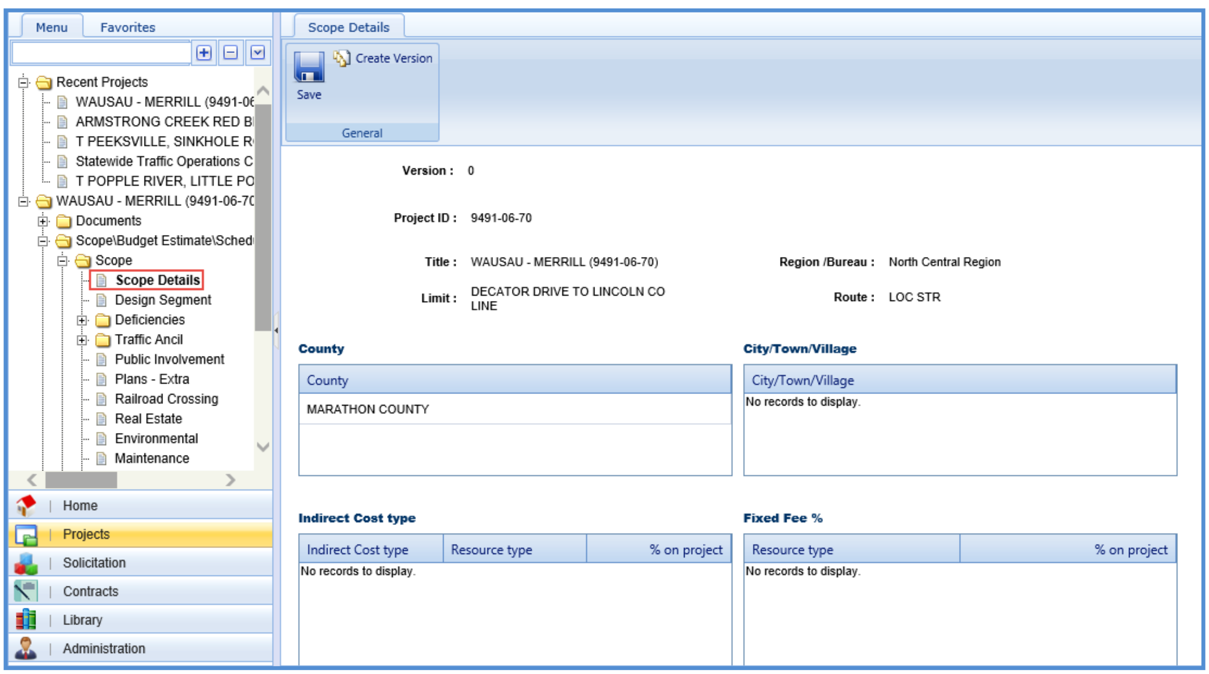
The procedure to define project scope, project estimate, and project schedule are described in the following sections.

- Defining Project Scope Details
- Creating a Project Budget Estimate
- Scheduling a Project

2.1 Defining Project Scope Details

Steps

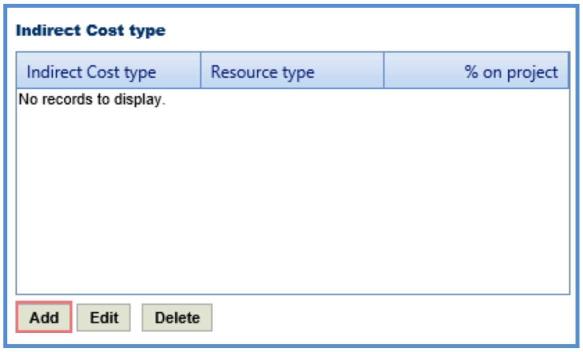
1. Double-click the project for which you want to define the scope. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder and then click **Scope Details**. The **Scope Details** page is displayed.



The values in the **Version, Project ID, Title, Region /Bureau, Limit, Route, County, City/Town/Village** fields/sections are auto populated.

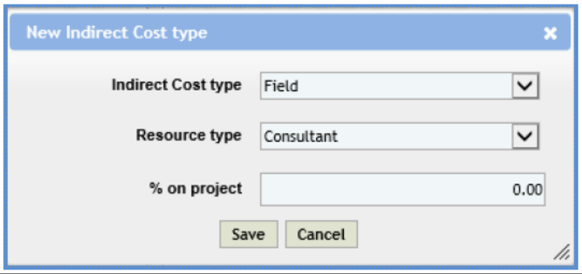
4. To add indirect cost type for the project, perform the following steps: In the **Indirect Cost type** section, click **Add**.

a. The **New Indirect Cost type** dialog box is displayed.



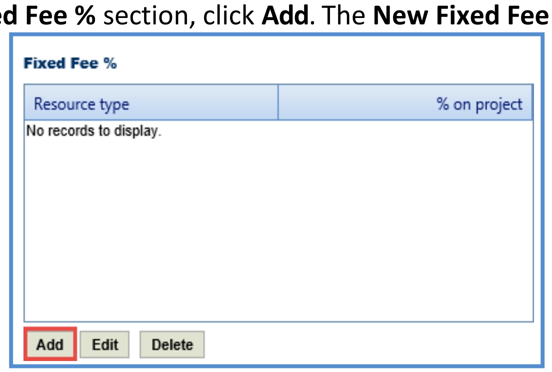
b. Enter information in the required fields. The fields are described in the following table.

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

Field	Description
	
Indirect Cost type	From the drop-down list, select the type of indirect cost for the project. For availability of options in the drop-down list, the indirect cost types must be defined in the **Indirect Cost Type** catalog of the library.
Resource type	From the drop-down list, select the resource type associated with the indirect cost. For availability of options in the drop- down list, the resource types must be defined in the **Resource Type** catalog of the library.
% On project	Enter the percentage of project that is associated with the indirect cost.

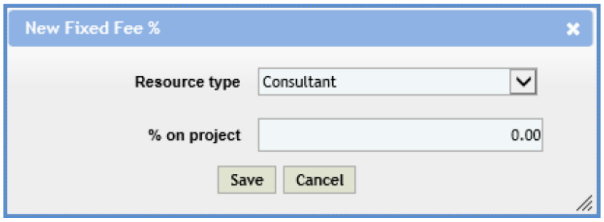
c. Click **Save**. The indirect cost details are displayed in the **Indirect Cost type** section.

5. To add Fixed Fee percentage, perform the following steps:
   a. In the **Fixed Fee %** section, click **Add**. The **New Fixed Fee %** dialog box is displayed.



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

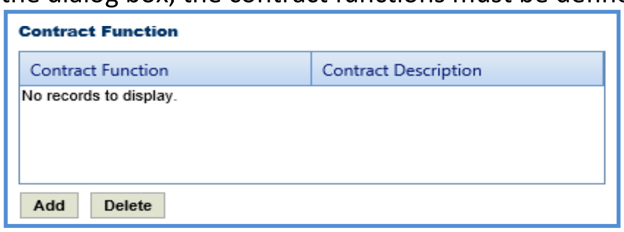
***Note**: All the fields described in the below table are non-mandatory fields.*

Field	Description
	
Resource type	From the drop-down list, select the resource type for the fixed fee. The fixed fee is primarily applicable for consultants. For availability of options in the drop- down list, the resource types must be defined in the **Resource Type** catalog of the library.
% On project	Enter the percentage of project that is associated with the fixed fee.

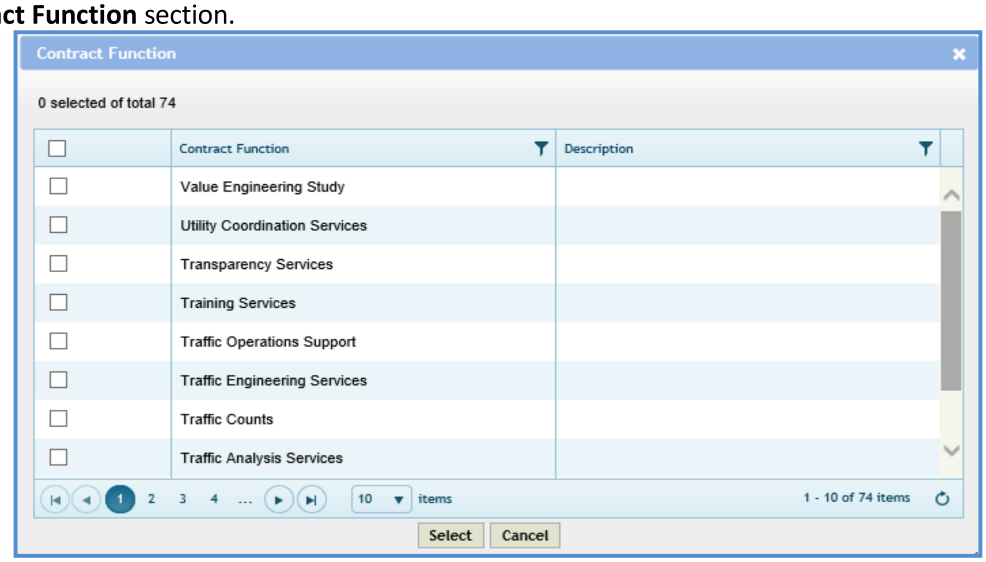
c. Click **Save**. The fixed fee details are displayed in the **Fixed Fee %** section.

6. To add **Contract Function**, perform the following steps:

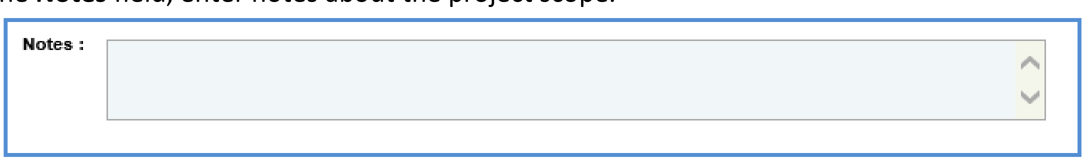
a. In the **Contract Function** section, click **Add.** The **Contract Function** dialog box is displayed. For availability of options in the dialog box, the contract functions must be defined in the **Contract Function** catalog of the library.



b. Select required contract functions for the project. Click **Select**. The contract function details are displayed in the **Contract Function** section.



c. In the **Notes** field, enter notes about the project scope.

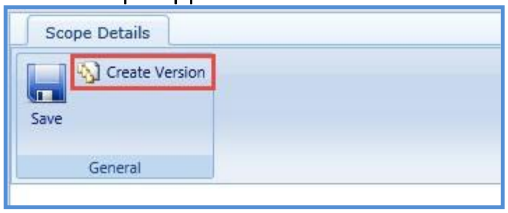


d. Click **Save**.

2.1.1 Creating a Scope Version

Steps:

1. Once the project scope details are saved, click **Create Version** in the **General** group. A message to continue to save and create a new version of the scope appears.



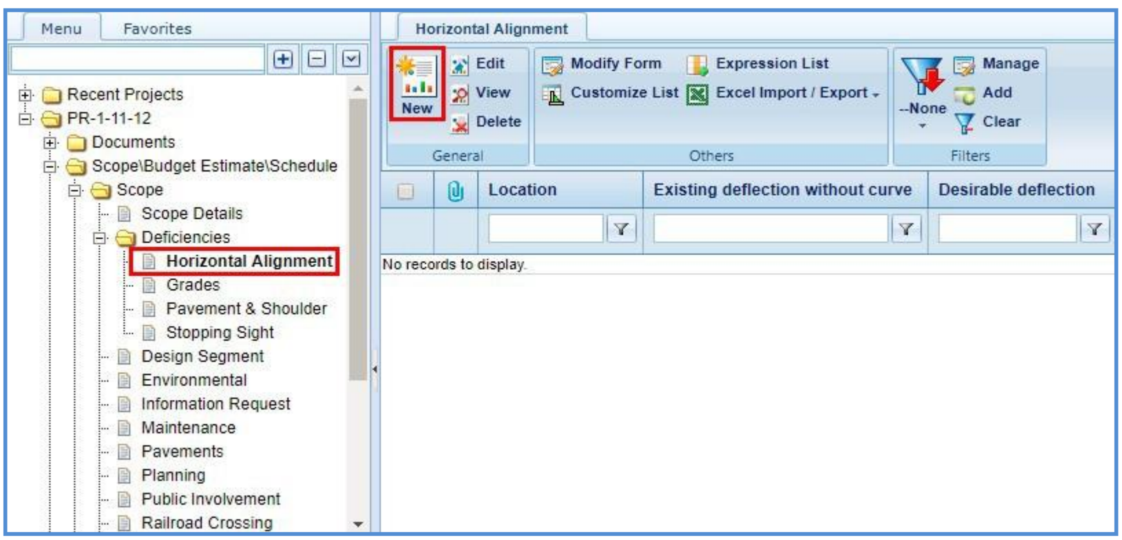
2. Click **OK**. The **Version** number on the **Scope Details** page is updated with the current version number.

2.1.2 Working with Deficiencies

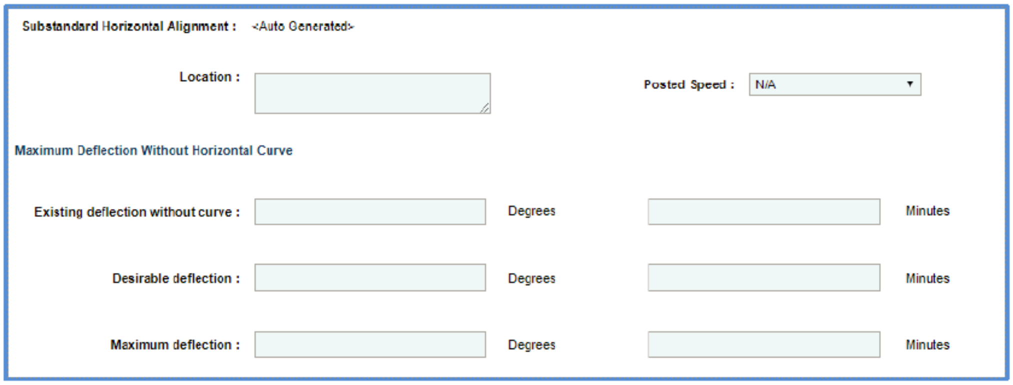
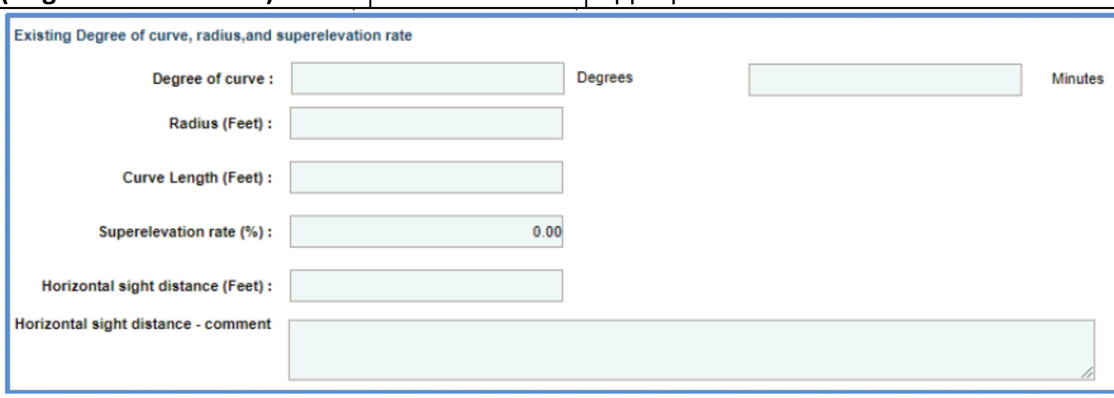
2.1.2.1 Horizontal Alignment

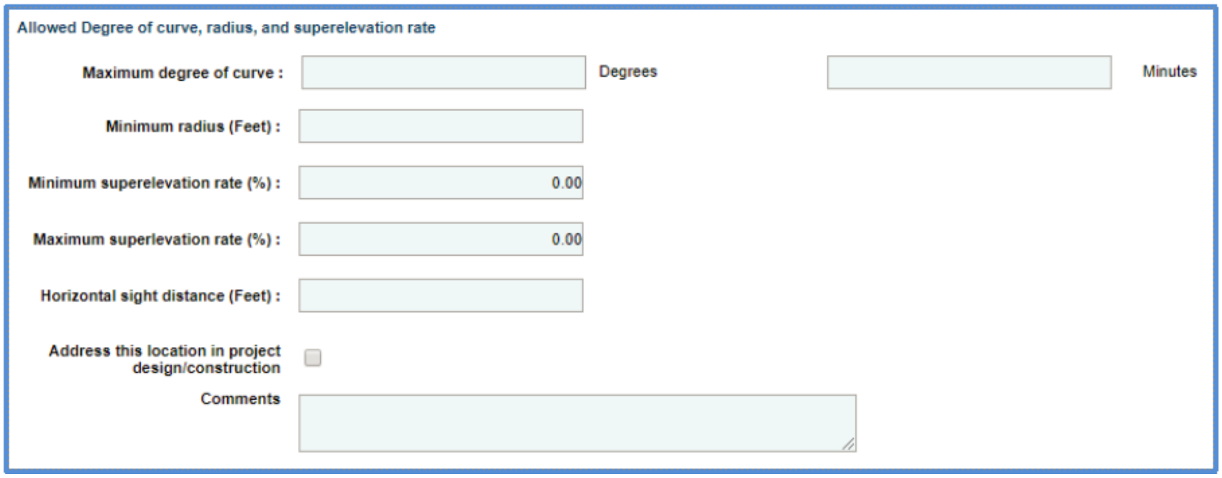
To create the Horizontal Alignment, perform the following steps:

1. Double-click the project. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder and then expand the **Deficiencies** folder.
4. In the navigation pane, click **Horizontal Alignment**. The **Horizontal Alignment** list page is displayed.
5. Click **New.** The **Horizontal Alignment** details page is displayed.



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

Field	Mandatory / Non-mandatory	Description
		
Substandard Horizontal Alignment	Non-mandatory	The substandard horizontal alignment is auto generated.
Location	Non-mandatory	Enter the Location Details.
Posted Speed	Non-mandatory	From the drop-down list, select the required posted speed. The options in the drop-down list are defined in the **Posted Speed** catalog of the library.
Existing deflection without curve (Degrees and Minutes)	Non-mandatory	Enter the Degrees and Minutes of the existing deflection in the appropriate boxes.
Desirable deflection (Degrees and Minutes)	Non-mandatory	Enter the Degrees and Minutes of the desirable deflection in the appropriate boxes.
Maximum deflection (Degrees and Minutes)	Non-mandatory	Enter the Degrees and Minutes of the maximum deflection in the appropriate boxes.
		
Degree of Curve (Degrees and Minutes)	Non-mandatory	Enter the Degrees and Minutes of existing curve in the appropriate boxes.
Radius (Feet)	Non-mandatory	Enter the existing radius.
Curve Length (Feet)	Non-mandatory	Enter the existing curve length.
Superelevation rate (%)	Non-mandatory	Enter the value of the existing superelevation.
Horizontal sight distance (Feet)	Non-mandatory	Enter the existing horizontal sight distance.
Horizontal sight distance - comment	Non-mandatory	Enter the comments.

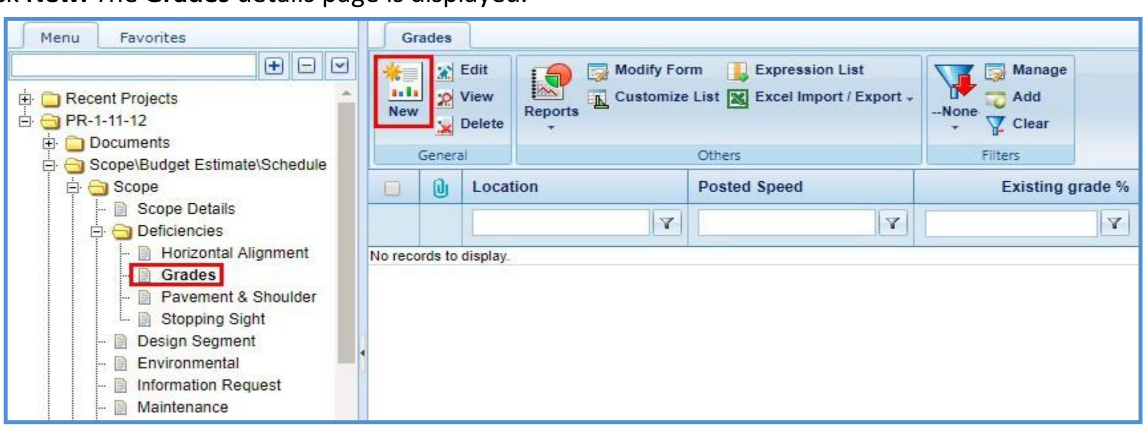
Field	Mandatory / Non-mandatory	Description
		
Maximum degree of curve (Degrees and Minutes)	Non-mandatory	Enter the Degrees and Minutes of curve in the appropriate boxes.
Minimum radius (Feet)	Non-mandatory	Enter the minimum radius.
Minimum superelevation rate (%)	Non-mandatory	Enter the minimum value of the superelevation.
Maximum superelevation rate (%)	Non-mandatory	Enter the maximum value of the superelevation.
Horizontal sight distance (Feet)	Non-mandatory	Enter the existing horizontal sight distance.
Address this location in project design/construction	Non-mandatory	Select the check box to address this location in project design/construction.
Comments	Non-mandatory	Enter the comments.

7. In the **Attachments** section upload any required documents. To upload images and files, refer *Attachments*.
8. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

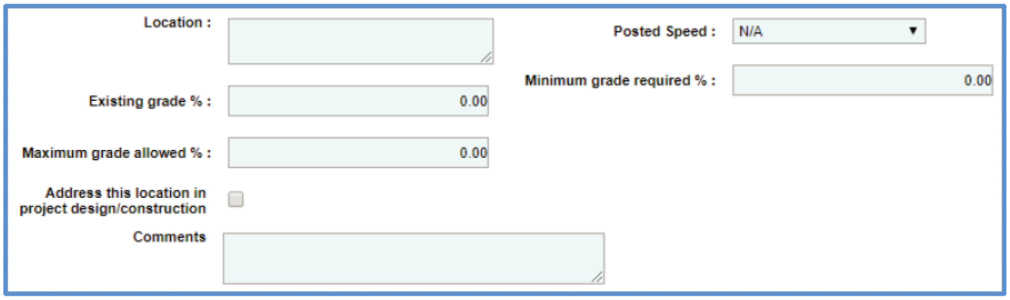
2.1.2.2 Grades

To create Grades, perform the following steps:

1. Double-click the project. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder and then expand the **Deficiencies** folder.
4. In the navigation pane, click **Grades**. The **Grades** list page is displayed.
5. Click **New.** The **Grades** details page is displayed.



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



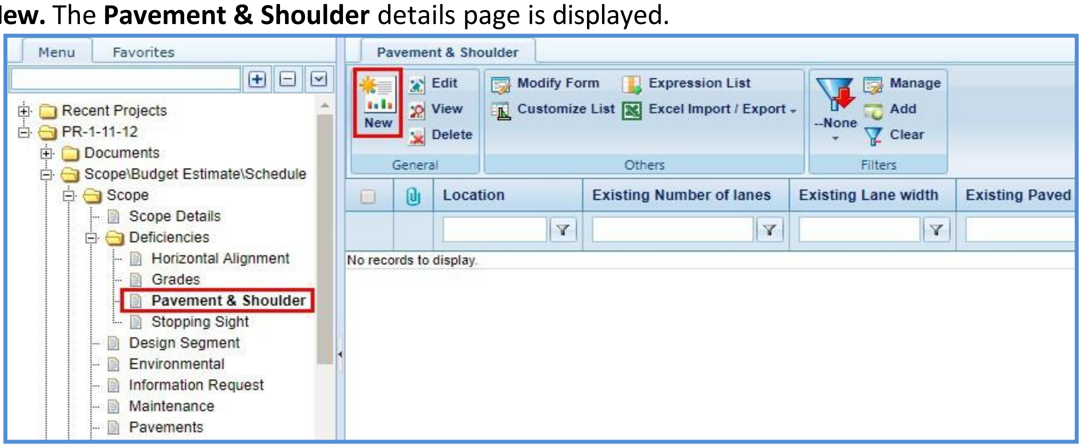
Field	Mandatory / Non-mandatory	Description
Location	Non-Mandatory	Enter the location details.
Posted Speed	Non-Mandatory	From the drop-down list, select the required posted speed. The options in the drop-down list are defined in the **Posted Speed** catalog of the library.
Existing grade %	Non-Mandatory	Enter the value of existing grade percentage.
Minimum grade required %	Non-Mandatory	Enter the value of required minimum grade percentage.
Maximum grade allowed %	Non-Mandatory	Enter the value of maximum grade percentage allowed.
Address this location in project design/construction	Non-Mandatory	Select the check box to address this location in project design/construction.
Comments	Non-Mandatory	Enter the comments.

7. In the **Attachments** section upload any required documents. To upload images and files, refer *Attachments*.
8. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

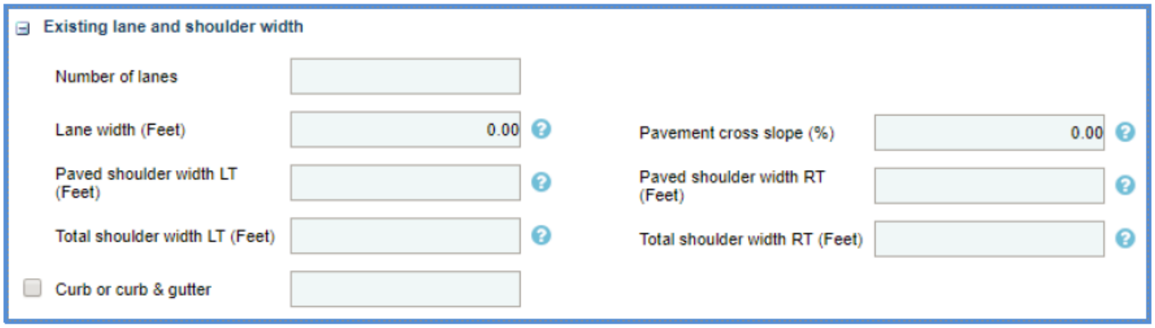
2.1.2.3 Pavement & Shoulder

To create Pavement & Shoulder details, perform the following steps:

1. Double-click the project. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder and then expand the **Deficiencies** folder.
4. In the navigation pane, click **Pavement & Shoulder**. The **Pavement & Shoulder** list page is displayed.
5. Click **New.** The **Pavement & Shoulder** details page is displayed.



6. In the **Substandard pavement & Shoulder Width Location Add** section, enter the **Location** details.
7. In the **Existing Lane and shoulder width** section, provide information in the required fields. The fields are described in the following table:

Field	Mandatory/ Non-mandatory	Description
		
Number of Lanes	Non-Mandatory	Enter the number of lanes.
Lane width (Feet)	Non-Mandatory	Enter the lane width.
Pavement cross slope (%)	Non-Mandatory	Enter the percentage value of the pavement cross slope.
Paved shoulder width LT (Feet)	Non-Mandatory	Enter the paved shoulder width LT.
Paved shoulder width RT (Feet)	Non-Mandatory	Enter the paved shoulder width RT.
Total shoulder width LT (Feet)	Non-Mandatory	Enter the total shoulder width LT.
Total shoulder width RT (Feet)	Non-Mandatory	Enter the total shoulder width RT.
Curb or curb & gutter	Non-Mandatory	If applicable, select the appropriate check boxes and enter the details.

8. In the **Required Lane and shoulder width** section, provide information in the required fields. The fields are described in the following table:

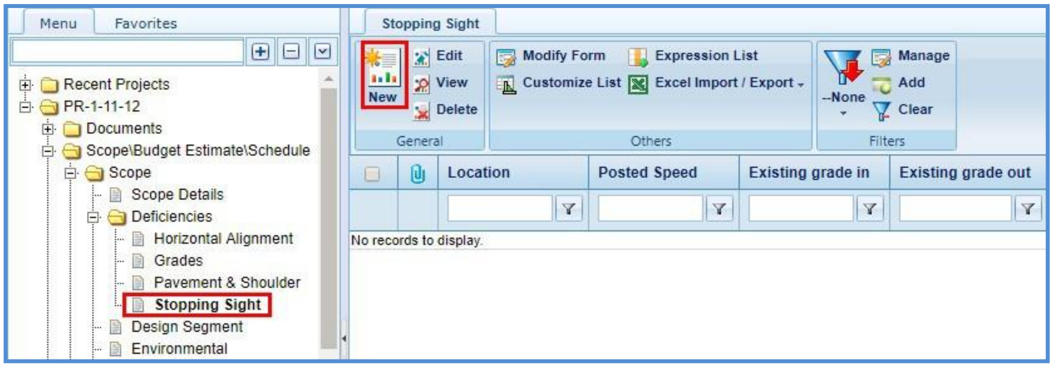
Field	Mandatory / Non-mandatory	Description
Number of lanes	Non-Mandatory	Enter the required number of lanes.
Lane Width (Feet)	Non-Mandatory	Enter the required lane width.
Pavement cross slope (%)	Non-Mandatory	Enter the required percentage value of the pavement cross slope.
Paved shoulder width LT (Feet)	Non-Mandatory	Enter the required paved shoulder width LT.
Paved shoulder width RT (Feet)	Non-Mandatory	Enter the required paved shoulder width RT.
Total shoulder width LT (Feet)	Non-Mandatory	Enter the required total shoulder width LT.
Total shoulder width RT (Feet)	Non-Mandatory	Enter the required total shoulder width RT.
Curb or curb & gutter	Non-Mandatory	If applicable, select the appropriate check boxes and enter the details.
Address this location in project design/ construction	Non-Mandatory	Select the check box to address this location in project design/construction.

9. In the **Comments** box, enter the comments.
10. In the **Attachments** section upload any relevant files. To upload images and files, refer *Attachments*.
11. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

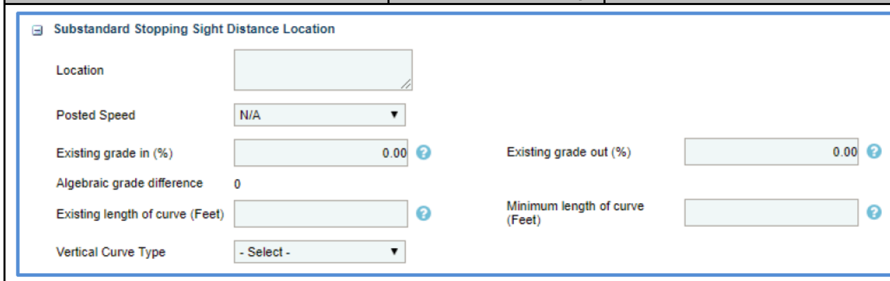
2.1.2.4 Stopping Sight

To create Stopping Sight details, perform the following steps:

1. Double-click the project. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder and then expand the **Deficiencies** folder.
4. In the navigation pane, click **Stopping Sight**. The **Stopping Sight** list page is displayed.
5. Click **New.** The **Stopping Sight** details page is displayed.



6. In the **Substandard Stopping Sight Distance Location** section, provide information in the required fields. The fields are described in the following table:

Field	Mandatory / Non-mandatory	Description
		
Location	Non-Mandatory	Enter the location details.
Posted Speed	Non-Mandatory	From the drop-down list, select the required posted speed. The options in the drop-down list are defined in the **Posted Speed** catalog of the library.
Existing grade in (%)	Non-Mandatory	Enter the value of existing grade in percentage.
Existing grade out (%)	Non-Mandatory	Enter the value of existing grade out percentage.
Algebraic grade difference	Non-Mandatory	Displays the value of algebraic grade difference.
Existing length of curve (Feet)	Non-Mandatory	Enter the value of existing length of curve.
Minimum length of curve (Feet)	Non-Mandatory	Enter the value of minimum length of curve.
Vertical Curve Type	Non-Mandatory	From the drop-down list, select the required vertical curve type. The options in the drop-down list are defined in the **Vertical curve** catalog of the library.
		

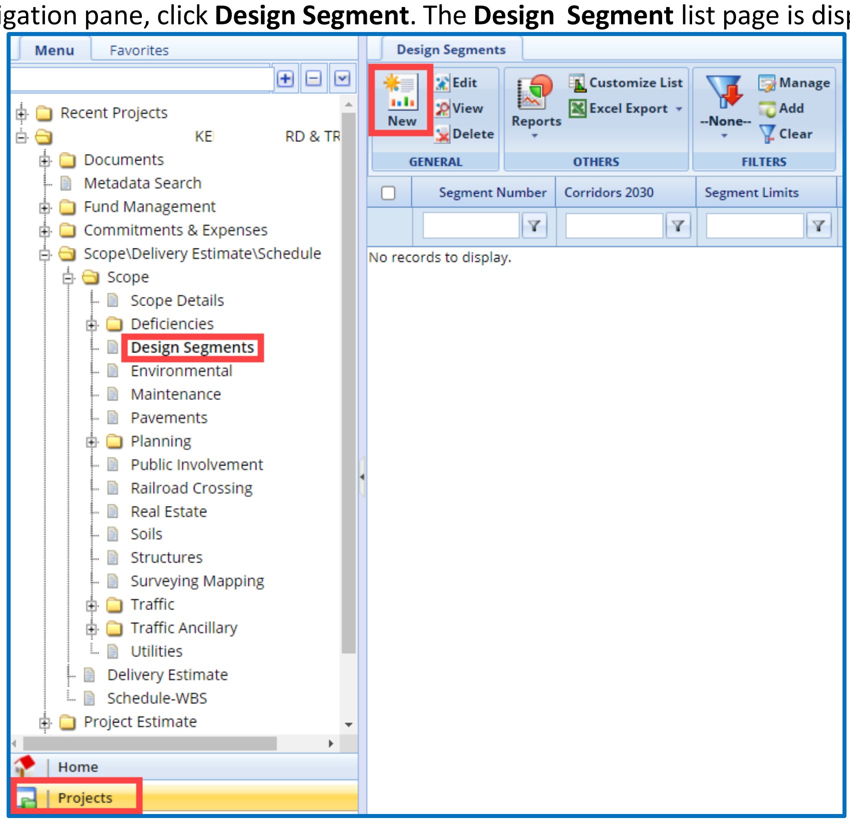
Field	Mandatory / Non-mandatory	Description
Existing K value	Non-Mandatory	Enter the existing K value.
Minimum K value	Non-Mandatory	Enter the minimum K value.
Desired K value	Non-Mandatory	Enter the desired K value.
Existing stopping sight distance (Feet)	Non-Mandatory	Enter the value of existing stopping sight distance.
Minimum stopping sight distance (Feet)	Non-Mandatory	Enter the value of minimum stopping sight distance.
Desirable stopping sight distance (Feet)	Non-Mandatory	Enter the value of desirable stopping sight distance.
Sight distance category	Non-Mandatory	From the drop-down list, select the required sight distance category. The options in the drop-down list are defined in the **Sight distance category** catalog of the library.
Maximum change in grade without a vertical curve (%)	Non-Mandatory	Enter the value of maximum change in grade without a vertical curve (%).
Address this location in project design/ construction	Non-Mandatory	Select the check box to address this location in project design/construction.

7. In the **Comments** box, enter the comments.
8. In the **Attachments** section upload any relevant files. To upload images and files, refer *Attachments*.
9. Click **Save**.
10. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

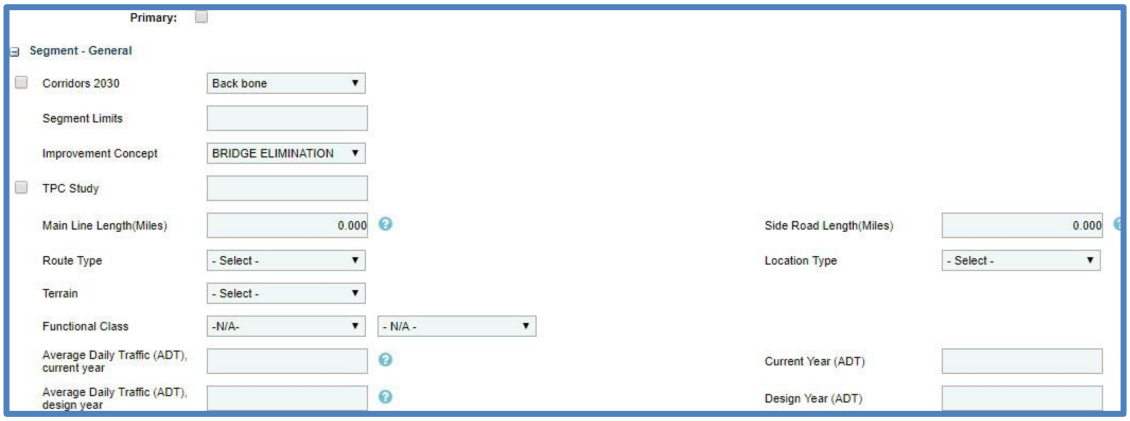
2.1.3 Design Segment

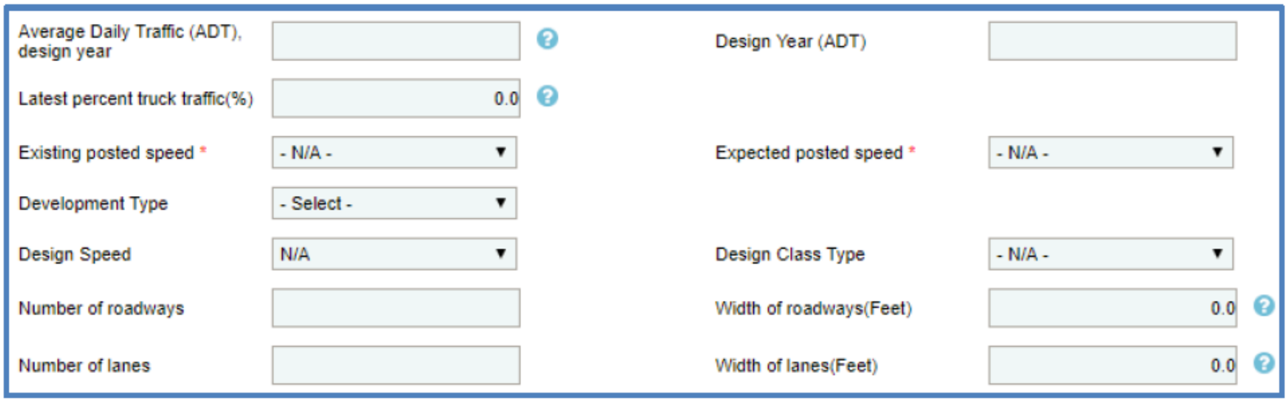
To create a design segment record, perform the following steps:

1. Double-click the project for which you want to create a **Design Segment** record. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder.
4. In the navigation pane, click **Design Segment**. The **Design Segment** list page is displayed.

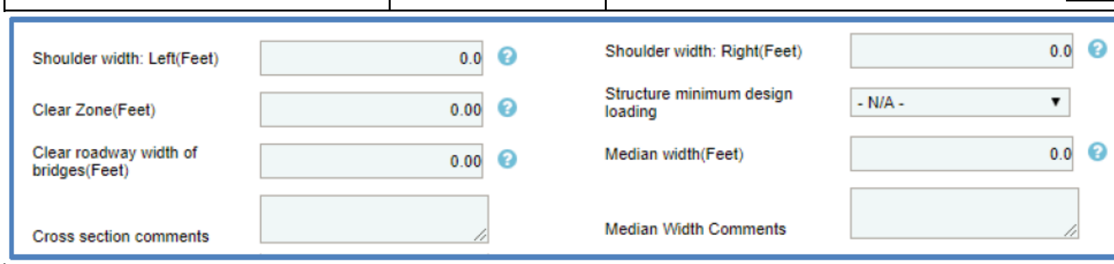


5. Click **New**. The **Design Segment** details page is displayed.
6. Select the **Primary** checkbox to indicate that the design segment is a primary design segment. Provide information in the required fields. The fields are described in the following table:

Field	Mandatory / Non-mandatory	Description
		
Corridors 2030	Non-mandatory	If applicable, select the check box and from the drop-down list, select the required type of Corridor 2030. The options in the drop-down list are defined in the **Corridors2030 Type** catalog of the library.
Segment Limits	Non-mandatory	Enter segment limit details.
Improvement Concept	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Improvement Concept** catalog of the library.
TPC Study	Non-mandatory	If applicable, select the check box and enter TPC study details.
Main Line Length (Miles)	Non-mandatory	Enter the length of the main line details. You can click to view an example.
Side Road Length (Miles)	Non-mandatory	Enter the length of the side road. You can click to view an example.
Route Type	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Route Type** catalog of the library.
Location Type	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Location Type** catalog of the library.
Terrain	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Terrain Type** catalog of the library.
Functional Class	Non-mandatory	This field has two drop-down lists. 1. From the first drop-down list, select the required functional class. The options in the drop-down list are defined in the **Functional Class** catalog of the library. From the second drop-down list, select the required functional class level. The options in the drop-down list are defined in the **Functional Class Level** catalog of the library.
Average Daily Traffic (ADT), current year	Non-mandatory	Enter the average value of daily traffic for the current year. You can click to view an example.
Current Year (ADT)	Non-mandatory	Enter current year associated with the average daily traffic.



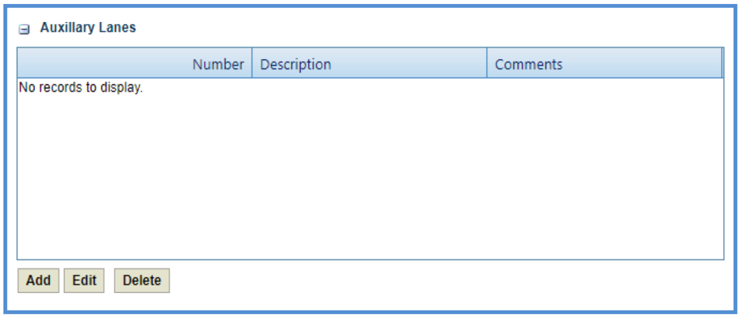
Field	Mandatory / Non-mandatory	Description
Average Daily Traffic (ADT), Design year	Non-mandatory	Enter the average value of daily traffic for the design year. You can click to view an example.
Design Year (ADT)	Non-mandatory	Enter design year associated with the average daily traffic.
Latest percent truck traffic (%)	Non-mandatory	Enter the latest percentage of truck traffic. You can click to view an example.
Existing posted speed	Mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Posted Speed** catalog of the library.
Expected posted speed	Mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Posted Speed** catalog of the library.
Development Type	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Development Type** catalog of the library.
Design Speed	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Design Speed Rate** catalog of the library.
Design Class Type	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Design Class Type** catalog of the library.
Number of roadways	Non-mandatory	Enter number of roadways.
Width of roadways (Feet)	Non-mandatory	Enter the width of roadways. You can click to view an example.
Number of lanes	Non-mandatory	Enter number of lanes.
Width of lanes (Feet)	Non-mandatory	Enter the width of lanes. You can click to view an example.



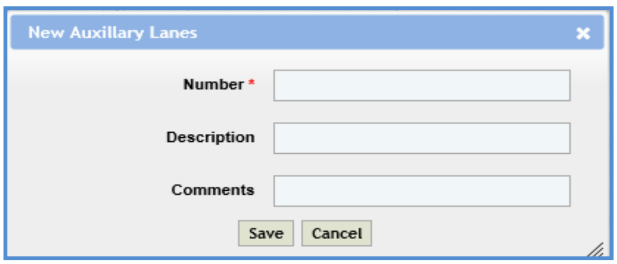
Shoulder width: Left (Feet)	Non-mandatory	Enter the left shoulder width. You can click to view an example.
Shoulder width: Right (Feet)	Non-mandatory	Enter the right shoulder width. You can click to view an example.
Clear Zone (Feet)	Non-mandatory	Enter the clear zone value. You can click to view an example.
Structure minimum design loading	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Structural Minimum Load** catalog of the library.

Field	Mandatory / Non-mandatory	Description
Clear roadway width of bridges (Feet)	Non-Mandatory	Enter the clear roadway width of bridges. You can click to view an example.
Median width (Feet)	Non-mandatory	Enter the median width. You can click to view an example.
Cross section comments	Non-mandatory	Enter comments about the cross section.
Median Width Comments	Non-mandatory	Enter comments about the median width.

7. In the **Auxiliary Lanes** section, perform the following steps to add auxiliary lanes details.



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

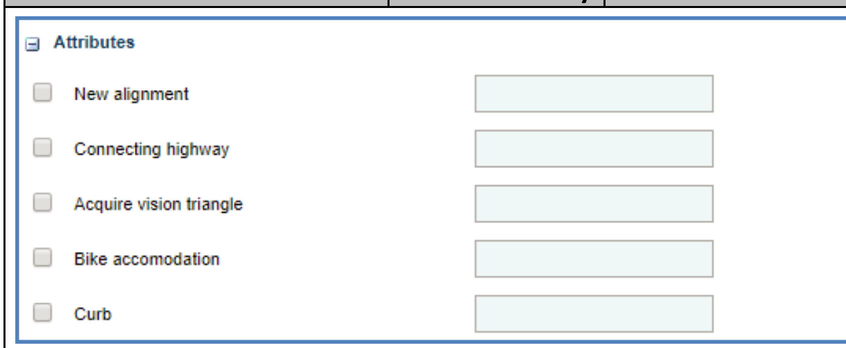


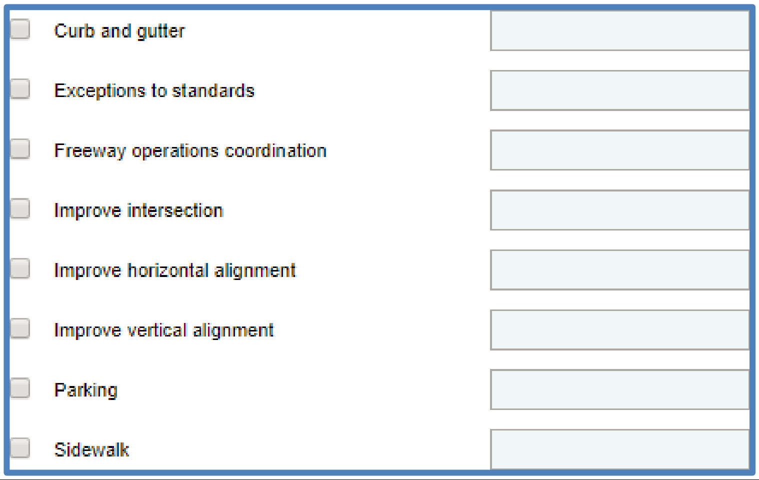
b. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
Number	Mandatory	Enter number of auxiliary lanes.
Description	Non-mandatory	Enter description about the auxiliary lanes.
Comments	Non-mandatory	Enter the comments.

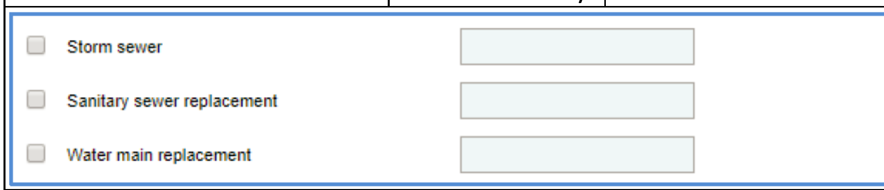
c. Click **Save**.

8. In the **Attributes** section, enter information in the required fields. The fields are described in the following table.

<table>
<tr><th>Field</th><th>Mandatory / Non-mandatory</th><th>Description</th></tr>
<tr><td colspan="3">
</td></tr>
<tr><td>New alignment</td><td>Non-mandatory</td><td rowspan="2">If applicable, select the check box and enter the details.</td></tr>
<tr><td>Connecting highway</td><td>Non-mandatory</td></tr>
<tr><td>Acquire vision triangle</td><td>Non-mandatory</td><td rowspan="3">If applicable, select the check box and enter the details.</td></tr>
<tr><td>Bike accommodation</td><td>Non-mandatory</td></tr>
<tr><td>Curb</td><td>Non-mandatory</td></tr>
</table>

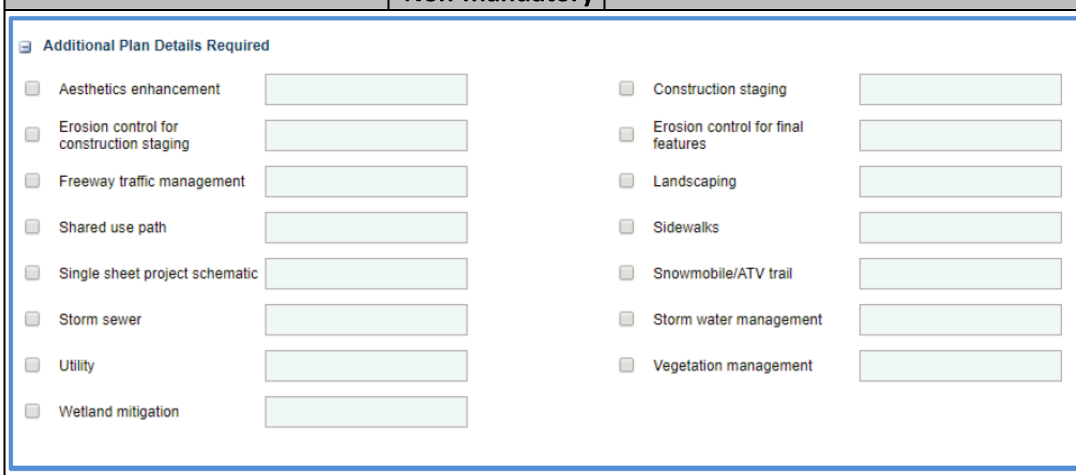


Field	Mandatory / Non-mandatory	Description
Curb and gutter	Non-mandatory	If applicable, select the check box and enter the details.
Exceptions to standards	Non-mandatory	
Freeway operations coordination	Non-mandatory	
Improve intersection	Non-mandatory	
Improve horizontal alignment	Non-mandatory	
Improve vertical alignment	Non-mandatory	
Parking	Non-mandatory	
Sidewalk	Non-mandatory	



Field	Mandatory / Non-mandatory	Description
Storm sewer	Non-mandatory	If applicable, select the check box and enter the details.
Sanitary sewer replacement	Non-mandatory	
Water main replacement	Non-mandatory	

9. In the **Additional Plan Details** required section, enter information in the required fields. The fields are described in the following table.



Field	Mandatory / Non-mandatory	Description
Aesthetics enhancement	Non-mandatory	If applicable, select the check box and enter the details.
Construction staging	Non-mandatory	

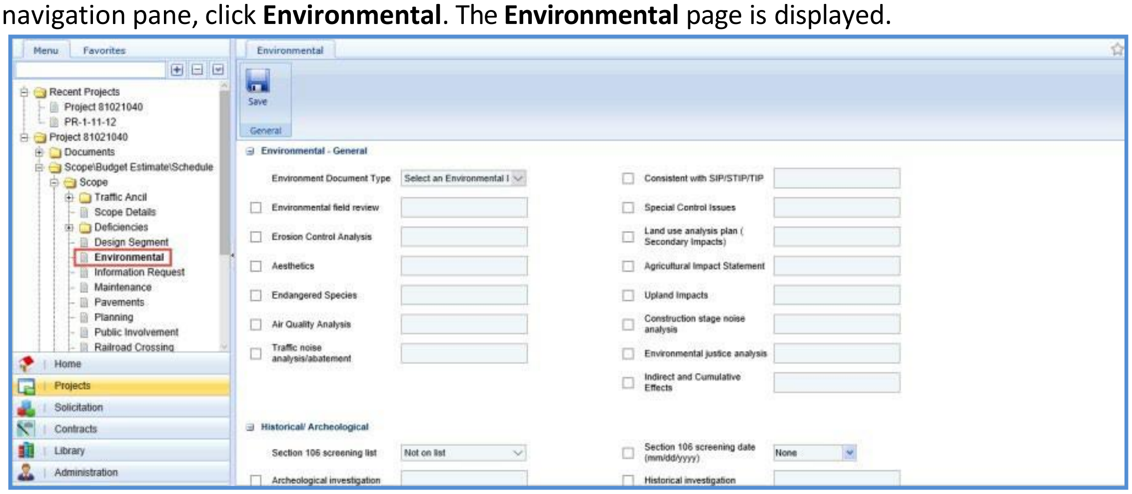
Field	Mandatory / Non-mandatory	Description
Erosion control for construction staging	Non-mandatory	If applicable, select the check box and enter the details.
Erosion control for final features	Non-mandatory	
Freeway traffic management	Non-mandatory	
Landscaping	Non-mandatory	
Shared use path	Non-mandatory	
Sidewalks	Non-mandatory	
Single sheet project schematic	Non-mandatory	
Snowmobile/ATV trails	Non-mandatory	
Storm sewer	Non-mandatory	
Storm water management	Non-mandatory	
Utility	Non-mandatory	
Vegetation management	Non-mandatory	
Wetland mitigation	Non-mandatory	

10. In the **Comments** field, enter comments about the design segment.
11. In the **Attachments** section upload any relevant files. To upload images and files, refer *Attachments*.
12. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

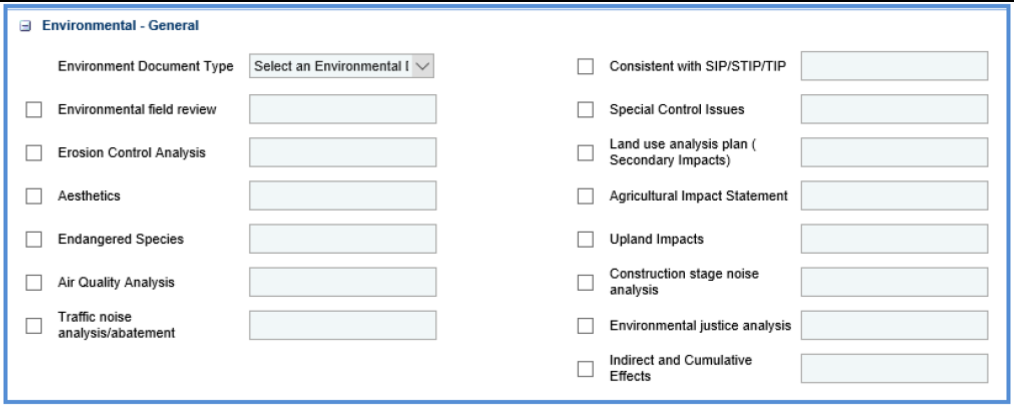
2.1.4 Environmental

To record environment related information, perform the following steps:

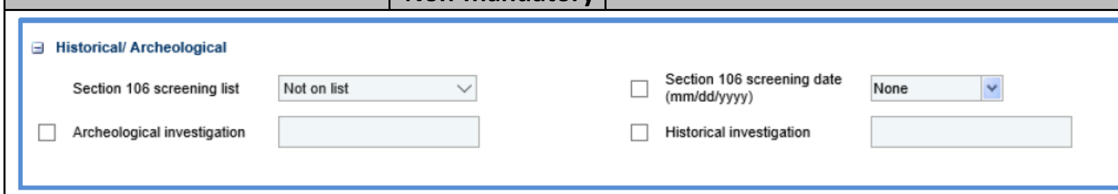
1. Double-click the project for which you want to record environment related information. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder.
4. In the navigation pane, click **Environmental**. The **Environmental** page is displayed.



5. In the **Environmental – General** section, provide information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Environment Document Type	Non-mandatory	From the drop-down list select the environment document type. The options in the drop-down list are defined in the **Environmental Document** catalog of the library.
Consistent with SIP/STIP/TIP	Non-mandatory	If applicable, select the check box and enter the details.
Environmental field review	Non-mandatory	
Special Control Issues	Non-mandatory	
Erosion Control Analysis	Non-mandatory	
Land use analysis plan (Secondary Impacts)	Non-mandatory	
Aesthetics	Non-mandatory	
Agriculture Impact Statement	Non-mandatory	
Endangered Species	Non-mandatory	
Endangered Species	Non-mandatory	If applicable, select the check box and enter the details.
Upland Impacts	Non-mandatory	
Air Quality Analysis	Non-mandatory	
Construction Stage Noise Analysis	Non-mandatory	

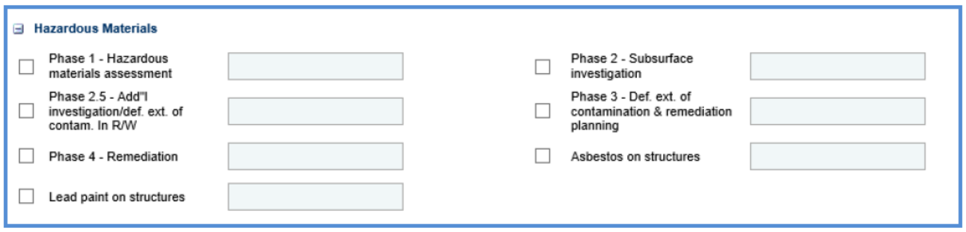
6. In the **Historical/Archaeological** section, provide information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Section 106 screening list	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Section 106 screening** catalog of the library.
Section 106 screening date (mm/dd/yyyy)	Non-mandatory	If applicable, select the check box and from the drop-down calendar, select the section 106 screening date.
Archeological investigation	Non-mandatory	If applicable, select the check box and enter the details.
Historical investigation	Non-mandatory	

7. In the **Burial Site(s)/Cemetery (157.70)** section, provide information in the required fields. The fields are described in the following table.

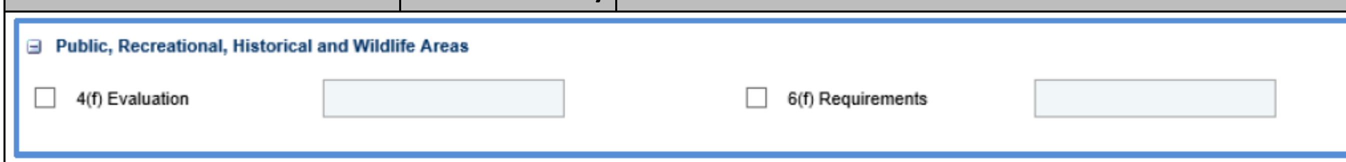
Field	Mandatory / Non-mandatory	Description
Uncatalogued burial authorization required	Non-mandatory	If applicable, select the check box and enter the details.
Cataloged burial permit required	Non-mandatory	

8. In the **Hazardous Materials** section, provide information in the required fields. The fields are described in the following table.



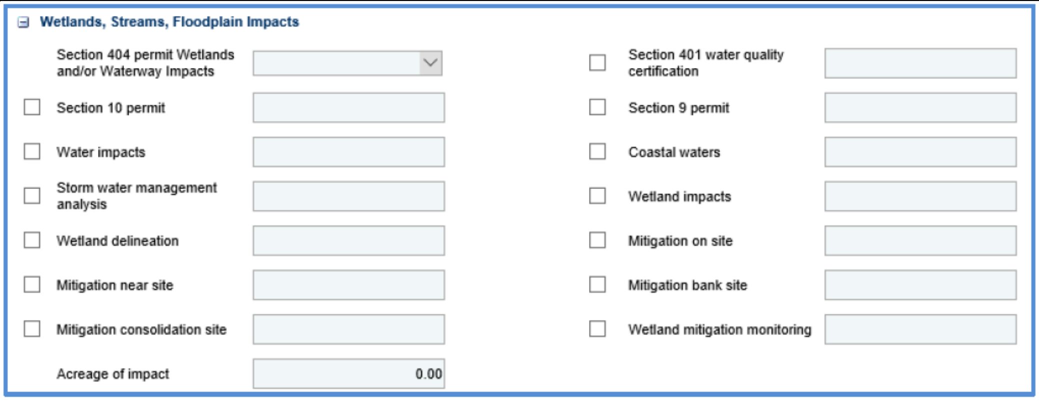
Field	Mandatory / Non-mandatory	Description
Phase 1 – Hazardous materials assessment	Non-mandatory	If applicable, select the check box and enter the details.
Phase 2 – Subsurface investigation	Non-mandatory	
Phase 2.5 – Add"l investigation/def. ext. of contam. In R/W	Non-mandatory	
Phase 3 – Def. ext. of contamination & remediation planning	Non-mandatory	
Phase 4 - Remediation	Non-mandatory	
Asbestos on structures	Non-mandatory	
Lead paint on structures	Non-mandatory	

9. In the **Public, Recreational, Historical and Wildlife Areas** section, provide information in the required fields. The fields are described in the following table.



Field	Mandatory / Non-mandatory	Description
4(f) Evaluation	Non-mandatory	If applicable, select the check box and enter the details.
6(f) Requirements	Non-mandatory	

10. In the **Wetlands, Streams, Floodplain Impacts** section, provide information in the required fields. The fields are described in the following table.



Field	Mandatory / Non-mandatory	Description
Section 404 permit Wetlands and/or Waterway Impacts	Non-mandatory	From the drop-down list, select the required option.
Section 401 water quality certification	Non-mandatory	If applicable, select the check box and enter the details.
Section 10 permit	Non-mandatory	
Section 9 permit	Non-mandatory	
Water impacts	Non-mandatory	
Coastal waters	Non-mandatory	
Storm water management analysis	Non-mandatory	
Wetland impacts	Non-mandatory	
Wetland delineation	Non-mandatory	
Mitigation on site	Non-mandatory	
Mitigation near site	Non-mandatory	
Mitigation bank site	Non-mandatory	
Mitigation consolidation site	Non-mandatory	
Wetland mitigation monitoring	Non-mandatory	
Acreage of impact	Non-mandatory	

11. In the **Department of Natural Resources** section, provide information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
Initial coordination	Non-mandatory	If applicable, select the check box and enter the details.
Construction timing/scheduling/special considerations	Non-mandatory	

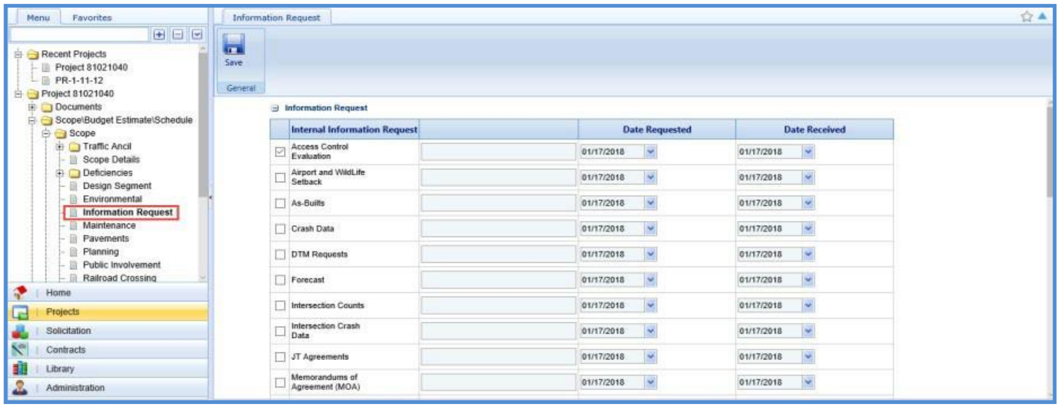
12. In the **Comments** field, enter comments about the environment details.
13. In the **Attachments** section, attach any relevant files. To upload images and files, refer *Attachments*.
14. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

2.1.5 Information Request

To record information request details, perform the following steps:

1. Double-click the project for which you want to record information request details. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.

3. Expand the **Scope** folder.
4. In the navigation pane, click **Information Request**. The **Information Request** page is displayed.

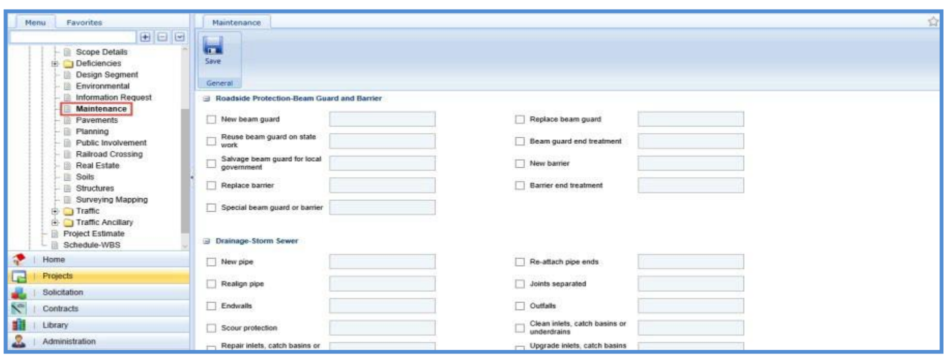


5. In the **Information Request** section, perform the following steps to record internal information request and external information request details.
    a. Corresponding to each internal information request/external information request, select the required check box and provide request details in the column.
    b. In the **Date Requested**, from the drop-down calendar select the date when the internal/ external request was requested.
    c. In the **Date Received** column, corresponding to each internal/external request select the date when the request was received.
6. In the **Comments** field, enter comments about the information request. Click **Save**.

2.1.6 Maintenance

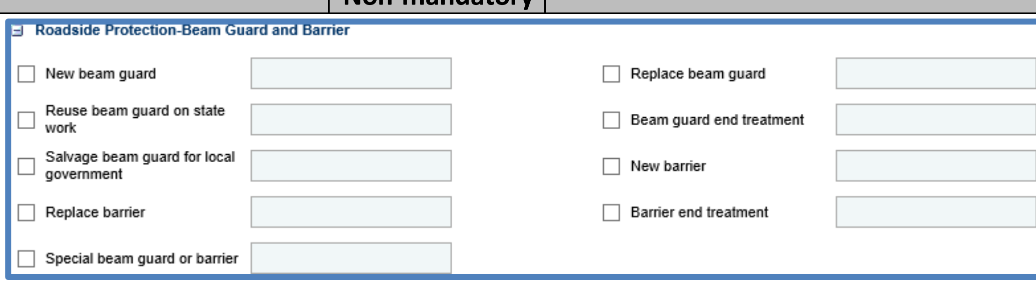
To record maintenance related information, perform the following steps:

1. Double-click the project for which you want to record maintenance related information. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder.
4. In the navigation pane, click **Maintenance**. The **Maintenance** page is displayed.



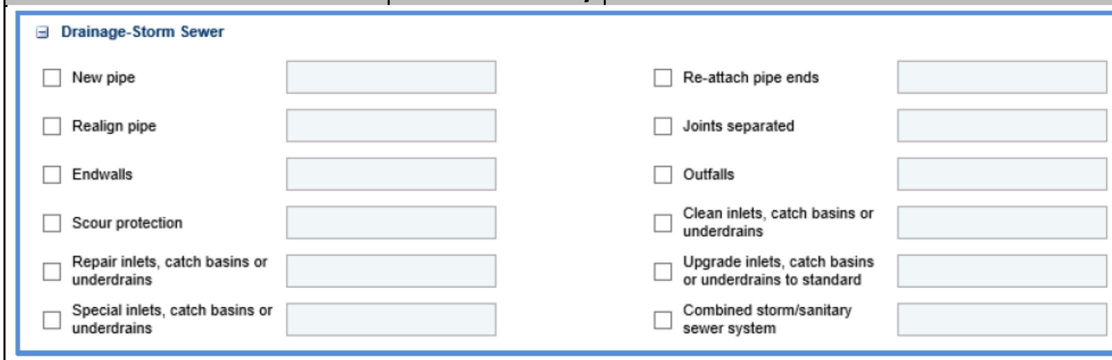
5. In the **Roadside Protection-Beam Guard and Barrier** section, provide information in the required fields. The different fields are described in the following table.

Field	Mandatory / Non-mandatory	Description

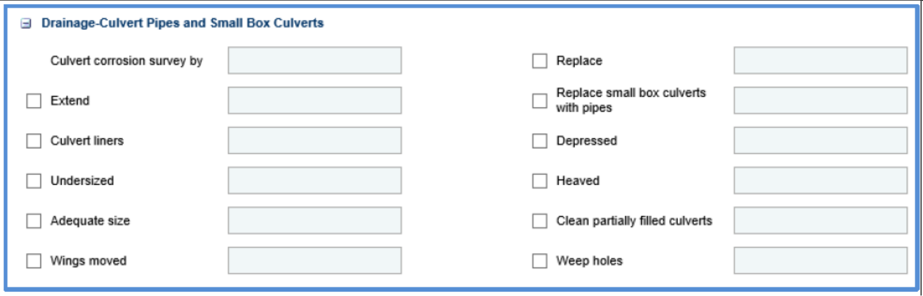


Field	Mandatory / Non-mandatory	Description
New beam guard	Non-mandatory	If applicable, select the check box and enter the details.
Replace beam guard	Non-mandatory	
Reuse beam guard on state work	Non-mandatory	
Beam guard end treatment	Non-mandatory	
Salvage beam guard for local government	Non-mandatory	
New barrier	Non-mandatory	
Replace barrier	Non-mandatory	
Barrier end treatment	Non-mandatory	
Special beam guard or barrier	Non-mandatory	

6. In the **Drainage-Storm Sewer** section, provide information in the required fields. The different fields are described in the following table.

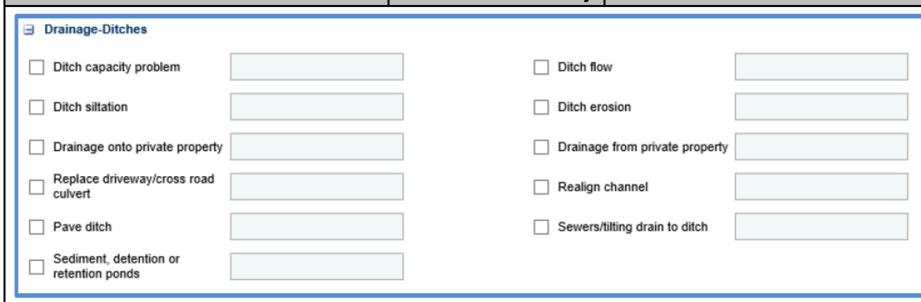
Field	Mandatory / Non-mandatory	Description
		
New pipe	Non-mandatory	If applicable, select the check box and enter the details.
Re-attach pipe ends	Non-mandatory	
Realign pipe	Non-mandatory	
Joints separated	Non-mandatory	
Endwalls	Non-mandatory	
Outfalls	Non-mandatory	
Scour protection	Non-mandatory	
Clean inlets, catch basins or underdrains	Non-mandatory	
Repair inlets, catch basins or underdrains	Non-mandatory	
Upgrade inlets, catch basins or underdrains to standard	Non-mandatory	
Special inlets, catch basins or underdrains	Non-mandatory	If applicable, select the check box and enter the details.
Combined storm/sanitary sewer system	Non-mandatory	

7. In the **Drainage-Culvert Pipes and Small Box Culverts** section, provide information in the required fields. The different fields are described in the following table.



Field	Mandatory / Non-mandatory	Description
Culvert corrosion survey by	Non-mandatory	Enter the name of the person who has performed the culvert corrosion survey.
Replace	Non-mandatory	If applicable, select the check box and enter the details.
Extend	Non-mandatory	
Replace small box culverts with pipes	Non-mandatory	
Culvert liners	Non-mandatory	
Depressed	Non-mandatory	
Undersized	Non-mandatory	
Heaved	Non-mandatory	
Adequate size	Non-mandatory	
Clean partially filled culverts	Non-mandatory	
Wings moved	Non-mandatory	
Weep holes	Non-mandatory	

8. In the **Drainage-Ditches** section, provide information in the required fields. The different fields are described in the following table.



Field	Mandatory / Non-mandatory	Description
Ditch capacity problem	Non-mandatory	If applicable, select the check box and enter the details.
Ditch flow	Non-mandatory	
Ditch siltation	Non-mandatory	
Ditch erosion	Non-mandatory	
Drainage onto private property	Non-mandatory	
Drainage from private property	Non-mandatory	
Replace driveway/crossroad culvert	Non-mandatory	
Realign channel	Non-mandatory	
Pave ditch	Non-mandatory	
Sewers/tilting drain to ditch	Non-mandatory	
Sediment, detention, or retention ponds	Non-mandatory	

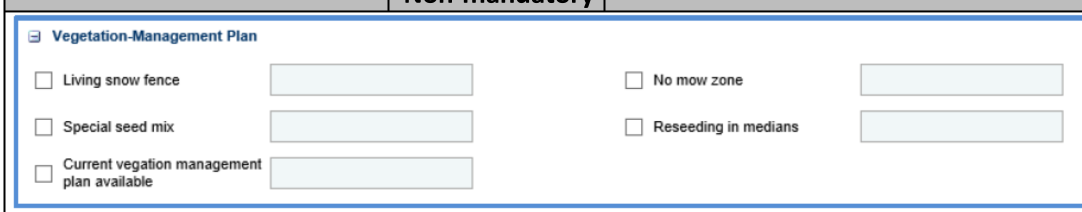
9. In the **Driveways (state if there are safety problems)** section, provide information in the required fields. The different fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
Permitted	Non-mandatory	If applicable, select the check box and enter the details.
Not permitted	Non-mandatory	
Non-conforming	Non-mandatory	
Illegal	Non-mandatory	

10. In the **Winter Driving** section, provide information in the required fields. The different fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
Areas of drifting snow	Non-mandatory	If applicable, select the check box and enter the details.
Areas of ice buildup	Non-mandatory	
Pavement shaded, snowmelt sheeting	Non-mandatory	
Trees shading road	Non-mandatory	
Steep slopes shading road	Non-mandatory	
Other	Non-mandatory	

11. In the **Vegetation-Management Plan** section, provide information in the required fields. The different fields are described in the following table.



Field	Mandatory / Non-mandatory	Description
Living snow fence	Non-mandatory	If applicable, select the check box and enter the details.
No mow zone	Non-mandatory	
Special seed mix	Non-mandatory	
Reseeding in medians	Non-mandatory	
Current vegetation management plan available	Non-mandatory	

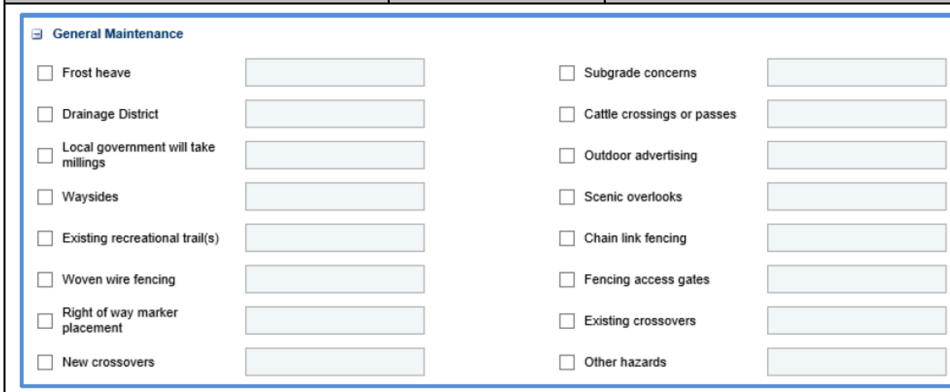
12. In the **Vegetation-Erosion** section, provide information in the required fields. The different fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Ground Cover	Non-mandatory	If applicable, select the check box and enter the details.
Eroding slopes	Non-mandatory	

13. In the **Vegetation-Trees** section, provide information in the required fields. The different fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Clearing	Non-mandatory	If applicable, select the check box and enter the details.
Plantings	Non-mandatory	
Glare screen	Non-mandatory	

14. In the **General Maintenance** section, provide information in the required fields. The different fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Frost heave	Non-mandatory	If applicable, select the check box and enter the details.
Subgrade concerns	Non-mandatory	
Drainage District	Non-mandatory	
Cattle crossings or passes	Non-mandatory	
Local government will take millings	Non-mandatory	
Outdoor advertising	Non-mandatory	
Waysides	Non-mandatory	
Scenic overlooks	Non-mandatory	
Existing recreational trail(s)	Non-mandatory	
Chain link fencing	Non-mandatory	
Woven wire fencing	Non-mandatory	
Fencing access gates	Non-mandatory	
Right of way marker placement	Non-mandatory	
Existing crossovers	Non-mandatory	

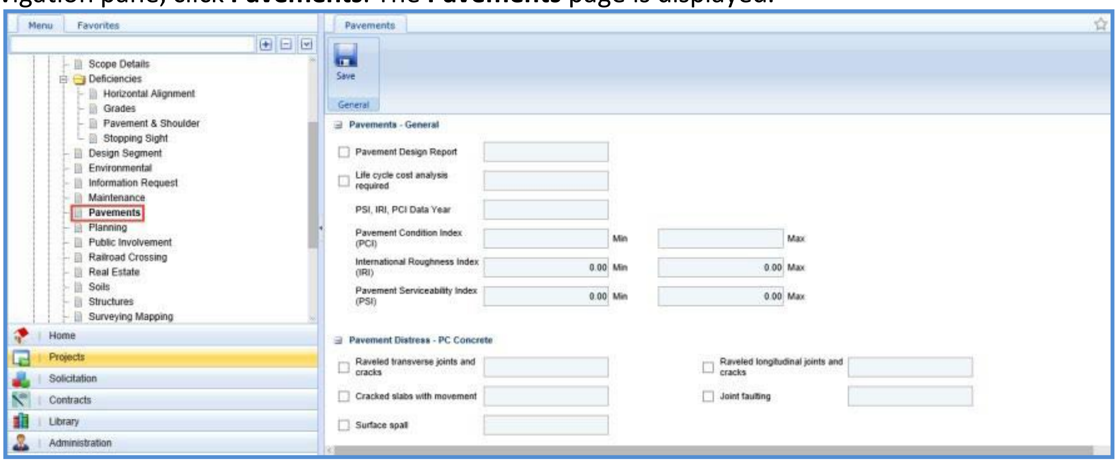
Field	Mandatory / Non-mandatory	Description
New crossovers	Non-mandatory	If applicable, select the check box and enter the details.
Other hazards	Non-mandatory	

5. In the **Maintenance Comments** field, enter comments about maintenance details.
6. In the **County Patrolperson Comments** field, enter comments provided by the county patrolperson.
7. In the **Attachments** section, to upload images and files, refer *Attachments*.
8. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

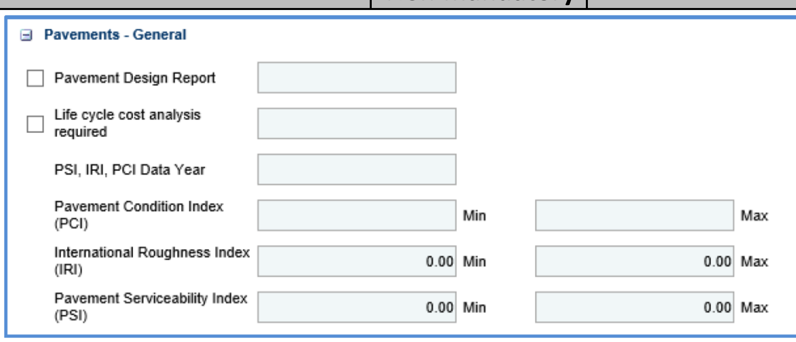
2.1.7 Pavements

To record pavement related information, perform the following steps:

1. Double-click the project for which you want to record pavement related information. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder.
4. In the navigation pane, click **Pavements**. The **Pavements** page is displayed.

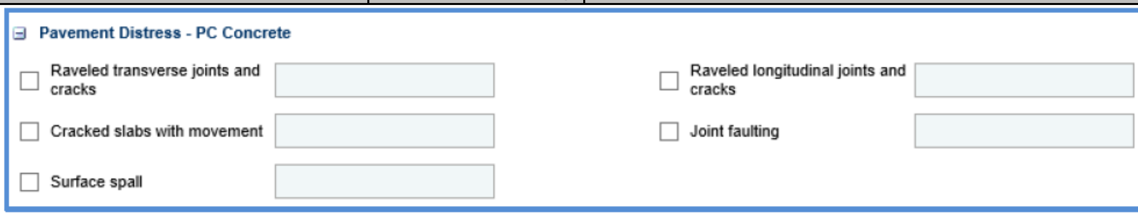


5. In the **Pavements - General** section, provide information in the required fields. The different fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
 		
Pavement Design Report	Non-mandatory	If applicable, select the check box and enter the details.
Life cycle cost analysis required	Non-mandatory	
PSI, IRI, PCI Data Year	Non-mandatory	Enter the PSI, IRI, PCI data year details.
Pavement Condition Index (PCI)	Non-mandatory	Enter the minimum and maximum Pavement Condition Index values.

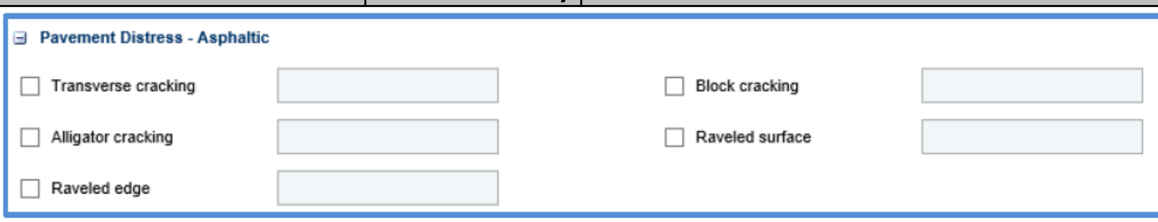
Field	Mandatory / Non-mandatory	Description
International Roughness Index (IRI)	Non-mandatory	Enter the minimum and maximum International Roughness Index values.
Pavement Serviceability Index (PSI)	Non-mandatory	Enter the minimum and maximum Pavement Serviceability Index values.

6. In the **Pavement Distress – PC Concrete** section, provide information in the required fields. The different fields are described in the following table.



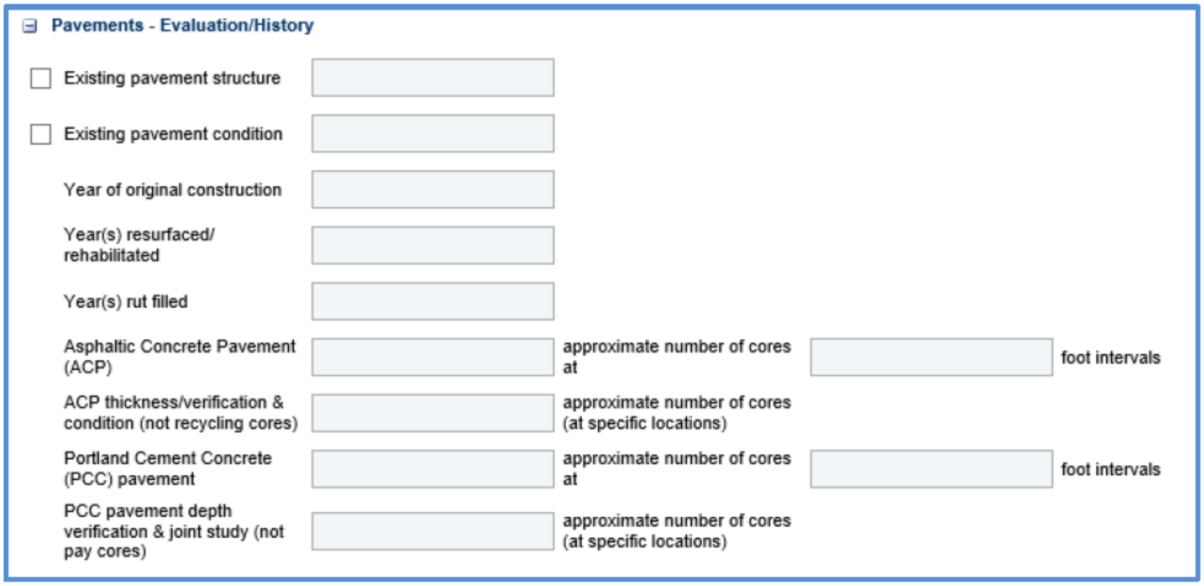
Field	Mandatory / Non-mandatory	Description
Raveled transverse joints and cracks	Non-mandatory	If applicable, select the check box and enter the details.
Raveled longitudinal joints and cracks	Non-mandatory	
Cracked slabs with movement	Non-mandatory	
Joint faulting	Non-mandatory	
Surface spall	Non-mandatory	

7. In the **Pavement Distress – Asphaltic** section, provide information in the required fields. The different fields are described in the following table.



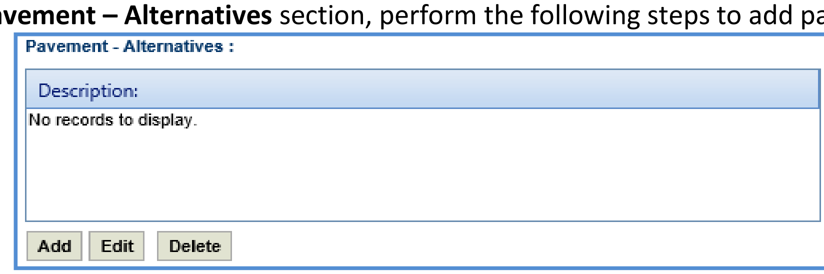
Field	Mandatory / Non-mandatory	Description
Transverse cracking	Non-mandatory	If applicable, select the check box and enter the details.
Block cracking	Non-mandatory	
Alligator cracking	Non-mandatory	
Raveled surface	Non-mandatory	
Raveled edge	Non-mandatory	

8. In the **Pavements - Evaluation/History** section, provide information in the required fields. The different fields are described in the following table.

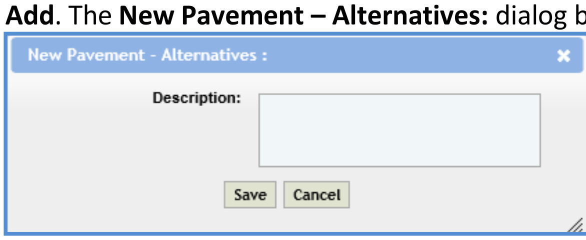


Field	Mandatory / Non-mandatory	Description
Existing pavement structure	Non-mandatory	If applicable, select the check box and enter the details.
Existing pavement condition	Non-mandatory	
Year of original construction	Non-mandatory	Enter the year when the pavement was originally constructed.
Year(s) resurfaced/ rehabilitated	Non-mandatory	Enter the years when the pavement was resurfaced/rehabilitated.
Year(s) rut filled	Non-mandatory	Enter year when the rut was filled.
Asphaltic Concrete Pavement (ACP)	Non-mandatory	Enter the number of cores and the foot intervals value.
ACP thickness/verification & condition (not recycling cores)	Non-mandatory	Enter the number of cores.
Portland Cement Concrete (PCC) pavement	Non-mandatory	Enter the number of cores and the foot intervals value.
PCC pavement depth verification & joint study (not pay cores)	Non-mandatory	Enter the number of cores.

9. In the **Pavement – Alternatives** section, perform the following steps to add pavement alternatives.



   a. Click **Add**. The **New Pavement – Alternatives:** dialog box is displayed.



   b. In the **Description** field, enter description about the pavement alternative.
   c. Click **Save**.

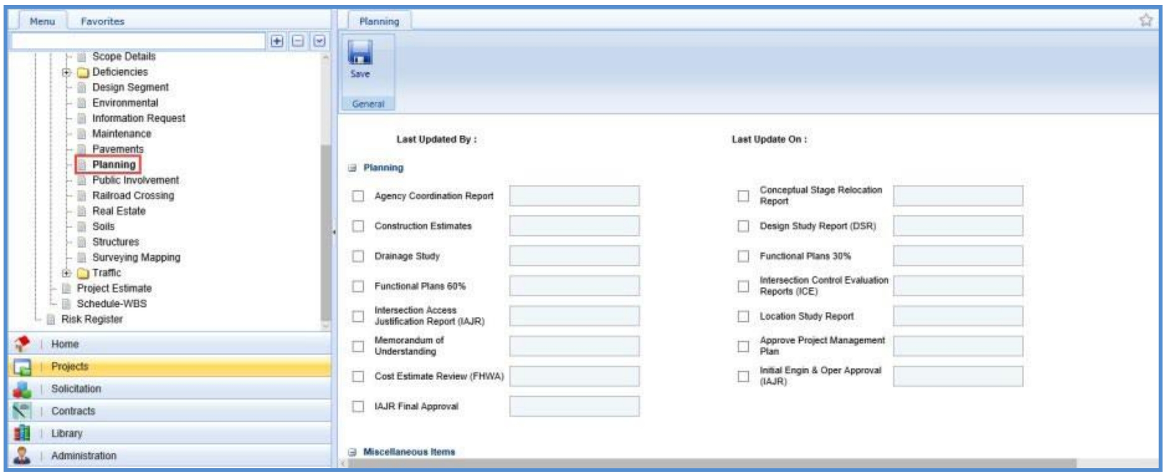
10. In the **Preliminary proposed alternative** field, enter details about the preliminary proposed alternative.

11. In the **Pavement Comments** field, enter comments about the pavement.
12. In the **Attachments** section upload any required documents. To upload images and files, refer *Attachments*.
13. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

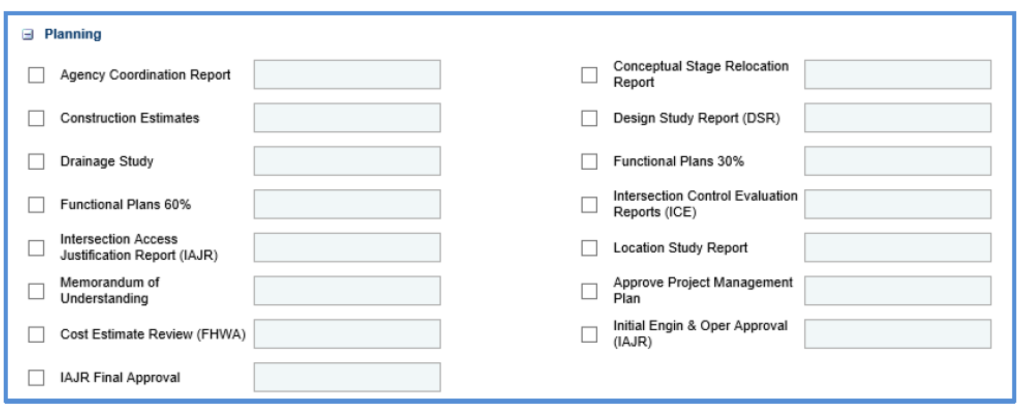
2.1.8 Planning

To record planning related information, perform the following steps:

1. Double-click the project for which you want to record planning related information. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder.
4. In the navigation pane, click **Planning**. The **Planning** page is displayed.



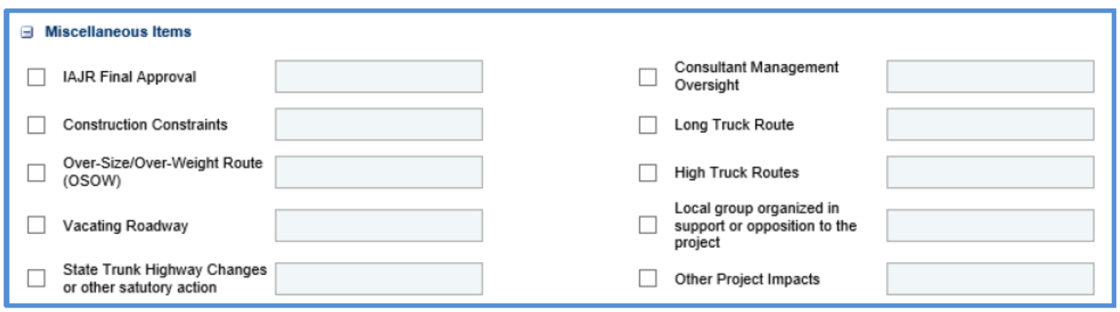
5. In the **Planning** section, provide information in the required fields. The different fields are described in the following table.



Field	Mandatory / Non-mandatory	Description
Agency Coordination Report	Non-mandatory	If applicable, select the check box and enter the details.
Conceptual Stage Relocation Report	Non-mandatory	
Construction Estimates	Non-mandatory	
Design Study Report (DSR)	Non-mandatory	
Drainage Study	Non-mandatory	
Functional Plans 30%	Non-mandatory	

Field	Mandatory / Non-mandatory	Description
Functional Plans 60%	Non-mandatory	If applicable, select the check box and enter the details.
Intersection Control Evaluation Reports (ICE)	Non-mandatory	
Intersection Access Justification Report (IAJR)	Non-mandatory	
Location Study Report	Non-mandatory	
Memorandum of Understanding	Non-mandatory	
Approve Project Management Plan	Non-mandatory	
Cost Estimate Review (FHWA)	Non-mandatory	
Initial Engin & Oper Approval (IAJR)	Non-mandatory	
IAJR Final Approval	Non-mandatory	

6. In the **Miscellaneous Items** section, provide information in the required fields. The different fields are described in the following table.



Field	Mandatory / Non-mandatory	Description
IAJR Final Approval	Non-mandatory	If applicable, select the check box and enter the details.
Consultant Management Oversight	Non-mandatory	
Construction Constraints	Non-mandatory	
Long Truck Route	Non-mandatory	
Over-Size/Over-Weight Route (OSOW)	Non-mandatory	
High Truck Routes	Non-mandatory	
Vacating Roadway	Non-mandatory	
Local group organized in support or opposition to the project	Non-mandatory	
State Trunk Highway Changes or other statutory action	Non-mandatory	
Other Project Impacts	Non-mandatory	

7. In the **Existing Access** section, provide information in the required fields. The different fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
Existing Access Control	Non-mandatory	If applicable, select the check box and enter the details.
Statutes 84.09 - purchase	Non-mandatory	
Statutes 84.25 statutory	Non-mandatory	

Field	Mandatory / Non-mandatory	Description
Statutes 84.295 freeway/ expressway	Non-mandatory	If applicable, select the check box and enter the details.
Statutes 86.07 statutory	Non-mandatory	
State Access Management Plan tier 1	Non-mandatory	
State Access Management Plan tier 2A	Non-mandatory	
State Access Management Plan tier 2B	Non-mandatory	
State Access Management Plan tier 3	Non-mandatory	
State Access Management Plan tier 4	Non-mandatory	
Existing Access Plan	Non-mandatory	
Existing Permits	Non-mandatory	

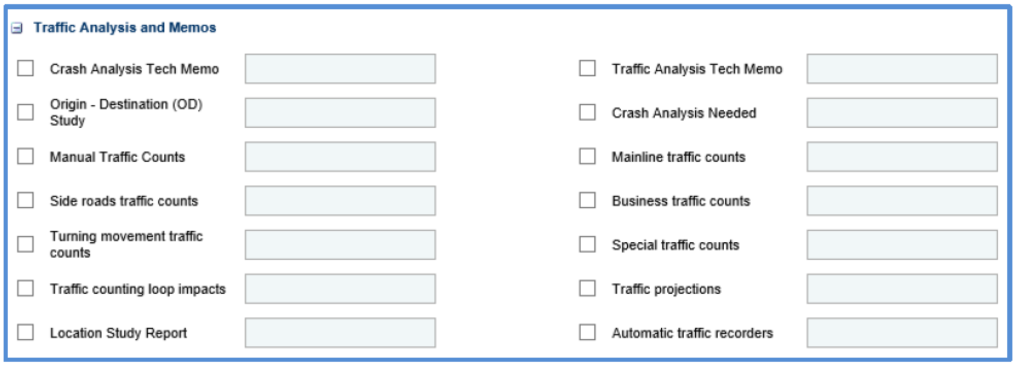
8. In the **Proposed Access** section, provide information in the required fields. The different fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
Statutes 84.25 statutory	Non-mandatory	If applicable, select the check box and enter the details.
Statutes 84.09 - purchase	Non-mandatory	
Statutes 86.07 statutory	Non-mandatory	
Statutes 84.295 freeway/ expressway	Non-mandatory	
State Access Management Plan tier 2A	Non-mandatory	
State Access Management Plan tier 1	Non-mandatory	
State Access Management Plan tier 3	Non-mandatory	
State Access Management Plan tier 2B	Non-mandatory	
Obtain Permits	Non-mandatory	
State Access Management Plan tier 4	Non-mandatory	
Acquire Access Control	Non-mandatory	
Proposed Development	Non-mandatory	
Reduce or Change Access points	Non-mandatory	

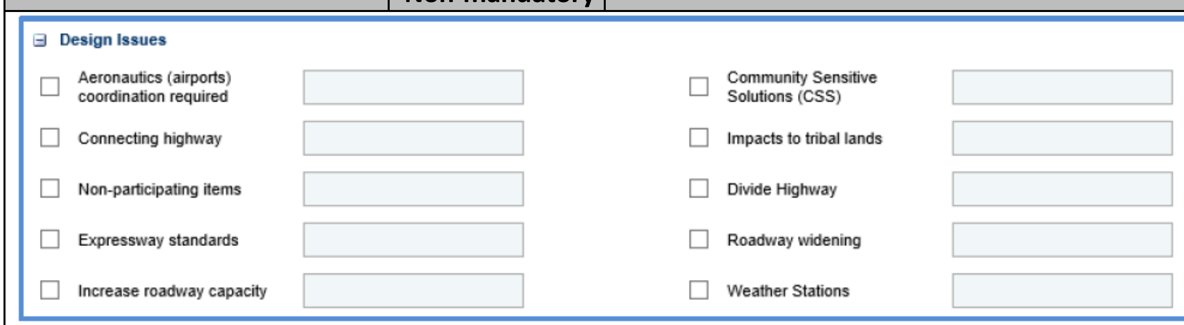
9. In the **Multimodal Report** section, provide information in the required fields. The different fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
Multimodal features	Non-mandatory	If applicable, select the check box and enter the details.
Pedestrian accommodation	Non-mandatory	
Bike accommodation	Non-mandatory	
Park and ride	Non-mandatory	
Mass transit	Non-mandatory	
Planning enhancement	Non-mandatory	

10. In the **Traffic Analysis and Memos** section, provide information in the required fields. The different fields are described in the following table.

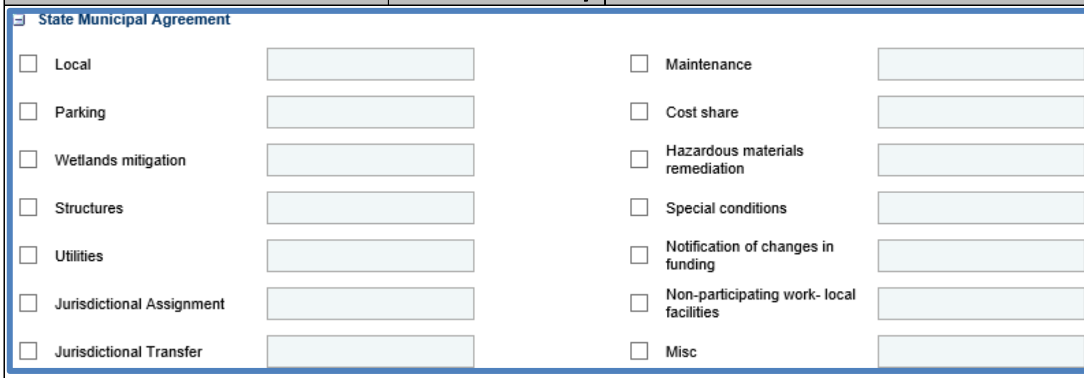
Field	Mandatory / Non-mandatory	Description
		
Crash Analysis Tech Memo	Non-mandatory	If applicable, select the check box and enter the details.
Traffic Analysis Tech Memo	Non-mandatory	
Origin - Destination (OD) Study	Non-mandatory	
Crash Analysis Needed	Non-mandatory	
Manual Traffic Counts	Non-mandatory	
Mainline traffic counts	Non-mandatory	
Side roads traffic counts	Non-mandatory	
Business traffic counts	Non-mandatory	
Turning movement traffic counts	Non-mandatory	
Special traffic counts	Non-mandatory	
Traffic counting loop impacts	Non-mandatory	
Traffic projections	Non-mandatory	
Location Study Report	Non-mandatory	
Automatic traffic recorders	Non-mandatory	

11. In the **Design Issues** section, provide information in the required fields. The different fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Aeronautics (airports) coordination required	Non-mandatory	If applicable, select the check box and enter the details.
Community Sensitive Solutions (CSS)	Non-mandatory	
Connecting highway	Non-mandatory	
Impacts to tribal lands	Non-mandatory	
Non-participating items	Non-mandatory	

Field	Mandatory / Non-mandatory	Description
Divide Highway	Non-mandatory	
Expressway standards	Non-mandatory	
Roadway widening	Non-mandatory	
Increase roadway capacity	Non-mandatory	
Weather Stations	Non-mandatory	

12. In the **State Municipal Agreement** section, provide information in the required fields. The different fields are described in the following table.



Field	Mandatory / Non-mandatory	Description
Local	Non-mandatory	
Maintenance	Non-mandatory	
Parking	Non-mandatory	
Cost share	Non-mandatory	
Wetlands mitigation	Non-mandatory	
Hazardous materials remediation	Non-mandatory	
Structures	Non-mandatory	
Special conditions	Non-mandatory	If applicable, select the check box and enter the details.
Utilities	Non-mandatory	
Notification of changes in funding	Non-mandatory	
Jurisdictional Assignment	Non-mandatory	
Non-participating work- local facilities	Non-mandatory	
Jurisdictional Transfer	Non-mandatory	
Misc	Non-mandatory	

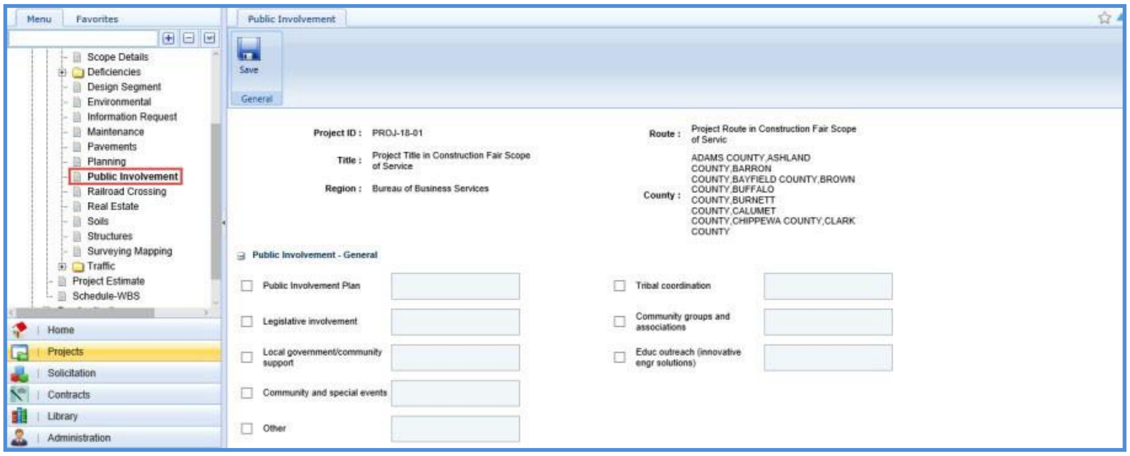
13. In the **Comments** field, enter comments about the planning details.
14. In the **Attachments** section, to upload images and files, refer *Attachments*.
15. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

2.1.9 Public Involvement

To record public involvement related information, perform the following steps:

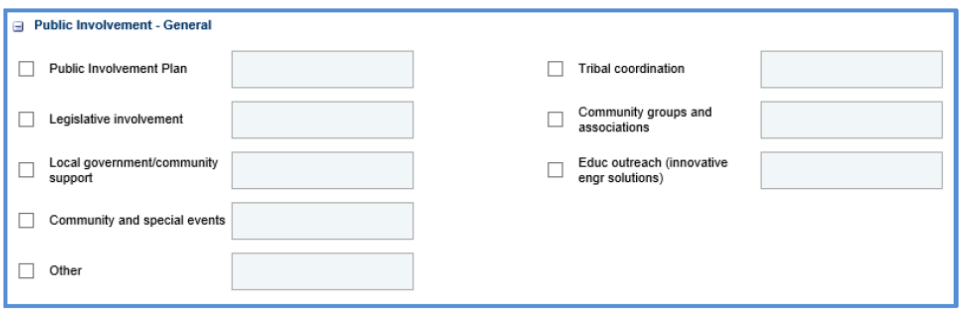
1. Double-click the project for which you want to record the public involvement related information. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.

3. Expand the **Scope** folder.
4. In the navigation pane, click **Public Involvement**. The **Public Involvement** page is displayed.

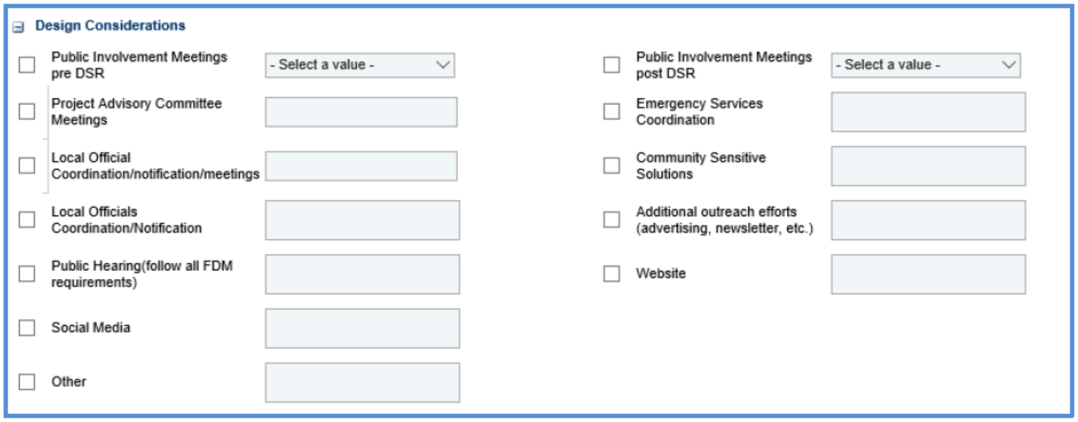


The values in the **Project ID, Route, Title, Region,** and **County** fields are auto populated.

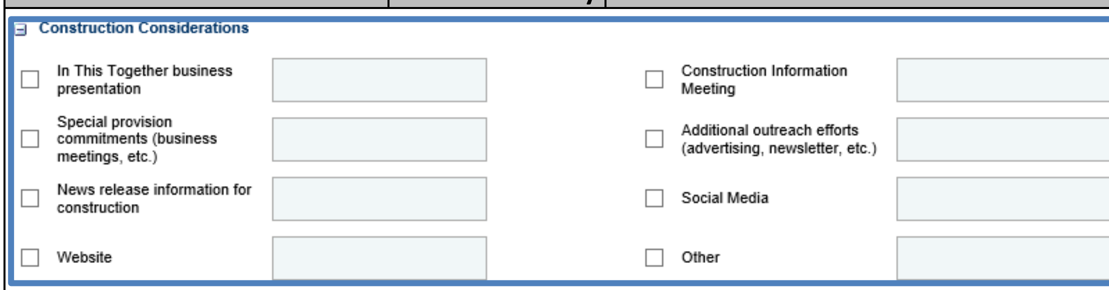
5. In the **Public Involvement - General** section, provide information in the required fields. The different fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Public Involvement Plan	Non-mandatory	If applicable, select the check box and enter the details
Tribal coordination	Non-mandatory	
Legislative involvement	Non-mandatory	
Community groups and associations	Non-mandatory	
Local government/community support	Non-mandatory	
Educ outreach (innovative energy solutions)	Non-mandatory	
Community and special events	Non-mandatory	
Other	Non-mandatory	

6. In the **Design Considerations** section, provide information in the required fields. The different fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Public Involvement Meetings pre DSR	Non-mandatory	If applicable, select the check box and enter the details.
Public Involvement Meetings post DSR	Non-mandatory	
Project Advisory Committee Meetings	Non-mandatory	
Emergency Services Coordination	Non-mandatory	
Local Official Coordination/ notification/meetings	Non-mandatory	
Community Sensitive Solutions	Non-mandatory	
Local Officials Coordination/ Notification	Non-mandatory	
Additional outreach efforts (advertising, newsletter, etc.)	Non-mandatory	
Public Hearing (follow all FDM requirements)	Non-mandatory	
Website	Non-mandatory	
Social Media	Non-mandatory	

7. In the **Construction Considerations** section, provide information in the required fields. The different fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
In This Together business presentation	Non-mandatory	If applicable, select the check box and enter the details.
Construction Information Meeting	Non-mandatory	

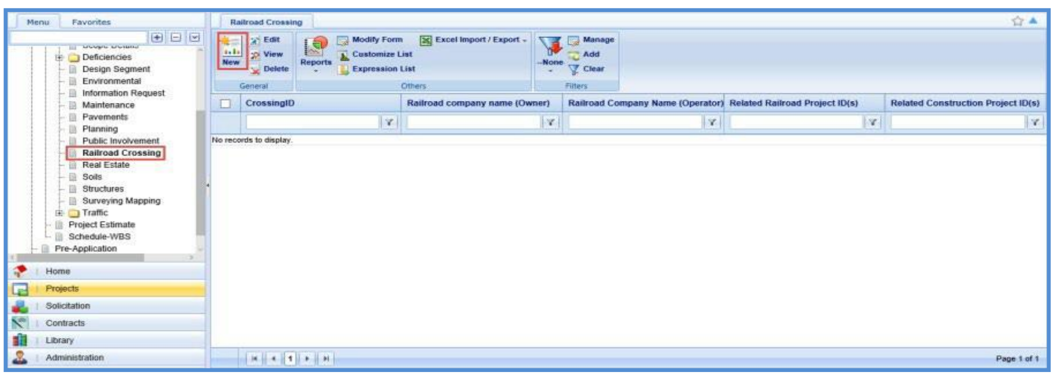
Field	Mandatory / Non-mandatory	Description
Special provision commitments (Business meetings, etc.)	Non-mandatory	If applicable, select the check box and enter the details.
Additional outreach efforts (advertising, newsletter, etc.)	Non-mandatory	
News release information for construction	Non-mandatory	
Social Media	Non-mandatory	
Website	Non-mandatory	
Other	Non-mandatory	

10. In the **Comments** field, enter comments about the public involvement details.
11. In the **Attachments** section upload any required documents. To upload images and files, refer *Attachments*.
12. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

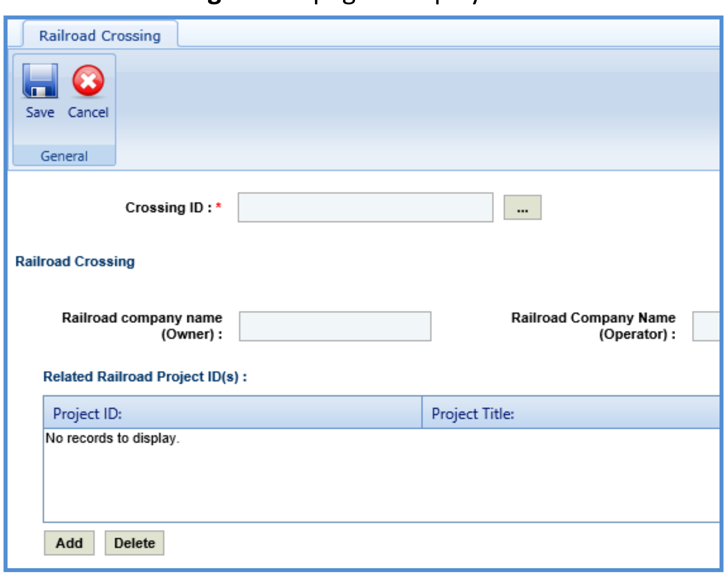
2.1.10 Railroad Crossing

To create a railroad crossing record, perform the following steps:

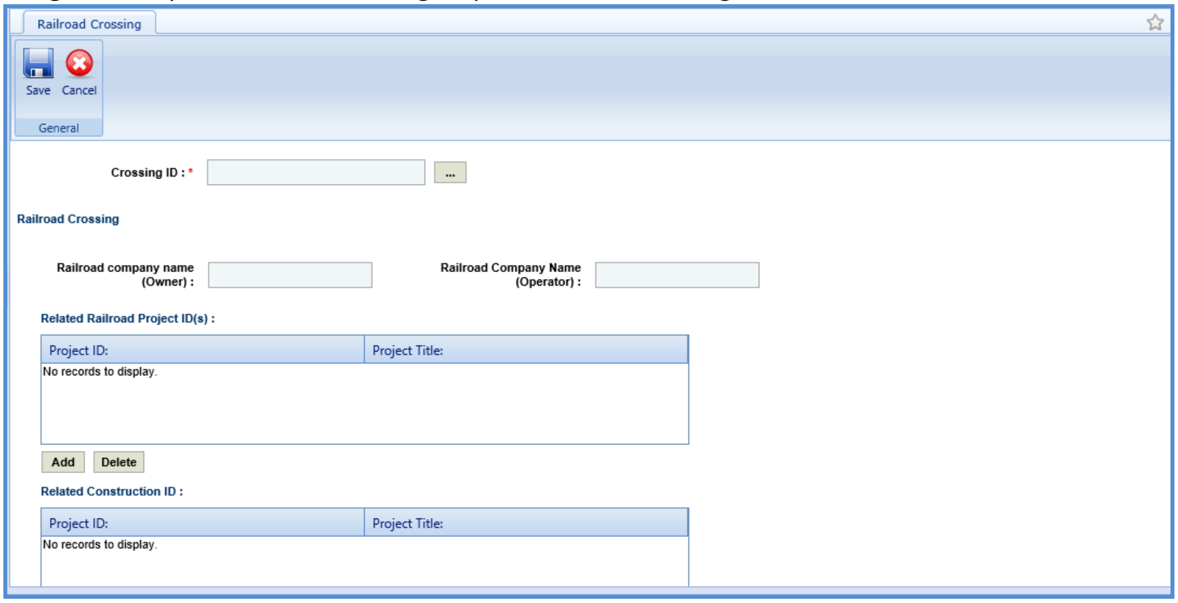
1. Double-click the project for which you want to create a railroad crossing record. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder.
4. In the navigation pane, click **Railroad Crossing**. The **Railroad Crossing** list page is displayed.



5. Click **New**. The **Railroad Crossing** details page is displayed.

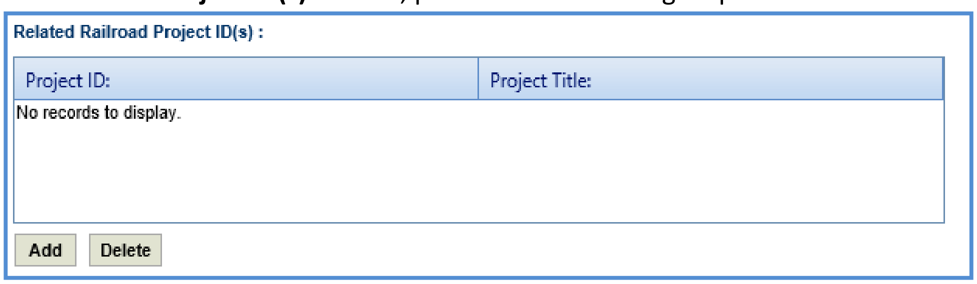


6. In the **Crossing ID** field, perform the following steps to select a crossing ID.



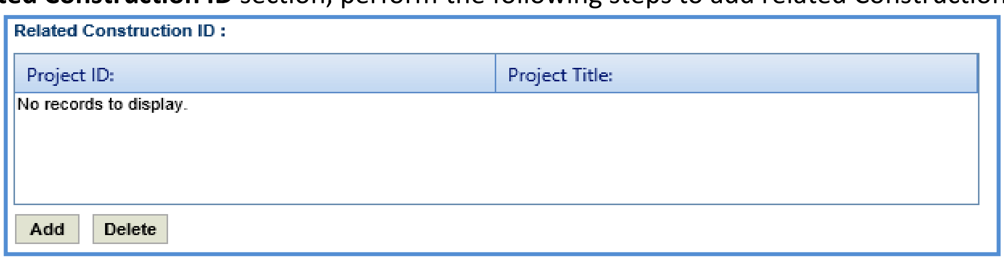
   a. Click **...**. The **Railroad Crossing ID** dialog box is displayed.
   b. Select the required railroad crossing and then click **Select**. The value in the Railroad company name (Owner), Railroad Company Name (Operator), High speed rail corridor, at roadway, Warning device highest protection level, Interconnect/preemption status, crossing position, Number of tracks, Number of trains per day, and Maximum Speed fields are displayed.

7. In the **Related Railroad Project ID(s)** section, perform the following steps to add related railroad projects.



   a. Click **Add**. The **Related Construction ID** dialog box is displayed.
   b. Select the required construction ID and then click **Select**.

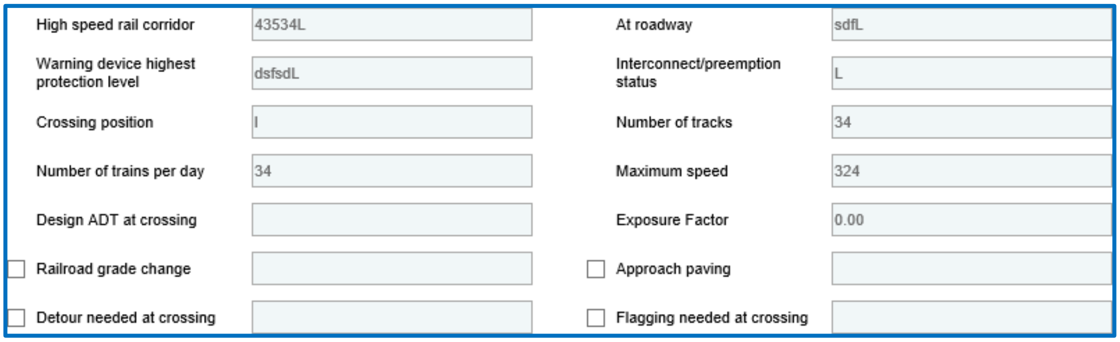
8. In the **Related Construction ID** section, perform the following steps to add related Construction ID.



   a. Click **Add**. The **Related Construction ID** dialog box is displayed.
   b. Select the required construction ID and then click **Select**.

9. In the **Railroad Crossing** section, provide information in the required fields. The fields are described in the following table.

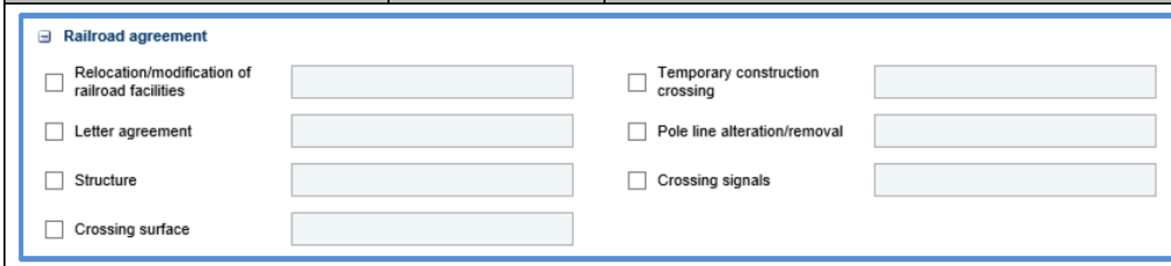
Field	Mandatory / Non-mandatory	Description



***Note**: Based on the selected **Crossing ID**, the values in the **High-speed rail corridor, at roadway, Warning device highest protection level, Interconnect/preemption status, Crossing position, Number of tracks, Number of trains per day,** and **Maximum speed** fields are displayed.*		
Design ADT at Crossing	Non-mandatory	Enter the design ADT at crossing value.
Exposure Factor	-	Based on the Design ADT at Crossing value, the exposure factor is auto calculated and displayed.
Railroad grade change	Non-mandatory	If applicable, select the check box and enter the details.
Approach Paving	Non-mandatory	
Detour needed at crossing	Non-mandatory	
Flagging needed at crossing	Non-mandatory	

8. In the **Railroad agreement** section, provide information in the required fields. The fields are described in the following table.

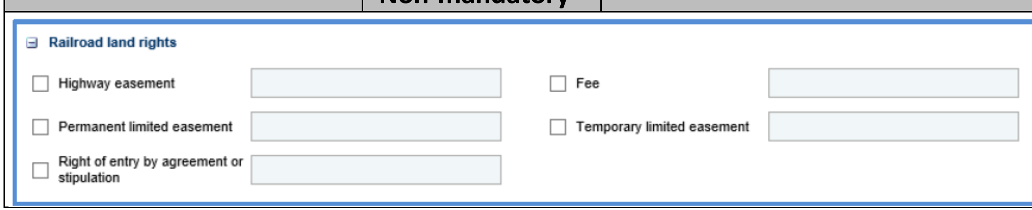
Field	Mandatory / Non-mandatory	Description



Relocation/modification of railroad facilities	Non-mandatory	If applicable, select the check box and enter the details.
Temporary construction crossing	Non-mandatory	
Letter agreement	Non-mandatory	
Pole line alteration/ removal	Non-mandatory	
Structure	Non-mandatory	
Crossing signals	Non-mandatory	
Crossing surface	Non-mandatory	

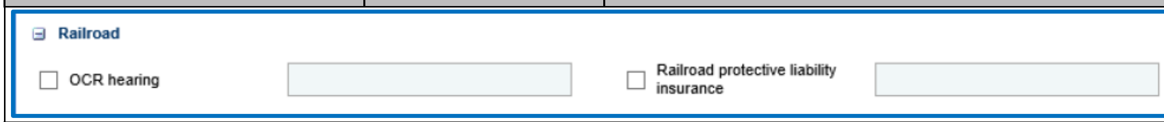
9. In the **Railroad land rights** section, provide information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description



Field	Mandatory / Non-mandatory	Description
Highest easement	Non-mandatory	If applicable, select the check box and enter the details.
Fee	Non-mandatory	
Permanent limited easement	Non-mandatory	
Temporary limited easement	Non-mandatory	
Right of entry by agreement or stipulation	Non-mandatory	

10. In the **Railroad** section, provide information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
OCR hearing	Non-mandatory	If applicable, select the check box and enter the details.
Railroad protective liability insurance	Non-mandatory	

11. In the **(Use with generic Crossing IDs)** section, provide information in the required fields. The fields are described in the following table.

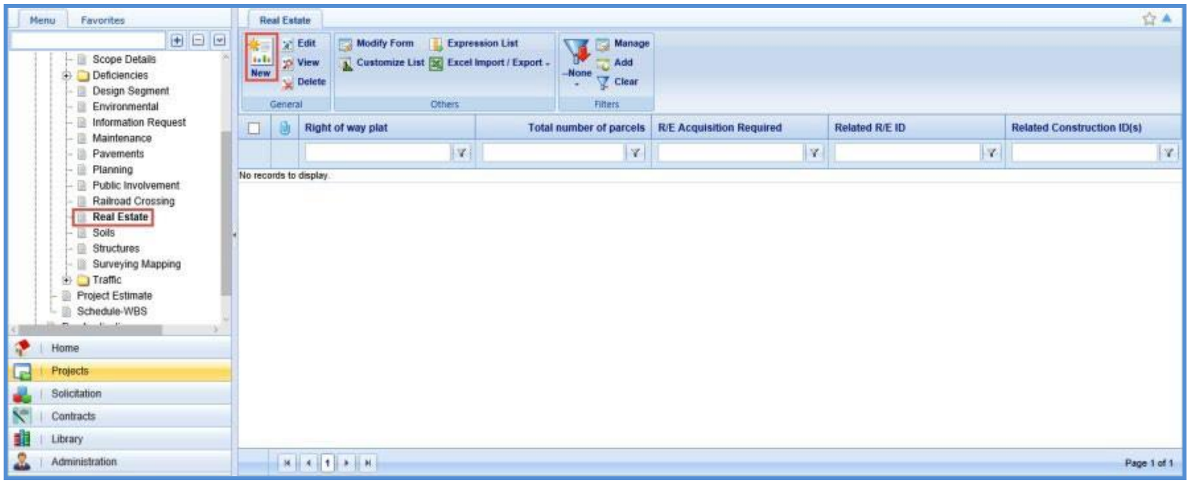
Field	Mandatory / Non-mandatory	Description
		
Assigned Railroad Owner	Non-mandatory	To select a railroad owner: 1. Click ... and the **Railroad Owner** dialog box is displayed. The options are defined in **Railroad Owner** catalog of the library. 2. Select the required railroad owner and click **Select**.
Assigned Railroad Operator	Non-mandatory	To select a railroad operator: 1. Click ... and the **Railroad Operator** dialog box is displayed. The options are defined in **Railroad Operator** catalog of the library. 2. Select the required railroad operator and click **Select**.

12. In the **Attachments** section upload any relevant files. To upload images and files, refer *Attachments*.
13. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

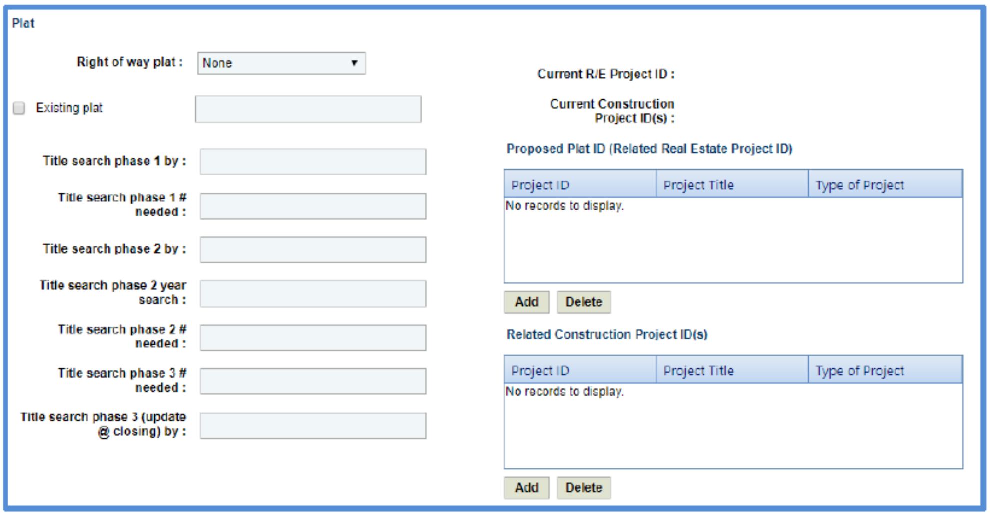
2.1.11 Real Estate

To create the Real Estate record, perform the following steps:

1. Double-click the project for which you want to create a real estate record. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder.
4. In the navigation pane, click **Real Estate**. The **Real Estate** list page is displayed.



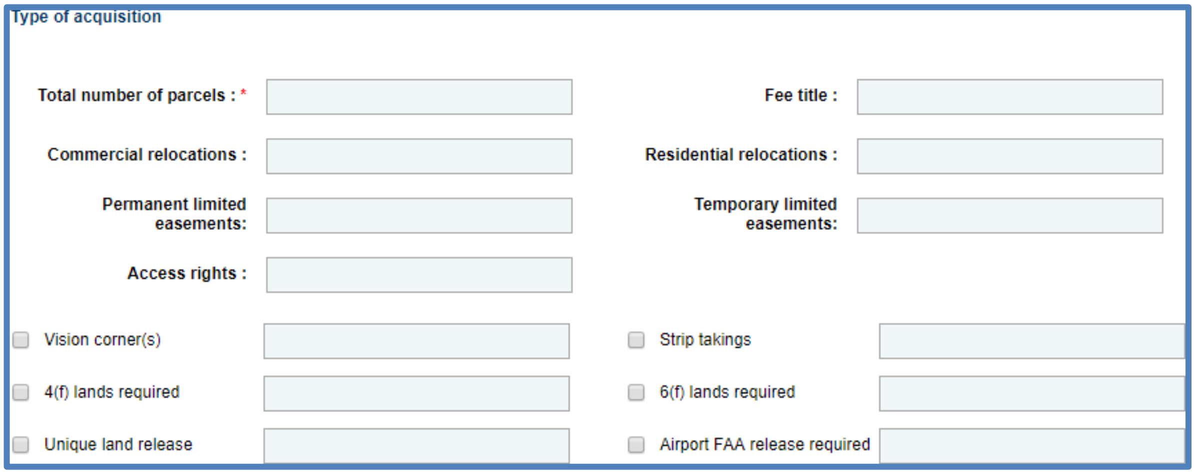
5. Click **New**. The **Real Estate** details page is displayed.
6. In the **Plat** section, provide information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Right of way plat	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Right of way Plat** catalog of the library.
Current R/E Project ID	-	The value in this field is auto populated.
Existing plat	Non-mandatory	If applicable, select the check box and enter the existing plat details.
Current Construction Project ID(s)	-	The value in this field is auto populated.
Title search phase 1 by	Non-mandatory	Enter the title search of phase one details.
Title search phase 1 # needed	Non-mandatory	Enter the title search phase one # needed value.
Title search phase 2 by	Non-mandatory	Enter the title search of phase two details.
Title search phase 2-year search	Non-mandatory	Enter the title search phase two-year search value.
Title search phase 2 # needed	Non-mandatory	Enter the title search phase two # needed value.
Title search phase 3 # needed	Non-mandatory	Enter the title search phase three # needed value.
Title search phase 3 (update @ closing) by	Non-mandatory	Enter the title search phase three update at closing details.

7. In the **Proposed Plat ID (Related Real Estate Project ID)** section, perform the following steps to add proposed plat ID.
   a. Click **Add**. The **Select Project** dialog box is displayed.
   b. Select the required projects and then click **Select**.

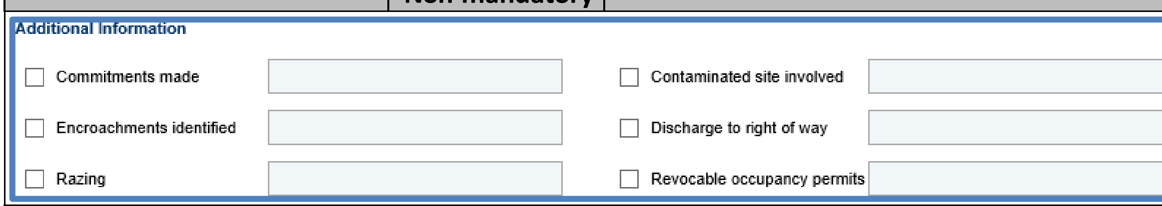
8. In the **Related Construction Project ID(s)** section, perform the following steps to add construction project ID.
   a. Click **Add**. The **Select Project** dialog box is displayed.
   b. Select the required projects and then click **Select**.

9. In the **Type of acquisition** section, provide information in the required fields. The fields are described in the following table.



Field	Mandatory / Non-mandatory	Description
Total number of parcels	Mandatory	Enter total number of parcels.
Fee title	Non-mandatory	Enter fee title.
Commercial relocations	Non-mandatory	Enter commercial relocation details.
Residential relocations	Non-mandatory	Enter residential relocation details.
Permanent limited easements	Non-mandatory	Enter permanent limited easement details.
Temporary limited easements	Non-mandatory	Enter temporary limited easement details.
Access rights	Non-mandatory	Enter access right details.
Vision corner(s)	Non-mandatory	If applicable, select the check box and enter the details.
Strip takings	Non-mandatory	
4(f) lands required	Non-mandatory	
6(f) lands required	Non-mandatory	
Unique land release	Non-mandatory	
Airport FAA release required	Non-mandatory	

14. Select the appropriate checkboxes and enter information in the required fields. The fields are described in the following table.



Field	Mandatory / Non-mandatory	Description
Commitments made	Non-mandatory	If applicable, select the check box and enter the details.
Contaminated site involved	Non-mandatory	
Encroachments identified	Non-mandatory	
Discharge to right of way	Non-mandatory	
Razing	Non-mandatory	
Revocable occupancy permits	Non-mandatory	

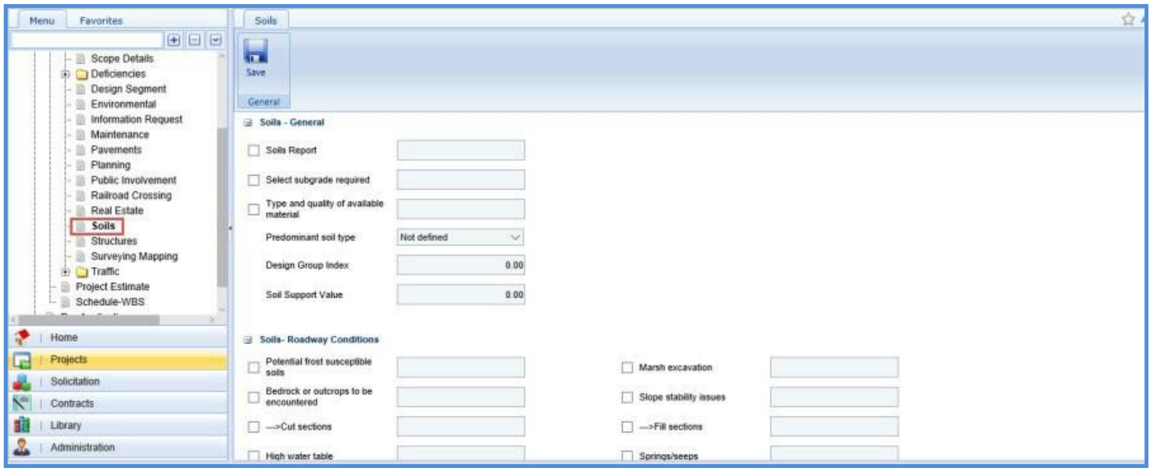
15. In the **Attachments** section upload any relevant documents. To upload images and files, refer *Attachments*.

16. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

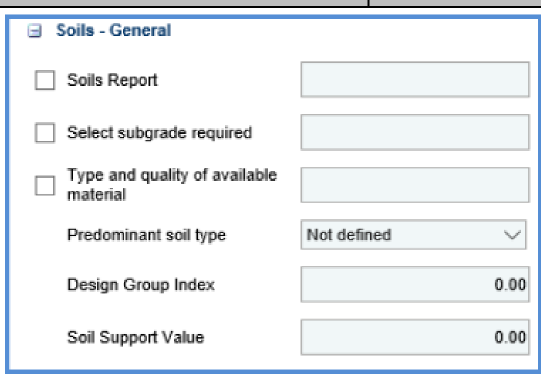
2.1.12 Soils

To record soil related information, perform the following steps:

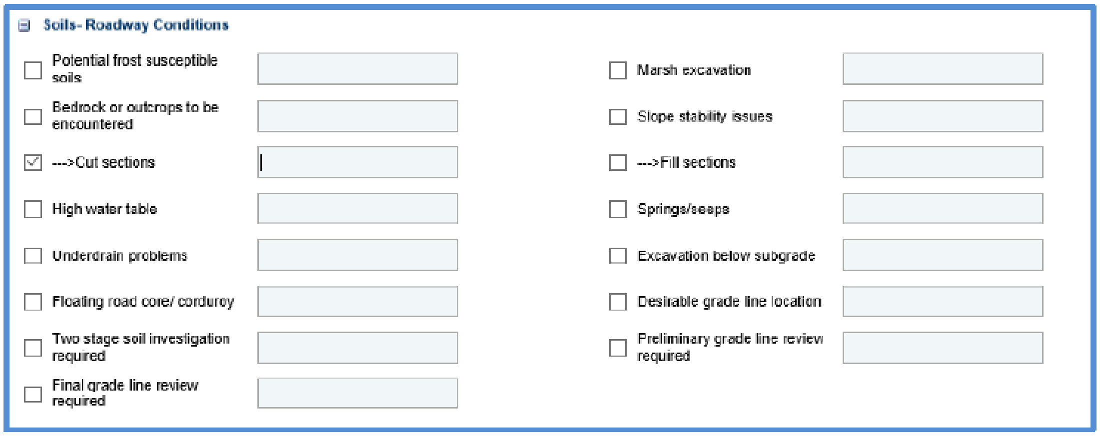
1. Double-click project for which you want to record soil related information. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder.
4. In the navigation pane, click **Soils.** The **Soils** page is displayed.



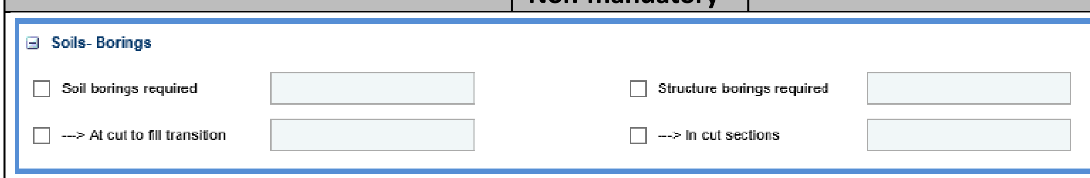
5. In the **Soils-General** section, provide information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Soils Report	Non-mandatory	If applicable, select the check box and enter the details.
Select subgrade required	Non-mandatory	
Type and quality of available material	Non-mandatory	
Predominant soil type	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Predominant Soil Type** catalog of the library.
Design Group Index	Non-mandatory	Enter design group index value.
Soil Support Value	Non-mandatory	Enter soil support value.

6. In the **Soils-Roadway Conditions** section, provide information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Potential frost susceptible soils	Non-mandatory	If applicable, select the check box and enter the details.
Marsh excavation	Non-mandatory	
Bedrock or outcrops to be encountered	Non-mandatory	
Slope stability issues	Non-mandatory	
--->Cut sections	Non-mandatory	
--->Fill sections	Non-mandatory	
High water table	Non-mandatory	
Springs/seeps	Non-mandatory	
Underdrain problems	Non-mandatory	
Excavation below subgrade	Non-mandatory	
Floating road core/ corduroy	Non-mandatory	
Desirable grade line location	Non-mandatory	
Two stage soil investigation required	Non-mandatory	
Preliminary grade line review required	Non-mandatory	
Final grade line review required	Non-mandatory	

7. In the **Soils-Borings** section, provide information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Soil borings required	Non-mandatory	If applicable, select the check box and enter the details.
Structure borings required	Non-mandatory	
---> At cut to fill transition	Non-mandatory	
---> In cut sections	Non-mandatory	

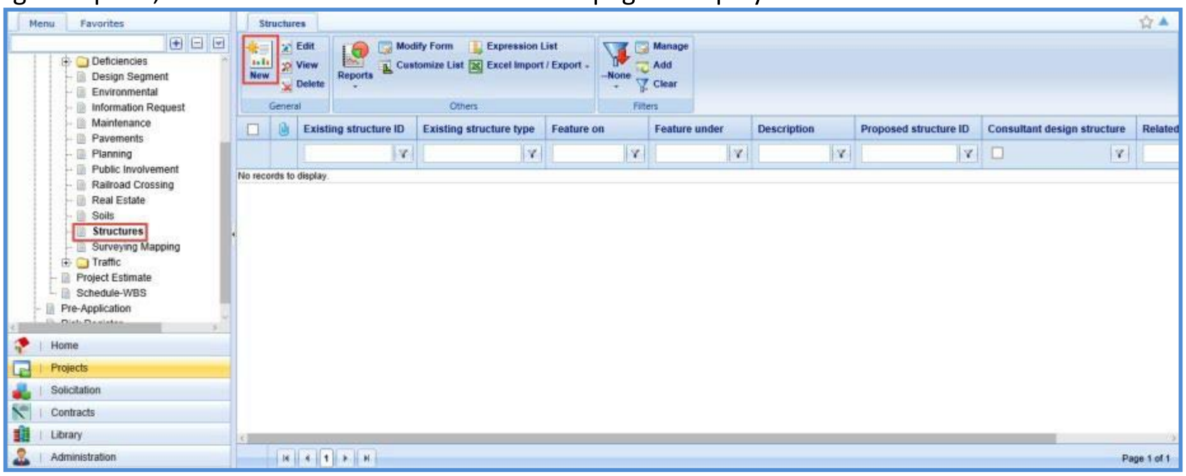
8. In the **Soil Comments** field, enter comments about the soil details.
9. In the **Attachments** section upload any required documents. To upload images and files, refer *Attachments*.

10. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

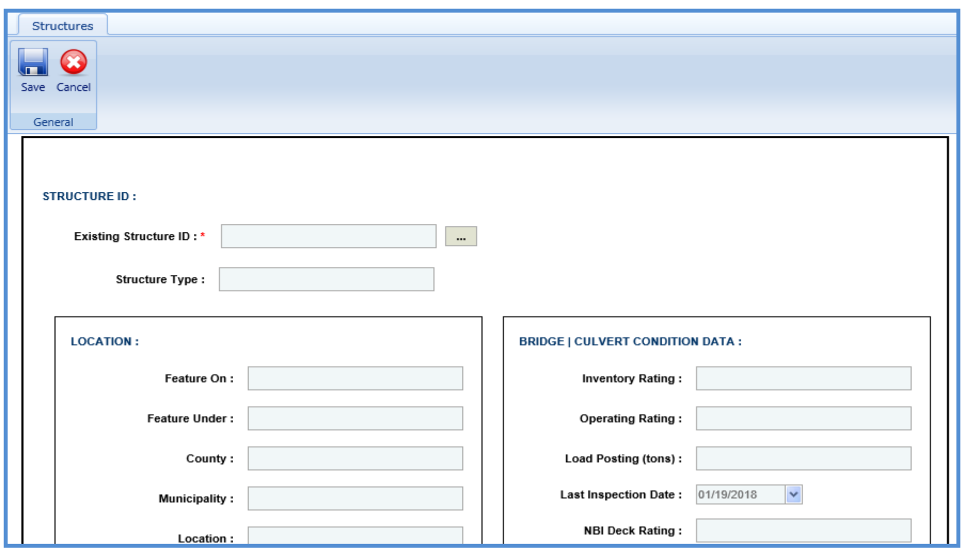
2.1.13 Structures

To create a Structures record, perform the following steps:

1. Double-click the project for which you want to create a structures record. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder.
4. In the navigation pane, click **Structures**. The **Structures** list page is displayed.

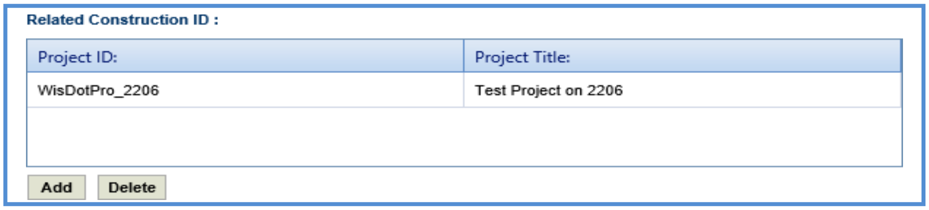


5. Click **New.** The **Structures** details page is displayed.



6. In the **Existing Structure ID** field, perform the following steps to enter an existing structure ID.
   a. Click ... and the **Select Structure** dialog box is displayed. For availability of options in the dialog box, existing structure IDs must be defined in the **Existing Structure ID** catalog of the library.
   b. Select the required existing structure ID and click **Select**. Based on the selected existing structure ID, the values in the **Structure Type** field, **LOCATION, BRIDGE | CULVERT CONDITION DATA, CONSTRUCTION HISTORY, BRIDGE | CULVERT STRUCTURE DATA, RETAINING WALL DATA, SIGN STRUCTURE DATA, NOISE WALL DATA** sections are displayed.
7. In the **CONSTRUCTION HISTORY** section, corresponding to the **Work Action**, click in the **Year** column and enter the year of work action.
8. In the **GENERAL COMMENTS** section, provide comments about the structure in the **Comments** field.
9. In the **Proposed Structure Work** section, perform the following steps to provide information about the proposed structure work.

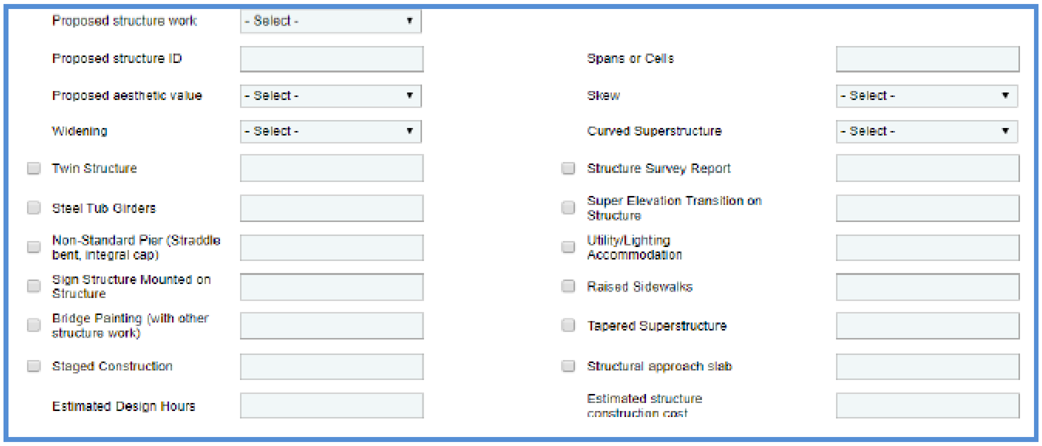
a. In the **Related Construction ID**, to add a related construction ID, perform the following steps:



i. Click **Add**. The **Related Construction ID** dialog box is displayed. The options in the drop-down list are defined in the **Related Construction ID** catalog of the library.

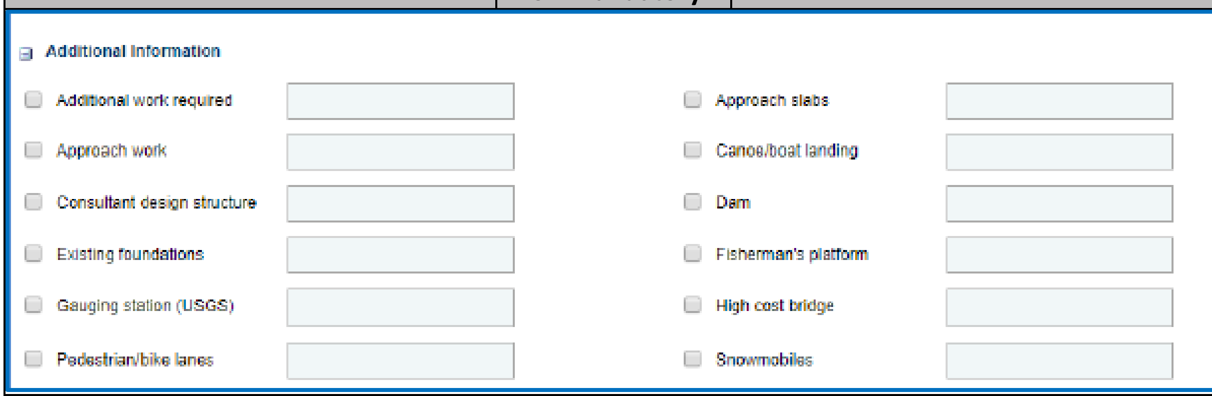
ii. Select the required related construction IDs and click **Select**.

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

Field	Mandatory / Non-mandatory	Description
		
Proposed structure work	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Proposed Structure Work** catalog of the library.
Proposed structure ID	Non-mandatory	Enter a unique ID for the proposed structure.
Spans or Cells	Non-mandatory	Enter number of spans or cells associated with the proposed structure work.
Proposed aesthetic value	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Proposed Aesthetic** catalog of the library.
Skew	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Skew** catalog of the library.
Widening	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Widening** catalog of the library.
Curved Superstructure	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Curved Superstructure** catalog of the library.
Twin Structure	Non-mandatory	
Structure Survey Report	Non-mandatory	
Steel Tub Girders	Non-mandatory	
Super Elevation Transition on Structure	Non-mandatory	If applicable, select the check box and enter the details.
Non-Standard Pier (Straddle bent, integral cap)	Non-mandatory	

Field	Mandatory / Non-mandatory	Description
Utility/Lighting Accommodation	Non-mandatory	If applicable, select the check box and enter the details.
Sign Structure Mounted on Structure	Non-mandatory	
Raised Sidewalks	Non-mandatory	
Bridge Painting (with other structure work)	Non-mandatory	
Tapered Superstructure	Non-mandatory	
Staged Construction	Non-mandatory	
Structural approach slab	Non-mandatory	
Estimated Design Hours	Non-mandatory	Enter the estimated design hours details.
Estimated structure construction cost	Non-mandatory	Enter the estimated structure construction cost details.

10. In the **Additional Information** section, enter information in the required fields. The fields are described in the following table.

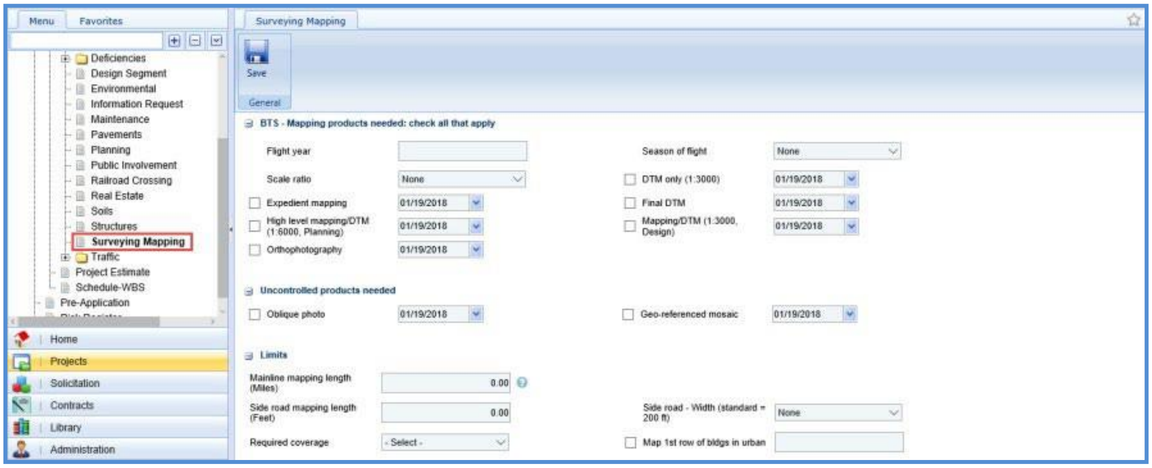
Field	Mandatory / Non-mandatory	Description
		
Additional work required	Non-mandatory	If applicable, select the check box and enter the details.
Approach slabs	Non-mandatory	
Approach work	Non-mandatory	
Canoe/boat landing	Non-mandatory	
Consultant design structure	Non-mandatory	
Dam	Non-mandatory	
Existing foundations	Non-mandatory	
Fisherman's platform	Non-mandatory	
Gauging station (USGS)	Non-mandatory	
High-cost bridge	Non-mandatory	
Pedestrian/bike lanes	Non-mandatory	
Snowmobiles	Non-mandatory	

11. In the **Comments** section, provide comments about the **Structure** details.
12. In the **Attachments** section upload any required documents. To upload images and files, refer *Attachments*.
13. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

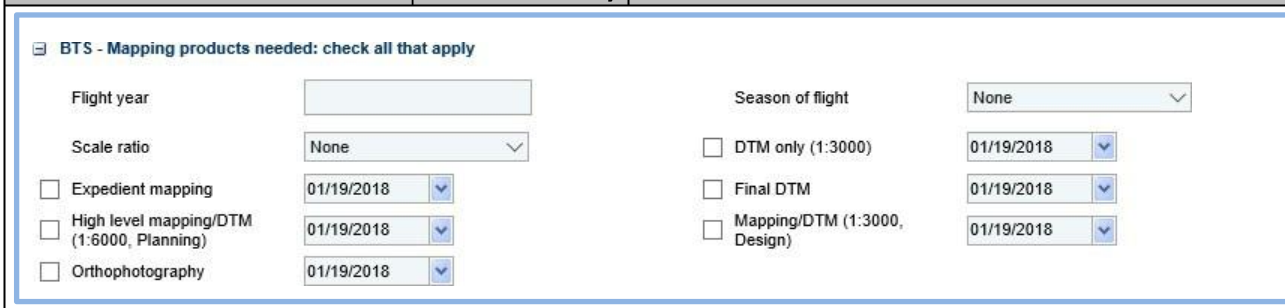
2.1.14 Surveying Mapping

To record surveying mapping related information, perform the following steps:

1. Double-click the project for which you want to record the surveying mapping related information. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder.
4. In the navigation pane, click **Surveying Mapping**. The **Surveying Mapping** page is displayed.



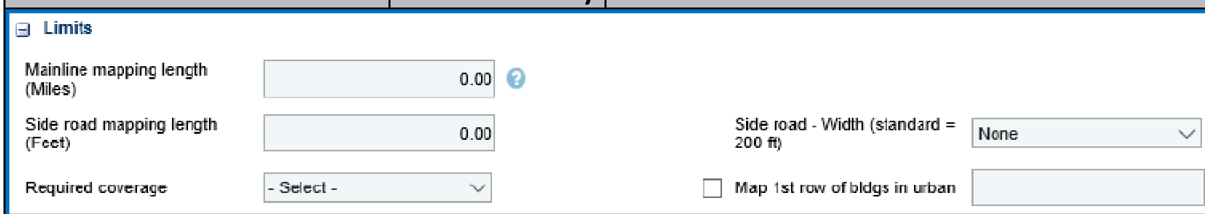
5. In the **BTS – Mapping products needed: check all that apply** section, provide information in the required fields. The fields are described in the below table.

Field	Mandatory / Non-mandatory	Description
		
Flight year	Non-mandatory	Enter the flight year.
Season of flight	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Season of Flight** catalog of the library.
Scale ratio	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Scale Ratio** catalog of the library.
DTM only (1:3000)	Non-mandatory	Select the check box and from the drop-down calendar, select the date of DTM.
Expedient mapping	Non-mandatory	Select the check box and from the drop-down calendar, select the date of expedient mapping.
Final DTM	Non-mandatory	Select the check box and from the drop-down calendar, select the date of final DTM.
High level mapping/DTM (1:6000, Planning)	Non-mandatory	Select the check box and from the drop-down calendar, select the date of high-level mapping/DTM.
Mapping /DTM (1:3000, Design)	Non-mandatory	Select the check box and from the drop-down calendar, select the date of mapping/DTM.
Orthophotography	Non-mandatory	Select the check box and from the drop-down calendar, select the date of orthophotography.

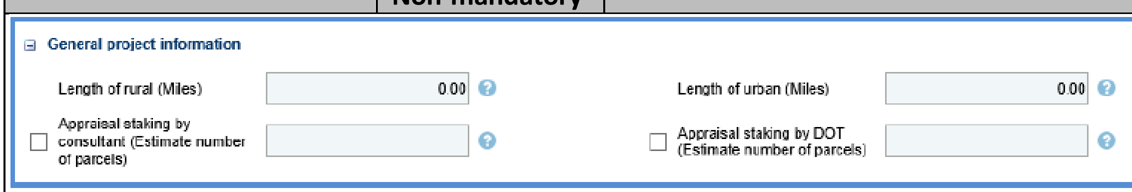
6. In the **Uncontrolled products needed** section, provide information in the required fields. The fields are described in the below table.

Field	Mandatory / Non-mandatory	Description
		
Oblique photo	Non-mandatory	Select the check box and from the drop-down calendar, select the date of oblique photo.
Geo-referenced mosaic	Non-mandatory	Select the check box and from the drop-down calendar, select the date of geo-referenced mosaic.

7. In the **Limits** section, provide information in the required fields. The fields are described in the below table.

Field	Mandatory / Non-mandatory	Description
		
Mainline mapping length (Miles)	Non-mandatory	Enter the mainline mapping length value. You can click to view an example.
Side road mapping length (Feet)	Non-mandatory	Enter the side road mapping length value
Side road - Width (Standard = 200ft)	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Side Road width** catalog of the library.
Required coverage	Non-mandatory	From the drop-down list, select the required option. The options in the drop-down list are defined in the **Required coverage** catalog of the library.
Map 1st row of bldgs in urban	Non-mandatory	Select the check box and enter the map first row of buildings in urban details.

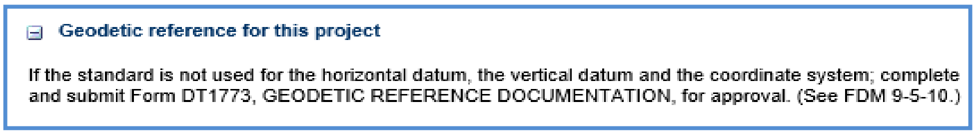
8. In the **General project information** section, provide information in the required fields. The fields are described in the below table.

Field	Mandatory / Non-mandatory	Description
		
Length of rural (Miles)	Non-mandatory	Enter the length of rural in miles. You can click to view an example.
Length of urban (Miles	Non-mandatory	Enter the length of urban in miles. You can click to view an example.
Appraisal Staking by consultant (Estimate number of parcels)	Non-mandatory	Enter appraisal staking by consultant value. You can click to view an example.
Appraisal staking by DOT (Estimate number of parcels)	Non-mandatory	Enter appraisal staking by DOT value. You can click to view an example.

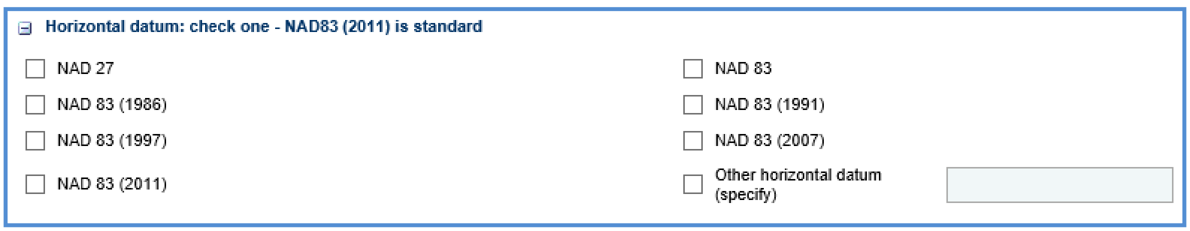
9. In the **Monumentation** section, provide information in the required fields. The fields are described in the below table.

Field	Mandatory / Non-mandatory	Description
		
Right of way monumentation	Non-mandatory	Enter the right of way monumentation value. You can click to view an example.
Temporary marking of right of way	Non-mandatory	Enter the temporary marking of right of way details.
Permanent marking of right of way	Non-mandatory	Enter the permanent marking of right of way details.

Note*: The* ***Geodetic reference for this project*** *section automatically displays the geodethic reference associated with the selected project.*

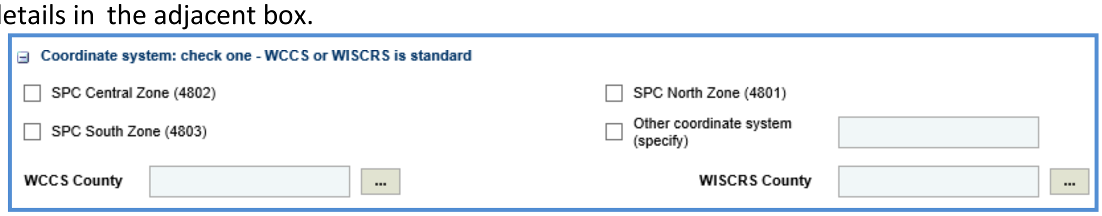


10. In the **Horizontal datum: check one – NAD83 (2011) is standard** section, select the required check box. If the selected option is **Other horizontal datum (specify)**, then you can enter the details in the adjacent box.



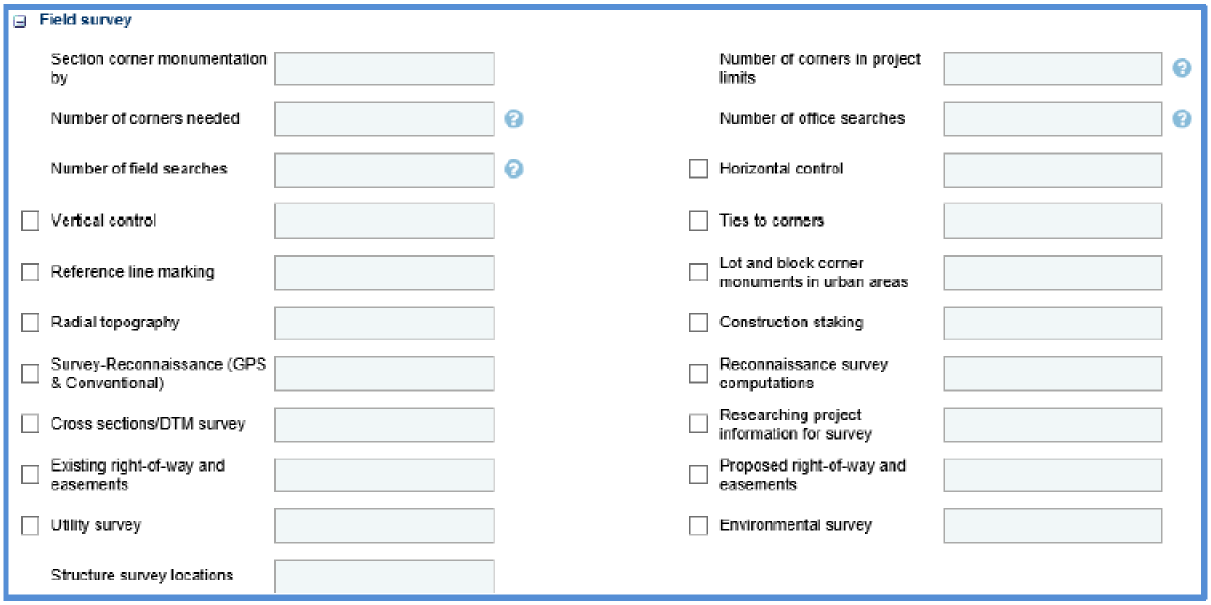
11. In the **Vertical datum: check one – NAD88 (2012) is standard** section, select the required check box. If the selected option is **Other vertical datum (specify)**, then you can enter the details in the adjacent box.

12. In the **Coordinate system: check one – WCCS or WISCRS is standard** section, perform the following:
    a. Select the required check box. If the selected option is **Other coordinate system (specify)**, then you can enter details in the adjacent box.



    b. In the **WCCS County** field and **WISCRS County** field, perform the following steps to select WCCS County and WISCRS County:
        i. Click ... and the **County** dialog box is displayed. The options in the drop-down list are defined in the **County** catalog of the library.
        ii. Select the required county and click **Select**.

13. In the **Field Survey** section, provide information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Section corner monumentation by	Non-mandatory	Enter the section corner monumentation by details.
Number of corners in project limits	Non-mandatory	Enter the number of corners in project limits. You can click to view an example.
Number of corners needed	Non-mandatory	Enter the number of corners needed. You can click to view an example.
Number of office searches	Non-mandatory	Enter the number of office searches. You can click to view an example.
Number of field searches	Non-mandatory	Enter the number of field searches. You can click to view an example.
Horizontal control	Non-mandatory	
Vertical control	Non-mandatory	
Ties to corners	Non-mandatory	
Reference line marking	Non-mandatory	
Lot and block corner monuments in urban areas	Non-mandatory	
Radial topography	Non-mandatory	
Construction staking	Non-mandatory	
Survey-Reconnaissance (GPS & Conventional)	Non-mandatory	
Reconnaissance survey computations	Non-mandatory	If applicable, select the check box and enter the details.
Cross sections/DTM survey	Non-mandatory	
Researching project information for survey	Non-mandatory	
Existing right-of-way and easements	Non-mandatory	
Proposed right-of-way and easements	Non-mandatory	
Utility survey	Non-mandatory	
Environmental survey	Non-mandatory	
Structure survey locations	Non-mandatory	Enter structure survey location details.

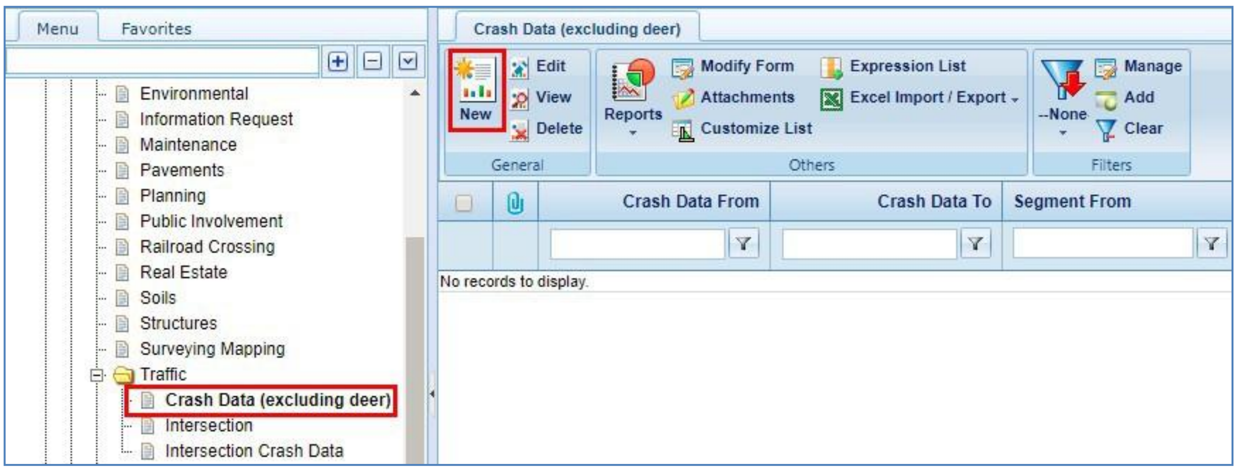
14. In the **Central Office Mapping Comments** field, enter comments about central office mapping.
15. In the **Region Survey Comments** field, enter comments about the region survey.
16. In the **Attachments** section upload any required documents. To upload images and files, refer *Attachments*.
17. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

2.1.15 Traffic

2.1.15.1 Crash Data (excluding deer)

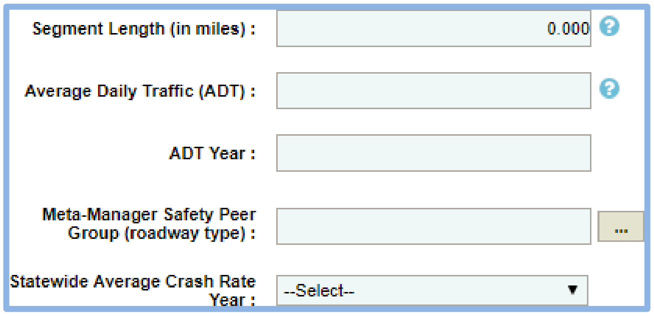
To create the Crash Data, perform the following steps:

1. Double-click the project. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder and then expand the **Traffic** folder.
4. In the navigation pane, click **Crash Data**. The **Crash Data** list page is displayed.
5. Click **New.** The **Crash Data** details page is displayed. The **Last Updated By** displays the name of the user who recently updated the details and the **Last Update On** displays the time and date of the recent update.



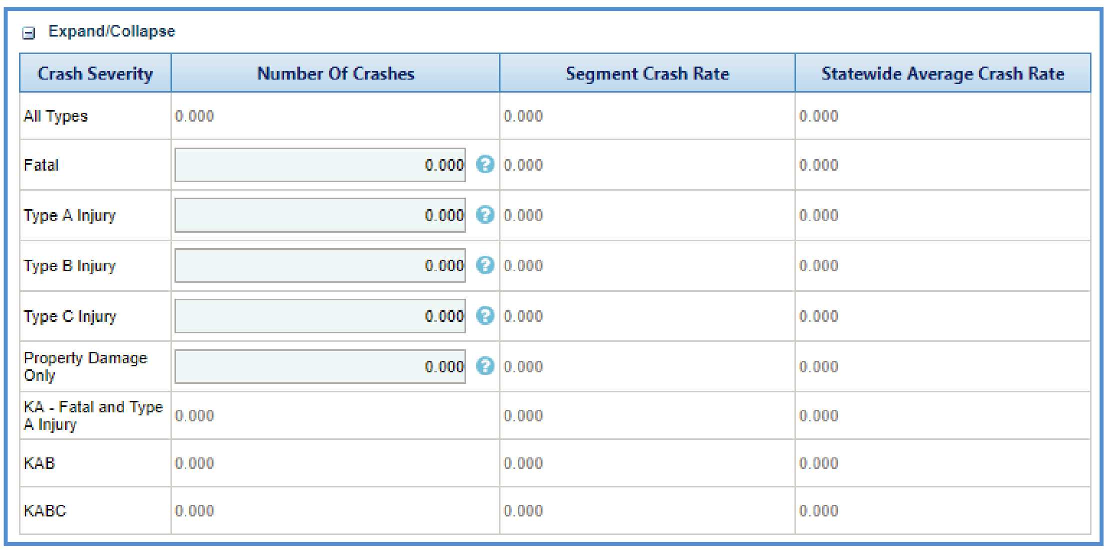
6. In the **Roadway Segment Crash Data** section, perform the steps as described in the following table.

<table>
<tr><th>Field</th><th>Mandatory / Non-mandatory</th><th>Description</th></tr>
<tr><td colspan="3">
</td></tr>
<tr><td>Crash data years From</td><td>Mandatory</td><td>Enter the year from when the crash data is required.</td></tr>
<tr><td>To</td><td>Mandatory</td><td>Enter the year till when the crash data is required.</td></tr>
<tr><td>Segment From</td><td>Non-Mandatory</td><td>Enter the segment from where the crash data is required.</td></tr>
<tr><td>To</td><td>Non-Mandatory</td><td>Enter the segment till where the crash data is required.</td></tr>
<tr><td>Segment RP From</td><td>Non-Mandatory</td><td>Enter the segment RP from where the crash data is required.</td></tr>
<tr><td>To</td><td>Non-Mandatory</td><td>Enter the segment RP till where the crash data is required.</td></tr>
</table>



Field	Mandatory / Non-mandatory	Description
Segment Length (in miles)	Non-Mandatory	Enter the length of the segment.
Average Daily Traffic (ADT)	Non-Mandatory	Enter the value of the ADT.
ADT Year	Non-Mandatory	Enter the ADT year.
Meta-Manager Safety Peer Group (roadway type)	Non-Mandatory	To select the Meta Manager group code: 1. Click ... The **Meta Manager Group Code** dialog box is displayed. The options are defined in the **Meta- Manager Safety Peer Group** catalog of the library. 2. Select the Meta Manager group code and click **Select**.
Statewide Average Crash Rate Year	Non-Mandatory	From the drop-down, select the statewide average crash rate year.

7. In the **Expand/Collapse** section, enter the appropriate values in the required fields.



Expand/Collapse

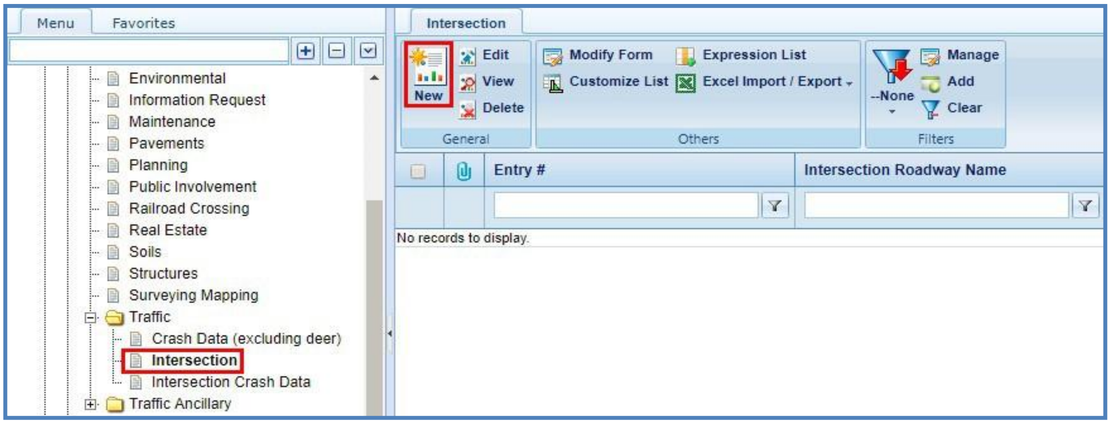
Crash Severity	Number Of Crashes	Segment Crash Rate	Statewide Average Crash Rate
All Types	0.000	0.000	0.000
Fatal	0.000	0.000	0.000
Type A Injury	0.000	0.000	0.000
Type B Injury	0.000	0.000	0.000
Type C Injury	0.000	0.000	0.000
Property Damage Only	0.000	0.000	0.000
KA - Fatal and Type A Injury	0.000	0.000	0.000
KAB	0.000	0.000	0.000
KABC	0.000	0.000	0.000

8. In the **Comments** box, enter the comments.
9. In the **Attachments** section upload any required documents. To upload images and files, refer *Attachments*.
10. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

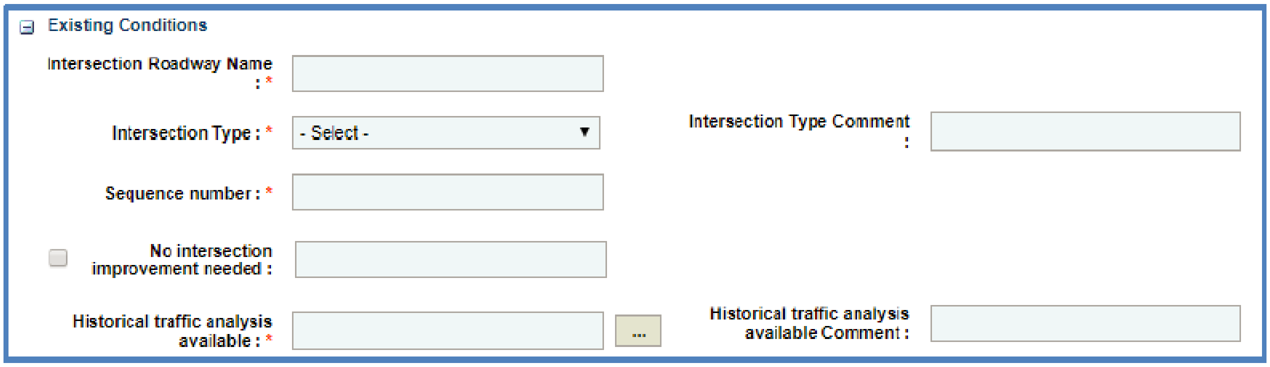
2.1.15.2 Intersection

To create the Intersection details, perform the following steps:

1. Double-click the project. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder and then expand the **Traffic** folder.
4. In the navigation pane, click **Intersection**. The **Intersection** list page is displayed.
5. Click **New.** The **Intersection** details page is displayed.

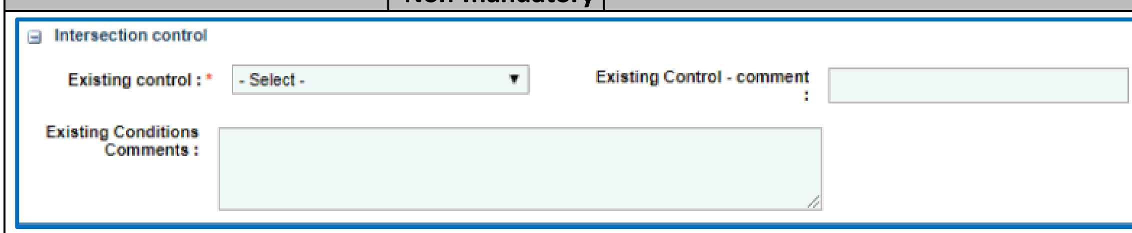


6. In the **Existing Conditions** section, perform the steps as described in the following table.



Field	Mandatory / Non-mandatory	Description
Intersection Roadway Name	Mandatory	Enter the intersection roadway name.
Intersection Type	Mandatory	From the drop-down, select the intersection type. The options are defined in **Intersection Type – Code** catalog of the library.
Intersection Type Comment	Non-Mandatory	Enter the comment.
Sequence number	Mandatory	Enter the sequence number.
No intersection improvement needed	Non-Mandatory	If applicable, select the check box and enter the details.
Historical traffic analysis available	Mandatory	To select the historical traffic analysis details: 1. Click ... The **Description** dialog box is displayed. The options are defined in **Historical traffic analysis available** catalog of the library. 2. Select one or more historical traffic analysis details and click **Select**.
Historical traffic analysis available Comment	Non-Mandatory	Enter the comments.

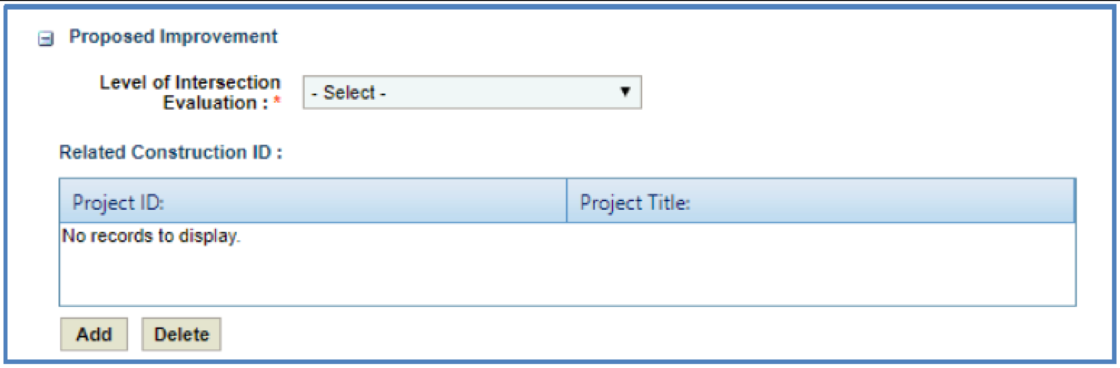
7. In the **Intersection control** section, perform the steps as described in the following table.



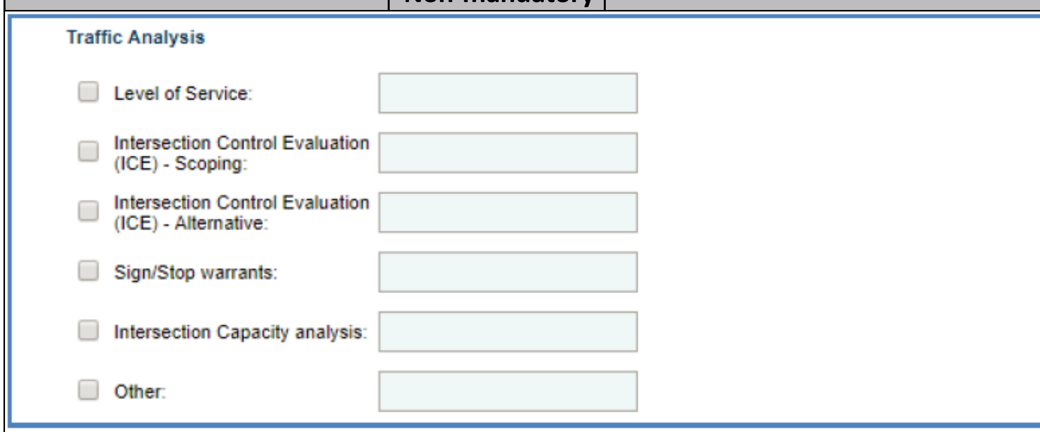
Field	Mandatory / Non-mandatory	Description
Existing control	Mandatory	From the drop-down, select the existing control. The options are defined in **Existing Control** catalog of the library.

Field	Mandatory / Non-mandatory	Description
Existing Control - comment	Non-Mandatory	Enter the comments.
Existing Conditions Comments	Non-Mandatory	Enter the comments.

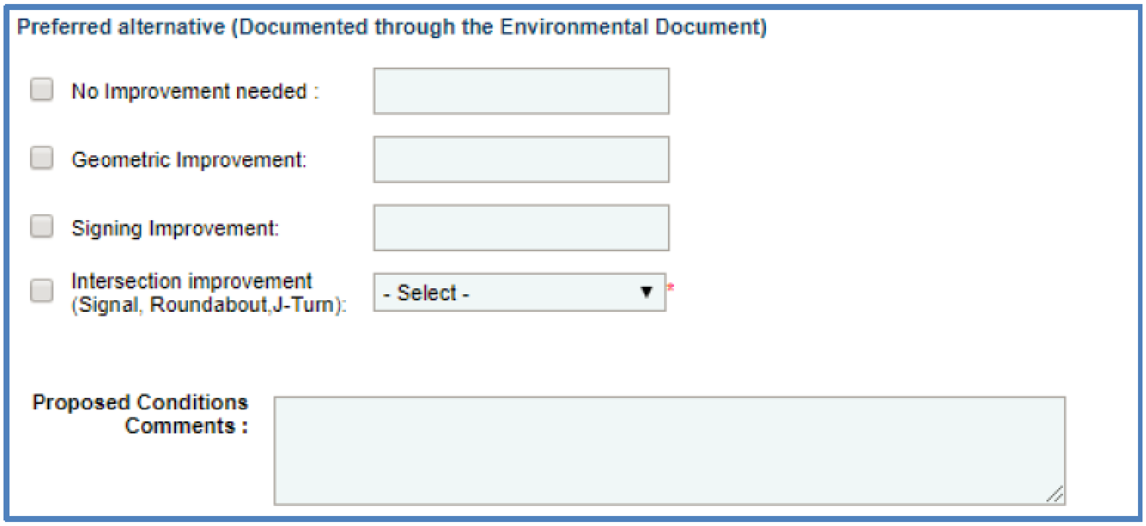
8. In the **Proposed Improvement** section, perform the steps as described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Level of Intersection Evaluation	Mandatory	From the drop-down, select the Level of Intersection Evaluation. The options are defined in **Level of Intersection Evaluation** catalog of the library.
Related Construction ID	Non-Mandatory	1. Click **Add.** The **Related Construction ID** dialog box is displayed. To add the related construction ID, the options are defined in the Related Construction ID catalog of the library. 2. Select one or more projects and click **Select**. The selected projects are added to the grid.

9. In the **Traffic Analysis** section, perform the steps as described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Level of Service	Non-Mandatory	
Intersection Control Evaluation (ICE) - Scoping	Non-Mandatory	
Intersection Control Evaluation (ICE) - Alternative	Non-Mandatory	If applicable, select the appropriate check boxes and enter the details.
Sign/Stop warrants	Non-Mandatory	
Intersection Capacity analysis	Non-Mandatory	
Other	Non-Mandatory	

10. In the **Preferred alternative** section, perform the steps as described in the following table.

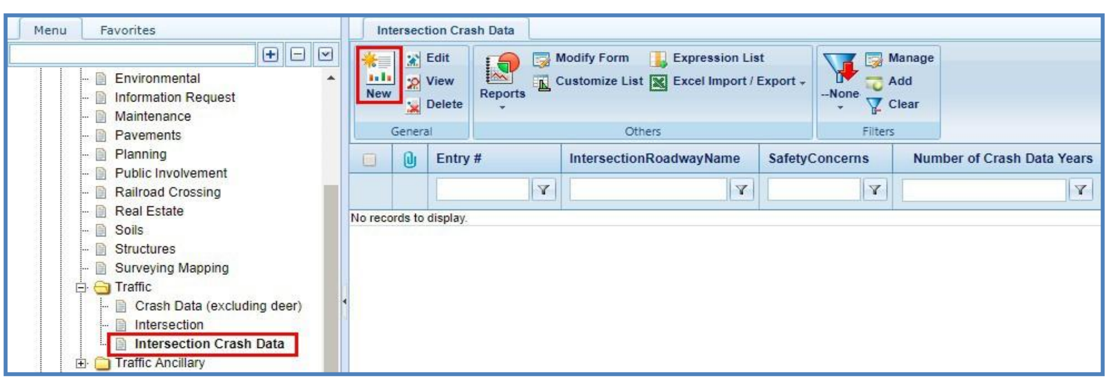
Field	Mandatory / Non-mandatory	Description
		
No Improvement needed:	Non-Mandatory	If applicable, select the appropriate check boxes and enter the details.
Geometric Improvement:	Non-Mandatory	
Signing Improvement:	Non-Mandatory	
Intersection improvement (Signal, Roundabout, J-Turn):	Mandatory	If applicable, select the check box. From the drop-down, select the intersection improvement. The options are defined in **Intersection improvement (Signal, roundabout, J-Turn)** catalog of the library.
Proposed Conditions Comments	Non-Mandatory	Enter the comments.

11. In the **Attachments** section upload any required documents. To upload images and files, refer *Attachments*.
12. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

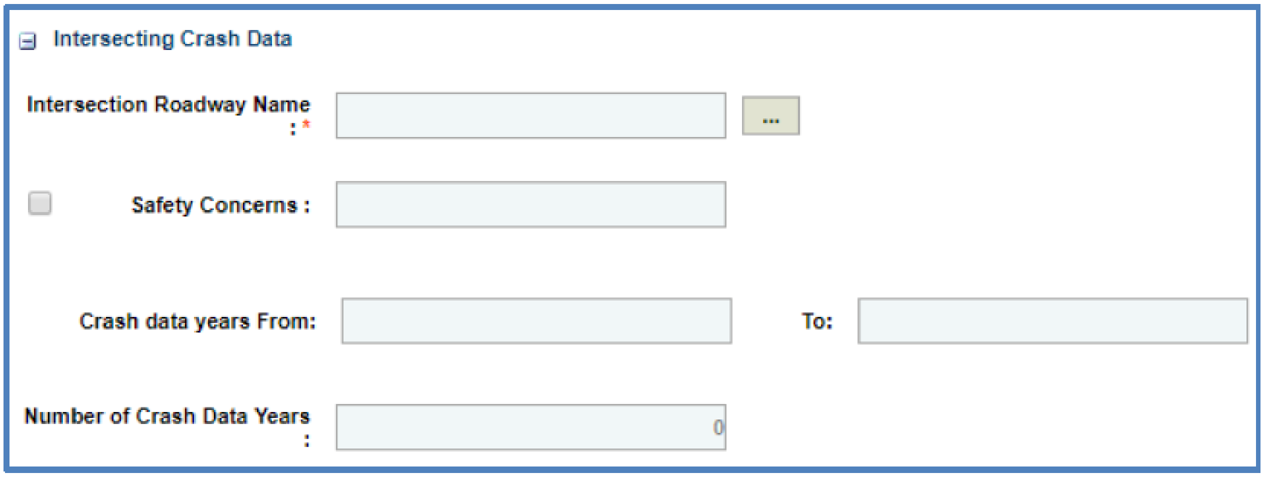
2.1.15.2 Intersection Crash Data

Intersection crash data is required only if the Intersection details are created. To create the Intersection Crash Data, perform the following steps:

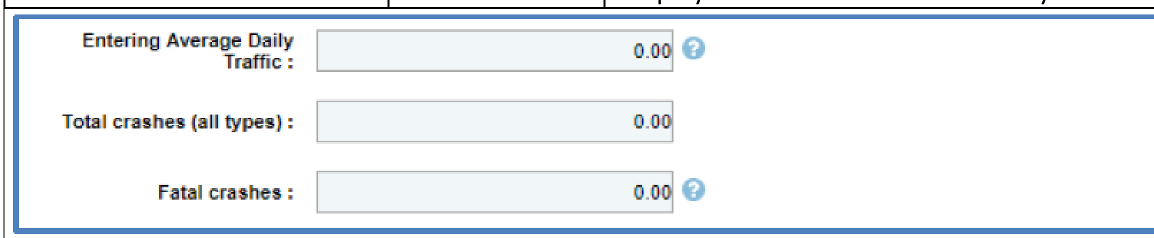
1. Double-click the project. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder and then expand the **Traffic** folder.
4. In the navigation pane, click **Intersection Crash Data**. The **Intersection Crash Data** list page is displayed.
5. Click **New.** The **Intersection Crash Data** details page is displayed.



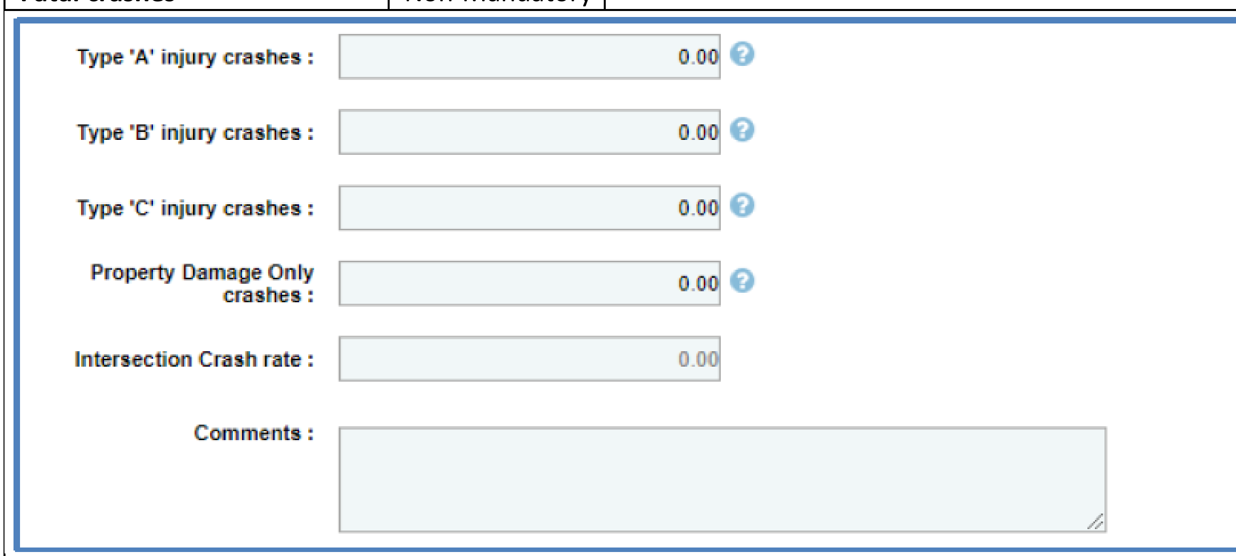
6. In the **Intersecting Crash Data** section, perform the steps as described in the following table.



Field	Mandatory / Non-mandatory	Description
Intersection Roadway Name	Mandatory	To select the Intersection Roadway Name details: 1. Click ... The **Select Intersection Roadway Name** dialog box is displayed. 2. Select the Intersection Roadway Name details and click **Select**.
Safety Concerns	Non-Mandatory	• Select the check box if the safety concerns are required. • Enter the safety concerns details.
Crash data years From	Non-Mandatory	Enter the year from when the crash data is required.
To	Non-Mandatory	Enter the year till when the crash data is required.
Number of Crash Data Years	–	Displays the number of Crash Data years.



Field	Mandatory / Non-mandatory	Description
Entering Average Daily Traffic	Non-Mandatory	If required, enter the values.
Total crashes (all types)	Non-Mandatory	
Fatal crashes	Non-Mandatory	



Field	Mandatory / Non-Mandatory	Description
Type 'A' injury crashes	Non-Mandatory	If required, enter the values.
Type 'B' injury crashes	Non-Mandatory	
Type 'C' injury crashes	Non-Mandatory	
Property Damage Only crashes	Non-Mandatory	
Intersection Crash rate	Non-Mandatory	
Comments	Non-Mandatory	Enter the comments.

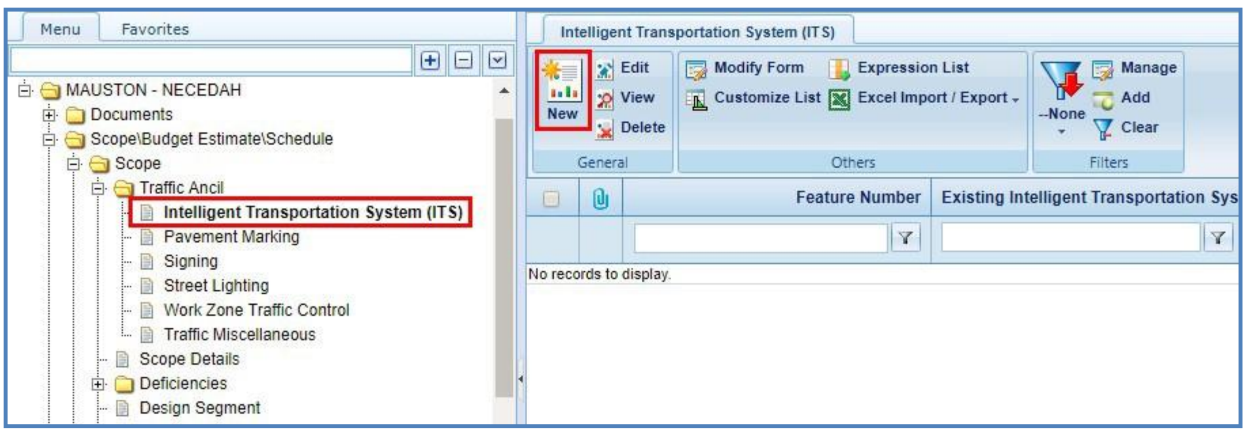
7. In the **Attachments** section upload any required documents. To upload images and files, refer *Attachments*.
8. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

2.1.16 Traffic Ancillary

2.1.16.1 Intelligent Transportation System (ITS)

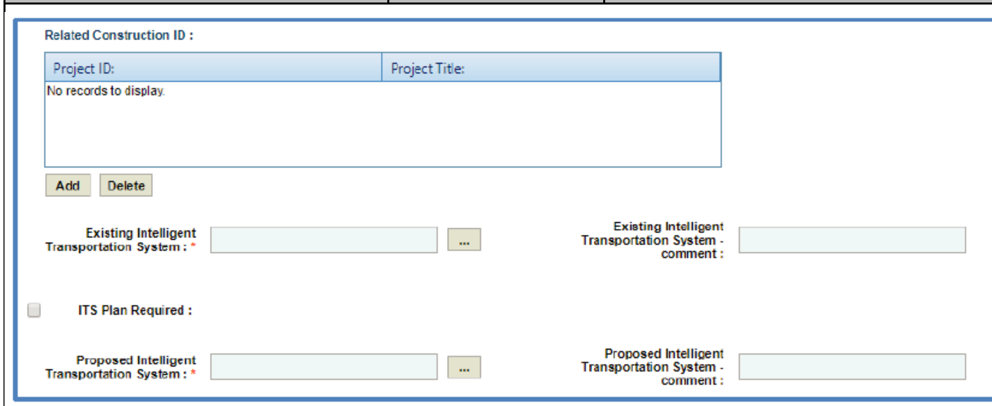
To create an Intelligent Transportation System (ITS), perform the following steps:

1. Double-click the project. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder and then expand the **Traffic Ancillary** folder.
4. In the navigation pane, click **Intelligent Transportation System (ITS)**. The **Intelligent Transportation System (ITS)** list page is displayed.
5. Click **New.** The **Intelligent Transportation System (ITS)** details page is displayed.

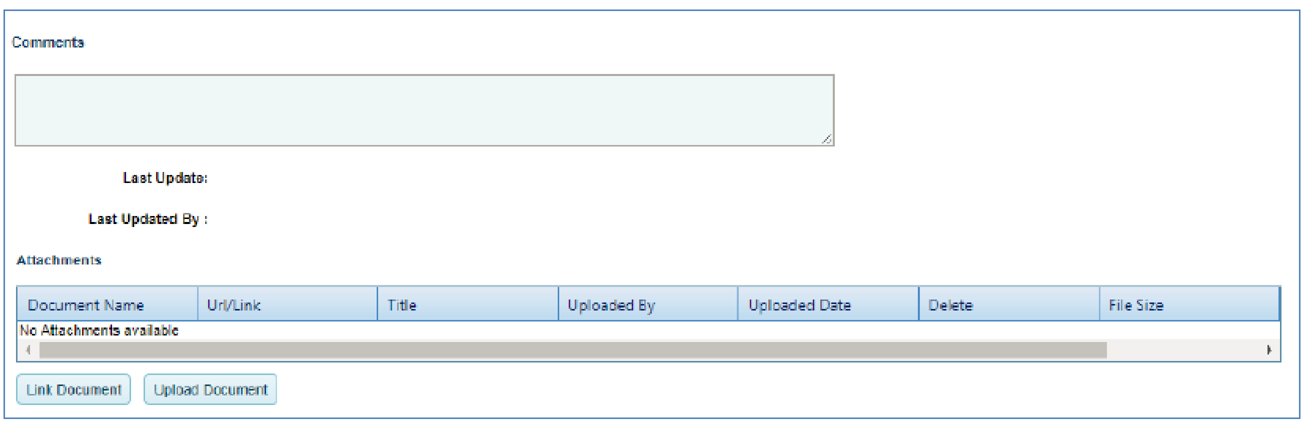


6. Enter information in the required fields. The fields are described in the following table:

Field	Mandatory / Non-mandatory	Description



Field	Mandatory / Non-mandatory	Description
Related Construction ID	Non-mandatory	To add the related construction ID: 1. Click **Add.** The **Related Construction ID** dialog box is displayed. The options are defined in the **Related Construction ID** catalog of the library. 2. Select one or more projects and click **Select**. The selected projects are added to the grid.
Existing Intelligent Transportation System	Mandatory	To select the existing Intelligent Transportation System: 1. Click ... The **Intelligent Transportation System** dialog box is displayed. The options are defined in the **Intelligent Transportation System** catalog of the library. 2. Select the existing Intelligent Transportation System and click **Select**.
Existing Intelligent Transportation System - comment	Non-mandatory	Enter the comments.
ITS Plan Required	Non-mandatory	Select the check box if the ITS plan is required.
Proposed Intelligent Transportation System	Mandatory	To select the proposed Intelligent Transportation System: 1. Click ... The **Intelligent Transportation System** dialog box is displayed. The options are defined in the **Intelligent Transportation System** catalog of the library. 2. Select the proposed Intelligent Transportation System and click **Select**.
Proposed Intelligent Transportation System - comment	Non-mandatory	Enter the comments.



Field	Mandatory / Non-mandatory	Description
Comments	Non-mandatory	Enter the comments.

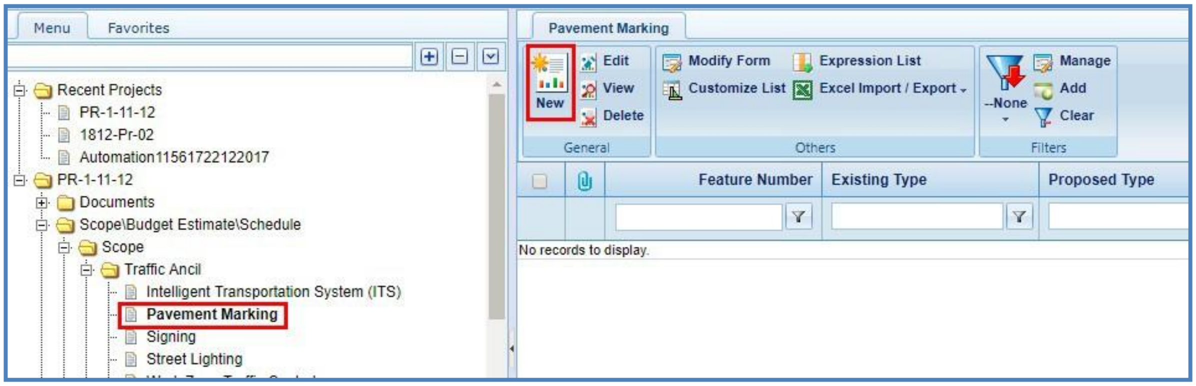
7. In the **Attachments** section upload any required documents. To upload images and files, refer *Attachments*.
8. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

2.1.16.2 Pavement Marking

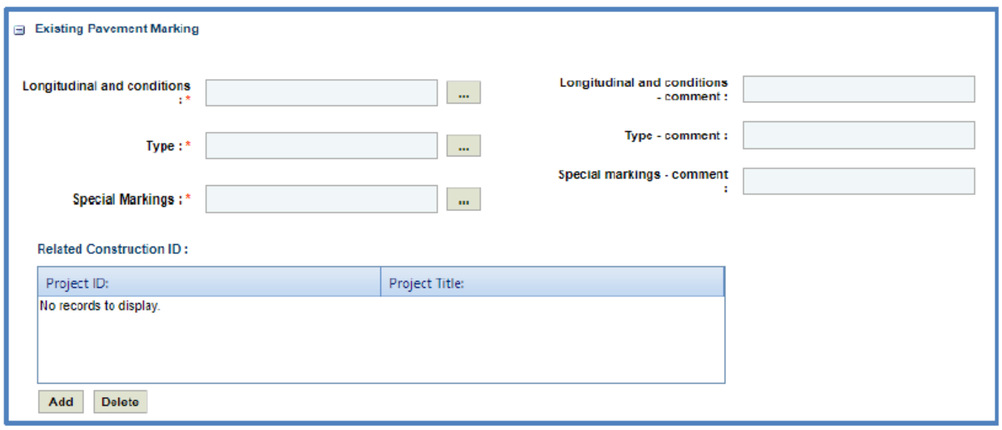
To create a Pavement Marking, perform the following steps:

1. Double-click the project. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.

3. Expand the **Scope** folder and then expand the **Traffic Ancillary** folder.
4. In the navigation pane, click **Pavement Marking**. The **Pavement Marking** list page is displayed.
5. Click **New.** The **Pavement Marking** details page is displayed.

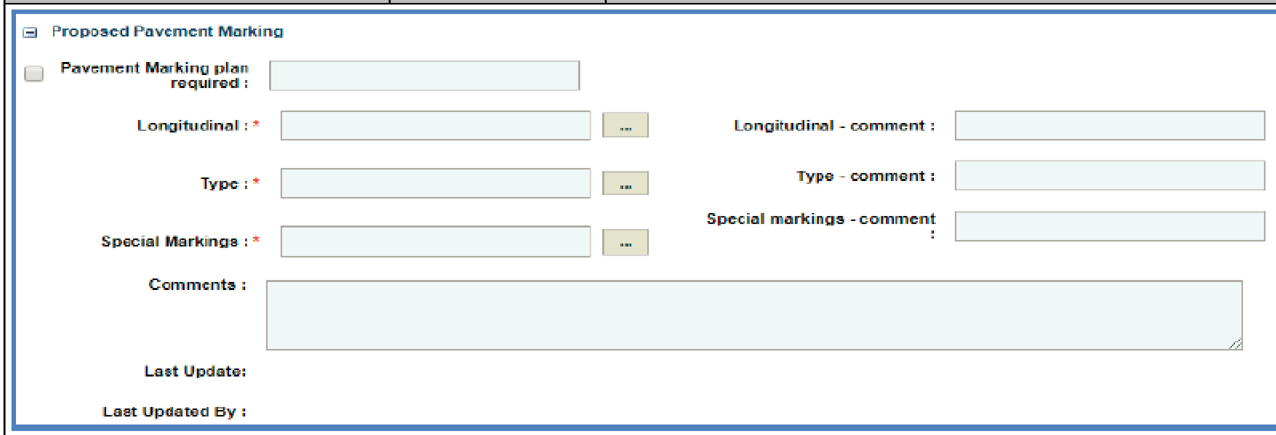


6. In the **Existing Pavement Marking** section, enter the information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Longitudinal and conditions	Mandatory	To select the existing Pavement Marking: 1. Click ... The **Longitudinal and Conditions** dialog box is displayed. The options are defined in the **Existing Pavement Marking Longitudinal** catalog of the library. 2. Select one or more existing pavement marking longitudinal and click **Select**.
Longitudinal and conditions - comment	Non-mandatory	Enter the comments.
Type	Mandatory	To select the pavement marking types: 1. Click ... The **Marking Types** dialog box is displayed. The options are defined in the **Pavement Marking Type** catalog of the library. 2. Select one or more pavement Marking Types and click **Select**.
Type - comment	Non-mandatory	Enter the comments.
Special Markings	Mandatory	To select the special pavement marking types: 1. Click ... The **Special Marking** dialog box is displayed. The options are defined in the **Pavement Marking Special Marking** catalog of the library. 2. Select one or more Special Marking Types and click Select.

Field	Mandatory / Non-mandatory	Description
Special markings - comment	Non-mandatory	Enter the comments.
Related Construction ID	Non-mandatory	To add the related construction ID: 1. Click **Add.** The **Related Construction ID** dialog box is displayed. The options are defined in the Related Constructions ID catalog of the library. 2. Select one or more project IDs and click Select. The selected projects are added to the grid.

7. In the **Proposed Pavement Marking** section, enter information in the required fields. The fields are described in the following table.

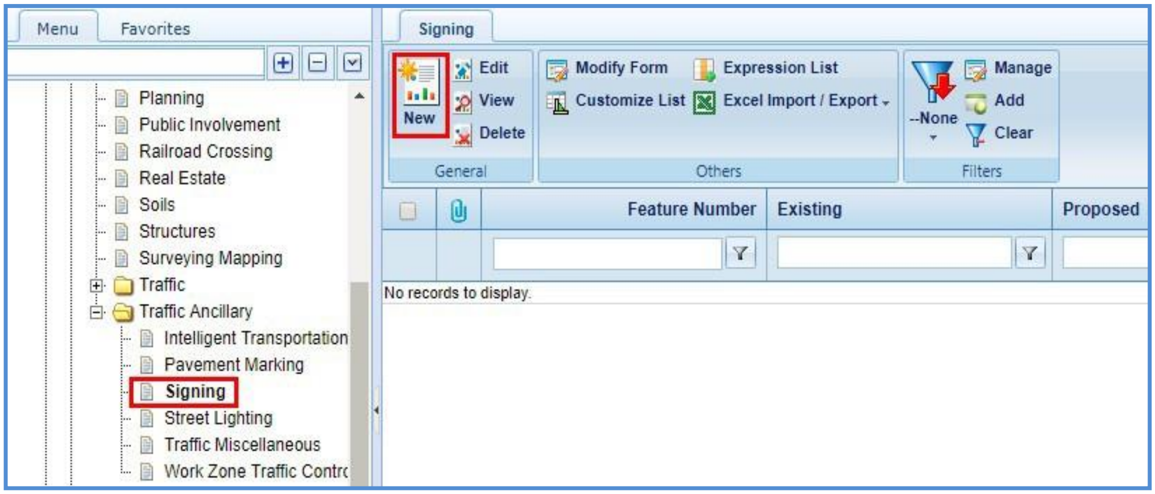
Field	Mandatory / Non-mandatory	Description
		
Pavement Marking plan required	Non-mandatory	Select the check box if the Pavement Marking Plan is required. Enter the Pavement Marking Plan details.
Longitudinal	Mandatory	To select the longitudinal details: 1. Click . The **Longitudinal** dialog box is displayed. The options are defined in the **Proposed Pavement Marking Longitudinal** catalog of the library. 2. Select one or more longitudinal and click **Select**.
Longitudinal - Comment	Non-mandatory	Enter the comments.
Type	Mandatory	To select the proposed pavement marking types: 1. Click ... The **Marking Types** dialog box is displayed. The options are defined in the **Pavement Marking Type** catalog of the library. 2. Select one or more pavement Marking Types and click **Select**.
Type - comment	Non-mandatory	Enter the comments.
Special markings	Mandatory	To select the special pavement marking types: 1. Click ... The **Special Marking** dialog box is displayed. The options are defined in the **Pavement Marking Special Marking** catalog of the library. 2. Select one or more Special Marking Types and click **Select**.
Special markings - comment	Non-mandatory	Enter the comments.
Comments	Non-mandatory	Enter the comments.

8. In the **Attachments** section upload any required documents. To upload images and files, refer *Attachments*.
9. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

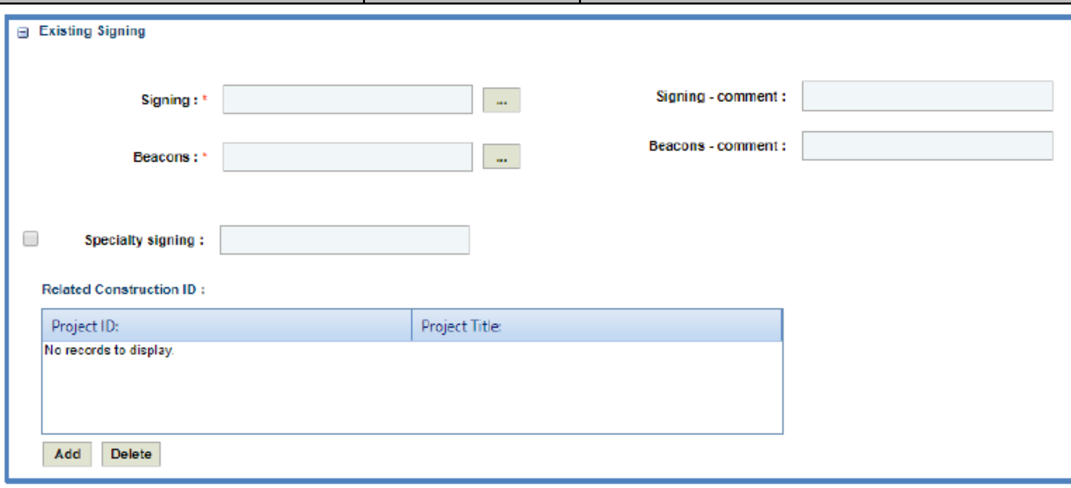
2.1.16.3 Signing

To create a Signing, perform the following steps:

1. Double-click the project. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. E xpand the **Scope** folder and then expand the **Traffic Ancillary** folder.
4. In the navigation pane, click **Signing**. The **Signing** list page is displayed.
5. Click **New.** The **Signing** details page is displayed.



6. In the **Existing Signing** section, enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Signing	Mandatory	To select the existing Signing: 1. Click ... The **Existing Signing** dialog box is displayed. The options are defined in the **Existing Signing** catalog of the library. 2. Select one or more existing signings and click **Select**.
Signing - comment	Non-mandatory	Enter the comments.
Beacons	Mandatory	To select the existing Beacons: 1. Click ... The **Beacons** dialog box is displayed. The options are defined in the **Beacon Type** catalog of the library. 2. Select one or more existing beacons and click **Select**.

Field	Mandatory / Non-mandatory	Description
Beacons - comment	Non-mandatory	Enter the comments.
Specialty Signing	Mandatory	1. Select the check box if the Specialty Signing is required. 2. Enter the Specialty Signing details.
Related Construction ID	Non-mandatory	To add the related construction ID: 1. Click **Add.** The **Related Construction ID** dialog box is displayed. The options are defined in the **Related Construction ID** catalog of the library. 2. Select one or more projects and click **Select**. The selected projects are added to the grid.

7. In the **Proposed Signing** section, enter information in the required fields. The fields are described in the following table.

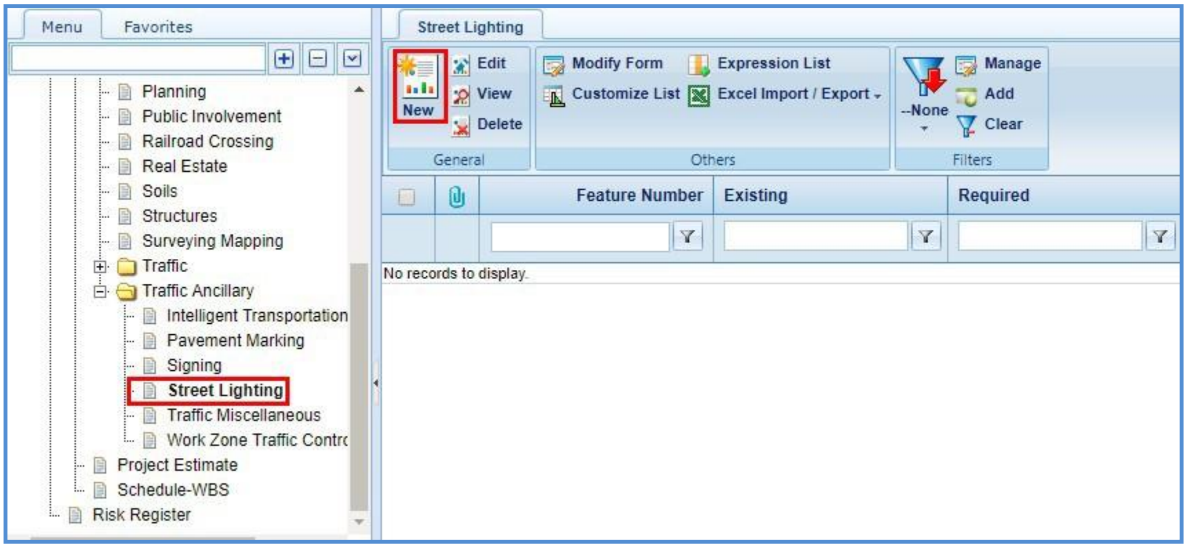
Field	Mandatory / Non-mandatory	Description
Signing Plan Required	Non-mandatory	
Signing	Mandatory	To select the proposed Signing: 1. Click ... The **Proposed Signing** dialog box is displayed. The options are defined in the **Proposed Signing** catalog of the library. 2. Select one or more proposed signings and click **Select**.
Signing - comment	Non-mandatory	Enter the comments.
Beacons	Mandatory	To select the proposed Beacons: 1. Click ... The **Beacons** dialog box is displayed. The options are defined in the **Beacon Type** catalog of the library. 2. Select one or more proposed beacons and click **Select**.
Beacons - comment	Non-Mandatory	Enter the comments.
Specialty Signing - comment	Non-Mandatory	1. Select the check box if the Specialty Signing is required. 2. Enter the Specialty Signing details.
Comments	Non-Mandatory	Enter the comments.

8. In the **Attachments** section upload any required documents. To upload images and files, refer *Attachments*.
9. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

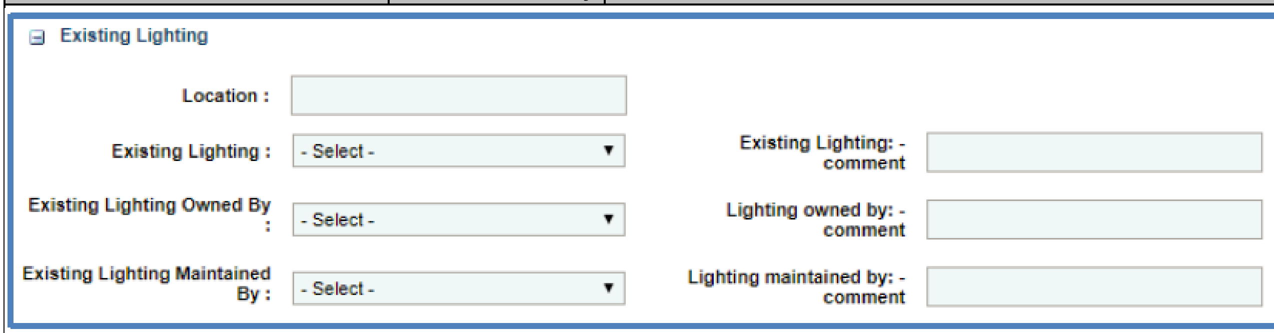
2.1.16.4 Street Lighting

To create a Street Lighting details, perform the following steps:

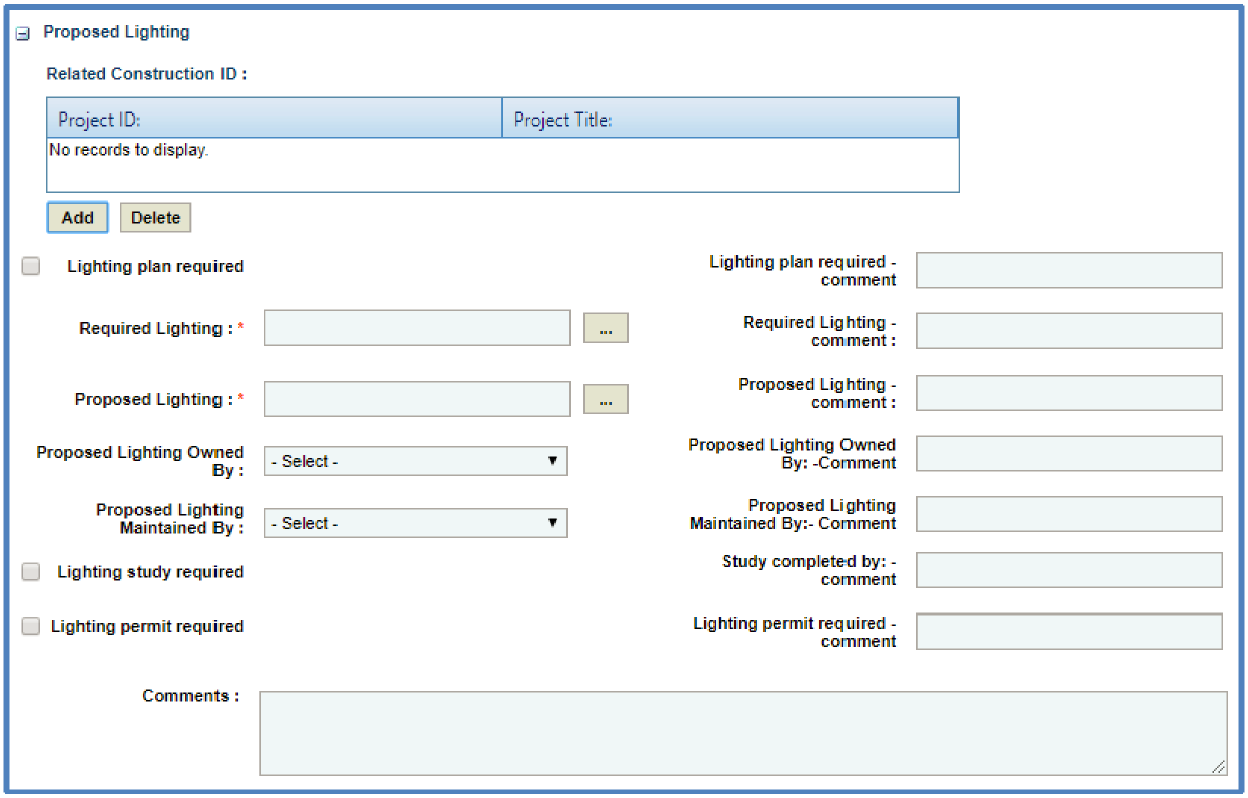
1. Double-click the project. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder and then expand the **Traffic Ancillary** folder.
4. In the navigation pane, click **Street Lighting**. The **Street Lighting** list page is displayed.
5. Click **New.** The **Street Lighting** details page is displayed.



6. In the **Existing Lighting** section, enter information in the required fields. The fields are described in the following table.

Field	**Mandatory / Non-mandatory**	**Description**
		
Location	Non-Mandatory	Enter the location details.
Existing Lighting	Non-Mandatory	From the drop-down list, select the existing lighting.
Existing Lighting comment	Non-Mandatory	Enter the comments.
Existing Lighting Owned By	Non-Mandatory	From the drop-down list, select the agency that owns the existing lighting.
Lighting owned by: - comment	Non-Mandatory	Enter the comments.
Existing Lighting Maintained By	Non-Mandatory	From the drop-down list, select the agency that maintains the existing lighting.
Lighting maintained by: - comment	Non-Mandatory	Enter the comments.

7. In the **Proposed Lighting** section, enter information in the required fields. The fields are described in the following table.



Field	Mandatory / Non-mandatory	Description
Related Construction ID	Non-Mandatory	To add the related construction ID: 1. Click **Add.** The **Related Construction ID** dialog box is displayed. The options are defined in the **Related Construction ID** catalog of the library. 2. Select one or more projects and click **Select**. The selected projects are added to the grid.
Lighting plan required	Non-Mandatory	Select the check box if the lighting plan is required.
Lighting plan required - comment	Non-Mandatory	Enter the comments.
Required Lighting	Mandatory	To select the required lighting: 1. Click ... . The **Required Lighting** dialog box is displayed. The options are defined in the **Required Lighting** catalog of the library. 2. Select one or more required lightings and click **Select**.
Required Lighting - comment	Non-Mandatory	Enter the comments.
Proposed Lighting	Mandatory	To select the proposed lighting: 1. Click ... The **Proposed Lighting** dialog box is displayed. The options are defined in the **Proposed Lighting** catalog of the library. 2. Select one or more proposed lightings and click **Select**.
Proposed Lighting - comment	Non-Mandatory	Enter the comments.
Proposed Lighting Owned By:	Non-Mandatory	From the drop-down list, select the agency that owns the proposed lighting.
Proposed Lighting Owned By: - Comment	Non-Mandatory	Enter the comments.
Proposed Lighting Maintained By	Non-Mandatory	From the drop-down list, select the agency that maintains the proposed lighting.

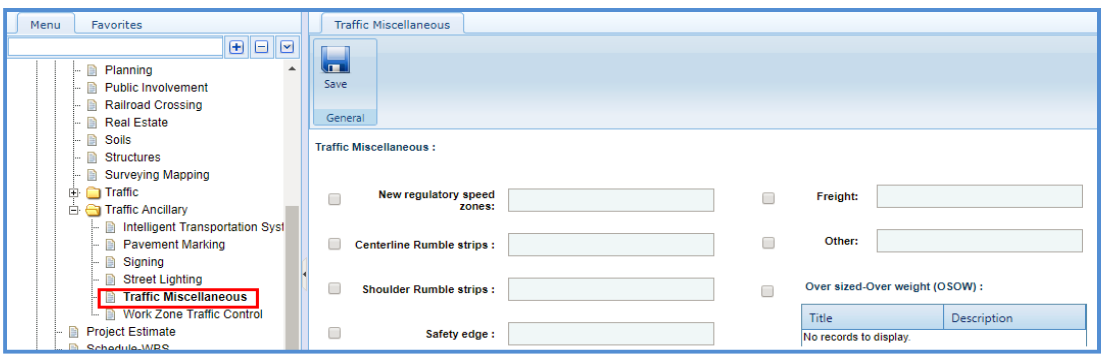
Field	Mandatory / Non-mandatory	Description
Proposed Lighting Maintained By: - Comment	Non-Mandatory	Enter the comments.
Lighting study required	Non-Mandatory	Select the check box if the lighting study is required.
Study completed by: - comment	Non-Mandatory	Enter the comments.
Lighting permit required	Non-Mandatory	Select the check box if the lighting permit is required.
Lighting permit required - comment	Non-Mandatory	Enter the comments.
Comments	Non-Mandatory	Enter the comments.

8. In the **Attachments** section upload any required documents. To upload images and files, refer *Attachments*.
9. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

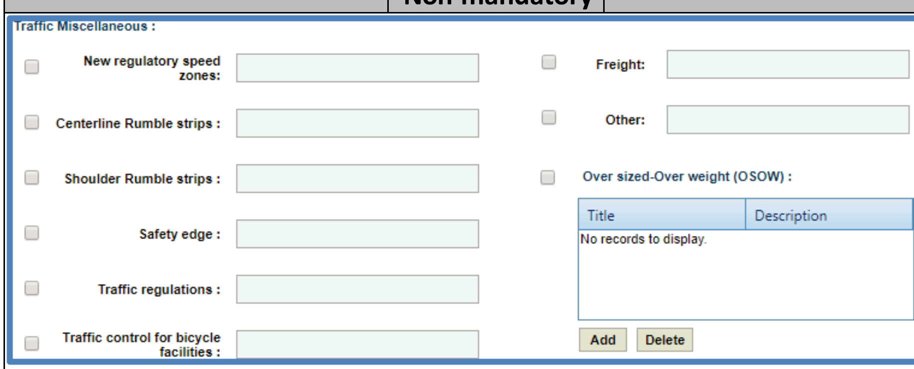
2.1.16.5 Traffic Miscellaneous

To create the Traffic Miscellaneous details, perform the following steps:

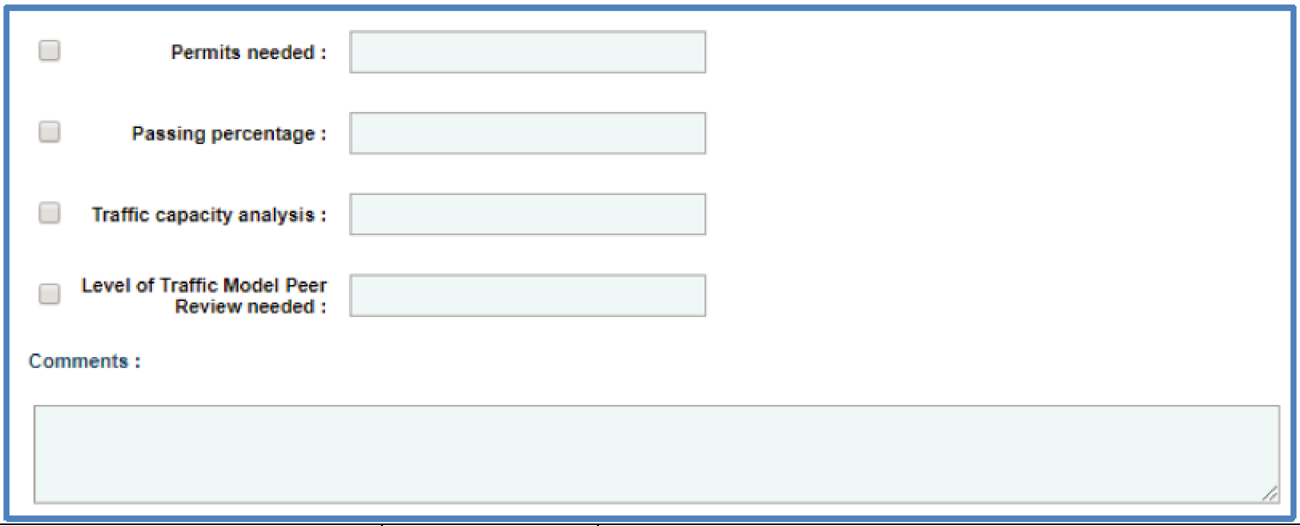
1. Double-click the project. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder and then expand the **Traffic Ancillary** folder.
4. In the navigation pane, click **Traffic Miscellaneous**. The **Traffic Miscellaneous** list page is displayed.



5. In the **Traffic Miscellaneous** section, perform the steps as described in the following table.

Field	Mandatory / Non-mandatory	Description
		
New regulatory speed zones	Non-Mandatory	If applicable, select the appropriate check boxes and enter the details.
Freight	Non-Mandatory	
Centerline Rumble strips	Non-Mandatory	
Other	Non-Mandatory	

Field	Mandatory / Non-mandatory	Description
Shoulder Rumble strips	Non-Mandatory	If applicable, select the appropriate check boxes and enter the details.
Oversized-Over weight (OSOW)	Non-Mandatory	If applicable, select the check box. To add an 1. Click **Add.** The dialog box is displayed. The options are defined in the Related Construction OSOW ID details dialog of the library. 2. Select one or more OSOW records and click **Select**.
Safety edge	Non-Mandatory	If applicable, select the appropriate check boxes and enter the details.
Traffic regulations	Non-Mandatory	
Traffic control for bicycle facilities	Non-Mandatory	



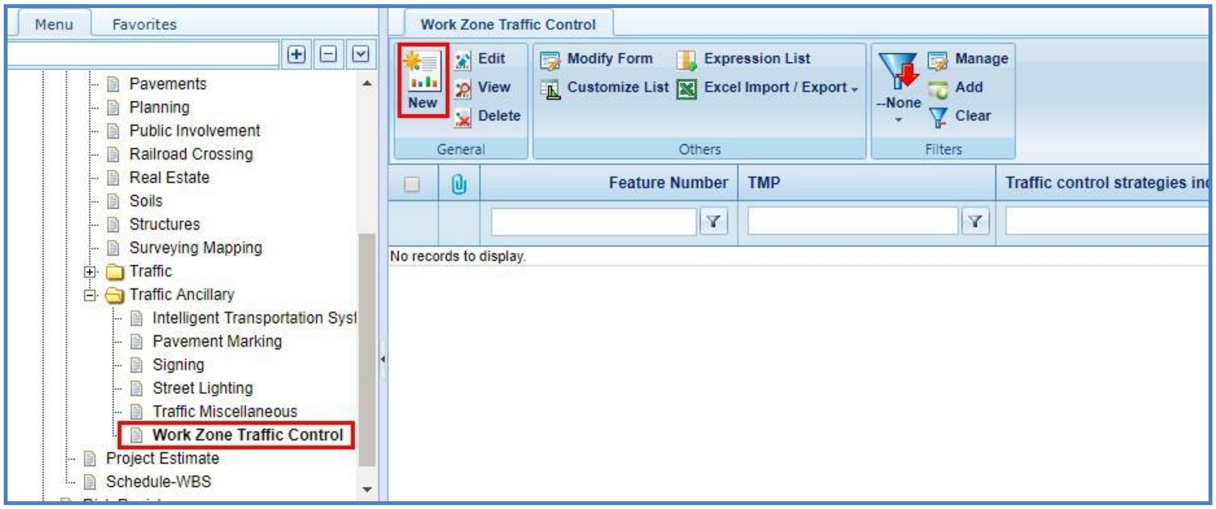
Field	Mandatory / Non-mandatory	Description
Permits needed	Non-Mandatory	If applicable, select the appropriate check boxes and enter the details.
Passing percentage	Non-Mandatory	
Traffic capacity analysis	Non-Mandatory	
Level of Traffic Model Peer Review needed	Non-Mandatory	
Comments	Non-Mandatory	Enter the comments.

6. In the **Attachments** section upload any required documents. To upload images and files, refer *Attachments*.
7. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

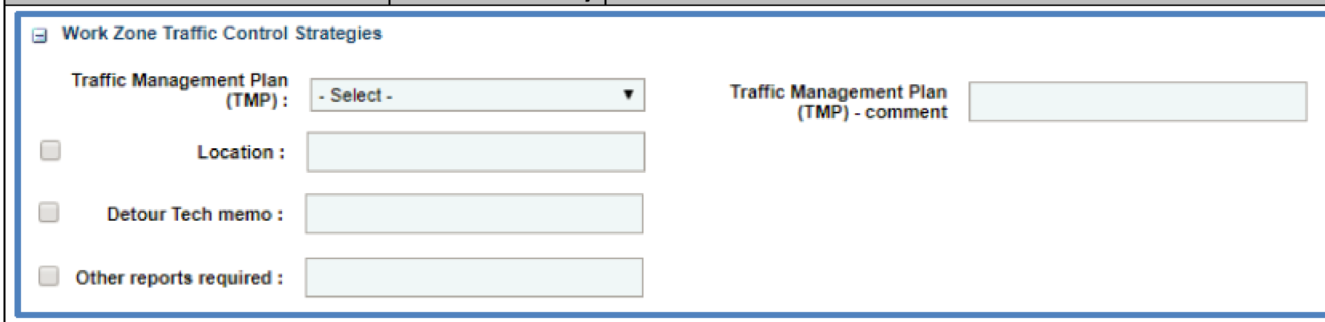
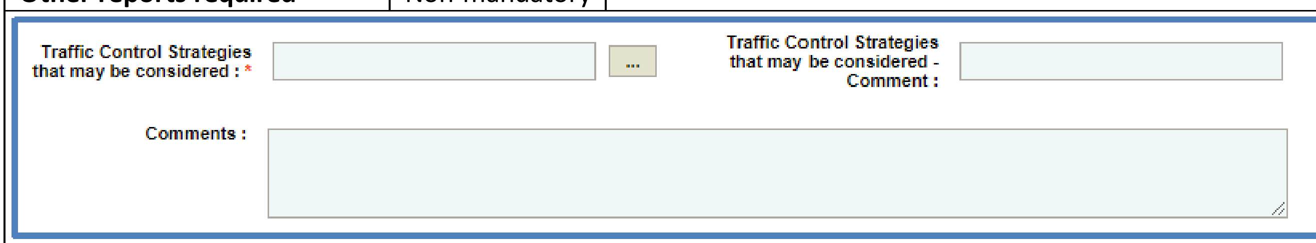
2.1.16.6 Work Zone Traffic Control

To create the Work Zone Traffic Control details, perform the following steps:

1. Double-click the project. The **Project Dashboard** is displayed.
2. Expand the project folder in the navigation pane and expand the **Scope\Budget Estimate\Schedule** folder.
3. Expand the **Scope** folder and then expand the **Traffic Ancillary** folder.
4. In the navigation pane, click **Work Zone Traffic Control**. The **Work Zone Traffic Control** list page is displayed.
5. Click **New.** The **Work Zone Traffic Control** details page is displayed.



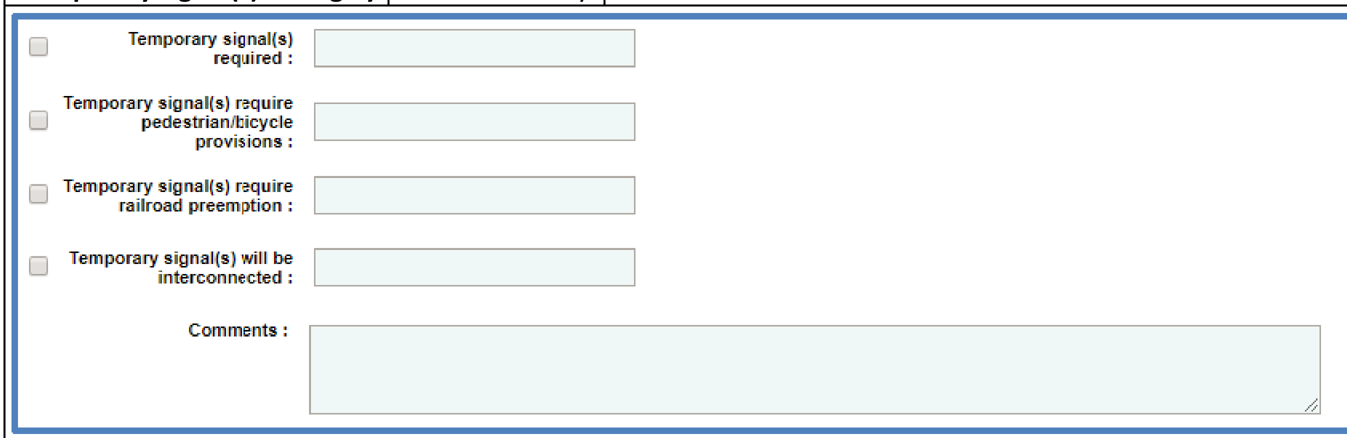
6. In the **Work Zone Traffic Control Strategies** section, perform the steps as described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Traffic Management Plan (TMP)	Non-mandatory	From the drop-down list, select the traffic management plan.
Traffic Management Plan (TMP) - comment	Non-mandatory	Enter the comments.
Location	Non-mandatory	If applicable, select the appropriate check boxes and enter the details.
Detour Tech memo	Non-mandatory	
Other reports required	Non-mandatory	
		
Traffic Control Strategies that may be considered	Mandatory	To select the proposed traffic control strategies: 1. Click ... The **Traffic Control Strategies** dialog box is displayed. The options are defined in the **Traffic Control Strategy** catalog of the library. 2. Select one or more Traffic Control Strategies and click **Select**.
Traffic Control Strategies that may be considered - Comment	Non-Mandatory	Enter the comments.
Comments	Non-Mandatory	

7. In the **Temporary Signals** section, perform the steps as described in the following table.

Field	Mandatory / Non-mandatory	Description

Field	Mandatory / Non-mandatory	Description
Temporary signal study by	Non-mandatory	If required, enter the appropriate temporary signals details.
Temporary signal(s) to be designed by	Non-mandatory	
Temporary signal(s) to be operated by	Non-mandatory	
Temporary signal(s) to be maintained by	Non-mandatory	
Temporary signal(s) timing by	Non-mandatory	



Field	Mandatory / Non-mandatory	Description
Temporary signal(s) required	Non-mandatory	If applicable, select the appropriate check boxes and enter the details.
Temporary signal(s) require pedestrian/bicycle provisions	Non-mandatory	
Temporary signal(s) require railroad preemption	Non-mandatory	
Temporary signal(s) will be interconnected	Non-mandatory	
Comments	Non-mandatory	Enter the comments.

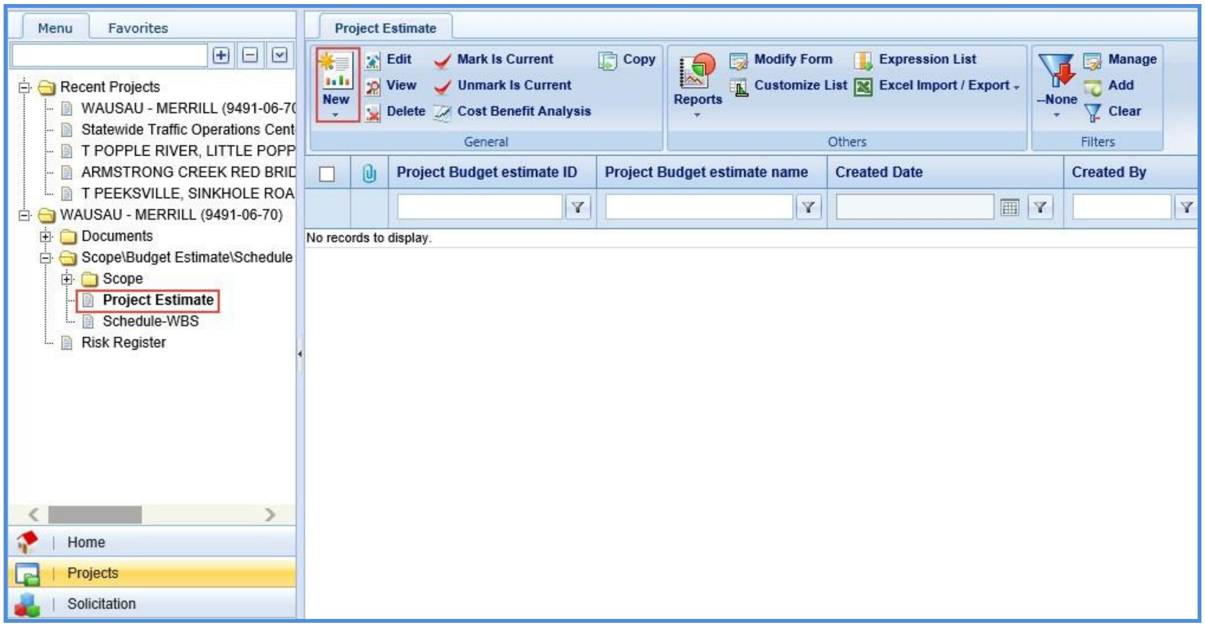
8. In the **Attachments** section upload any required documents. To upload images and files, refer *Attachments*.
9. Click **Save**. On saving the record, the **Last Update** displays the time and date of the recent update and the **Last Updated By** displays the name of the user who recently updated the details.

2.2 Creating Project Estimates

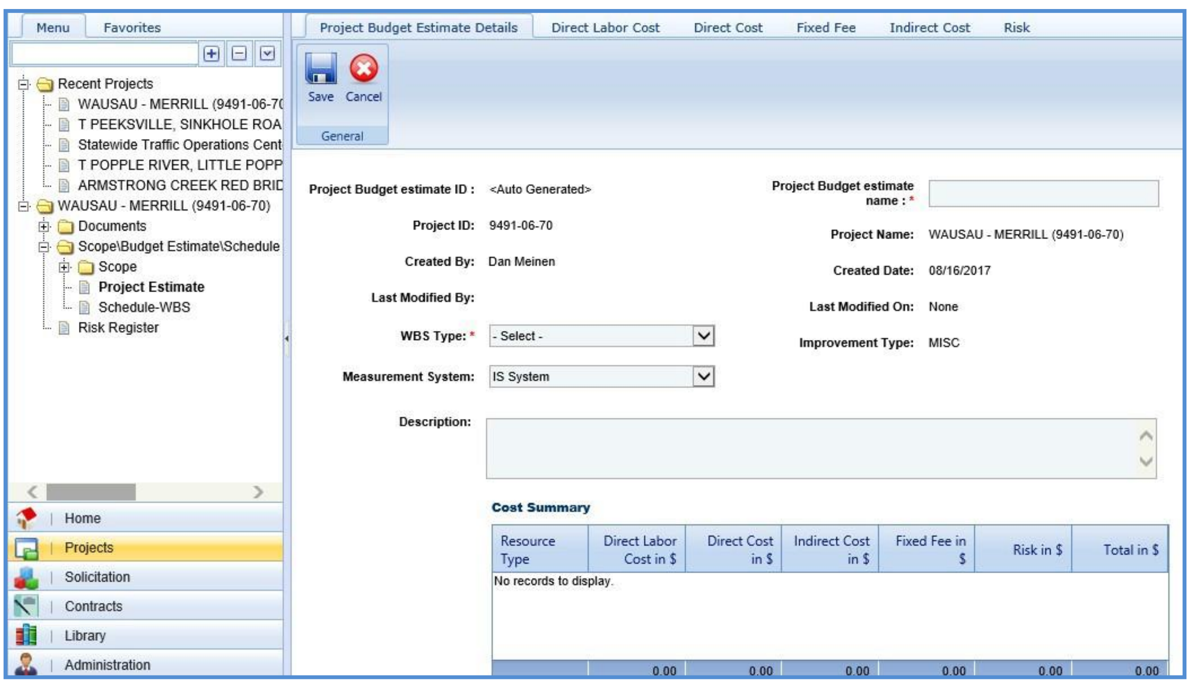
Project Estimate can be created either newly or by copying from an existing project estimate of the same project or a different project. Multiple project estimates can be created for what-if analysis and one of the project estimate is marked as the current project estimate.

To create a project estimate, perform the following steps:

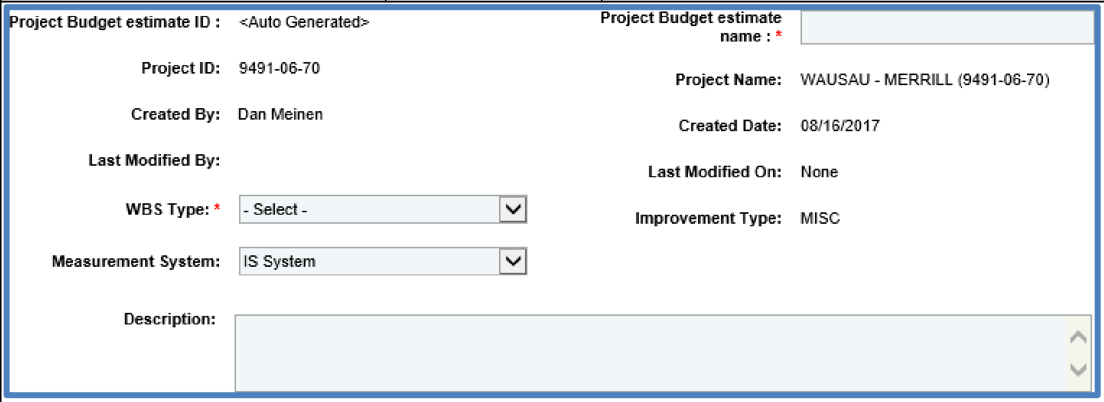
1. Select the project for which you want to create a project estimate. The **Project Dashboard** is displayed.
2. In the navigation pane, expand the project folder and then expand the **Scope\Budget Estimate\Schedule** folder.
3. Click **Project Estimate** in the navigation pane. The **Project Estimate** page is displayed.



4. Click New and then select **New.** The **Project Budget Estimate Details** page is displayed.

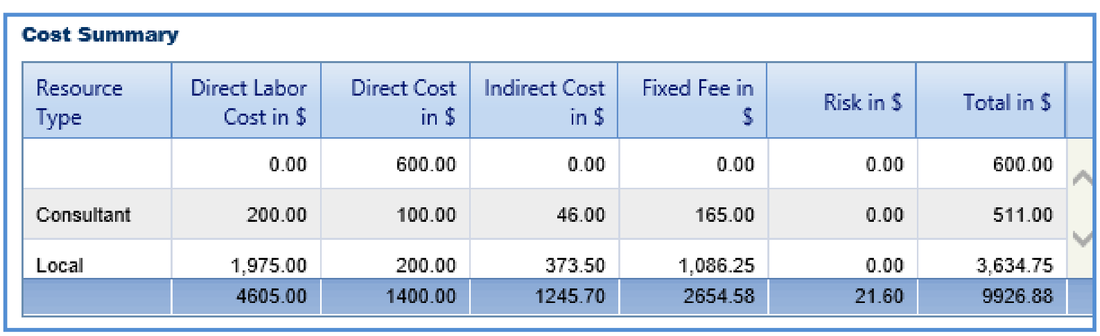


5. In the **Project Budget Estimate Details** tab, perform the following steps:
   a. Enter information in the required fields. The fields are described in the following table.



Field	Mandatory / Non-mandatory	Description
Project Budget estimate ID	-	The project budget estimate ID is auto- generated.
Project Budget estimate name	Mandatory	Enter a name for the project budget estimate.
Project ID	-	The project ID is auto populated.
Project Name	-	The project name is auto populated.
Created By	-	The name of the person who is creating project estimate is auto populated.
Created Date	-	The date when the project estimate is created is auto populated.
Last Modified By	-	The username of the person who last modified the project estimate is auto populated. This field is applicable only when the project estimate is modified.
Last Modified On	-	The date when the project estimate was last modified is auto populated. This field is applicable only when the project estimate is modified.
WBS Type	Mandatory	From the drop-down list, select the required WBS Type. The options in the drop-down list are defined in the **WBS Type** catalog of the library.
Improvement Type	-	The improvement type associated with the project is auto populated.

***Note**: The **Cost Summary** section auto-populates the total Direct Labor Cost, Direct Cost, Fixed Fee, Indirect Cost, and Risk for each resource type, based on the values entered in the respective tabs. The sum of all these costs is also auto calculated and displayed in the **Total in $** field.*



Cost Summary

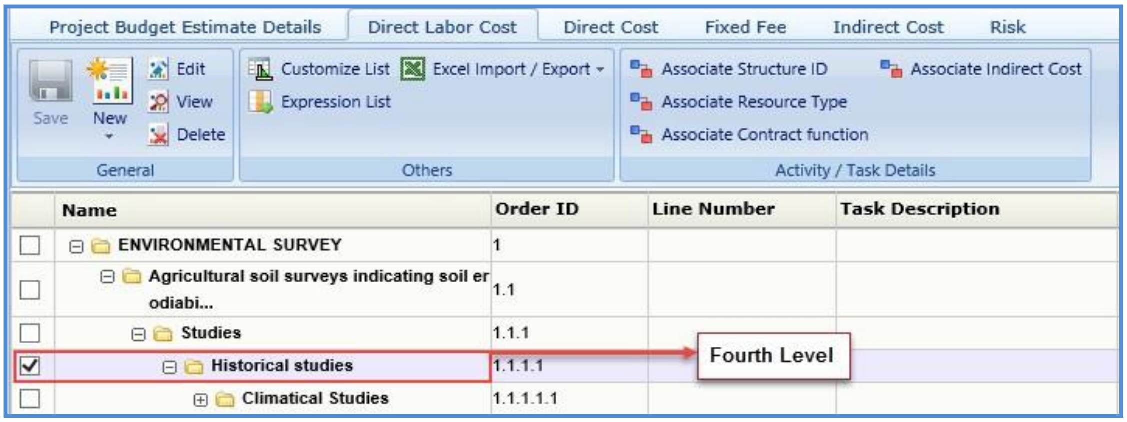
Resource Type	Direct Labor Cost in $	Direct Cost in $	Indirect Cost in $	Fixed Fee in $	Risk in $	Total in $
	0.00	600.00	0.00	0.00	0.00	600.00
Consultant	200.00	100.00	46.00	165.00	0.00	511.00
Local	1,975.00	200.00	373.50	1,086.25	0.00	3,634.75
	4605.00	1400.00	1245.70	2654.58	21.60	9926.88

b. In the **Attachments** section, upload images and files relevant to the project budget estimate. For information on attachments, refer *Attachments*.
c. Click **Save.**

6. Click the **Direct Labor Cost** tab. The tasks that are associated with the selected **WBS Type** in the **Project Budget Estimate Details** tab and **Improvement Concept** of the project is displayed. For the tasks to be displayed in the

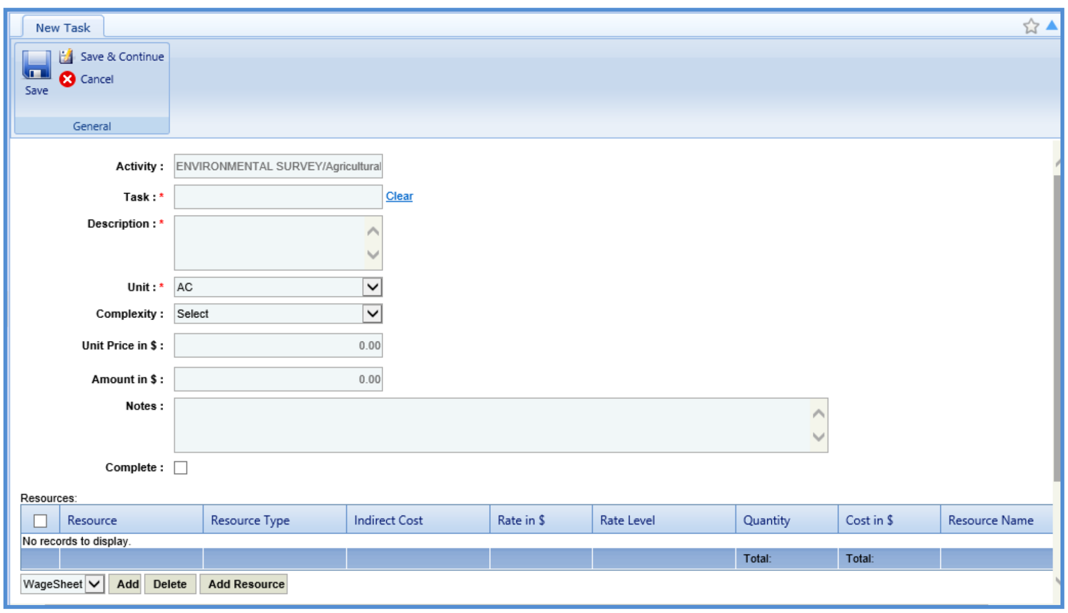
Direct Labor Cost tab, tasks must be associated with the WBS types and improvement types in the **Associate WBS Type** catalog of the library. If required, additional direct labor cost tasks can be added in the tab. Multiple direct labor cost tasks can be added at a time from the library. You can also add additional activity folders for these tasks.

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

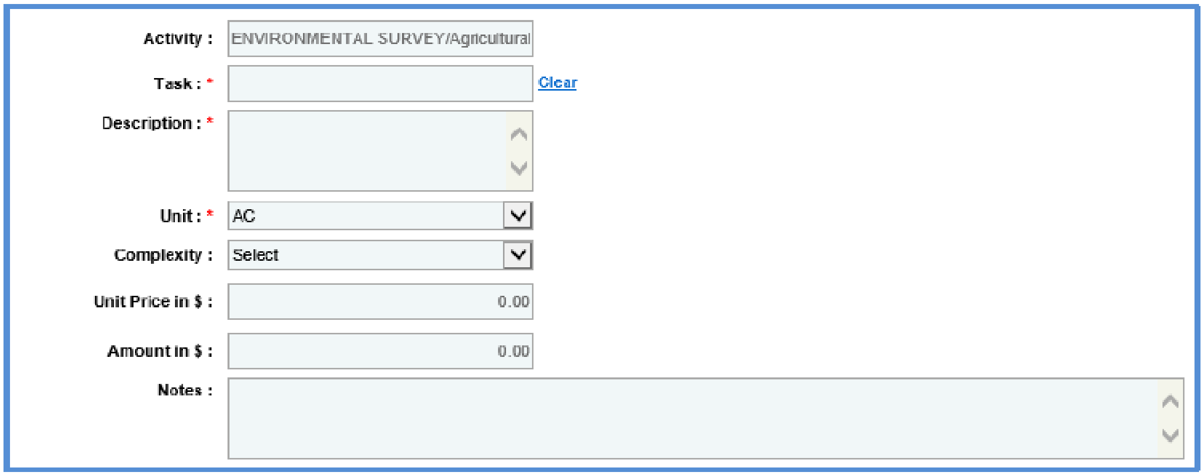


- To add a direct labor cost task, perform the following steps:

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

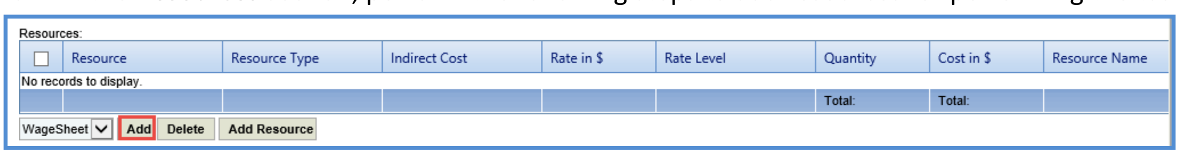


c. Provide information in the required fields. The fields in the section are described in the following table:



Field	Mandatory / Non-mandatory	Description
Activity	-	The name of the selected activity folder in which the task is being added is auto populated.
Task	Mandatory	Enter a name for the task.
Description	Mandatory	Enter description about the task.
Unit	Mandatory	From the drop-down list, select the unit of measurement.
Complexity	Non-mandatory	By default, the system displays the complexity that is defined on the **Project Initiation** page. However, from the drop-down list, you can select the required option. **Low** **Medium** **High** When a complexity is selected, a text box displaying the details of the complexity is also displayed.
Unit Price in $	-	The value in this field is auto calculated and displayed from the **Resources** section.
Amount in $	-	The value in this field is auto calculated and displayed from the **Resources** section.
Notes	Non-mandatory	Enter notes about the task.

d. In the **Resources** section, perform the following steps to add resources for performing the task.



i. Click **Add**. The **Resource** dialog box is displayed. The dialog box displays only those resource classifications that are associated with a wage sheet in the **Wage Sheet** catalog of the library.

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

iii. Click in the **Resource Type** column to select the **Resource Type** for the task**.** The different resource types are:

- WisDOT
- Consultant
- Local

Alternatively, you can bulk associate multiple tasks with the same resource type. For more information, refer Bulk Association.

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

v. Click in the **Indirect Cost** column to select the indirect cost type for the resource. The options in the drop-down list are defined in the **Indirect Cost type** section of the project **Scope Details**.

Alternatively, you can bulk associate multiple tasks with the same indirect cost. For more information, refer Bulk Association.

vi. Click in the **Quantity** column to enter the number of hours required by the resource to complete the task. The total quantity of all the resources is auto calculated and displayed in the column.

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

vii. Click **Add Resource** to add resource name. The **Resource Name** dialog box is displayed. The dialog box lists all the names of resources who belong to the selected **Resource Type**. Select the required resource names and click **Select**.

e. In the next section, upload images and files relevant to the project budget estimate. For information on attachments, refer *Attachments*.

f. Click **Save**.

- Adding Multiple Direct Labor Tasks

To add multiple direct labor cost tasks at a time, perform the following steps:

a. Click 

and then click **Add Multiple**. The **Add Standard Tasks** page is displayed.

b. From the **Standard Tasks list** drop-down list, select the required **WBS Type**.

c. In the **General** group, click **Add**. The **Standard Items** dialog box is displayed. The dialog box displays all the tasks associated with the selected **WBS Type**. The tasks are associated with the WBS Type in the **Associate WBS Type** catalog of the library.

d. Select the required tasks that must be added and then click **Select**. The selected items are listed on the **Add Standard Tasks** page.

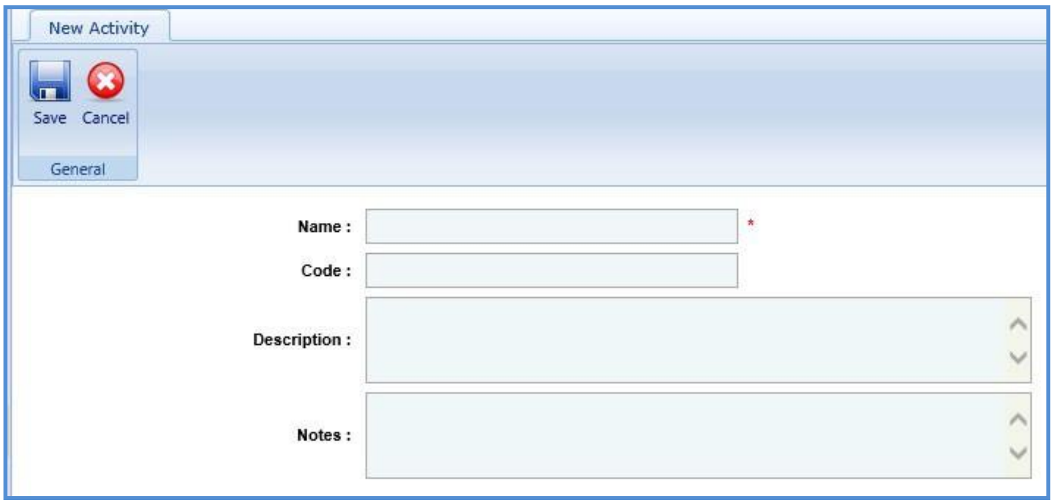
e. Click **Save**.

- Adding an Activity

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

a. Click 

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

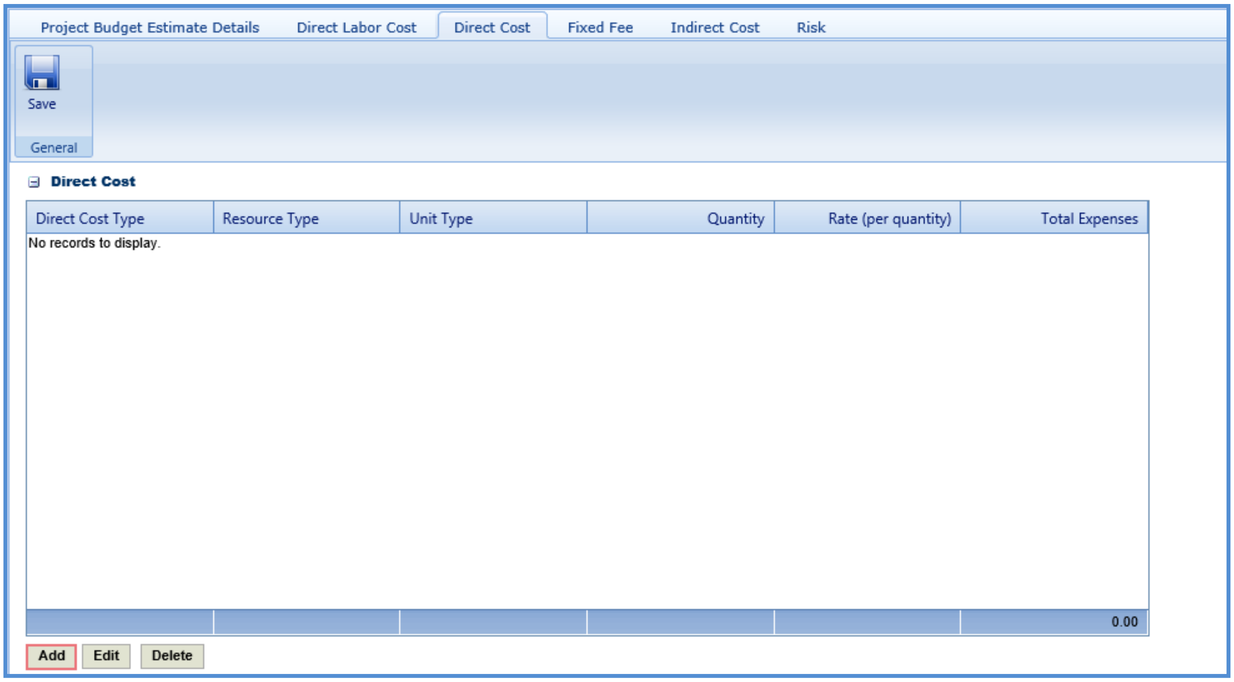


b. Enter information in the required fields. The fields are described in the following table.

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

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

7. Click the **Direct Cost** tab to add direct costs to the project estimate. Perform the following steps:

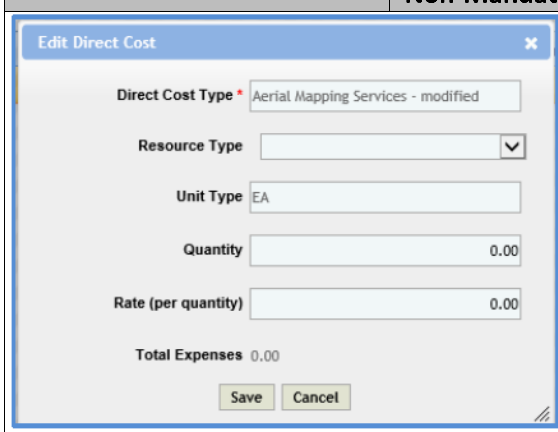


a. Click **Add**. The **Direct Cost** dialog box is displayed listing all the direct costs. For availability of direct costs in the dialog box, direct costs must be defined in the **Direct Cost Type** catalog of the library.

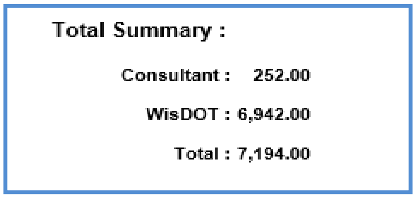
b. Select the required direct costs. Click **Select**. The selected direct costs are listed in the **Direct Cost** table.

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

d. Enter information in the **Quantity** and **Rate** fields. The fields are described in the following table.

Field	Mandatory / Non-Mandatory	Description
		
Direct Cost Type	-	The name of the selected direct cost type is auto populated.
Resource Type	**Non-mandatory**	From the drop-down list, select the type of resource for the direct cost. The options in the drop-down list are defined in the **Resource Type** catalog of the library.
Unit Type	**Non-mandatory**	The unit type of the selected direct cost is auto populated.
Quantity	**Non-mandatory**	Enter quantity for the direct cost.
Rate (per quantity)	**Non-mandatory**	Enter the rate for one quantity of the direct cost.
Total Expenses	-	The total direct cost expenses based on the entered quantity and rate is auto calculated and displayed.
Total Summary	-	The total direct cost expenses of each resource type are auto calculated and displayed.

e. Click **Save**.
f. In the **Direct Cost** page, click **Save**. The total of direct costs for each resource type is displayed in the Total Summary section of the page.



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

8. Click the **Fixed Fee** tab to view the fixed fee details of the project budget estimate. The different field details are described in the following table.

Note: *The Fixed Fee % details can be viewed only when:*

- *The* ***Fixed Fee %*** *is defined on the* ***Scope Details*** *page.*
- *The* ***Resource Type*** *selected in the* ***Fixed Fee %*** *section on the project* ***Scope Details*** *and the* ***Resource Type*** *selected in the* ***Direct Labor Cost*** *tab of the* ***Project Estimate*** *are same. The fixed fee is primarily applicable only for the Consultant type of resource.*

Note: *The values in the fields are auto populated.*

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

The total fixed fee is displayed in the **Cost Summary** section of the **Project Budget Estimate Details** tab.

9. Click the **Indirect Cost** tab.
   The indirect cost details of the project budget estimate are displayed. The different details that are displayed are described in the following table.

***Note**: The Indirect Cost details can be viewed only when:*

- *The **Indirect Cost type** is defined on the **Scope Details** page and*
- *The **Resource Type** selected on the **Scope Details** page and the **Resource Type** selected in the **Direct Labor Cost** tab of the **Project Estimate** are same.*

***Note**: The values in all the fields are auto populated.*

Field	Description
Total direct labor cost against an indirect type	Indicates the total direct labor cost associated with an indirect cost type for the resource. The value in this field is auto populated based on the total direct labor cost associated with an indirect cost type defined on the **New Task** page of the **Direct Labor Cost** tab.
Indirect type %	Indicates the percentage of indirect cost defined for the resource. The value in this field is auto populated based on the percentage defined in the **Indirect Cost Type** section of the **Scope Details** page.
Indirect cost against an indirect cost type	Indicates the indirect cost amount of a resource and associated indirect cost type, which is auto calculated based on the total direct labor cost and indirect type %.
Total Consultant Indirect Cost	Indicates the total indirect cost for the resources associated with the same indirect cost type. This cost is auto calculated based on the indirect cost amount of all the specific resource types associated with the same indirect cost type.
Total Indirect Cost	Indicates the total indirect cost amount of the project budget estimate, which is the auto calculated based on the total of indirect costs of all the resource types.

The Total Indirect Cost is displayed in the **Cost Summary** section of the **Project Budget Estimate Details** tab.

10. Once the project estimates are created, to mark an estimate as the current estimate, on the **Project Estimate** page, select an appropriate Project Estimate record and click **Mark Is Current**. The **Is Current** check box is selected for the estimate.

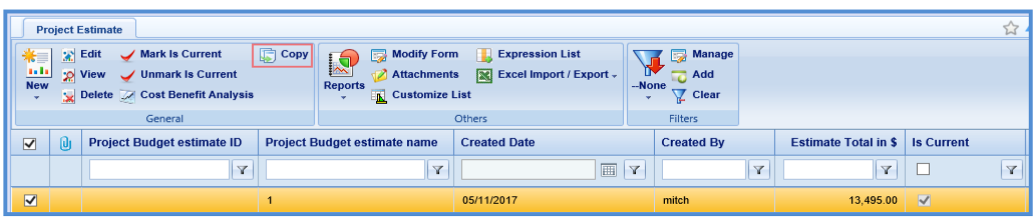
Note:

- *To mark a different budget estimate as the current estimate, click the budget estimate marked as current, click **Unmark Is Current** and then perform Step 11.*
- *The tasks associated with Current Project Estimate is auto populated in the Solicitation Task List when the project is associated with a solicitation.*

2.2.1 Creating Project Estimate by Copying from an Existing Estimate

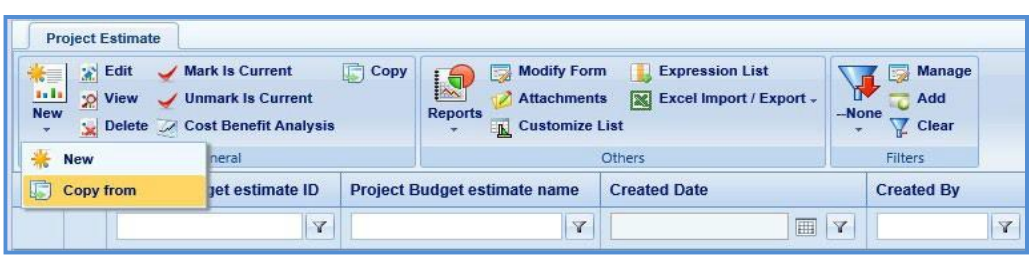
The system allows you to create project estimates by copying an existing estimate from the same project or a different project. Only the tasks of the project estimate can be copied to the newly created project. If you are copying a project estimate from a different project, only estimates that are marked as **Is Current** can be copied.

- To copy a project estimate from the same project, perform the following steps:
  1. On the **Project Estimate** page, select an estimate which you want to copy.



  2. In the **General** group, click **Copy**. A new estimate with a different budget estimate ID is created. The task list, resources, resource types, quantity, and dollars will be copied to the new project estimate.

- To copy a project estimate from a different project, perform the following steps:
  1. On the **Project Estimate** page, click **Copy** and then select **Copy From.** The **Select Estimate** dialog box is displayed listing project estimates of all the projects. The dialog box lists only those project estimates that are marked as **Is Current**.



  2. Click **Select**. A new estimate with a different budget estimate ID is created. The task list, resources, resource types, quantity, and dollars will be copied to the new project estimate.

2..2.2 Bulk Association

The system allows you to associate Structure ID, Resource Type, Contract Function, and Indirect Cost with direct labor cost tasks in bulk.

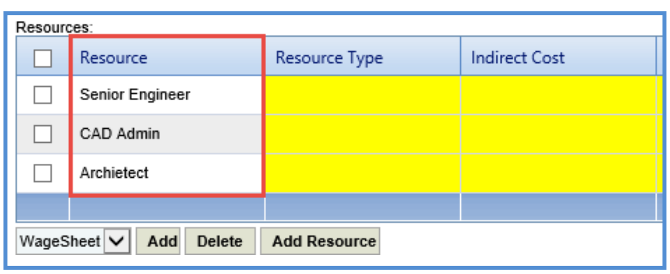
- **Associate Structure ID**
  You can associate a single structure ID to multiple direct labor cost tasks at a time. Perform the following steps to associate the Structure ID with the direct labor cost tasks.

Steps:

1. On the **Direct Labor Cost** tab, select tasks for which you want to associate with the same structure ID. In the **Activity / Task Details** group, click **Associate Structure ID**.
2. The **Select Structure ID** dialog box is displayed. The dialog box displays all the structure IDs that are added in the **Structure ID** section of the **Project Initiation** page.
3. Select the required structure ID and click **Select**.

- **Associate Resource Type**
  You can associate a single resource type to multiple direct labor cost tasks at a time. Perform the following steps to associate the resource type with the direct labor cost tasks.

Pre-requisite: All the selected tasks for association of resource type must be associated with a resource classification in the **Resources** section.



Steps:

1. On the **Direct Labor Cost** tab, select tasks for which you want to associate with the same resource type. In the **Activity / Task Details** group, click **Associate Resource Type**.
2. The **Select Resource Type** dialog box is displayed. The dialog box displays all the resource types defined in the **Resource Type** catalog of the library.
3. Select the required resource type and click **Select**.

- **Associate Contract Function**
  You can associate a single contract function to multiple direct labor cost tasks at a time. Perform the following steps to associate the contract function with the direct labor cost tasks.

Steps:

1. On the **Direct Labor Cost** tab, select tasks for which you want to associate with the same contract function.
2. In the **Activity / Task Details** group, click **Associate Contract function**. The **Select Contract function** dialog box is displayed. The dialog box displays all the contract functions that are added in the **Contract Function** section of the project **Scope Details** page.
3. Select the required contract function and click **Select**.

- **Associate Indirect Cost**

  You can associate a single indirect cost type to multiple direct labor cost tasks at a time. Perform the following steps to associate the indirect cost with the direct labor cost tasks.

Steps:

1. On the **Direct Labor Cost** tab, select tasks for which you want to associate with the same indirect cost type.
2. In the **Activity / Task Details** group, click **Associate Indirect Cost**. The **Select Indirect Cost** dialog box is displayed. The dialog box displays all the different indirect cost types that are added in the **Indirect Cost Type** section of the project **Scope Details** page.
3. Select the required indirect cost and click **Select**.

- **Associate Complexity**

  You can associate a single complexity to multiple direct labor cost tasks at a time. Perform the following steps to associate the complexity with the direct labor cost tasks.

Steps:

1. On the **Direct Labor Cost** tab, select tasks for which you want to associate with the same complexity type.
2. In the **Activity / Task Details** group, click **Associate Complexity**. The **Select Complexity** dialog box is displayed.
3. Select the required complexity and click **Select**.

3 Solicitation

The procedure to create solicitation by adding multiple projects, scope of services, creating bimonthly solicitation by adding multiple solicitations, viewing NOI responses, shortlisting, and ranking the consultants are described.

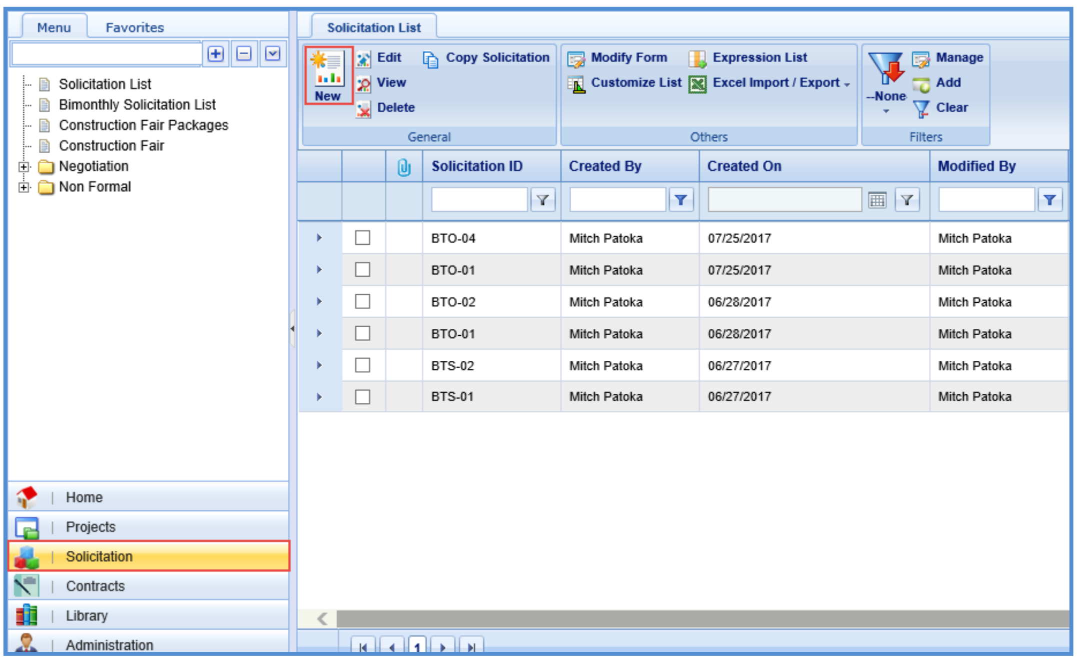
3.1 Functional Flow for Solicitation

The following sequential tasks comprise the functional flow for solicitation.

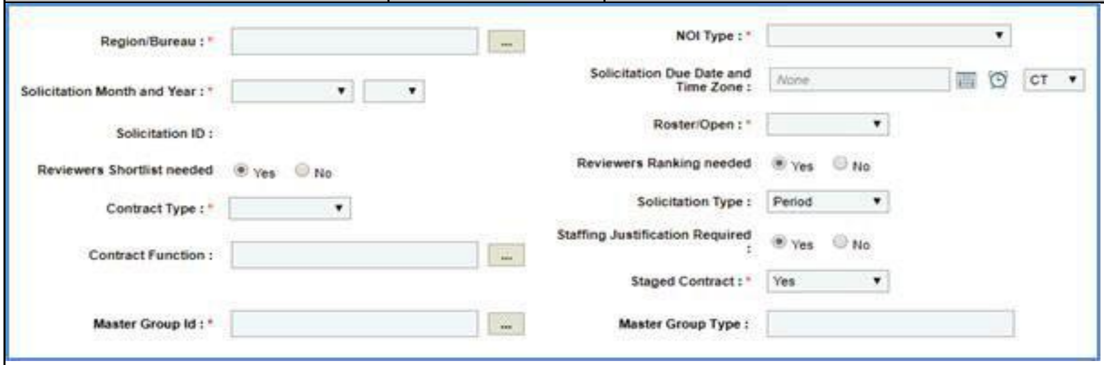
1. Create Solicitation.
2. Create Bimonthly Solicitation by adding multiple Solicitation Forms, publish the Bimonthly Solicitation, and mark as **Is Current**. Consultants respond to the current bimonthly solicitation.
3. View the NOI responses received from the consultants.
4. Shortlist consultants based on the NOI responses.
5. Final shortlisting of consultants for ranking. Rank the final shortlisted consultants.
6. Final Ranking of consultants for negotiation.

3.1.1 Creating Solicitation

1. Click **Solicitation** in the module menu. The **Solicitation List** page is displayed.

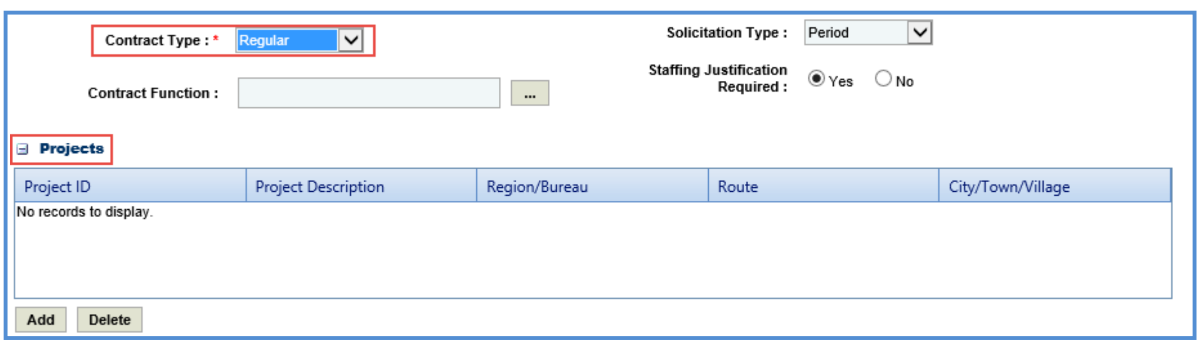


2. Click **New**. The **Solicitation** page is displayed.
3. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Region/Bureau	Mandatory	To select region/bureau of the solicitation: 1. Click ... and **Region/Bureau** dialog box is displayed. For availability of options in the dialog box, region/bureaus must be defined in the **Region-Bureau** catalog of the library. 2. Select the required region/bureau and click **Select**.
NOI Type	Mandatory	From the drop-down list, select the required type of NOI. For availability of options in the drop-down list, NOI types must be defined in the **NOI Type** catalog of the library.
Solicitation Month and Year	Mandatory	From the drop-down lists, select the month and year of solicitation.
Solicitation Due Date and Time Zone	Non-mandatory	Enter the due date and time of solicitation. Alternatively, you can click the calendar icon and clock icon to select the due date and time. From the drop-down list, select the time zone.
Solicitation ID	Non-mandatory	The unique ID for the solicitation is auto populated based on the selected **Region/Bureau** and **Solicitation Month and Year**.
Roster/Open	Mandatory	From the drop-down list, select the required option. • **Open**: Select this option if the solicitation is published to all the consultants at the enterprise level. • **Roster**: Select this option if the solicitation is published only to the consultants who are marked as Roster at the enterprise level.
Reviewers Shortlist needed	Non-mandatory	Click **Yes** to indicate that the reviewers' shortlisting procedure is mandatory to shortlist the consultants. Or Click **No** to indicate that the reviewers' shortlisting procedure is non-mandatory, and the final shortlisting of the consultants can be done directly.
Reviewers Ranking needed	Non-mandatory	Click **Yes** to indicate that the reviewers' ranking procedure is mandatory to rank the shortlisted consultants. Or Click **No** to indicate that the reviewers' ranking procedure is non-mandatory and the final ranking of consultants can be done directly.
Contract Type	Mandatory	From the drop-down list, select the required option. • Master: Select this option if there is no defined project scope. The work orders are created as and when required for a project. When **Master** is selected, the **Master Group Id** and **Master Group Type** fields are displayed. • **Regular**: Select this option if the contract is associated with a defined project scope. When **Regular** is selected, the **Projects** section is displayed.

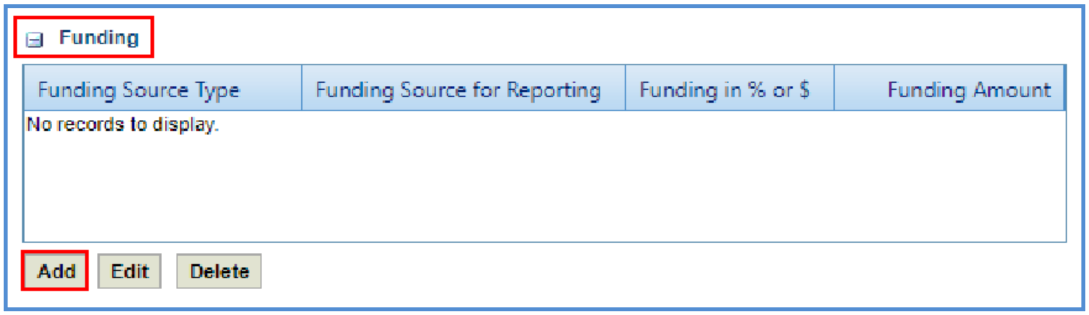
Field	Mandatory / Non-mandatory	Description
Solicitation Type	Non-mandatory	From the drop-down list, select if the contract type is **Period**. If **Period** is selected, the **Staffing Justification Required** field is displayed.
Contract Function	Non-mandatory	To select contract function of the solicitation: 1. Click ... and **Contract Function** dialog box is displayed. For availability of options in the dialog box, contract functions must be defined in the **Contract Function** catalog of the library. 2. Select the required contract function and click **Select**.
Staffing Justification Required	Mandatory	This field is displayed only when the **Solicitation Type** is **Period**. Click **Yes** to indicate that staffing justification is required for the solicitation or click **No** to indicate that Staffing Justification is not required for the solicitation. If **Staffing Justification Required** is **Yes**, then the **Staffing Justification** is listed in the navigation pane of the solicitation to provide necessary details. For more information on **Staffing Justification**, refer Staffing Justification.
Staged Contract	Mandatory	By default, 'Yes' is selected. • If Staged Contract is selected 'Yes', the user can create multiple contracts for the Solicitation ID. • If Staged Contract is selected 'No', the user can create only one contract for the Solicitation ID.
Master Group Id	Mandatory	This field is displayed only when the Contract Type is Master. To select a Master Group ID: 1. Click the Master Group ID page on the contract. The Master Group ID dialog box is displayed listing all the Master Group IDs from the contract. The Master Group IDs that are listed are of the same region as the solicitation region. The date of creation for the solicitation is within the completion date of the Master ID. 2. Select the required Master Group ID and click **Select**.
Master Group Type	Non-mandatory	This field is displayed only when the **Contract Type** is **Master**. Indicates the type of the selected Master Group ID. The value in this field is auto populated.

4. The **Projects** section is displayed only when the **Contract Type** is **Regular**. In the **Projects** section, perform the following steps to add the projects for the solicitation.

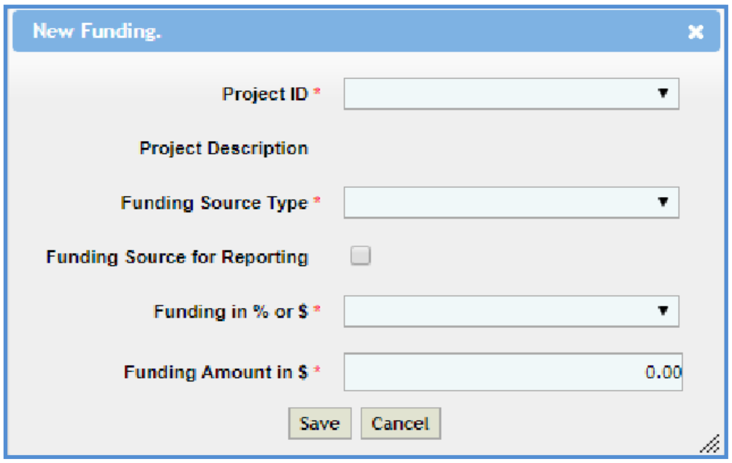


a. Click **Add**. The **Select Project** dialog box is displayed listing all the projects that are associated with the region/bureau of the solicitation.
b. Select the required projects and click **Select**.

5. In the **Funding** section, perform the following steps to add the project funding details for the solicitation.

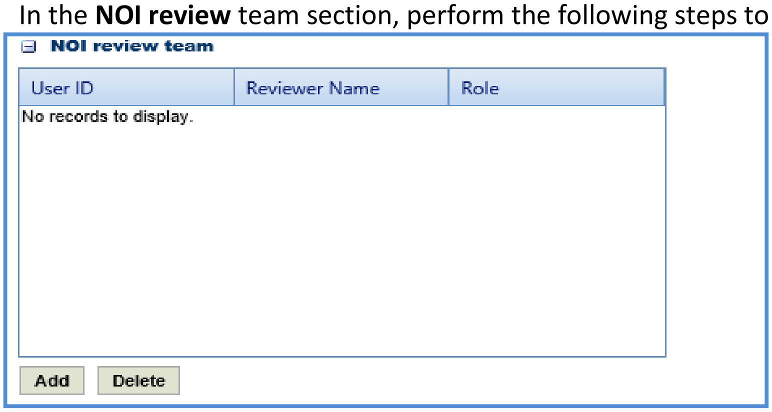


   a. Click **Add**. The **New Funding** dialog box is displayed. **Project ID** and **Project Description** are displayed if the Contract Type is selected as **Regular**.



   b. In the **Project ID** drop-down list, select the required project. The list displays all the projects that are part of the solicitation. **Project Description** is auto populated.
   c. From the drop-down list, select the **Funding Source Type**. The options in the drop-down list are defined in the **Funding Source Type** catalog of the library.
   d. Select the **Funding Source for Reporting** checkbox to allow the user to select any number of records in solicitation or a project record in case of regular contract.
   e. In **Funding in % or $**, select % or $.
   f. Click **Save**.

6. In the **NOI review** team section, perform the following steps to add reviewers for shortlisting the consultants:



   a. Click **Add**. The **Select Reviewers** dialog box is displayed. The dialog box lists all active users from the list of User Accounts in the enterprise.
   b. Select reviewers and click **Select**.

***Note**: When the **Reviewers Shortlist needed** is **Yes**, then all the reviewers selected in the **NOI Review Team** section must complete the shortlisting of consultants.*

7. In the **Selection team** section, perform the following steps to add reviewers for ranking the shortlisted consultants:

   a. Click **Add**. The **Select Reviewers** dialog box is displayed. The dialog box lists all active users from the list of User Accounts in the enterprise.
   b. Select the required reviewers and click **Select**.

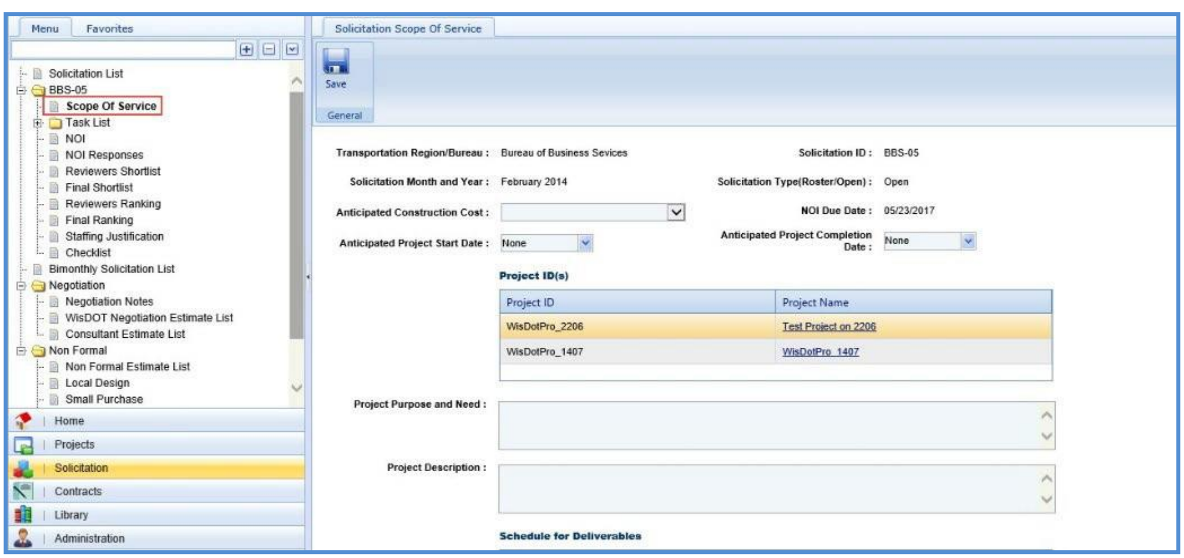
***Note**: When the **Selection team** is **Yes**, then all the reviewers selected in the **Selection Team** section must complete the ranking of consultants.*

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

3.2 Solicitation Scope of Service

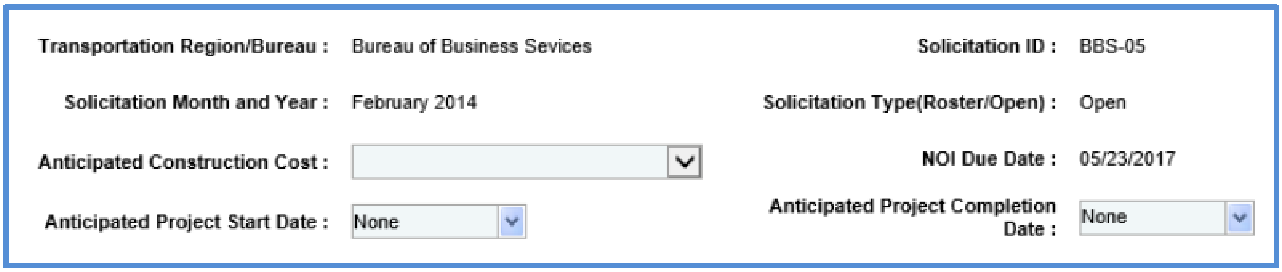
The system allows you to define scope of service for the solicitation. Perform the following steps to define the scope of service:

1. Select the solicitation for which you want to define the scope of service and click **Edit**.
2. In the navigation pane, expand the solicitation folder, and then click **Scope of Service**. The **Solicitation Scope of Service** page is displayed.



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

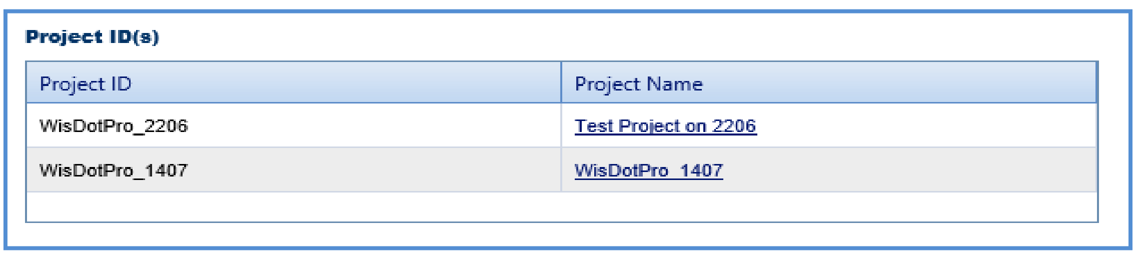
***Note**: All the fields described in the below table are non-mandatory fields.*

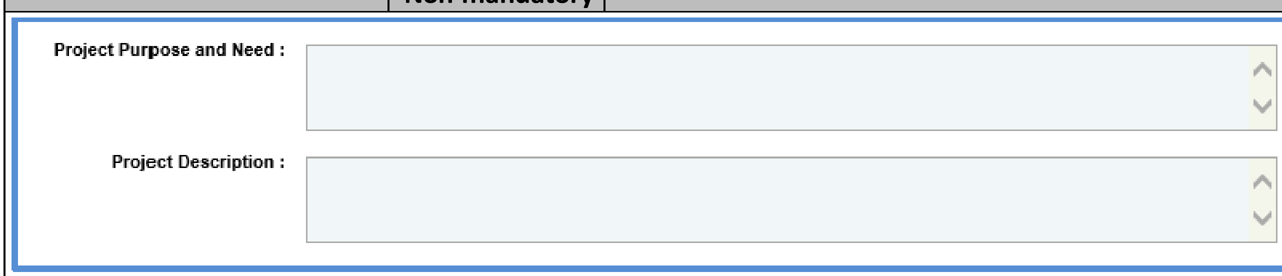


Field	Description
Transportation Region/Bureau	The transportation region/bureau of solicitation is auto populated.
Solicitation ID	The unique ID of the solicitation is auto populated.
Solicitation Month and Year	The month and year of solicitation is auto populated.
Solicitation Type (Roster/Open)	The type of solicitation whether **Roster** or **Open** is auto populated.
Anticipated Construction Cost	From the drop-down list, select the expected cost range for construction.
NOI Due Date	The due date of NOI is auto populated.
Anticipated Project Start Date	From the drop-down calendar, select the expected start date of the project.
Anticipated Project Completion Date	From the drop-down calendar, select the expected completion date of the project.

4. In the **Project ID(s)** section, enter information in the required fields. The fields are described in the following table:

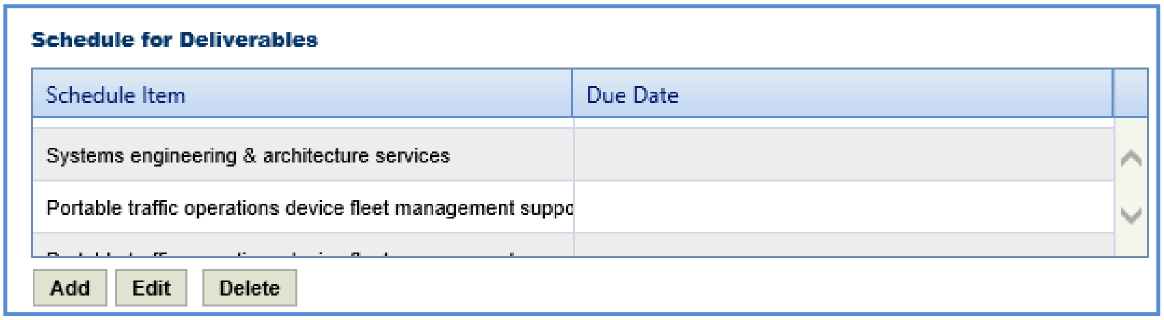
***Note**: The table in the section lists all the projects that are associated with the solicitation. You can click the required **Project Name** link to view the **Project Details** page in a different tab.*



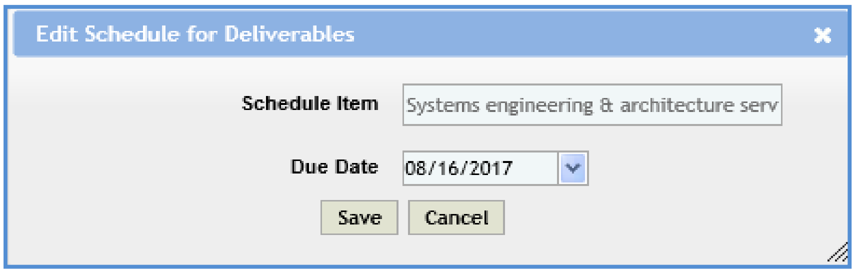


Field	Mandatory / Non-mandatory	Description
Project Purpose and Need	Non-mandatory	Enter the purpose and need for the project.
Project Description	Non-mandatory	Enter the description about the project.

5. In the **Schedule for Deliverables** section, perform the following steps to add key milestone deliverables and set the schedule for the deliverables.

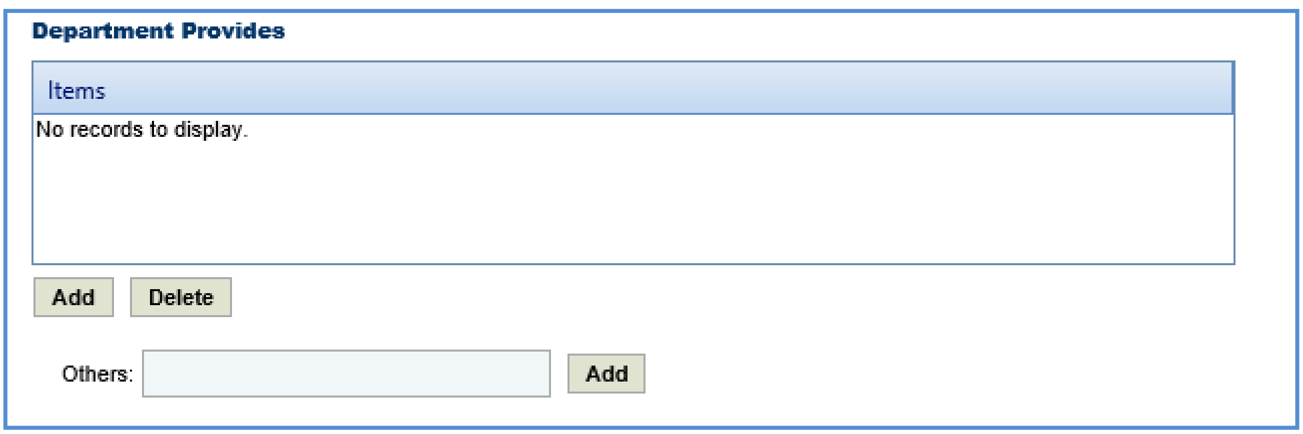


- To add schedule for deliverables from library:
  a. Click **Add**. The **Schedule for Deliverables** dialog box is displayed listing all the deliverables that are defined in the **Deliverables** catalog of the library.
  b. Select the required deliverables and click **Select**. The selected schedule for deliverables is listed in the table.
  c. Select a schedule for deliverable and click **Edit**. The **Edit Schedule for Deliverables** dialog box is displayed.



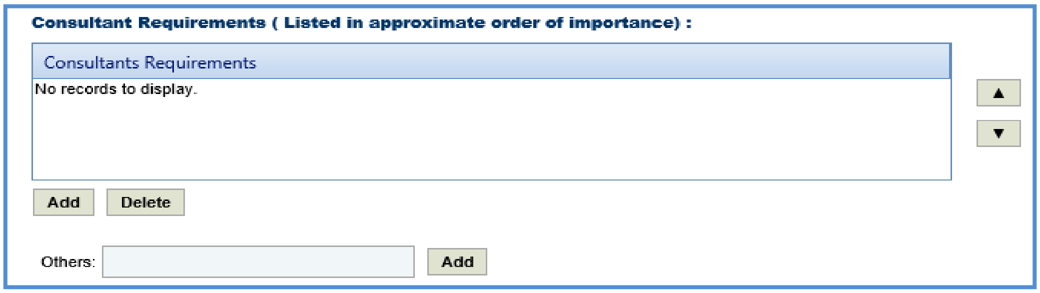
  d. From the **Due Date** drop-down calendar, select the due date for the deliverable.
  e. Click **Save**.

- To add schedule for deliverables that are not defined in the library:
  a. In the **Others** field, enter the name of the item.
  b. Click **Add.** The item is displayed in the table.



6. In the **Department Provides** section, perform the following steps to add items that are provided by WisDOT.
   - To add items from library:
     a. Click **Add**. The **Department Provides** dialog box is displayed listing all the items that are defined in the **Department Provides** catalog of the library.
     b. Select the required items and click **Select**. The selected items are listed in the table.

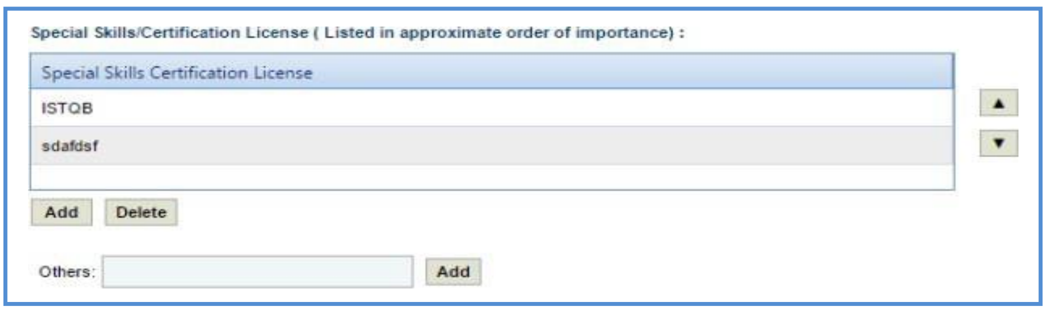
   - To add items that are not defined in the library:
     a. In the **Others** field, enter the name of the item.
     b. Click **Add.** The item is displayed in the table.
7. In the **Consultant Requirements (Listed in approximate order of importance)** section, perform the following steps to add consultant requirements.



- To add items from library:
  a. Click **Add**. The **Consultants Requirements** dialog box is displayed listing all the consultants' requirements defined in the **Consultants Requirements** catalog of the library.
  b. Select the required consultant requirements and click **Select**.

- To add items that are not defined in the library:
  a. In the **Others** field, enter the name of the requirement.
  b. Click **Add.** The requirement is displayed in the table.

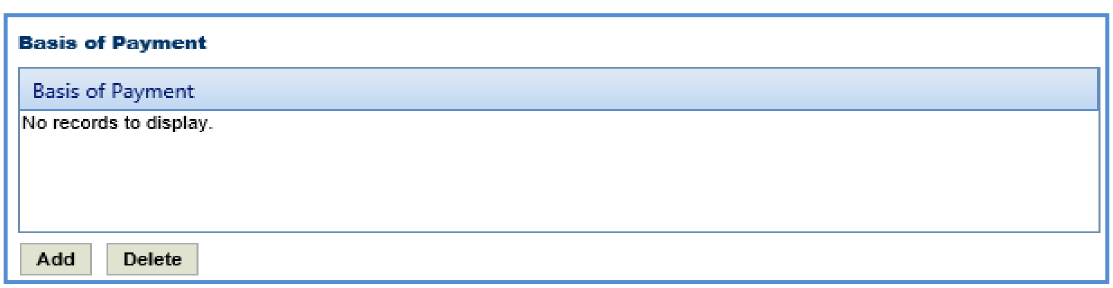
8. In the **Special Skills/Certification License (Listed in approximate order of importance)** section, perform the following steps to add Special Skills/Certification License details.



- To add items from library:
  a. Click **Add**. The **Special Skills** dialog box is displayed listing all the special skills/certifications/licenses defined in the **Special skills-certifications-Licenses** catalog of the library.
  b. Select the required special skills and click **Select**.

- To add items that are not defined in the library:
  a. In the **Others** field, enter the name of the skill/certification.
  b. Click **Add.** The skill/ certification is displayed in the table.

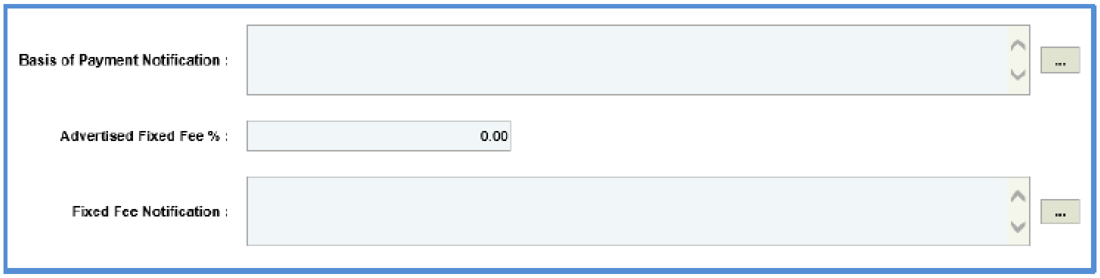
9. In the **Basis of Payment** section, perform the following steps to add basis of payment details.



  a. Click **Add**. The **Basis of Payment** dialog box is displayed listing all the basis of payments defined in the **Basis of Payment** catalog of the library.
  b. Select the required basis of payments and click **Select**. The selected basis of payments is listed in the table

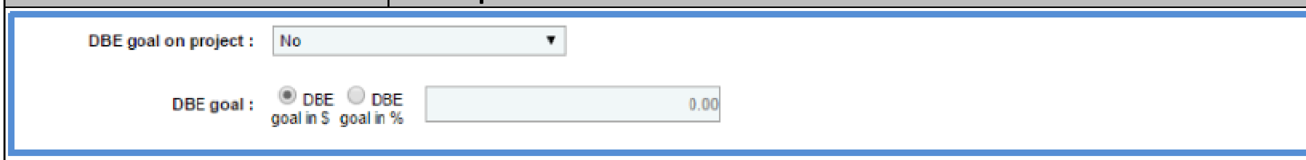
10. Enter information in the other required fields. The fields are described in the following table.

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

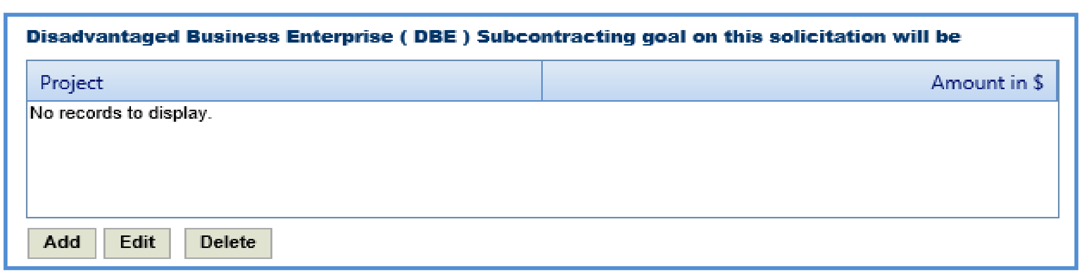
Field	Description
	
Basis of Payment Notification	To add basis of payment notification: 1. Click ... The **Basis of Payment Notification** dialog box is displayed listing all the basis of payment notifications defined in the **Basis of Payment Notification** catalog of the library. 2. Select the required basis of payment notification and click **Select**.
Advertised Fixed Fee %	Enter the percentage of advertised fixed fee.
Fixed Fee Notification	To add fixed fee notification: 1. Click ... The **Fixed Fee Notification** dialog box is displayed listing all the fixed fee notifications defined in the Fixed Fee catalog library. 2. Select the required fee notification and click **Select**.

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

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

Field	Description
	
DBE goal on project	From the drop-down list, select the required option to indicate if there is a Disadvantaged Business Enterprise (DBE) goal on the projects. • If the select option is **Yes,** you can add DBE goal amount or percentage, and projects for the DBE goal. • If the selected option is **No**, then in the **Notification pertaining to DBE goals** field, you can select the notification **pertaining to DBE goals.**
DBE goal	• **DBE goal in $:** If this option is selected, then enter the DBE goal amount. • **DBE goal in %:** If this option is selected, then enter the DBE goal percentage.

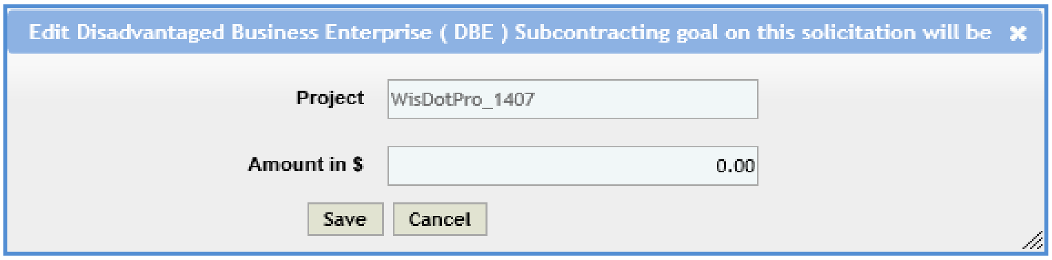
12. In the **Disadvantaged Business Enterprise (DBE) Subcontracting goal on this solicitation will be** section, perform the following steps to add projects for the DBE Subcontracting goal.



a. Click **Add**. The **Project Name** dialog box is displayed listing the projects associated with the solicitation.

b. Select the required projects and click **Select**. The project is displayed in the table.

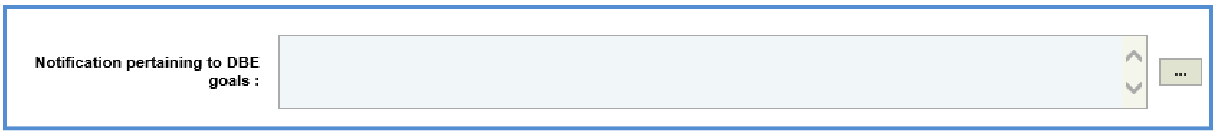
c. Select the project and click **Edit**. The **Edit Disadvantaged Business Enterprise (DBE) Subcontracting goal on this solicitation will be** dialog box is displayed.



d. Enter the value in the **Amount in $** field.

e. Click **Save**.

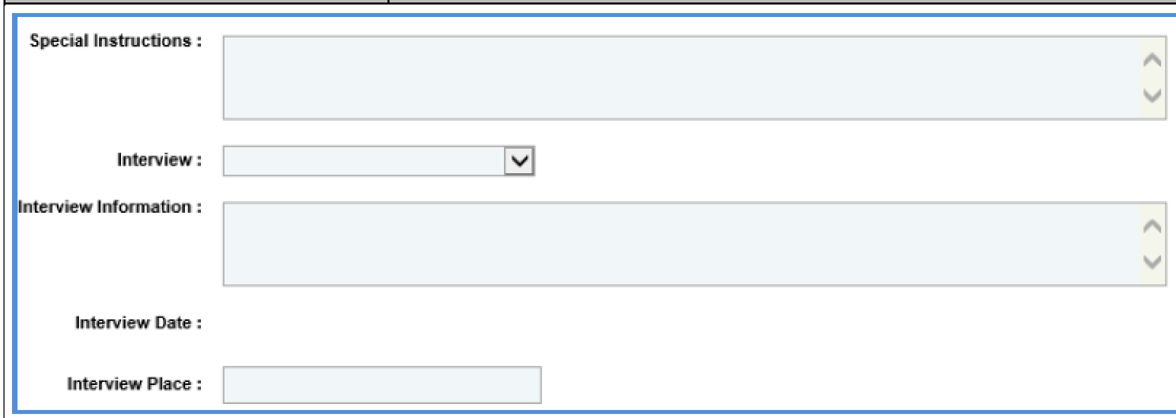
13. In the **Notification pertaining to DBE goals** field, the system allows you to select notifications pertaining to DBE goals in this field only when the value in the **DBE goal on project** field is **No**.



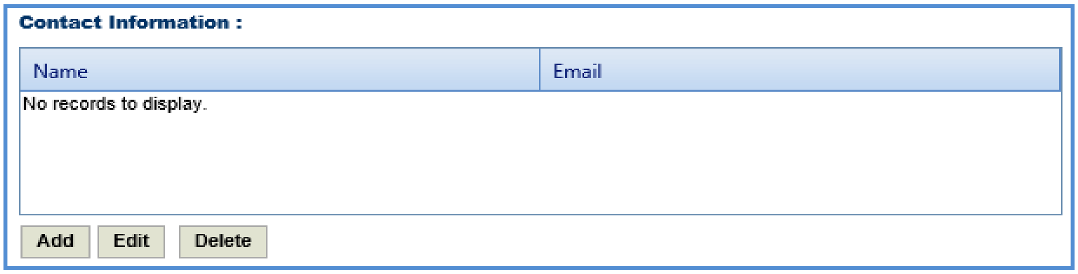
- To select notification pertaining to DBE goals:
  a. Click ... The **Notification pertaining to DBE goals** dialog box is displayed listing all the notifications pertaining to DBE goals that are defined in the **Notification pertaining to DBE goals** catalog of the library.
  b. Select the required notification pertaining to DBE goals and click **Select.**

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

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

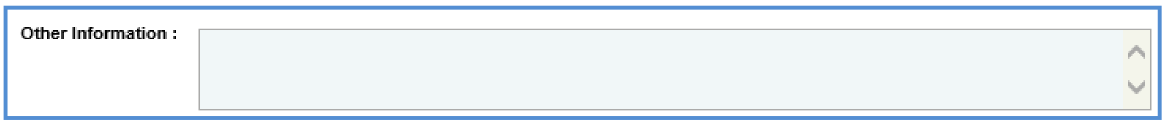
Field	Description
	
Special Instructions	Enter special instructions about the solicitation.
Interview	From the drop-down list, select the required option to indicate if an interview will be held with the shortlisted consultants. If the select option is **Interview will be conducted**, then the **Interview Information**, **Interview Date**, and **Interview Place** fields are available.
Interview Information	The field is available only where the value in the **Interview** field is **Yes**. Enter information about the interview.
Interview Date	From the drop-down calendar, select the date of interview.
Interview Place	To select an interview region/bureau: 1. Click ... The **Region/Bureau** dialog box is displayed listing all the regions/bureaus that are defined in the **Region/bureau** catalog of the library. 2. Select the required region/bureau and click **Select**.

15. In the **Contact Information** section, perform the following steps, to add contact information for consultants.



   a. Click **Add**. The **Name** dialog box is displayed listing all the active users from the list of User Accounts in the enterprise.
   b. Select the required contact names and click **Select**.

16. In the **Other Information** field, enter any other information about the solicitation scope of service.



17. Click **Save**.

3.3 Solicitation Task List

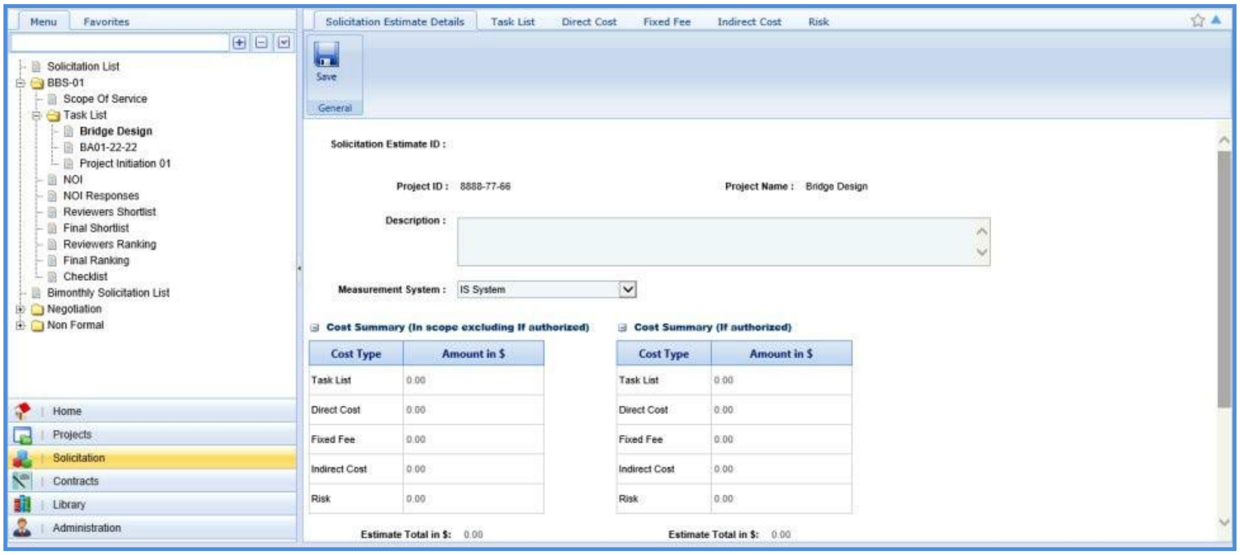
The solicitation task list allows you to define the solicitation estimate details, tasks, direct costs, fixed fees, indirect costs, and risks. Based on the contract type selected on the **Solicitation** page, the task list is defined.

3.3.1 Solicitation Task List for Regular Contract Type

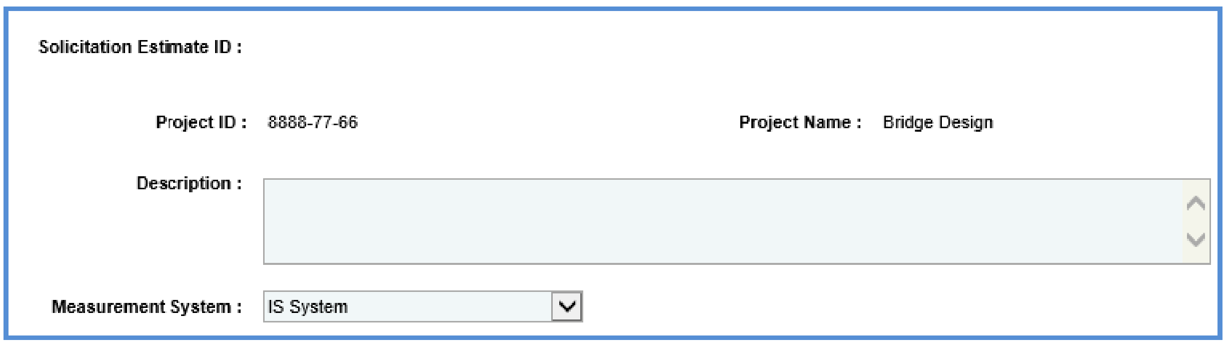
If the Solicitation **Contract Type** is **Regular,** then the task list is displayed separately for each project and the task details displayed are based on the project details.

To define the solicitation task list for regular contract type:

1. Select the solicitation for which you want to define the task list and click **Edit**.
2. In the navigation pane, expand the solicitation folder, and then expand the **Task List** folder. The list of projects associated with the solicitation is displayed.
3. Click the project for which you want to define the task list. The **Solicitation Estimate Details** tab is displayed.

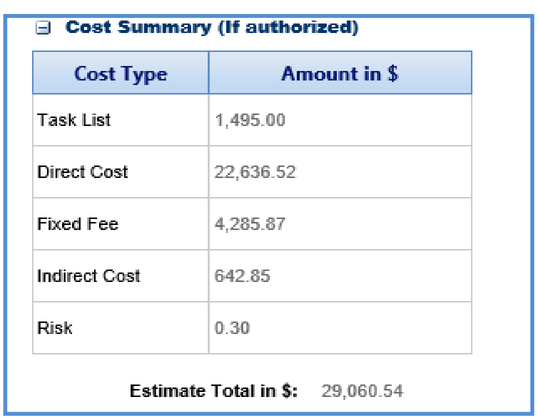


4. In the **Solicitation Estimate Details** tab, perform the following steps:
   a. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Solicitation Estimate ID	–	The solicitation estimate ID is auto generated.
Project ID	–	The project ID is auto populated.
Project Name	–	The project name is auto populated.
Description	Non-mandatory	Enter description about the solicitation estimate.
Measurement System	–	The measurement system is auto populated.

Note:

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



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

b. In the **Attachments** section, upload images and files relevant to the solicitation estimate. For information on attachments, refer [Attachments](#).

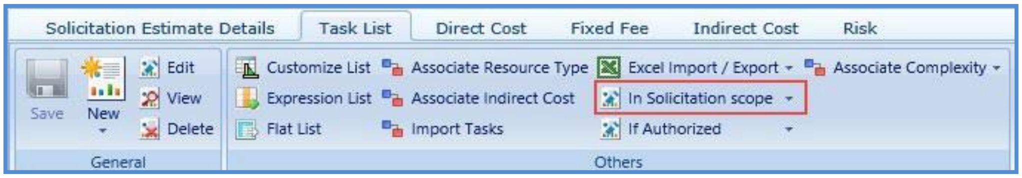
c. Click **Save.**

5. Click the **Task List** tab and perform the following steps:

***Note:** All the tasks that are associated with the project estimate are auto populated. However, you can add additional tasks. To add additional tasks, assign resources, and indirect costs, refer to the [adding direct labor cost task](#) as described in the **Creating Project Estimates** topic.*

a. To indicate tasks that are in scope of the solicitation, perform the following steps.

i. Select the tasks and then click **In Solicitation Scope** in the **Others** group.

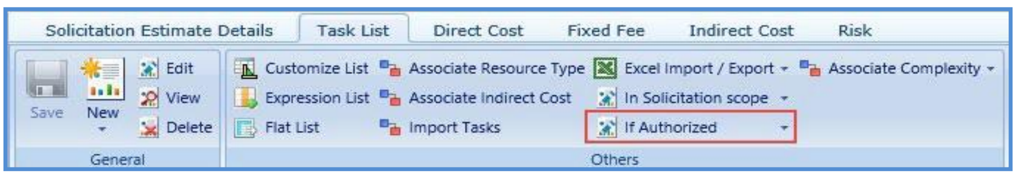


ii. From the **In Solicitation Scope** drop-down list, select **Yes**.

b. The tasks for which cost details are available for future implementation can be marked as authorized. To indicate tasks as authorized, perform the following steps:

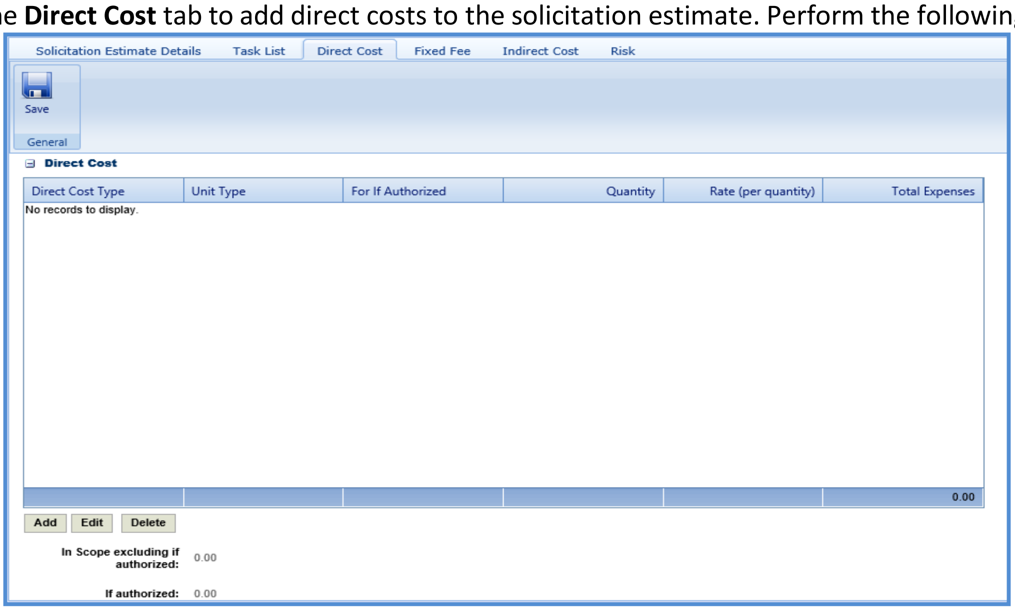
i. Select the tasks and then click **If Authorized** in the **Others** group.

ii. From the **If Authorized** drop-down list, select **Yes**.

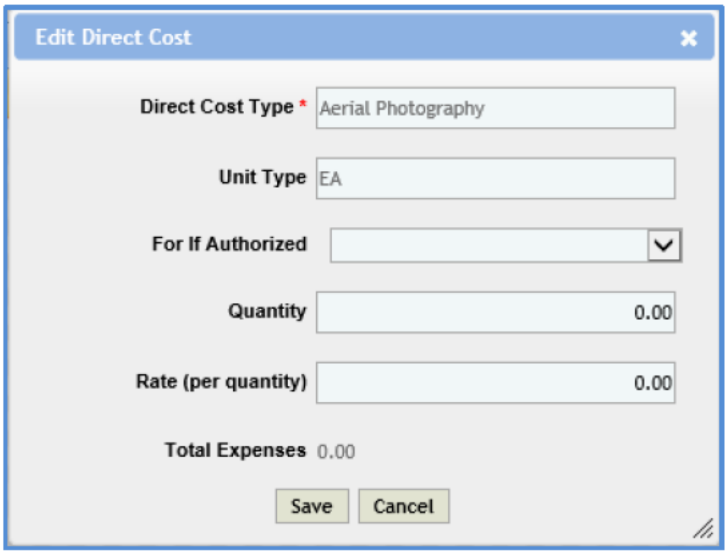


The total of task list costs that are marked as in scope and excluding task list costs that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of task list costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **Solicitation Estimate Details** tab.

6. Click the **Direct Cost** tab to add direct costs to the solicitation estimate. Perform the following steps:



1. Click **Add**. The **Direct Cost** dialog box is displayed listing all the direct costs. For availability of direct costs in the dialog box, direct costs must be defined in the **Direct Cost Type** catalog of the library.
2. Select the required direct costs.
3. Click **Select**. The selected direct costs are listed in the **Direct Cost** table.
4. Select the direct cost for which you want to indicate as authorized, add/edit quantity and rate details, and then click **Edit**. The **Edit Direct Cost** dialog box is displayed.
5. Enter information in the required fields. The fields are described in the following table.

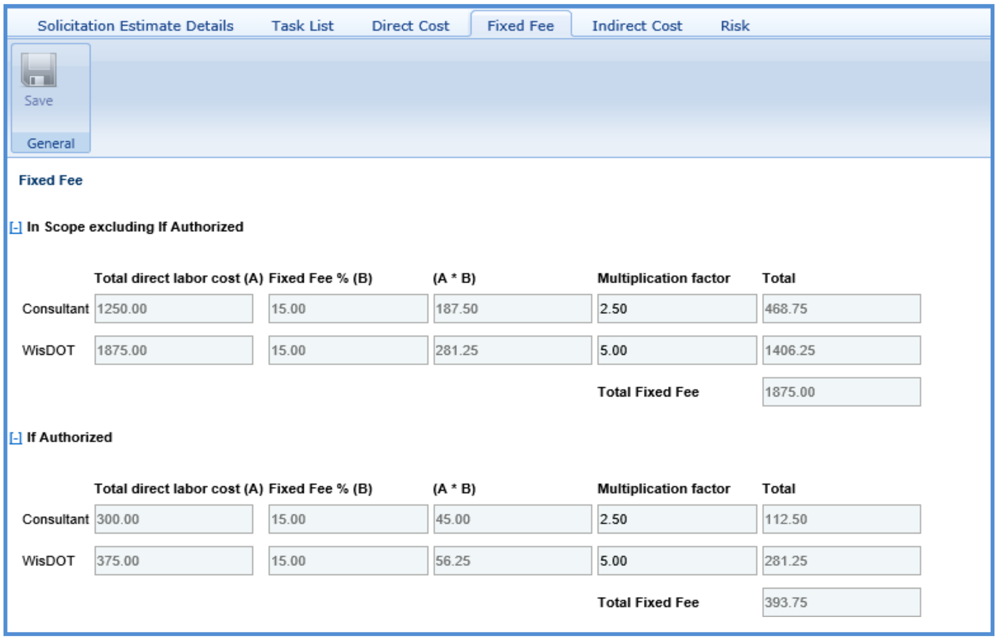
Field	**Mandatory / Non-Mandatory**	**Description**
		
Direct Cost Type	–	The name of the selected direct cost type is auto populated.
Unit Type	**Non-mandatory**	The unit type of the selected direct cost is auto populated.
For If authorized	**Non-mandatory**	From the drop-down list, select **Yes** or **No** to indicate whether the direct cost is authorized.
Quantity	**Non-mandatory**	Enter quantity for the direct cost.
Rate (per quantity)	**Non-mandatory**	Enter or edit the rate for one quantity of the direct cost.
Total Expenses	–	The total direct cost expenses based on the entered quantity and rate is auto calculated and displayed.

Note*: The total of direct costs that are in scope for the solicitation is auto calculated and displayed in the* ***In Scope excluding if authorized*** *field and the total of direct costs that are indicated as authorized is auto calculated and displayed in the* ***If authorized*** *field.*

f. Click **Save**.
The total of direct costs that are marked as in scope excluding direct costs that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of direct costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **Solicitation Estimate Details** tab.

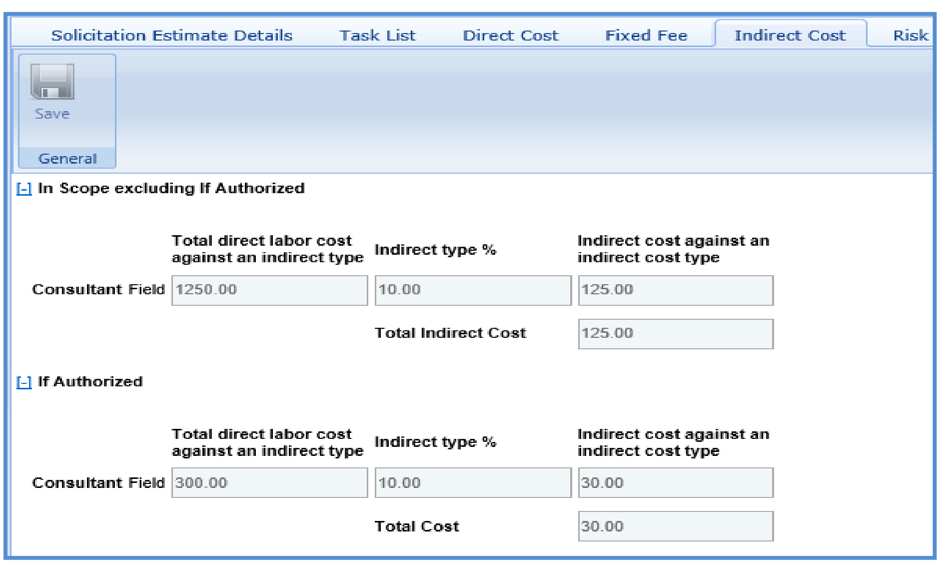
7. Click the **Fixed Fee** tab. The fixed fee details from the project estimate are displayed based on the tasks that are marked **In Scope** and **If Authorized**. The different field details that are displayed are described in the following table.

Note: *The information in the in the tab is displayed only if the value in the* ***Advertised Fixed Fee %*** *field is defined on the* ***Solicitation Scope of Service*** *page.*



Field	Description
Total direct labor cost	Indicates the total direct labor cost of the resource. The value in this field is auto populated based on the total direct labor cost in the **Task** page of the **Task List** tab.
Fixed Fee %	Indicates the percentage of fixed fee defined in the **Advertised Fixed Fee %** field on the **Solicitation Scope of Service** page.
(A*B)	The system displays the fixed fee amount, which is auto calculated based on the total direct labor cost and fixed fee percentage.
Multiplication factor	Indicates multiplication factor used to calculate the total fixed fee of a resource. The multiplication factor is auto populated based on the multiplication factor defined for the resource type in the **Resource Type** catalog of the library.
Total	Indicates the total fixed fee for the resource, which is auto calculated based on the fixed fee amount and the multiplication factor.
Total Fixed Fee	Indicates the total fixed fee of the solicitation estimate which is the auto calculated based on the total of fixed fees of all the resources.

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



8. Click the **Indirect Cost** tab. The indirect cost details of the solicitation are displayed. The different details that are displayed are described in the following table.

Note*: The Indirect Cost details can be viewed only when:*

- *The* ***Indirect Cost type*** *is defined on the* ***Solicitation Estimate Details*** *tab and*
- *The* ***Indirect Cost*** *is defined for the resources of the direct labor tasks and the required tasks are marked as* ***In Scope*** *and* ***If Authorized*** *in the* ***Task Lists*** *tab.*

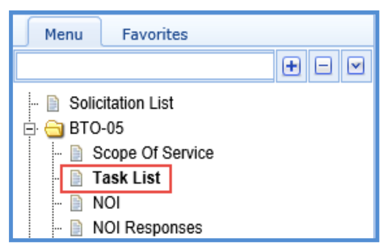
Field	Description
Total direct labor cost against an indirect type	Indicates the total direct labor cost associated with an indirect cost type for the resource. The value in this field is auto populated based on the total direct labor cost associated with an indirect cost type defined on the **New Task** page of the **Direct Labor Cost** tab.
Indirect type %	Indicates the percentage of indirect cost defined for the resource. The value in this field is auto populated based on the percentage defined in the **Indirect Cost Type** section of the **Solicitation Estimate Details** page.
Indirect cost against an indirect cost type	Indicates the indirect cost amount of a resource and associated indirect cost type, which is auto calculated based on the total direct labor cost and indirect type %.
Total	Indicates the total indirect cost for the resources associated with the same indirect cost type. This cost is auto calculated based on the indirect cost amount of all the specific resource types associated with the same indirect cost type.
Total Indirect Cost	Indicates the total indirect cost amount of the solicitation estimate, which is the auto calculated based on the total of indirect costs of all the resource types.

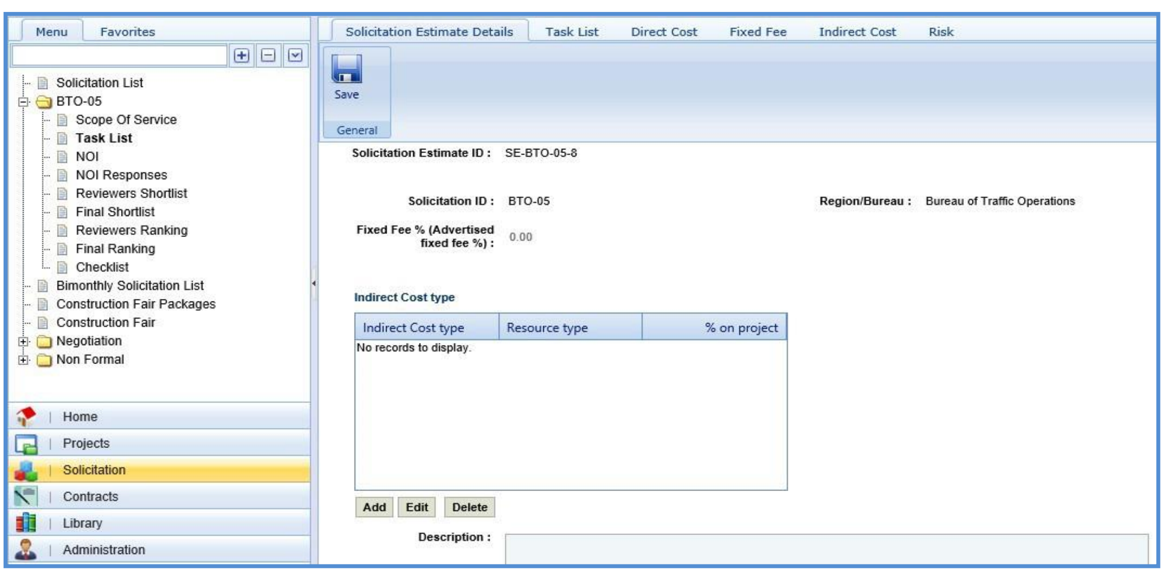
3.3.2 Solicitation Task List for Master Contract Type

If the solicitation contract type is **Master**, then a task list is displayed to define the task details.

To define the solicitation task list for master contract type:

1. Select the solicitation for which you want to define the task list and click **Edit**.
2. In the navigation pane, expand the solicitation folder, and then click **Task List**. The **Solicitation Estimate Details** tab is displayed.

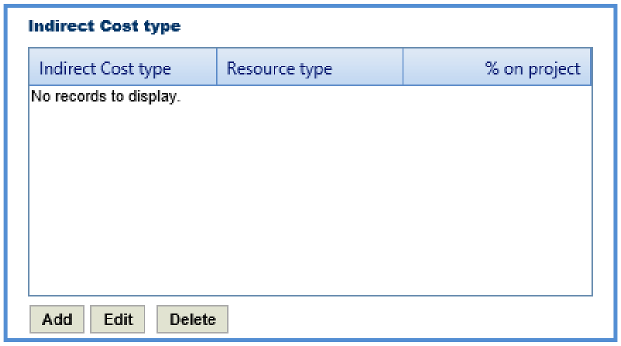




3. In the **Solicitation Estimate Details** tab, perform the following steps:

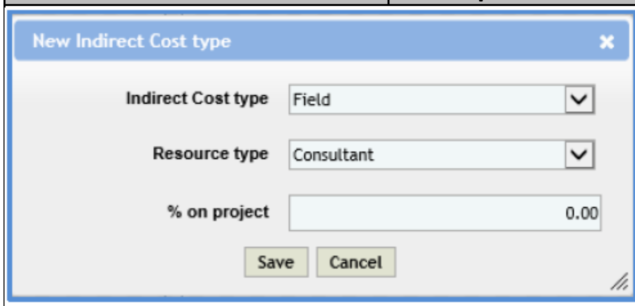
***Note**: The values in the **Solicitation Estimate ID, Solicitation ID, Region/Bureau,** and **Fixed Fee% (Advertised fixed fee %)** fields are auto populated.*

a. In the **Indirect Cost** type section, perform the following steps to add the indirect cost type for the solicitation.



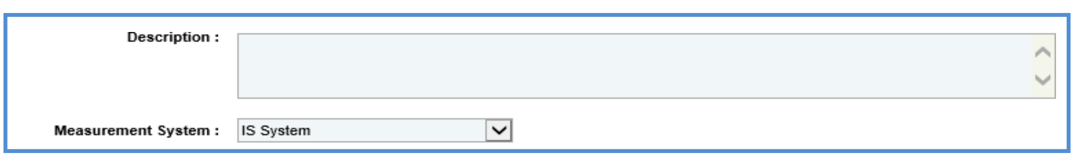
i. Click **Add**. The **New Indirect Cost Type** dialog box is displayed.

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

Field	Description
	
Indirect Cost type	From the drop-down list, select the type of indirect cost for the project. For availability of options in the drop-down list, the indirect cost types must be defined in the **Indirect Cost Type** catalog of the library.
Resource type	From the drop-down list, select the resource type associated with the indirect cost. For availability of options in the drop- down list, the resource types must be defined in the **Resource Type** catalog of the library.
% On project	Enter the percentage of project that is associated with the indirect cost.

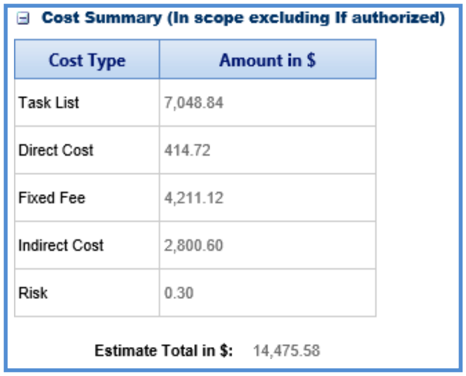
iii. Click **Save**.

b. In the **Description** field, enter the description about the solicitation estimate. ***Note**: The measurement system for the solicitation is auto populated.*



Note:

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

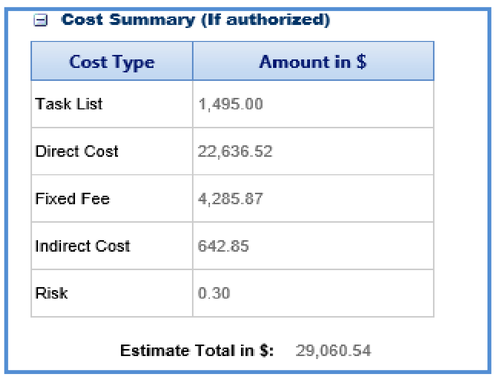


Cost Summary (In scope excluding If authorized)

Cost Type	Amount in $
Task List	7,048.84
Direct Cost	414.72
Fixed Fee	4,211.12
Indirect Cost	2,800.60
Risk	0.30

Estimate Total in $: 14,475.58

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



Cost Summary (If authorized)

Cost Type	Amount in $
Task List	1,495.00
Direct Cost	22,636.52
Fixed Fee	4,285.87
Indirect Cost	642.85
Risk	0.30

Estimate Total in $: 29,060.54

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

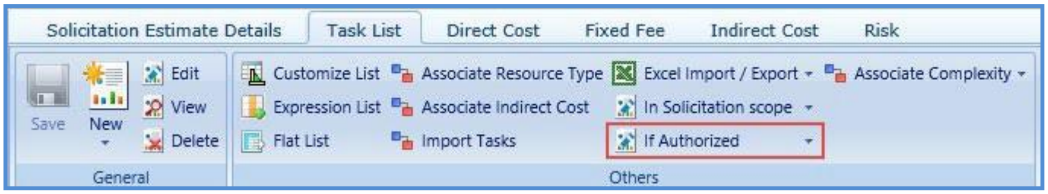
d. Click **Save.**

4. Click the **Task List** tab and perform the following steps:
   a. You can add tasks, assign resources, and indirect costs for solicitation. To add tasks, refer to the adding multiple direct labor cost tasks step described in the **Creating Project Estimates** topic.
   b. To indicate tasks that are in scope of the solicitation, perform the following steps.
      i. Select the tasks and then click **In Solicitation Scope** in the **Others** group.

      ii. From the **In Solicitation Scope** drop-down list, select **Yes**.

   c. The tasks for which cost details are available for future implementation can be marked as authorized. To indicate tasks as authorized, perform the following steps:

i. Select the tasks and then click **If Authorized** in the **Others** group.



ii. From the **If Authorized** drop-down list, select **Yes**.

The total of task list costs that are marked as in scope and excluding task list costs that are marked as if authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of task list costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **Solicitation Estimate Details** tab.

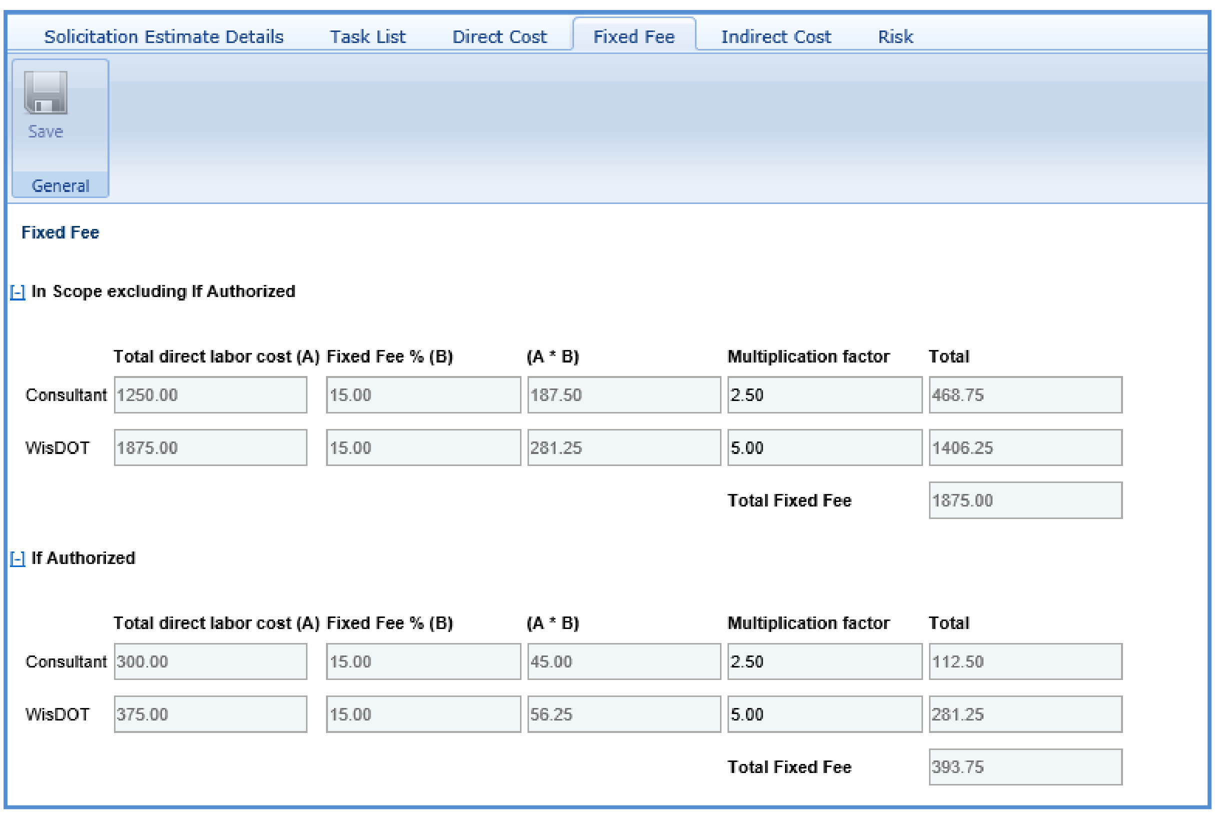
***Note:** The system allows you to bulk associate multiple tasks with the same resource type, indirect cost, or and complexity. For more information, refer to Bulk Association.*

5. Click the **Direct Cost** tab to add direct costs to the construction fair package estimate. Refer to adding direct cost step in Construction Fair Package Task List for Regular Contract Type.

   The total of direct costs that are marked as in scope excluding direct costs that are marked as if authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of direct costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **Solicitation Estimate Details** tab.

6. Click the **Fixed Fee** tab. The fixed fee details are displayed based on the direct labor tasks added and marked as **In Scope** and **If Authorized** in the **Task List** tab. The different field details that are displayed are described in the following table.

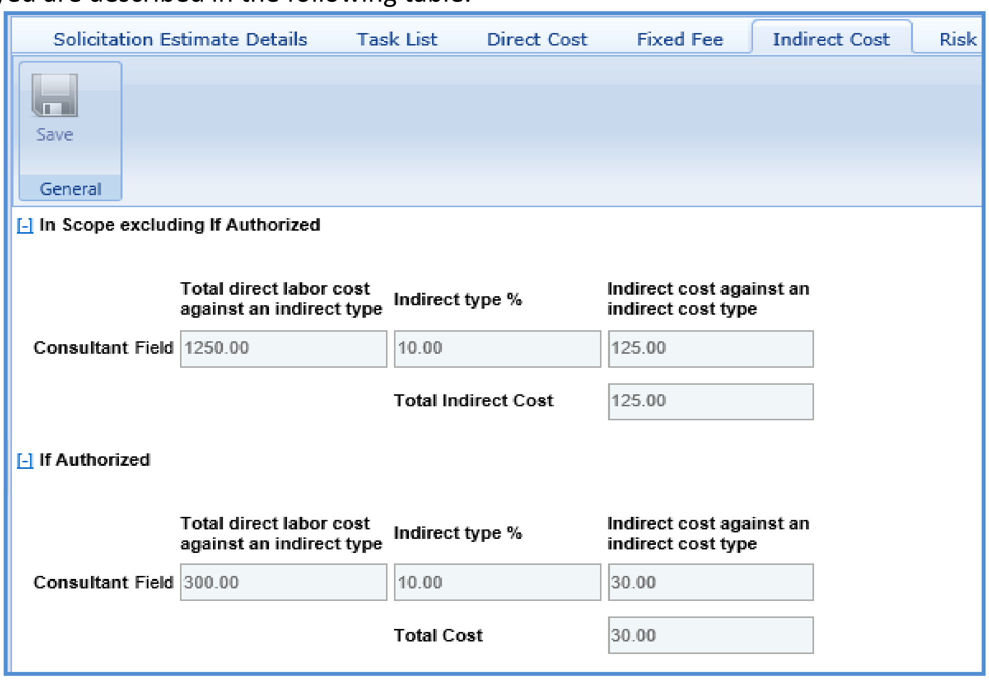
***Note:** The information in the **If Authorized** section in the tab is displayed only if the value in the **Advertised Fixed Fee %** field is defined on the* Solicitation Scope of Service page.



Field	Description
Total direct labor cost	Indicates the total direct labor cost of the resource. The value in this field is auto populated based on the total direct labor cost in the **Task** page of the **Task List** tab.
Fixed Fee %	Indicates the percentage of fixed fee defined in the **Advertised Fixed Fee %** field on the **Solicitation Scope of Service** page.
(A*B)	The system displays the fixed fee amount, which is auto calculated based on the total direct labor cost and fixed fee percentage.
Multiplication factor	Indicates multiplication factor used to calculate the total fixed fee of a resource. The multiplication factor is auto populated based on the multiplication factor defined for the resource type in the Resource Type catalog of the library.
Total	Indicates the total fixed fee for the resource, which is auto calculated based on the fixed fee amount and the multiplication factor.
Total Fixed Fee	Indicates the total fixed fee of the solicitation estimate which is the auto calculated based on the total of fixed fees of all the resources.

The total of fixed fees that are marked as **in scope** excluding fixed fees marked as **If Authorized** are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of fixed fees that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **Solicitation Estimate Details** tab.

7. Click the **Indirect Cost** tab. The indirect cost details of the solicitation are displayed. The different details that are displayed are described in the following table.



***Note**: The Indirect Cost details can be viewed only when:*

- *The **Indirect Cost type** is defined on the **Solicitation Estimate Details** tab and*
- *The **Indirect Cost** is defined for the resources of the direct labor tasks and the required tasks are marked as **In Scope** and **If Authorized** in the **Task Lists** tab.*

Field	Description
Total direct labor cost against an indirect type	Indicates the total direct labor cost associated with an indirect cost type for the resource. The value in this field is auto populated based on the total direct labor cost associated with an indirect cost type defined on the **New Task** page of the **Direct Labor Cost** tab.
Indirect type %	Indicates the percentage of indirect cost defined for the resource. The value in this field is auto populated based on the percentage defined in the **Indirect Cost Type** section of the **Solicitation Estimate Details** page.

Indirect cost against an indirect cost type	Indicates the indirect cost amount of a resource and associated indirect cost type, which is auto calculated based on the total direct labor cost and indirect type %.
Total	Indicates the total indirect cost for the resources associated with the same indirect cost type. This cost is auto calculated based on the indirect cost amount of all the specific resource types associated with the same indirect cost type.
Total Indirect Cost	Indicates the total indirect cost amount of the solicitation estimate, which is the auto calculated based on the total of indirect costs of all the resource types.

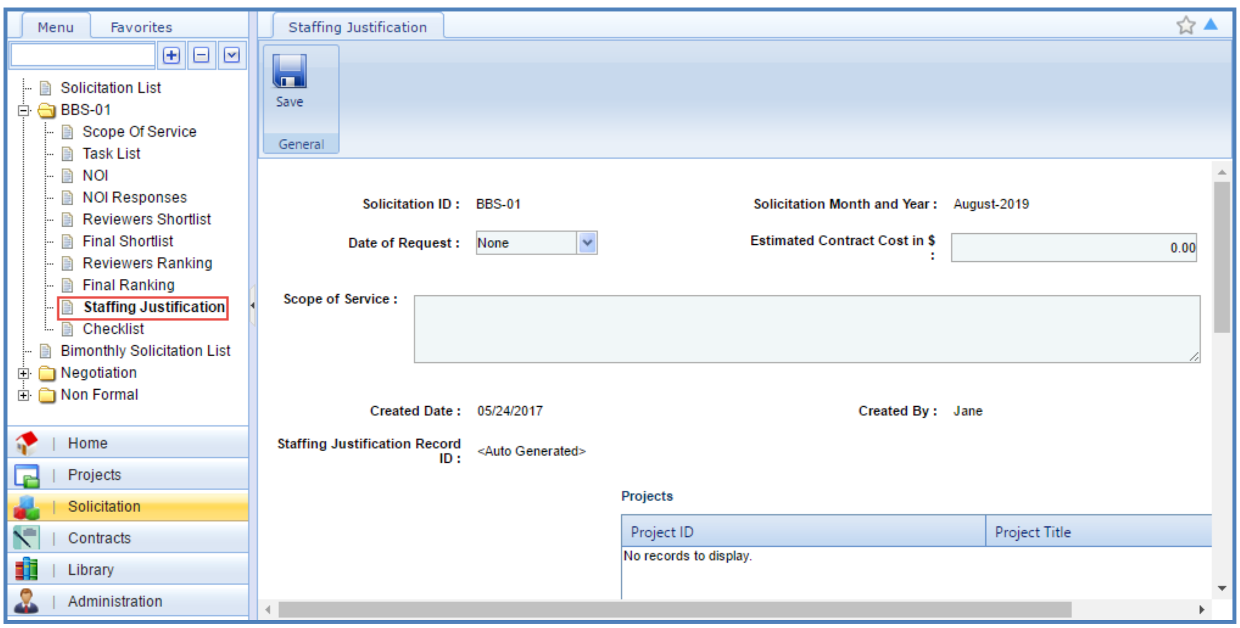
3.4 Staffing Justification

If the **Solicitation Type** is **Period**, the system allows you to justify the staffing requirements for the solicitation through the **Staffing Justification** page.

Pre-requisite: On the **Solicitation** page, the **Solicitation Type** should be **Period** and the value selected in the **Staffing Justification Required** field should be **Yes**.

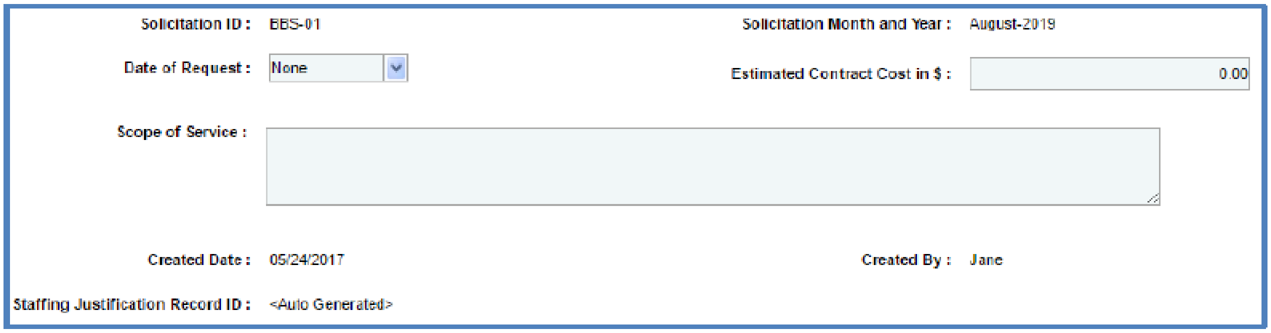
Steps:

1. Select the solicitation for which you want to justify the staffing and click **Edit**.
2. In the navigation pane, expand the solicitation folder, and then click **Staffing Justification**. The **Staffing Justification** page is displayed.



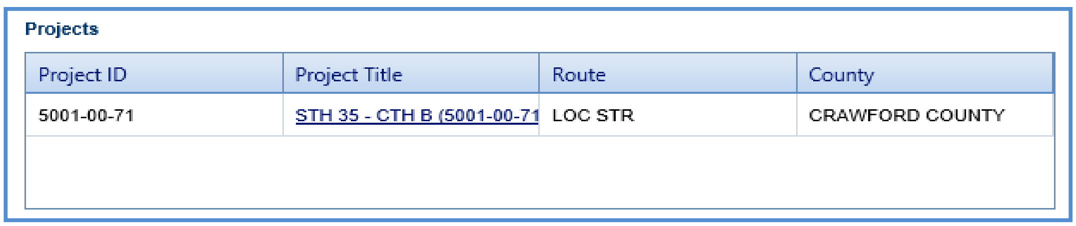
3. Enter information in the required fields. The fields are described in the following table.

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



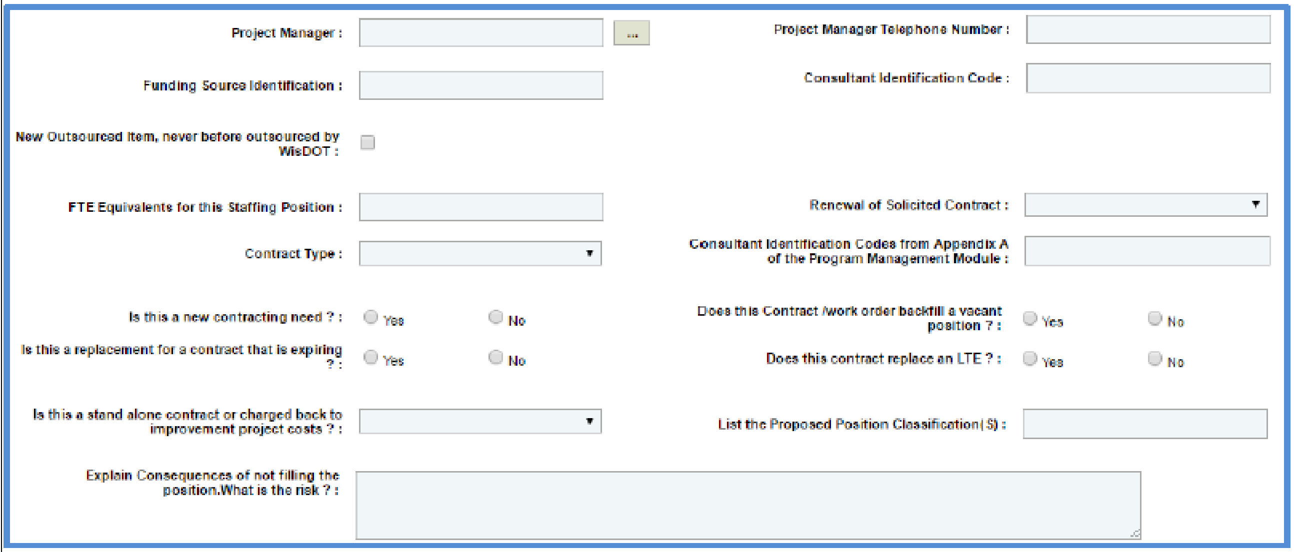
Field	Description
Solicitation ID	The Solicitation ID is auto populated.
Solicitation Month and Year	The month and year of the solicitation is auto populated.
Date of Request	From the drop-down calendar, select the date of request of staffing justification.
Estimated Contract Cost in $	Enter the estimated cost of the contract.
Scope of Service	Enter the details about scope of service.
Created Date	The date when staffing justification record is created is auto populated.
Created By	The name of the person who is providing the staffing justification is auto populated.
Staffing Justification Record ID	The unique ID of the staffing justification record is auto generated.

***Note**: The Projects table lists all the projects that are associated with the solicitation if the **Contract Type** is **Regular**. You can click the required **Project Title** link to view the **Project Details** page in a different tab.*



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

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



Field	Description
Project Manager	To select a project manager: 1. Click ... and the **Select Project Manager** dialog box is displayed. The dialog box lists users who are in the Project Manager role from the list of User Accounts in the enterprise. 2. Select a user and click **Select**.
Project Manager Telephone Number	Enter the contact number of the project manager.
Funding Source Identification	Enter the funding source identification details.
Consultant Identification Code	Enter the consultant identification code.
New Outsourced Item, never before outsourced by WisDOT	Select the check box to indicate that the item is newly outsourced by WisDOT.
FTE Equivalents for this Staffing Position	Enter FTE equivalents details for the staffing position.
Renewal of Solicited Contract	From the drop-down list, select the year for renewal of solicited contract.
Contract Type	From the drop-down list, select whether the contract type is **Work Order Required** or **Solicited Contract**.
Consultant Identification Codes from Appendix A of the Program Management Module	Enter the consultant identification codes from appendix A of the program management module.
Is this a new contracting need? :	Click **Yes** to indicate if the staffing requirement is a new contracting need or click **No** to indicate if the staffing requirement is a not a new contracting need.
Does this Contract /work order backfill a vacant position?	Click **Yes** to indicate if the staffing requirements is for filling a vacant position of the contract/work order or click **No** to indicate if the staffing requirements is not for filling a vacant position of the contract/work order.
Is this a replacement for a contract that is expiring?	Click **Yes** to indicate the staffing requirements is for replacing a contract that is expiring or click **No** to indicate the staffing requirements is not for replacing a contract that is expiring.

Field	Description
Is this a replacement for a contract that is expiring?	Click **Yes** to indicate the staffing requirements is for replacing a contract that is expiring or click **No** to indicate the staffing requirements is not for replacing a contract that is expiring.
Does this contract replace an LTE?	Click **Yes** to indicate the contract is replacing an LTE or click No to indicate the contract is not replacing an LTE.
Is this a standalone contract or charged back to improvement project costs?	From the drop-down list, select whether the contract is a **Standalone Contract** or **Charged back** to improvement project costs.
List the Proposed Position Classification(S)	Enter proposed position classification details.
Explain Consequences of not filling the position. What is the risk?	Enter risk and consequence details if the position is not filled.

5. Click **Save**.

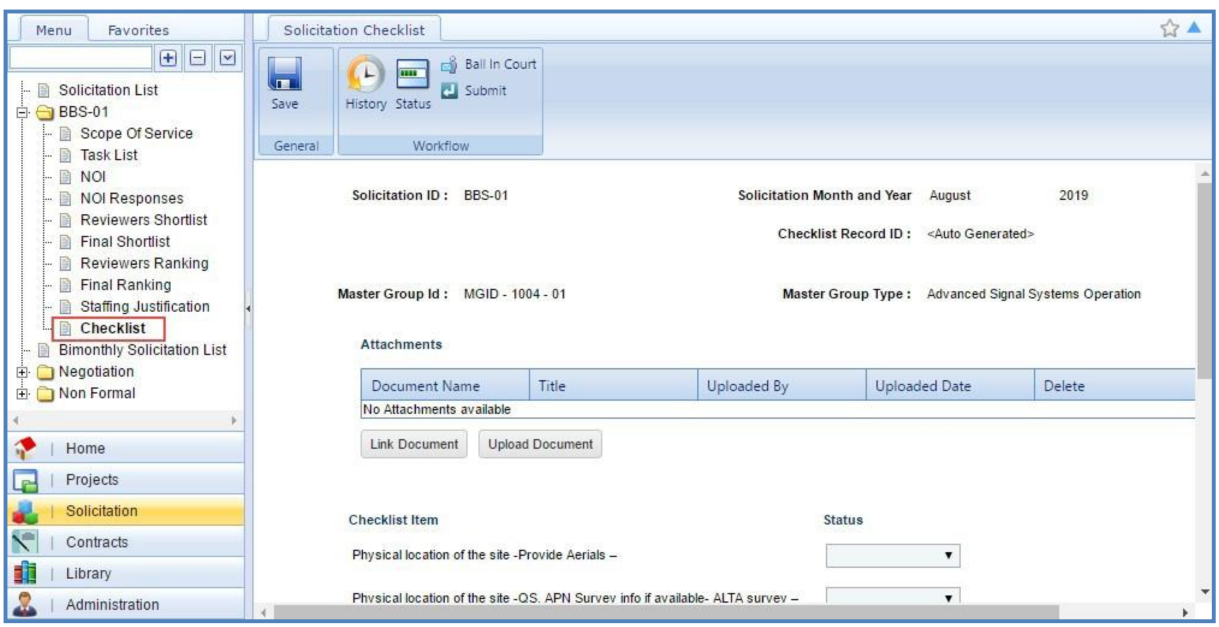
3.5 Submitting Solicitation Checklist

The checklist of the solicitation allows you to attach any relevant documents for the solicitation, update the status of the checklist items, and enter comments about the solicitation checklist.

Pre-requisite: Prior to submitting a checklist, the **Basis of Payment,** and **Advertised Fixed Fee%** for the solicitation must be defined on the **Solicitation Scope of Service** page.

To update and submit the solicitation checklist:

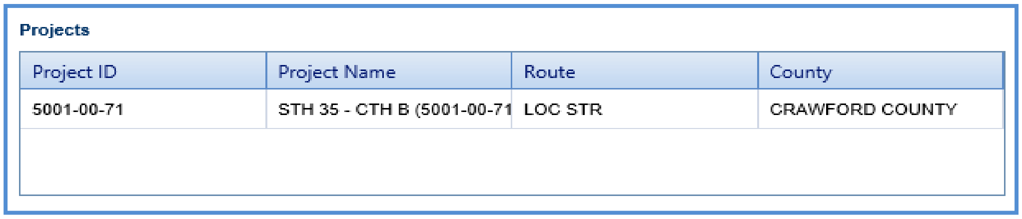
1. Select the solicitation, and then click **Edit**.
2. In the navigation pane, expand the solicitation folder, and then click **Checklist**. The **Solicitation Checklist** page is displayed.



Note:

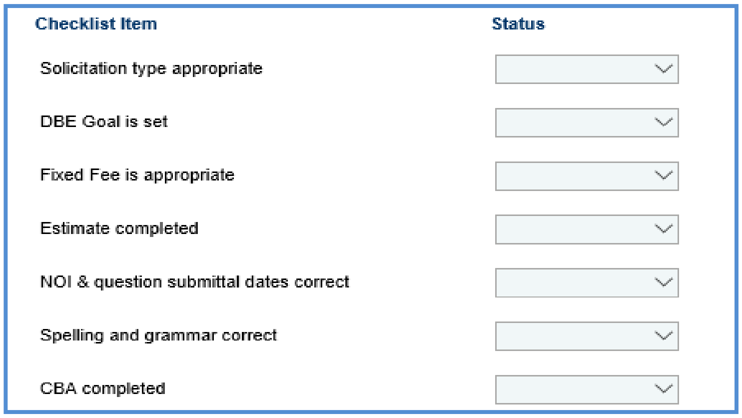
- *The values in the **Solicitation ID**, **Solicitation Month and Year**, and **Checklist Record ID** fields are auto populated.*
- *If the **Contract Type** is **Master**, then the values in the **Master Group Id** and **Master Group Type** fields are auto populated.*

- *If the **Contract Type** is **Regular**, then the **Projects** table is displayed listing all the projects that are associated with the solicitation.*


Projects

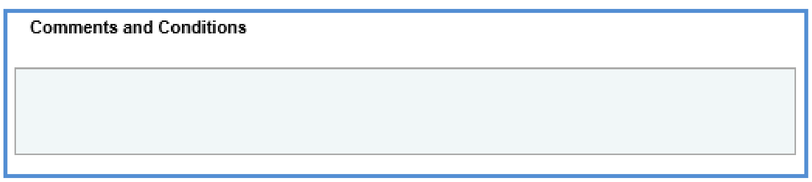
Project ID	Project Name	Route	County
5001-00-71	STH 35 - CTH B (5001-00-71	LOC STR	CRAWFORD COUNTY

3. In the **Attachments** section, upload images and files relevant to the solicitation checklist. For information on attachments, refer *Attachments*.
4. Corresponding to a checklist item, from the **Status** drop-down list, select the status for each item. This is mandatory to submit the checklist.



Checklist Item	Status
Solicitation type appropriate	
DBE Goal is set	
Fixed Fee is appropriate	
Estimate completed	
NOI & question submittal dates correct	
Spelling and grammar correct	
CBA completed	

5. In the **Comments and Conditions** section, enter comments and conditions about the solicitation checklist.



6. Click **Save**.
7. In the **Workflow** group, click **Submit**. The **WisDOT – Masterworks** dialog box is displayed.
8. Enter required information and then click **OK.** Optionally, in the **Workflow** group, you can click **Close** or **Redraft**, enter required information in the dialog box that is displayed, and then click **OK** to close or redraft the record.

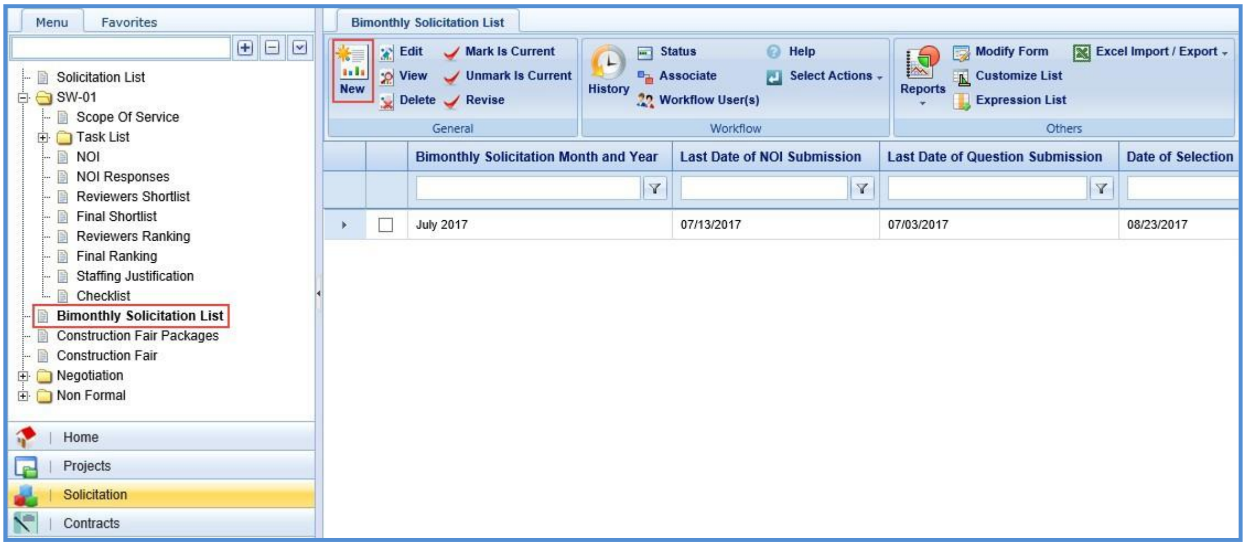
***Note:** You can add a solicitation to a bimonthly solicitation only when the checklist items status is updated and submitted.*

3.6 Creating and Publishing Bimonthly Solicitation

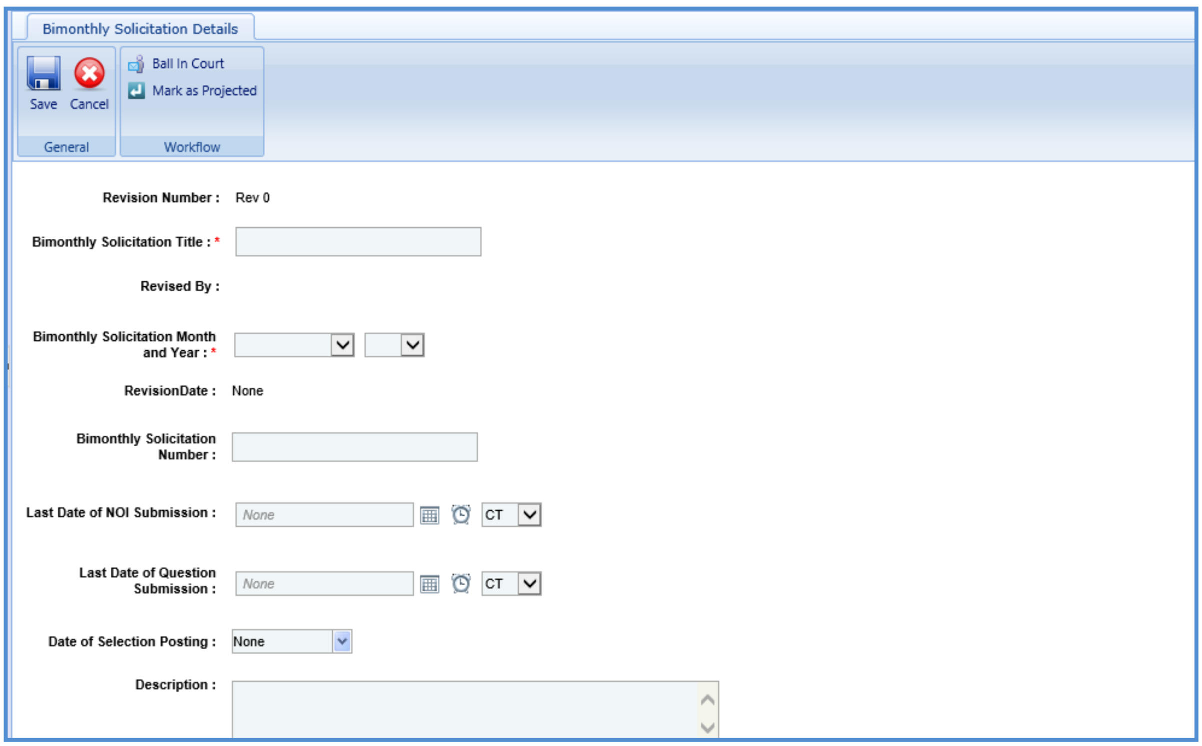
The system allows you to add multiple solicitations and create a **Bimonthly Solicitation** that will be published to the consultants. The consultants will provide response to the NOI questionnaire, based on which consultants will be shortlisted and ranked.

Steps:

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

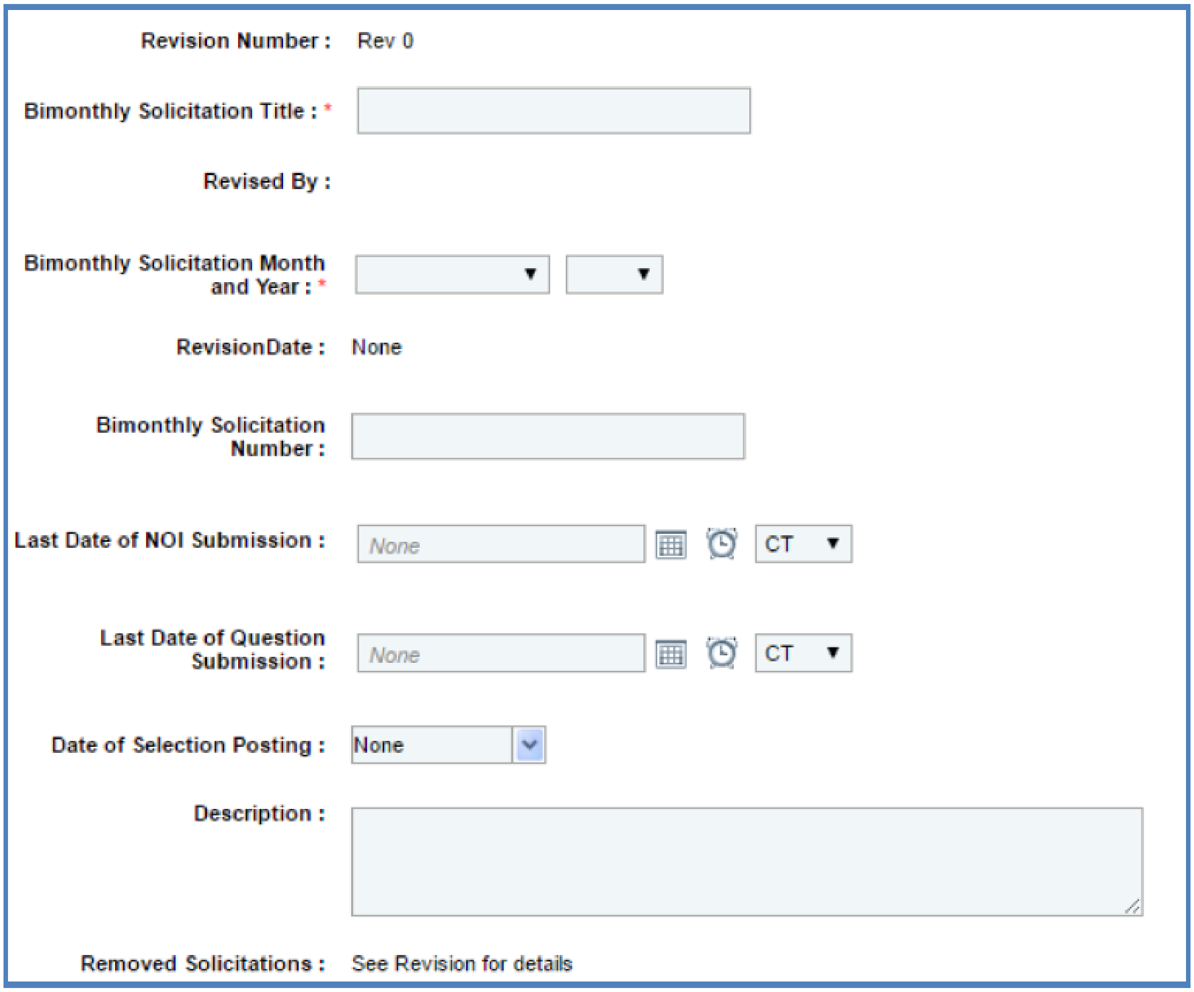


3. Click **New**. The **Bimonthly Solicitation Details** page is displayed.



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

Field	Mandatory / Non-mandatory	Description



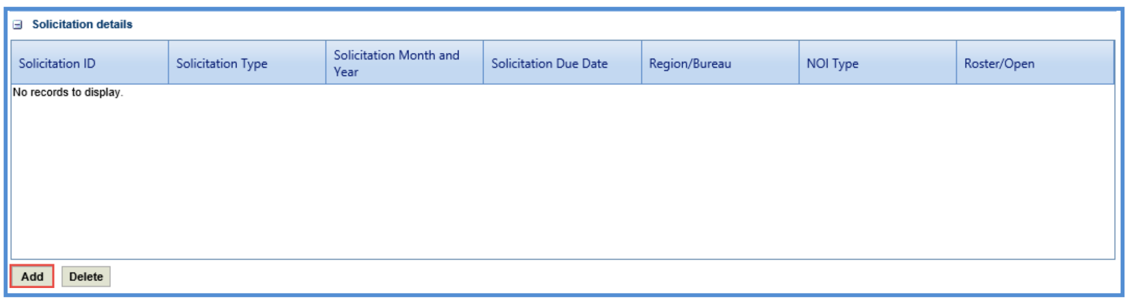
Field	Mandatory / Non-mandatory	Description
Revision Number	-	The revision number of the bimonthly solicitation is auto populated. This is applicable only when a bimonthly solicitation is revised.
Bimonthly Solicitation Title	Mandatory	Enter the title for the Bimonthly Solicitation.
Revised By	Non-mandatory	The name of the person who has revised the bimonthly solicitation is auto populated. This is applicable only when a bimonthly solicitation is revised.
Bimonthly Solicitation Month and Year	Mandatory	From the drop-down list, select the month and year of the bimonthly solicitation. You can create only one bimonthly solicitation for a specific combination of month and year.
Revision Date	Non-mandatory	The date when the bimonthly solicitation is revised is auto populated. This is applicable only when a bimonthly solicitation is revised.
Bimonthly Solicitation Number	Non-mandatory	Enter a unique number for the bimonthly solicitation.
Last Date of NOI Submission	Mandatory	Enter the last date and time for submission of the NOI by the consultant. Alternatively, you can click the calendar icon and clock icon to select the date and time. From the drop-down list, select the time zone.
Last Date of Question Submission	Mandatory	Enter the last date and time for submission of questions related to the NOI by the consultant. Alternatively, you can click the calendar icon and clock icon to select the date and time. From the drop-down list, select the time zone.

Field	Mandatory / Non-mandatory	Description
Date of Selection Posting	Non-mandatory	From the drop-down calendar, select the date when the consultants will be intimated about their selection.
Description	Non-mandatory	Enter description about the bimonthly solicitation.
Removed Solicitations	Non-mandatory	Indicates if any existing solicitations has been removed from the bimonthly solicitation during the bimonthly solicitation revision. This field is applicable only when a bimonthly solicitation is revised.

5. In the **Solicitation details** section, perform the following steps to add the solicitations.

Pre-requisite: The solicitation checklist must be submitted for the solicitation to be available for adding in the Bimonthly Solicitation.

a. In the **Solicitation details** section, click **Add**. The **Select Solicitation** dialog box is displayed. The dialog box lists all the solicitations that are of the same month and year as that of the bimonthly solicitation, for which the checklist is submitted, and solicitations that are not associated with any other bimonthly solicitation.



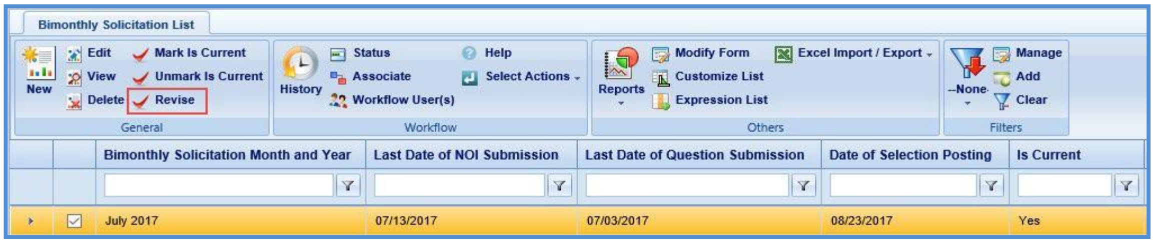
b. Select the solicitations to add to the Bimonthly Solicitation.
c. Click **Select**.

6. Click **Save**. The Bimonthly Solicitation is in the **Draft** workflow status.
7. Select the Bimonthly Solicitation record and click **Select Actions** in the **Workflow** group.
8. Click **Mark as Projected** and then click **OK.** The **Workflow Status** of the Bimonthly Solicitation is set to p**rojected**.
9. Select the projected Bimonthly Solicitation record and click **Select Actions** in the **Workflow** group.
10. Click **Publish** and click **OK.** The **Workflow Status** of the Bimonthly Solicitation is set to **Published**. The bimonthly solicitation is published to the consultants. Once published, the consultant can access the bimonthly solicitation through the:
    - Masterworks application (https://wisdot.masterworkslive.com/Modules/USRMGMT/Login.aspx)
    - Public Portal (http:// wisdotprojects.masterworkslive.com)
11. Optionally, in the **Workflow** group, you can click **Complete** or **ReDraft**, enter required information in the dialog box that is displayed, and then click **OK** to complete or redraft the record.

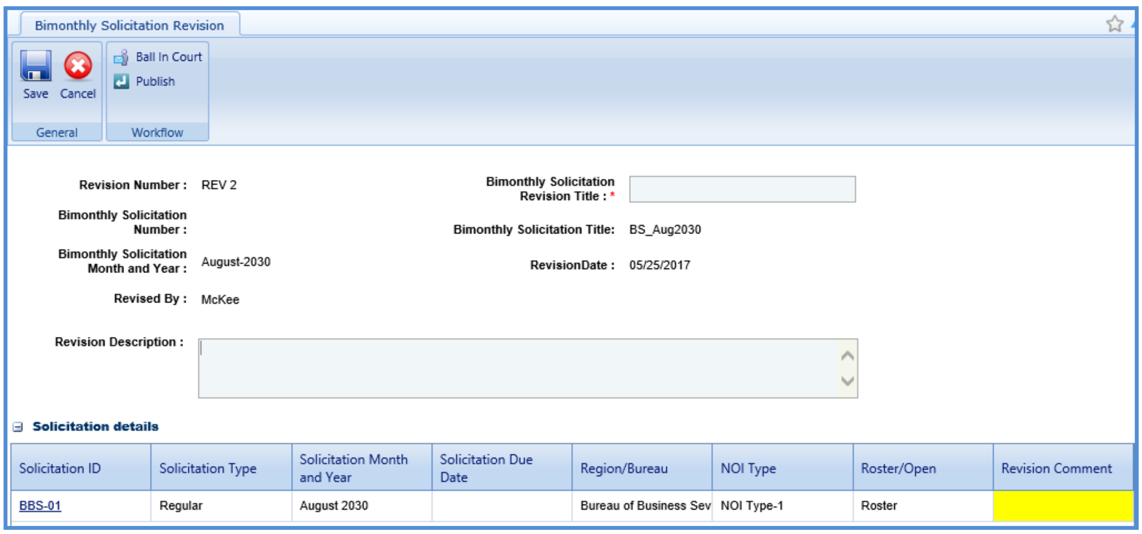
3.6.1 Revising Bimonthly Solicitation

A current Bimonthly Solicitation that is published can be revised to include changes. The solicitations associated with the Bimonthly Solicitation that is being revised, can also be edited.
The procedure to revise a current Bimonthly Solicitation is described.

1. On the **Bimonthly Solicitation List** page, select the published Bimonthly Solicitation that is marked as current, which you want to revise.



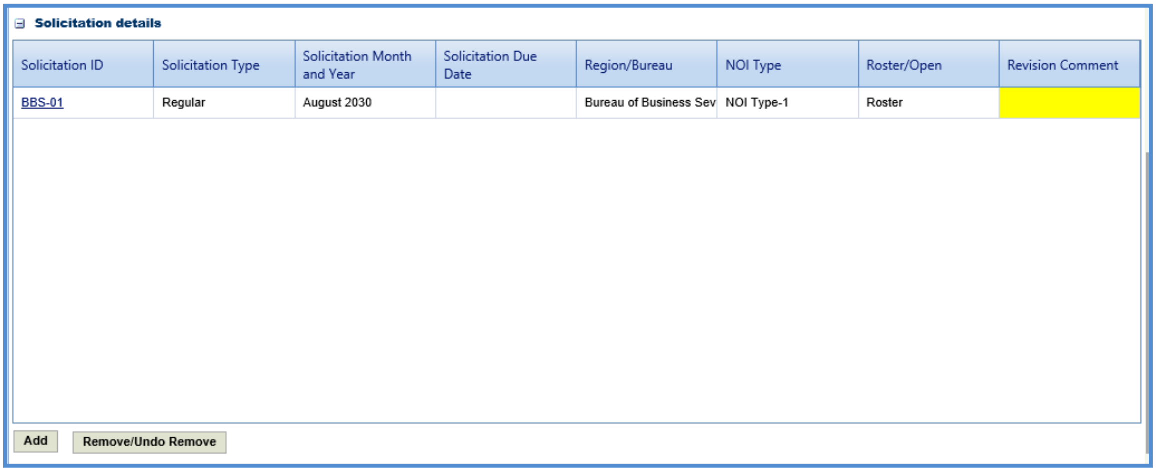
2. In the **General** group, click **Revise.** The **Bimonthly Solicitation Revision** page is available in the Bimonthly Solicitation folder in the navigation pane.
3. In the navigation pane, expand the Bimonthly Solicitation folder and then click the **Bimonthly Solicitation Revision**. The **Bimonthly Solicitation Revision** page is displayed with the Bimonthly Solicitation record in **Work in progress** status.
4. Select the record in the **Work in progress** status and click **Edit**. The **Bimonthly Solicitation Revision** details page is displayed.



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

Field	Mandatory / Non-mandatory	Description
Revision Number	**-**	The Revision Number of the Bimonthly Solicitation is auto populated.
Bimonthly Solicitation Revision Title	Mandatory	Enter a title for the Bimonthly Solicitation Revision.
Bimonthly Solicitation Number	**-**	The Bimonthly Solicitation Number is auto populated.
Bimonthly Solicitation Title	-	The title of Bimonthly Solicitation is auto populated.
Bimonthly Solicitation Month and Year	-	The Bimonthly Solicitation Month and Year is auto populated.
Revision Date	-	The date when the Bimonthly Solicitation is revised is auto populated.
Revised By	-	The name of the person who is revising the Bimonthly Solicitation is auto populated.
Revision Description	Non-mandatory	Enter description about the Bimonthly Solicitation revision.

6. In the **Solicitation** details section, you can perform the following revisions:



- Revise a solicitation that is associated with Bimonthly Solicitation.
- Click the link in the **Solicitation ID** column to edit the details of the solicitation.
- In the **Revision Comment** column, enter comments about the solicitation revision.
- To add a solicitation, perform the following steps:
  - i. Click **Add**. The **Select Solicitation** dialog box is displayed.
  - ii. Select the required solicitations and click **Select**.
  - iii. Click **Save**.
- To remove an existing solicitation, select the solicitation, and then click **Remove/Undo Remove**.

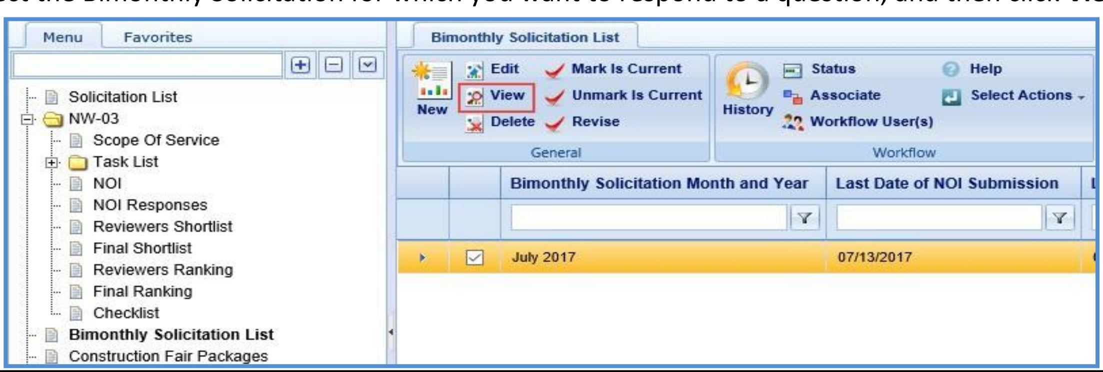
7. Select the revised Bimonthly Solicitation record. In the **Workflow** group, click **Select Actions**, click **Publish**, and then click **OK.** The revised Bimonthly Solicitation is published to the consultants and the **Revision Status** of the record on the **Bimonthly Solicitation** page is set to **Done**.
8. Optionally, in the **Workflow** group, you can click **Close**, enter required information in the dialog box that is displayed, and then click **OK** to close the record.

3.7 Responding to NOI Questions

The consultants can raise questions related to the solicitations published to them. These questions can be raised before the expiry of the **Last Date of Question Submission** set in the **Bimonthly Solicitation Details** page. You can provide answers to these questions. However, the answers can be published to the consultants only after the expiry of **Last Date of Question Submission.**

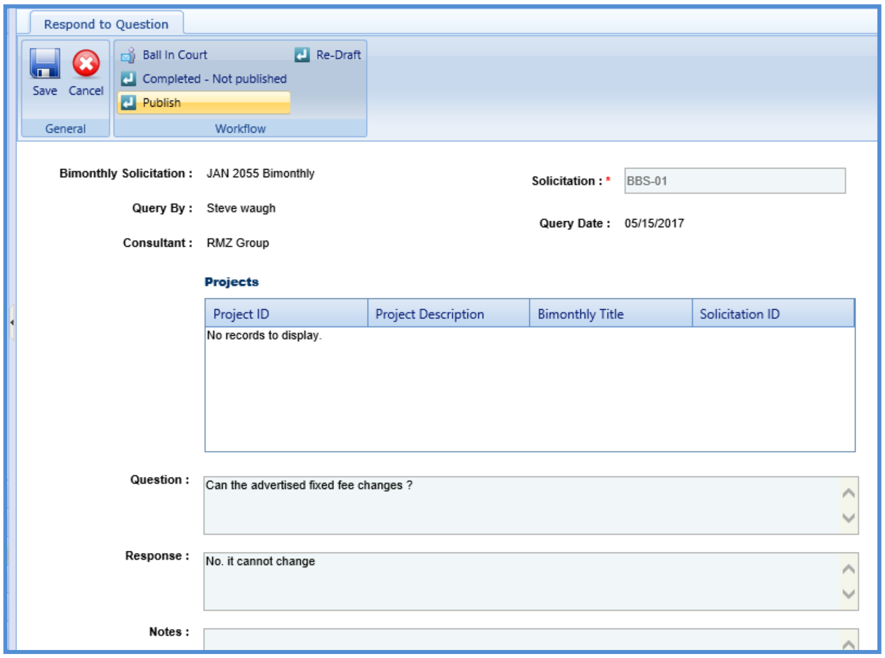
To answer the questions:

1. In the module menu, click **Solicitation**. The **Solicitation List** page is displayed.
2. In the navigation pane, click **Bimonthly Solicitation List**. The **Bimonthly Solicitation List** page is displayed.
3. Select the Bimonthly Solicitation for which you want to respond to a question, and then click **View**.



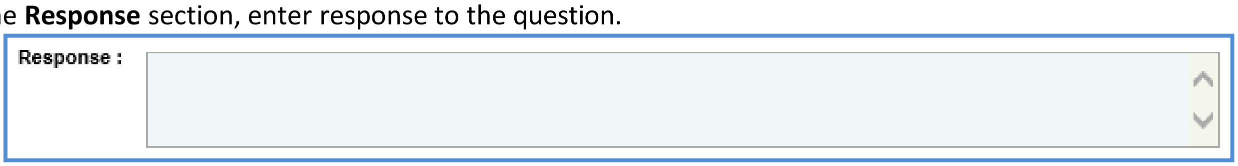
4. In the navigation pane, expand the bimonthly solicitation folder, and then click **Questions and Responses**. The **Questions and Responses** page is displayed.

5. Select the question for which you want to respond and click **Edit**. The **Respond to Question** page is displayed.

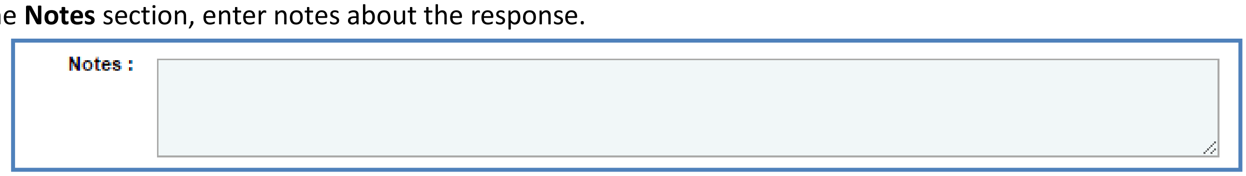


***Note**: The values in the **Bimonthly Solicitation, Solicitation, Query By, Query Date,** and **Consultant** fields are auto populated. In the Projects section, the projects associated with the Bimonthly Solicitation is auto populated.*

6. In the **Response** section, enter response to the question.



7. In the **Notes** section, enter notes about the response.



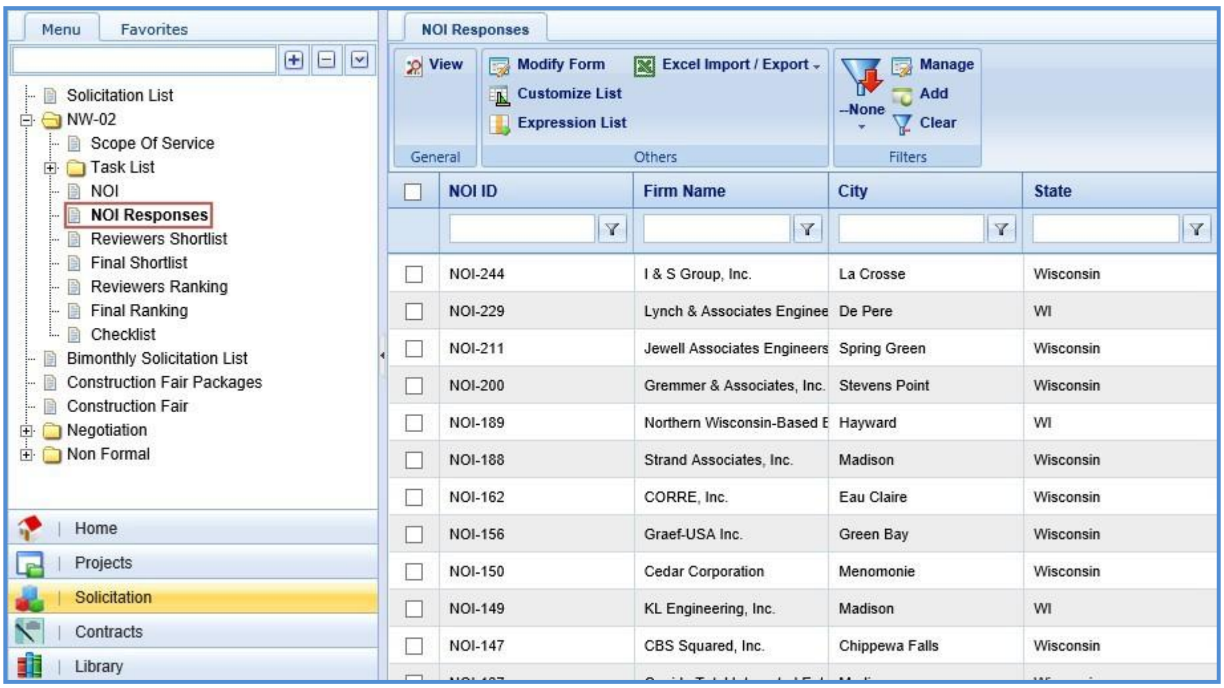
8. In the **Attachments** section, upload images and files relevant to the response. For information on attachments, refer *Attachments.*
9. Click **Save**.
10. Select the question and response record and in the **Workflow** group, click **Select Actions**.
11. Click **Publish.** The **WisDOT – Masterworks** dialog box is displayed.
12. Enter the required information and then click **OK.** The **Workflow Status** of the record is set to **Response Published**. The response to the 11. question is published to the consultants.

13. Optionally, if the response to the question need not be published to the consultants, enter notes in the **Notes** section. In the **Workflow** group, click **Completed – Not Published**, in the dialog box, enter required information, and then click **OK**. In the **Workflow** group, you can also click **ReDraft**, enter required information in the dialog box that is displayed, and then click **OK** to close or redraft the record.

3.8 Viewing NOI Responses

The procedure to view the consultants' responses of NOI Questionnaires is described.

1. Click **Solicitation** in the module menu. The **Solicitation List** page is displayed.
2. Select the solicitation for which NOI response must be viewed and click **View**. The **Solicitation** page is displayed.
3. In the navigation pane, expand the solicitation and click **NOI Responses**. The **NOI Responses** page is displayed.



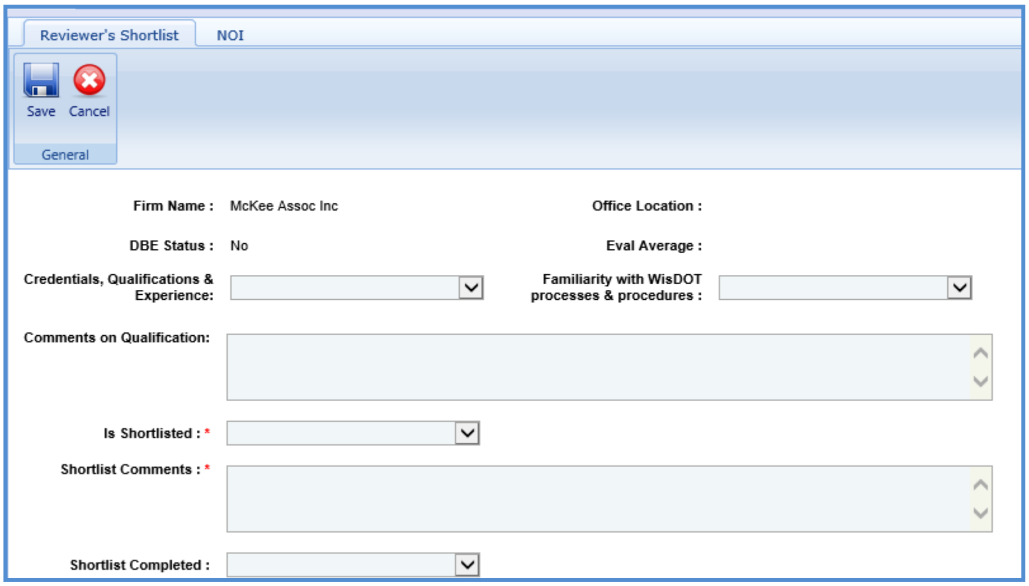
4. Select the **NOI Response** that you want to view and then click **View** in the **General** group. The duly filled **NOTICE OF INTEREST QUESTIONNAIRE** page is displayed.

3.9 Shortlisting Consultants

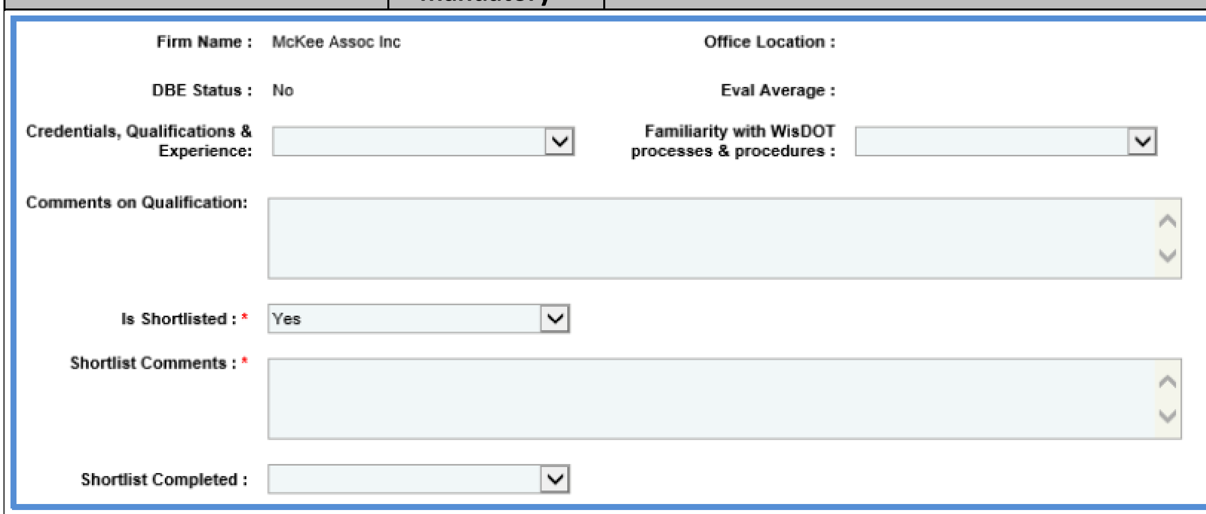
The consultant firms are shortlisted based on their NOI responses. The NOI responses are auto populated in the **Reviewer's Shortlist** page once the last date of NOI submission is expired. The procedure to shortlist the consultant firms is described.

1. In the module menu, click **Solicitation**. The **Solicitation List** page is displayed.
2. Select the solicitation for which the consultants must be shortlisted and click **View**. The **Solicitation** page is displayed.
3. In the navigation pane, expand the solicitation and click **Reviewers Shortlist**. The **Reviewer's Shortlist** page is displayed listing the consultant firms who have responded to the NOI.

4. Select a consultant firm record and click **Edit**. The **Reviewer's Shortlist** page of the record is displayed.

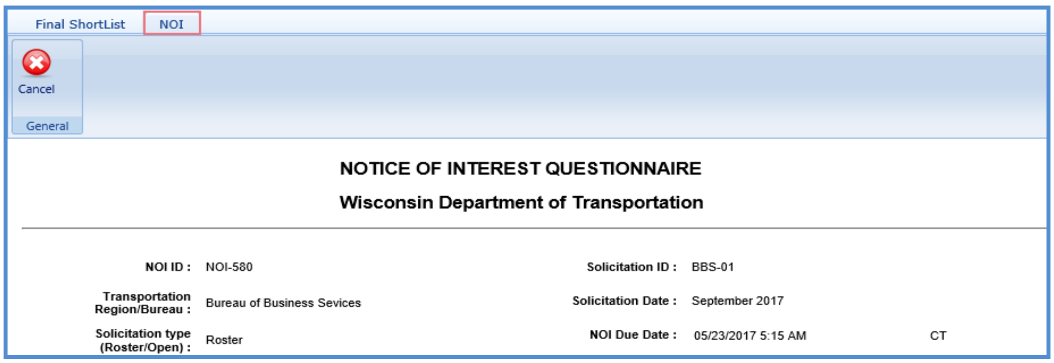


5. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory/Non-mandatory	Description
		
Firm Name	-	The consultant firm name is auto populated.
Office Location	-	The consultant firm's office location is auto populated.
DBE Status	-	The DBE Status of the consultant firm is auto populated.
Eval Average	-	The evaluated average is auto populated.

Field	Mandatory/Non - mandatory	Description
Credentials, Qualifications & Experience	Non-mandatory	From the drop-down list, select the required option.
Familiarity with WisDOT processes & procedures	Non-mandatory	From the drop-down list, select the required option.
Comments on Qualification	Non-mandatory	Enter comments about the consultant firm's qualification.
Is Shortlisted	Mandatory	From the drop-down list, select **Yes** to indicate that the consultant firm is shortlisted or select **No** to indicate that the consultant firm is not shortlisted.
Shortlist Comments	Mandatory	Enter comments about shortlisting of the consultant firm.
Shortlist Completed	Non-mandatory	From the drop-down list, select **Yes** to indicate that the shortlisting of consultant firm is completed or select **No** to indicate that the shortlisting of consultant firm is not completed.

Note: *Click the **NOI** tab to view the NOI response of the consultant firm.*



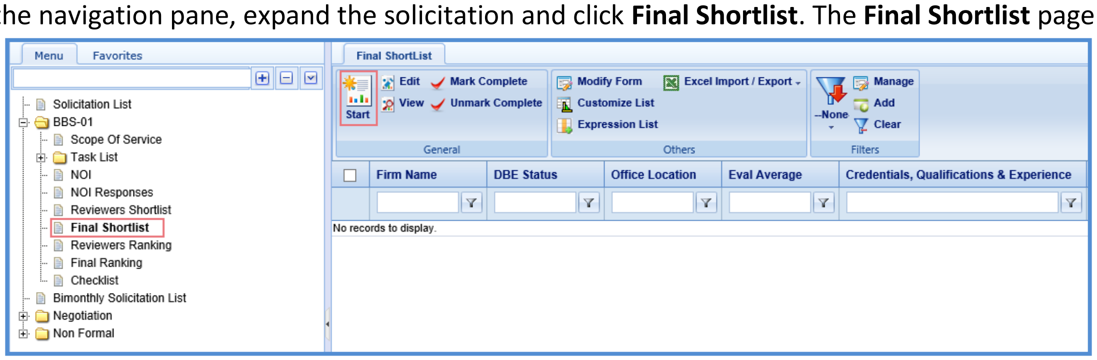
6. Click **Save.**
7. Select the records and click **Mark Complete** in the **General** group.

Note: *All the records on the **Reviewer's Shortlist** page must be marked as complete to proceed with the final shortlisting procedure.*

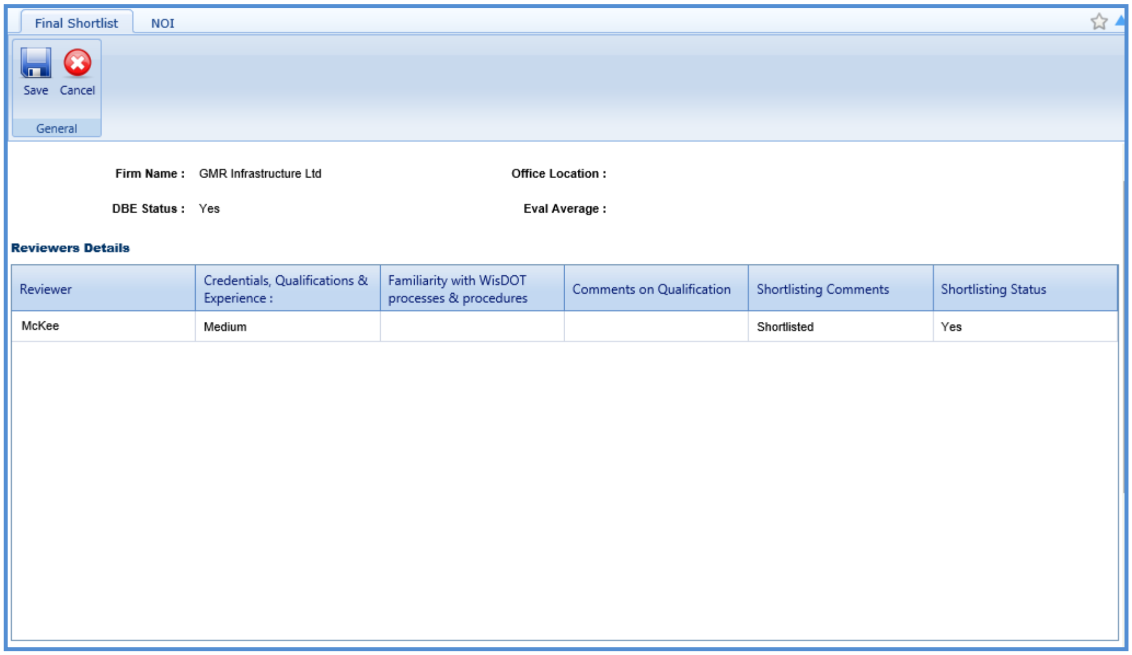
3.10 Final Shortlisting Consultants

Pre-requisite: All the consultant firm records on the **Reviewers Shortlist** page must be marked as completed. The procedure to final shortlist the shortlisted consultant firms.

1. Click **Solicitation** in the module menu. The **Solicitation List** page is displayed.
2. Select the solicitation for which the consultants must be final shortlisted and click **View**. The **Solicitation** page is displayed.
3. In the navigation pane, expand the solicitation and click **Final Shortlist**. The **Final Shortlist** page is displayed.

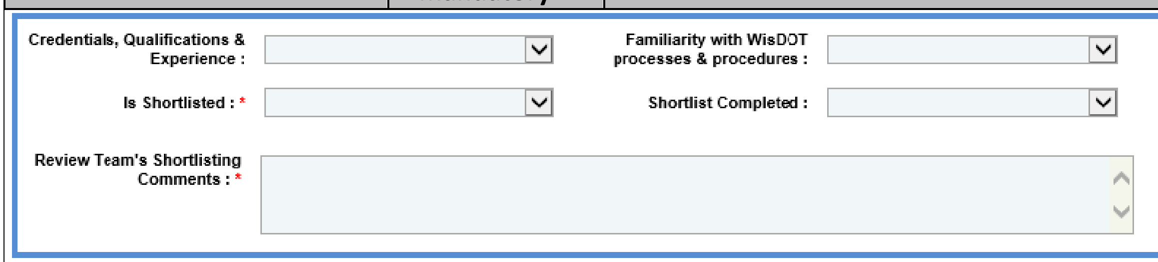


4. Click **Start** in the **General** group. All the consultant firm records are listed.
5. Select a consultant firm record which you want to final shortlist and click **Edit**. The **Final Shortlist** details page is displayed.

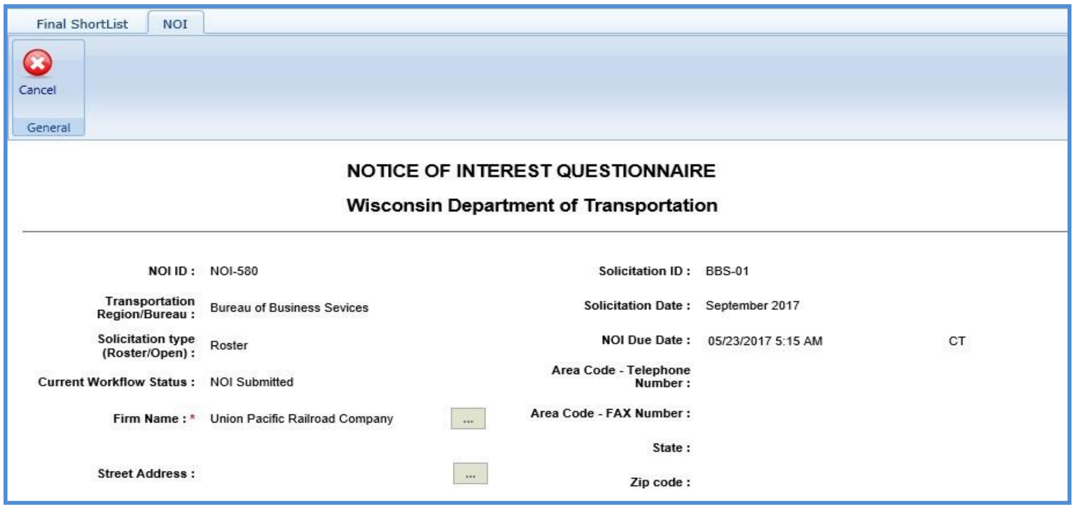


Note:
*The values in the **Firm Name, Office Location, DBE Status,** and **Eval Average** fields are auto populated. The **Reviewers Details** section auto-populates the reviewer's shortlisting details of the consultant firm.*

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

Field	Mandatory/Non - mandatory	Description
		
Credentials, Qualifications & Experience	Non-mandatory	From the drop-down list, select the required option.
Familiarity with WisDOT processes & procedures	Non-mandatory	From the drop-down list, select the required option.
Is Shortlisted	Mandatory	From the drop-down list, select **Yes** to indicate that the consultant firm is final shortlisted or select **No** to indicate that the consultant firm is not final shortlisted.
Shortlist Completed	Non-mandatory	From the drop-down list, select **Yes** to indicate that the final shortlisting of the consultant firm is completed or select **No** to indicate that the final shortlisting of consultant firm is not completed.
Review Team's Shortlisting Comments	Mandatory	Enter comments about final shortlisting of the consultant firm.

***Note**: Click the **NOI** tab to view the NOI response of the consultant firm.*



7. Click **Save.**
8. Select the records and click **Mark Complete** to complete the final shortlisting of the consultant firms.

Note*: The final shortlisted records are available for ranking.*

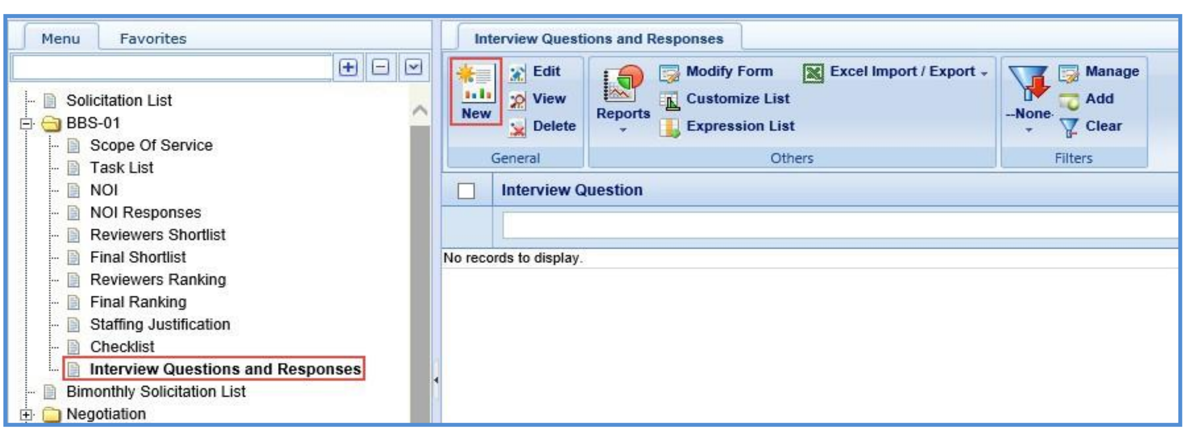
3.11 Interview Questions and Responses

If an interview is held with the shortlisted consultants before the ranking process, then the system allows you to record the questions asked and responses received during the interview process.

Pre-requisite: On the **Solicitation Scope of Service** page, the value in the **Interview** field should be **Interviews will be conducted.**

3.11.1 Recording Interview Questions

1. Click **Solicitation** in the module menu. The **Solicitation List** page is displayed.
2. Select the solicitation for which interview questions and responses must be recorded and then click **View**. The **Solicitation** page is displayed.
3. In the navigation pane, expand the solicitation and click **Interview Questions and Responses**. The **Interview Questions and Responses** page is displayed.

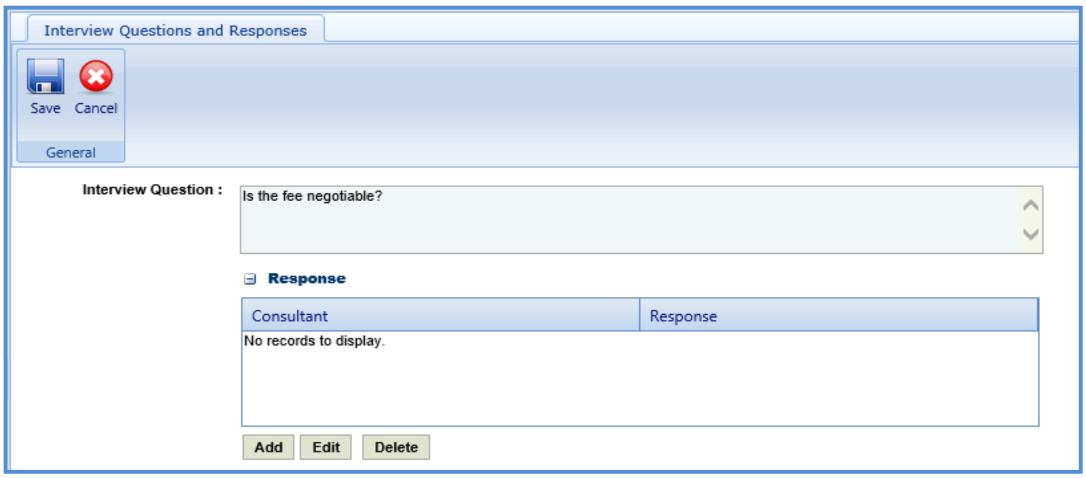


4. Click **New**. The **Interview Questions and Responses** page is displayed.
5. In the **Interview Question** field, enter the question asked during the interview.

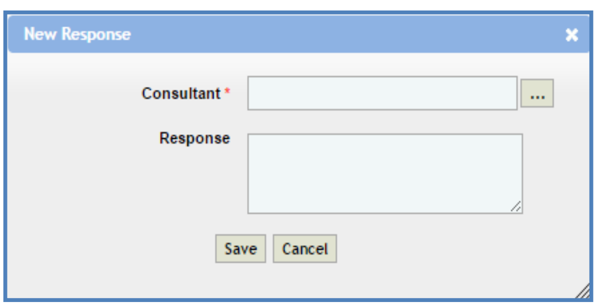
6. Click **Save**.

3.11.2 Recording Interview Responses

1. On the **Interview Questions and Responses** page, select the question for which you want to record the response received from the consultant and then click **Edit**. The **Response** section is displayed on the **Interview Questions and Responses** page.



2. In the **Response** section, click **Add**. The **New Response** dialog box is displayed.



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

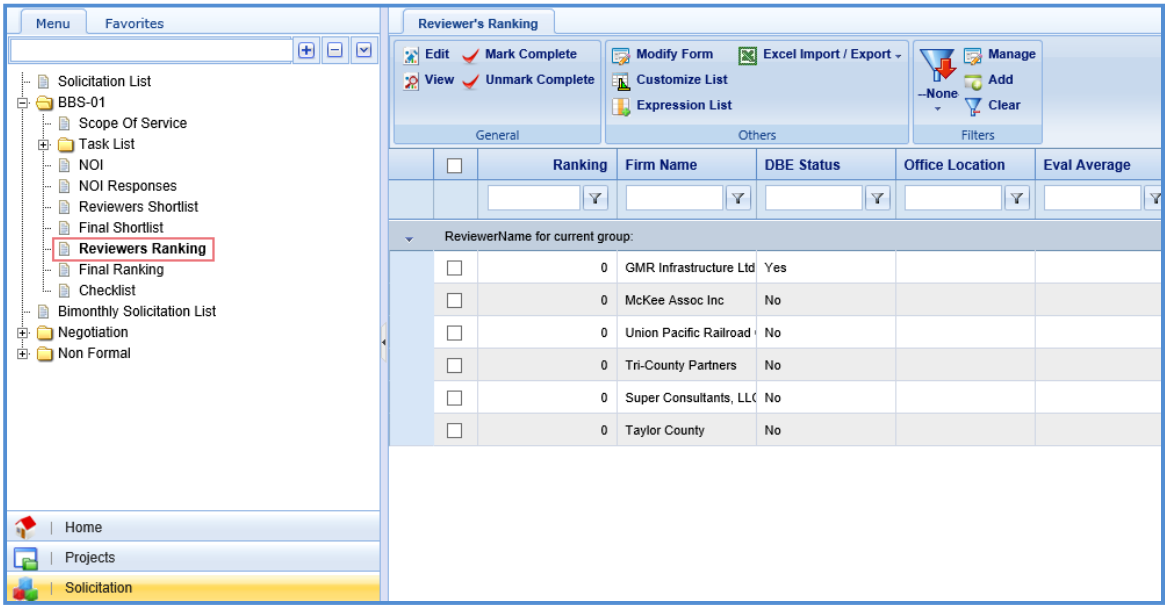
Field	Mandatory/ Non-mandatory	Description
Consultant	Mandatory	To select a consultant: whose response you want to record. 1. Click ... and the **Select Consultant** dialog box is displayed. The dialog box lists all the shortlisted consultants of the solicitation. 2. Select the consultant whose response you want to record and Click **Select**
Response	Non-mandatory	Enter the response provided by the consultant.

4. Click **Save**.

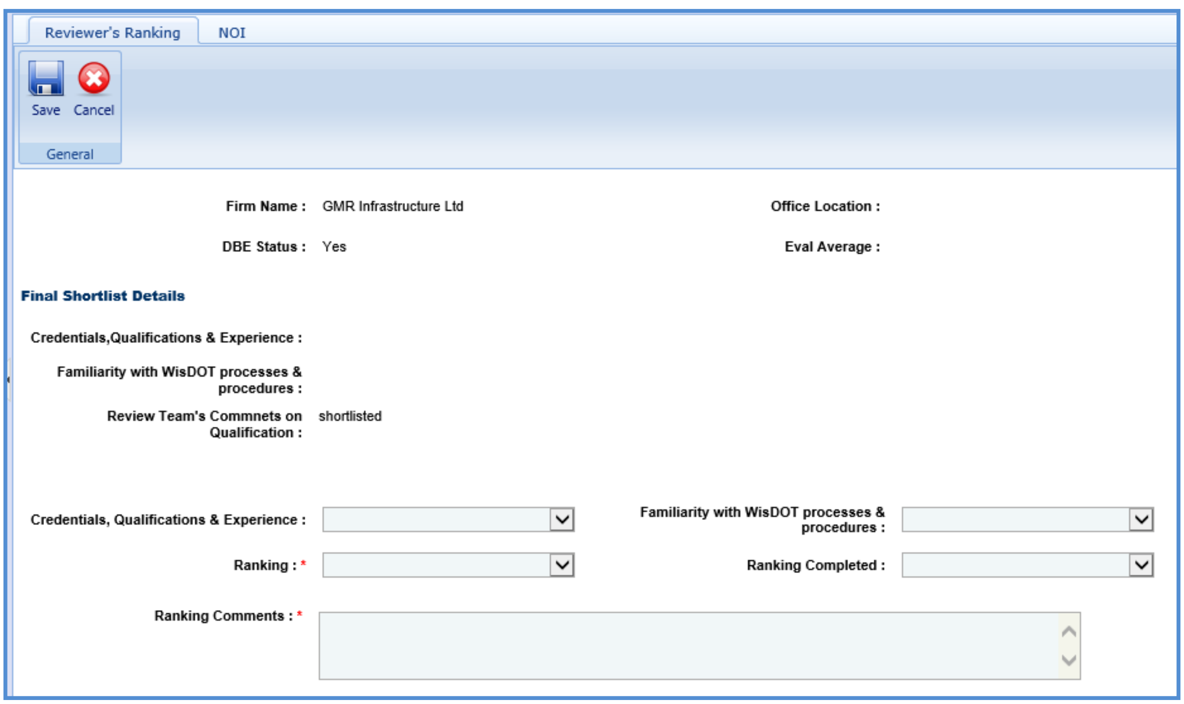
3.12 Ranking Consultants

Prerequisite: The consultant firms must be final shortlisted. The procedure to rank the final shortlisted consultants is described.

1. Click **Solicitation** in the module menu. The **Solicitation List** page is displayed.
2. Select the solicitation for which the consultants must be ranked and click **View**. The **Solicitation** page is displayed.
3. In the navigation pane, expand the solicitation, and then click **Reviewers Ranking**. The **Reviewers Ranking** page is displayed.



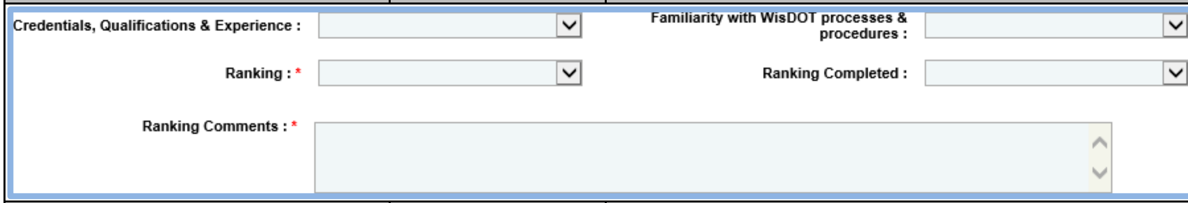
4. Select the consultant firm record that you want to rank, and then click **Edit**. The **Reviewers Ranking** details page is displayed.



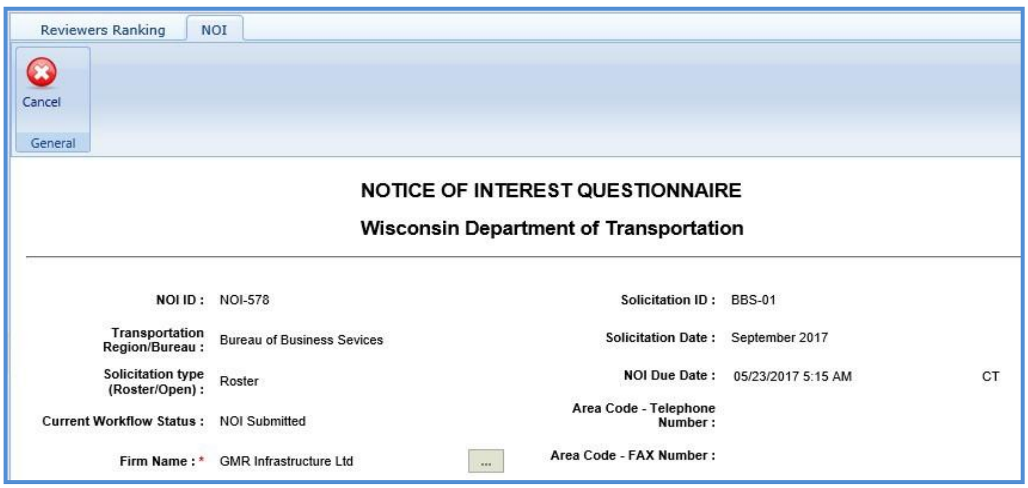
Note:

- *The values in the **Firm Name, Office Location, DBE Status,** and **Eval Average** fields are auto populated.*
- *In the **Final Shortlist Details** section, the values in the **Credentials, Qualifications & Experience, Familiarity with WisDOT processes & procedures,** and **Review Team's Comments on Qualification** fields are auto populated.*

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

Field	Mandatory/ Non-mandatory	Description
		
Credentials, Qualifications & Experience	Non-mandatory	From the drop-down list, select the required option.
Familiarity with WisDOT processes & procedures	Non-mandatory	From the drop-down list, select the required option.
Ranking	Mandatory	From the drop-down list, select a ranking for the consultant firm. When the contract type is Master for solicitation, then all the contractors are ranked 1.
Ranking Completed	Non-mandatory	From the drop-down list, select **Yes** to indicate that the ranking of the consultant firm is completed or select **No** to indicate that the ranking of consultant firm is not completed.
Ranking Comments	Mandatory	Enter comments about ranking the consultant firm.

***Note**: Click the **NOI** tab to view the NOI response of the consultant firm.*



6. Click **Save.**
7. Select the records and click **Mark Complete** to complete the reviewer's ranking of the consultant firms.

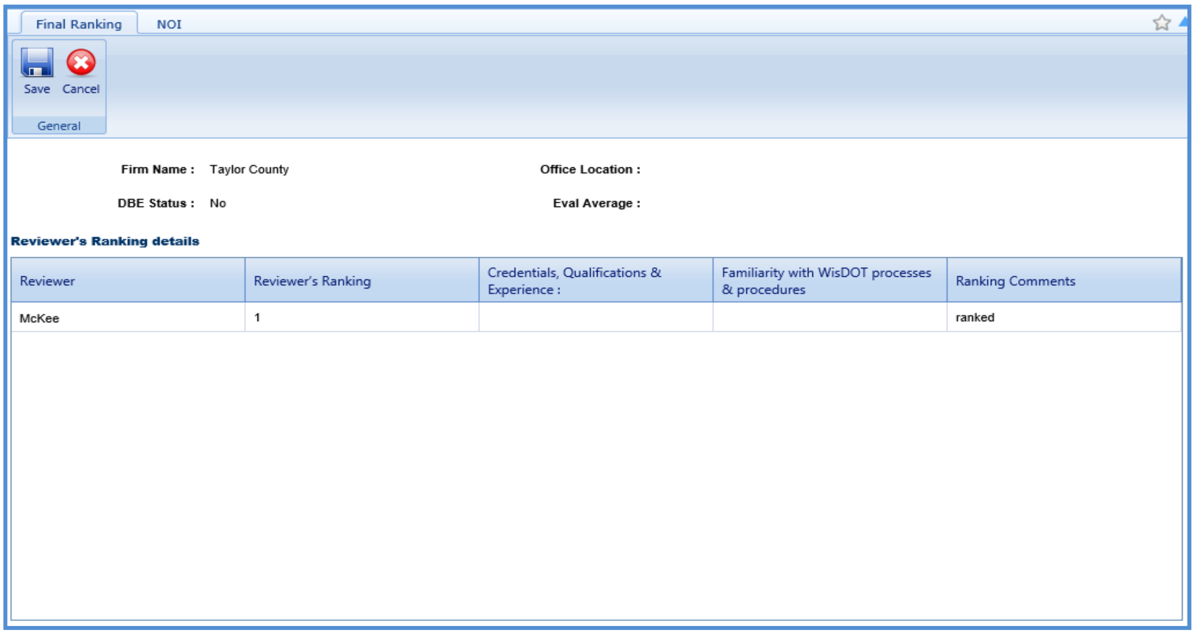
***Note**: All the records on the **Reviewer's Ranking** page must be marked as complete to proceed with the final ranking procedure.*

3.13 Final Ranking Consultants

Pre-requisite: All the consultant firm records on the **Reviewer's Ranking** page must be marked as completed. The procedure to final rank the consultants is described.

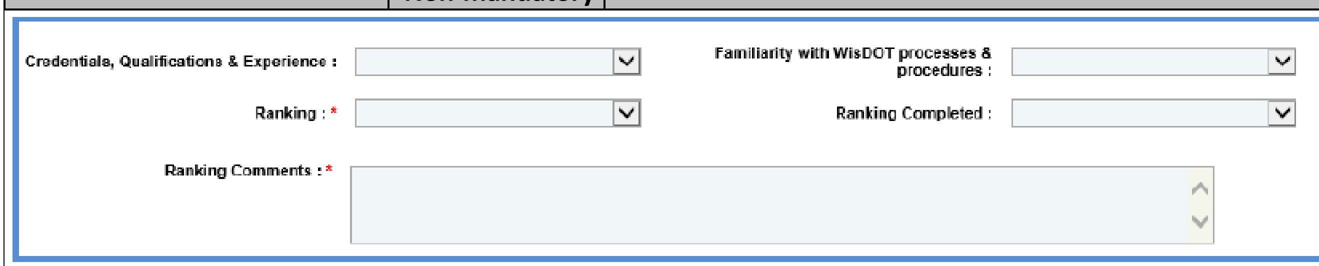
1. Click **Solicitation** in the module menu. The **Solicitation List** page is displayed.
2. Select the solicitation for which the consultants must be ranked and click **View**. The **Solicitation** page is displayed.
3. In the navigation pane, expand the Solicitation, and then click **Final Ranking**. The **Final Ranking** page is displayed.

4. Click **Start** in the **General** group. The ranked consultant firm records are listed.
5. Select the consultant firm record that you want to final rank and click **Edit**. The **Final Ranking** details page of the consultant firm is displayed.



Note:
The values in the ***Firm Name, Office Location, DBE Status,*** *and* ***Eval Average*** *fields are auto populated.*
The ***Reviewers Ranking Details*** *section auto-populates the reviewer's ranking details of the consultant firm.*

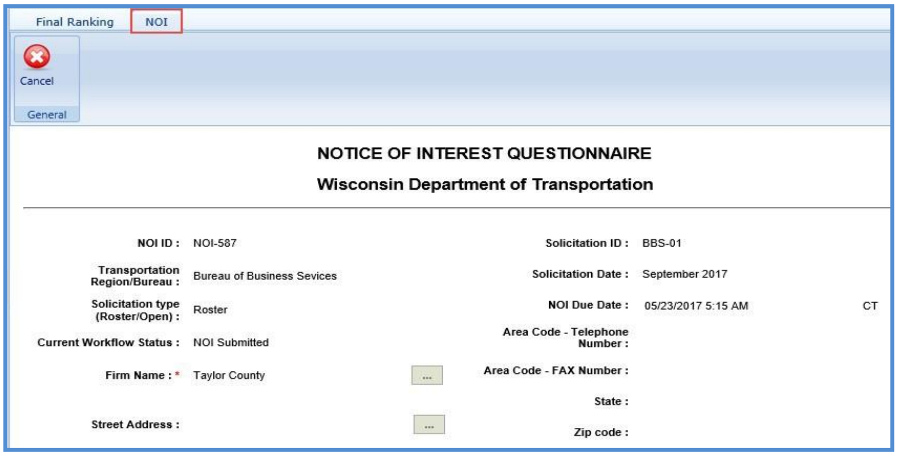
6. Enter information in the required fields. The fields are described in the following table.



Field	Mandatory/ Non-mandatory	Description
Credentials, Qualifications & Experience	Non-mandatory	From the drop-down list, select the required option.
Familiarity with WisDOT processes & procedures	Non-mandatory	From the drop-down list, select the required option.
Ranking	Mandatory	From the drop-down list, select a final rank for the consultant firm.

Field	Mandatory/ Non-mandatory	Description
Ranking Completed	Non-mandatory	From the drop-down list, select **Yes** to indicate that the final ranking of the consultant firm is completed or select **No** to indicate that the final ranking of consultant firm is not completed.
Review Team's Comments	Mandatory	Enter comments about final ranking of the consultant firm.

***Note**: Click the **NOI** tab to view the NOI response of the consultant firm.*



Click **Save.**

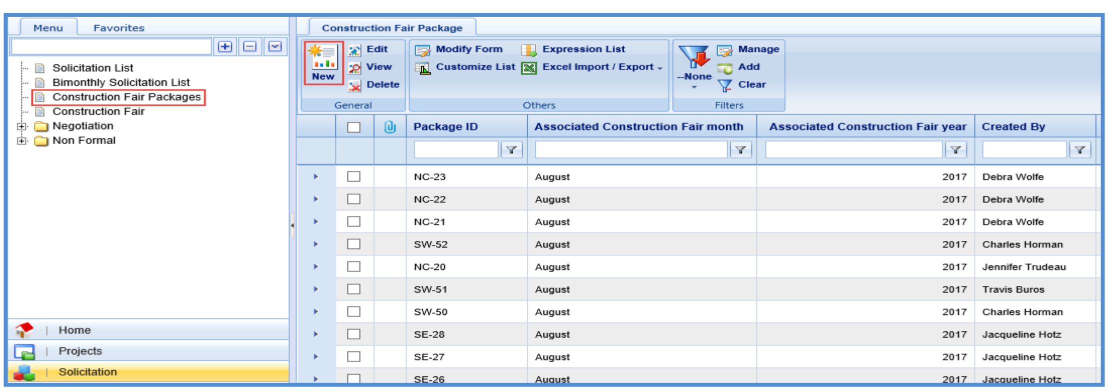
7. Once all the records are ranked, select the records, and then click **Mark Complete** to complete the final ranking of the consultant firms.

4 Construction Fair

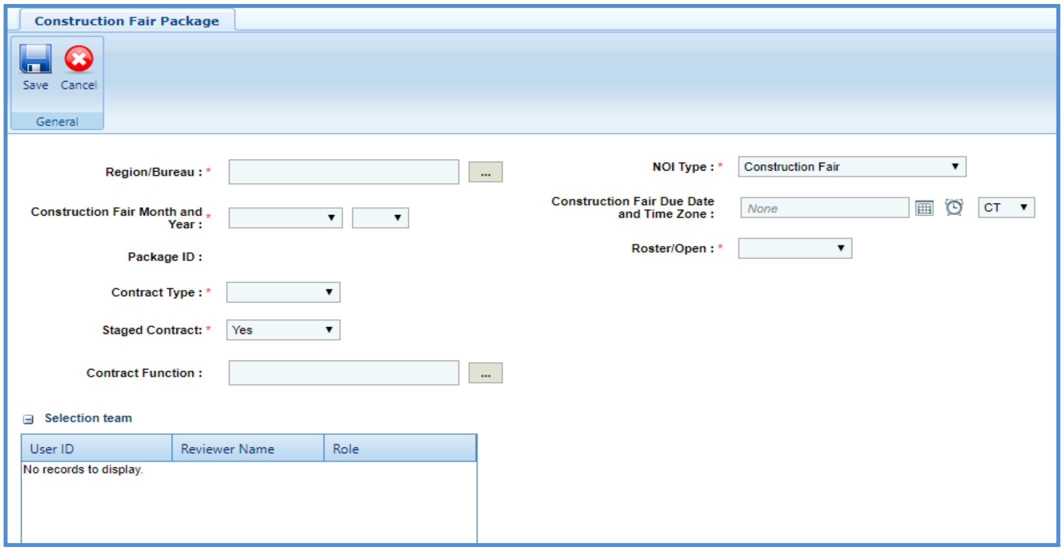
Construction fairs are conducted annually by WisDOT to select consultants who can carry out construction oversight/construction engineering for projects being executed across Wisconsin. The construction fair packages are created for a complete construction package and published to the consultants to receive their NOI for the entire package. The procedure to create construction fair packages by adding scope of services, viewing NOI responses, and ranking the consultants are described.

4.1 Creating Construction Fair Packages

1. Click **Solicitation** in the module menu.
2. In the navigation pane, click **Construction fair packages**. The **Construction fair package** list page is displayed.



3. Click **New**. The **Construction fair package** details page is displayed.

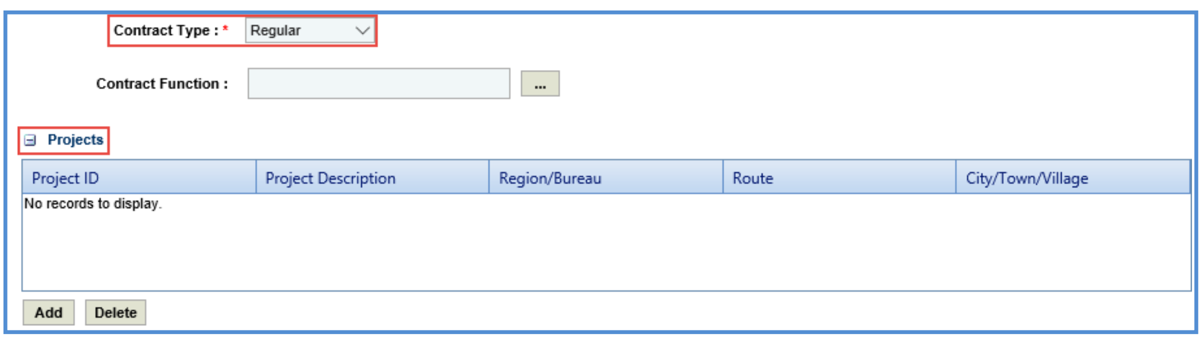


i. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non- mandatory	Description
Region/Bureau	Mandatory	To select region/bureau of the construction fair package: 1. Click ... and the **Region/Bureau** dialog box is displayed. For availability of options in the dialog box, region/bureaus must be defined in the **Region- Bureau** catalog of the library. 2. Select the required region/bureau and click **Select**.
NOI Type	Mandatory	Indicates the NOI type. The value in this field is auto populated.
Construction Fair Month and Year	Mandatory	From the drop-down lists, select the month and year of construction fair package.
Construction Fair Due Date and Time Zone	Non-mandatory	Enter the due date and time of construction fair package. Alternatively, you can click the calendar icon and clock icon to select the due date and time. From the drop-down list, select the time zone.
Package ID	Non-mandatory	The unique ID for the construction fair package is auto populate based on the selected **Region/ Bureau** and **Construction Fair Month and Year**.
Roster/Open	Mandatory	From the drop-down list, select the required option. • **Roster:** Select this option if the construction fair package is published only to the consultants who are marked as Roster at the enterprise level. • **Open:** Select this option if the construction fair package is published to all the consultant at the enterprise level.

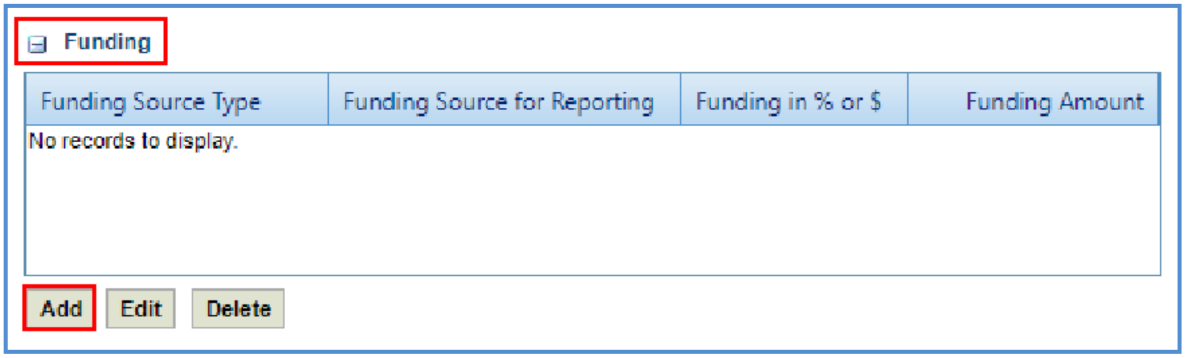
Field	Mandatory / Non- Mandatory	Description
Contract Type	Mandatory	• **Master:** Select this when there is no definite project scope, and the work orders are placed as and when required for a project. • When **Master** is selected, the **Master Group Id** and **Master Group Type** fields are displayed. • **Regular:** Select this when the contract is associated with a definite project scope. • When **Regular** is selected, the **Projects** section is displayed.
Staged Contract	Mandatory	By default, 'Yes' is selected. • If Staged Contract is selected 'Yes', the user can create multiple contracts for the Package ID. • If Staged Contract is selected 'No', the user can create only one contract for the Package ID.
Contract Function	Non-mandatory	To select contract function of the construction fair package: 1. Click ... and **Contract Function** dialog box is displayed. For availability of options in the dialog box, contract functions must be defined in the **Contract Function** catalog of the library. 2. Select the required contract function and click **Select.**
Master Group Id	Mandatory	This field is displayed only when the **Contract Type** is **Master**. To select a Master Group ID: 1. Click ... The **Master Group ID** dialog box is displayed listing all the Master Group IDs from the **Master Group ID** page of the Contract. The Master Group IDs that are listed is of the same region as the construction fair package region and the date of creation of construction fair package is within the completion date of the Master ID. 2. Select the required Master Group ID and click **Select**.
Master Group Type	Non-mandatory	This field is displayed only when the **Contract Type** is **Master**. Indicates the type of the selected Master Group ID. The value in this field is auto populated when the **Master Group Id** is selected.

ii. The **Projects** section is displayed only when the **Contract Type** is **Regular**. In the **Projects** section, perform the following steps, to add the projects for the construction fair package.

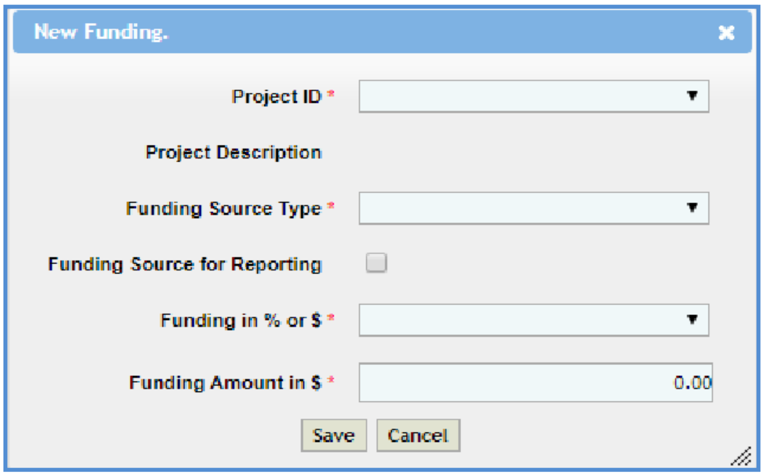


a. Click **Add**. The **Select Project** dialog box is displayed listing all the projects that are associated with the region/bureau of the construction fair package.
b. Select the required projects and click **Select**.

4. In the **Funding** section, perform the following steps to add the project funding details for the solicitation.



a. Click **Add**. The **New Funding** dialog box is displayed. **Project ID** and **Project Description** are displayed if the Contract Type is selected as **Regular**.



b. In the **Project ID** drop-down list, select the required project. The list displays all the projects that are part of the solicitation. **Project Description** is auto populated.
c. From the drop-down list, select the **Funding Source Type**. The options in the drop-down list are defined in the **Funding Source Type** catalog of the library.
d. Select the **Funding Source for Reporting** checkbox to allow the user to select any number of records in solicitation or a project record in case of regular contract.
e. In **Funding in % or $**, select % or $. Click **Save**.

5. In the **Selection team** section, perform the following steps to add reviewers for ranking the consultants:

a. Click **Add**. The **Select Reviewers** dialog box is displayed. The dialog box lists all active users from the list of User Accounts in the enterprise.
b. Select the required reviewers and click **Select**.

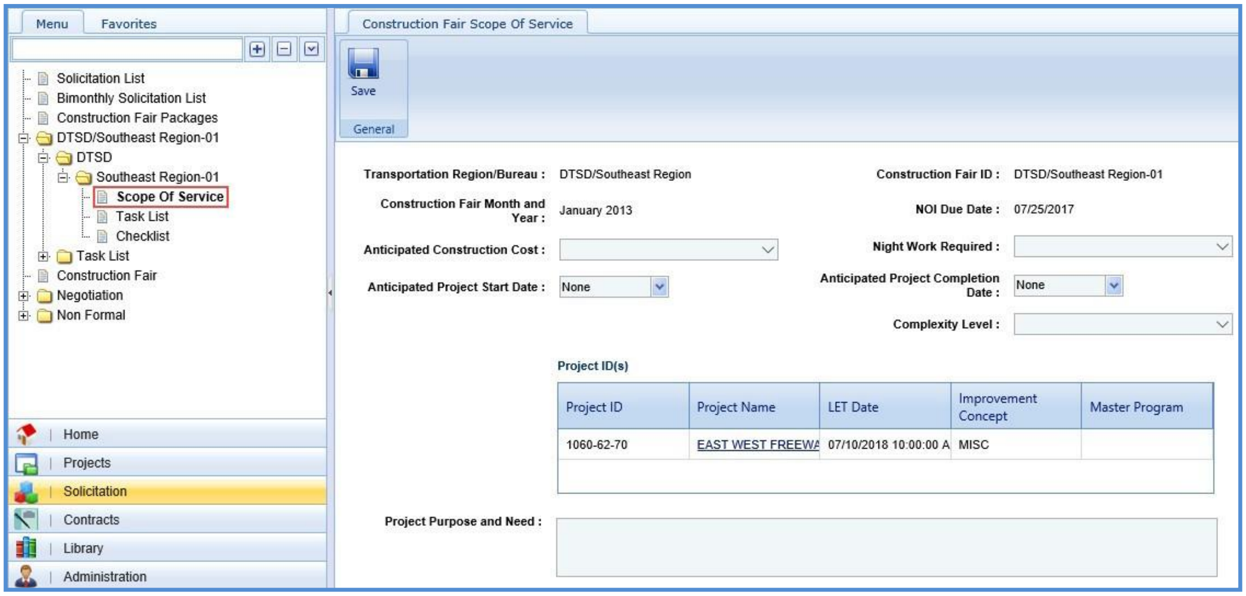
***Note**: When the **Selection team** is **Yes**, then all the reviewers selected in the **Selection Team** section must complete the ranking of consultants.*

6. In the **Attachments** section, upload images and files relevant to the construction fair package. For information on attachments, refer *Attachments*.

4.2 Construction Fair Package Scope of Service

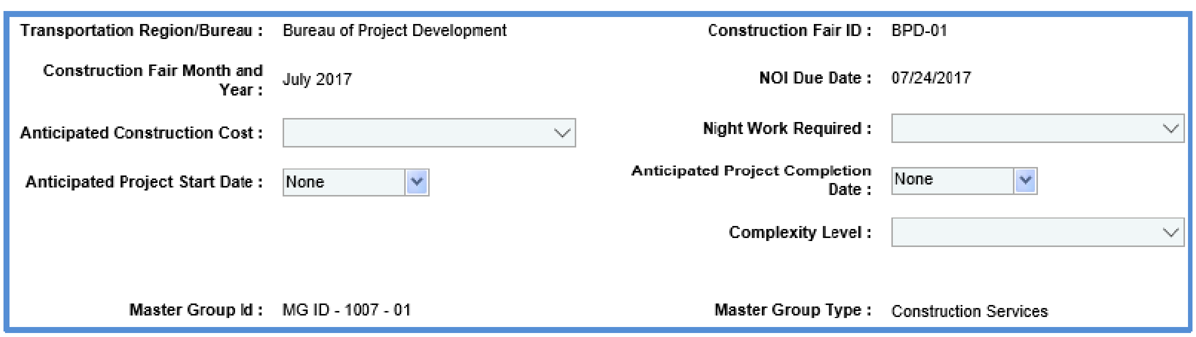
The system allows you to define scope of service for the construction fair package. Perform the following steps to define the scope of service:

1. Select the construction fair package for which you want to define the scope of service and click **Edit**.
2. In the navigation pane, expand the construction fair package folder, and then click **Scope of Service**. The **Construction Fair Scope of Service** page is displayed.



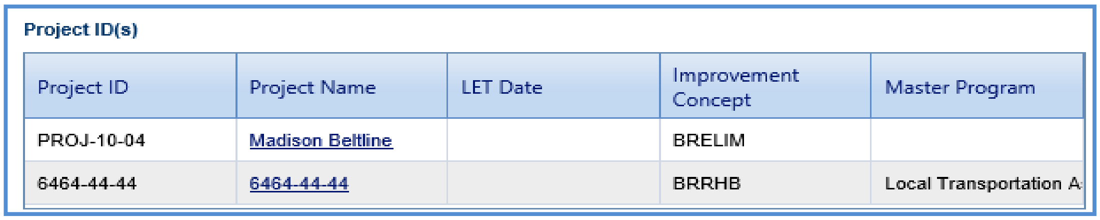
3. Enter information in the required fields. The fields are described in the following table.

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

Field	Description
	
Transportation Region/ Bureau	The transportation region/bureau of construction fair package is auto populated.
Construction Fair ID	The unique ID of the construction fair package is auto populated.
Construction Fair Month and Year	The month and year of the construction fair package is auto populated.
NOI Due Date	The due date of NOI is auto populated.
Anticipated Construction Cost	From the drop-down list, select the expected cost range for construction.
Night Work Required	From the drop-down list, select **Yes** if working at night is required or select **No** if working at night is not required.
Anticipated Project Start Date	From the drop-down calendar, select the expected start date of the project.

Field	Description
Anticipated Project Completion Date	From the drop-down calendar, select the expected completion date of the project.
Complexity Level	From the drop-down list, select the level of complexity of the construction fair package.
Master Group Id	This field is displayed only when the contract type of the construction fair package is **Master**. The master group ID associated with the construction fair package is auto populated.
Master Group Type	This field is displayed only when the contract type of the construction fair package is **Master**. The master group type associated with the construction fair package is auto populated.

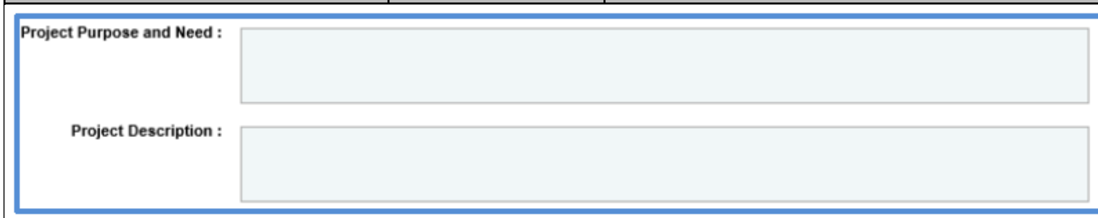
4. In the **Project ID(s)** section, enter information in the required fields. The fields are described in the following table.


Project ID(s)

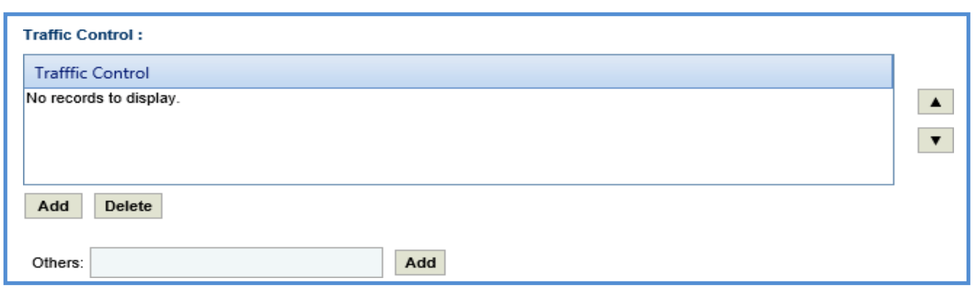
Project ID	Project Name	LET Date	Improvement Concept	Master Program
PROJ-10-04	Madison Beltline		BRELIM	
6464-44-44	6464-44-44		BRRHB	Local Transportation A

Note:

- *The table in the section lists all the projects that are associated with the construction fair package. The table in this section is displayed only when the contract type of the construction fair package is **Regular**. You can click the required **Project Name** link to view the **Project Details** page in a different tab.*
- *Additionally, corresponding to a project, click in the **LET Date** column to enter the LET date of the project.*

Field	Mandatory / Non-mandatory	Description
		
Project Purpose and need	Non-mandatory	Enter the purpose and need for the project.
Project Description	Non-mandatory	Enter the description about the project.

5. In the **Traffic Control** section, perform the following steps to add traffic control details.

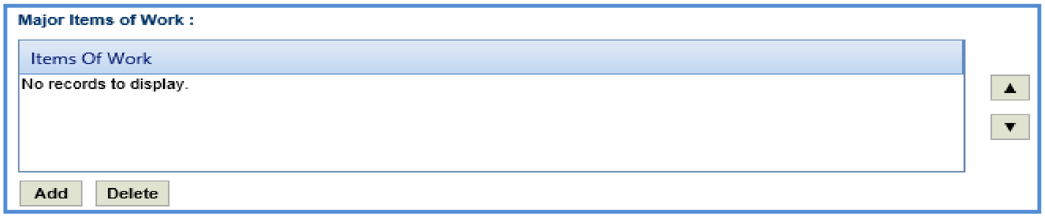


- To add traffic control records from library:
  a. Click **Add**. The **Traffic Control** dialog box is displayed listing all the traffic control records that are defined in the **Traffic Control** catalog of the library.
  b. Select the required traffic control records and then click **Select**.

- To add traffic control records that are not defined in the library:
  a. In the **Other** fields, enter the traffic control details.

b. Click **Add**. The traffic control details are displayed in the table.

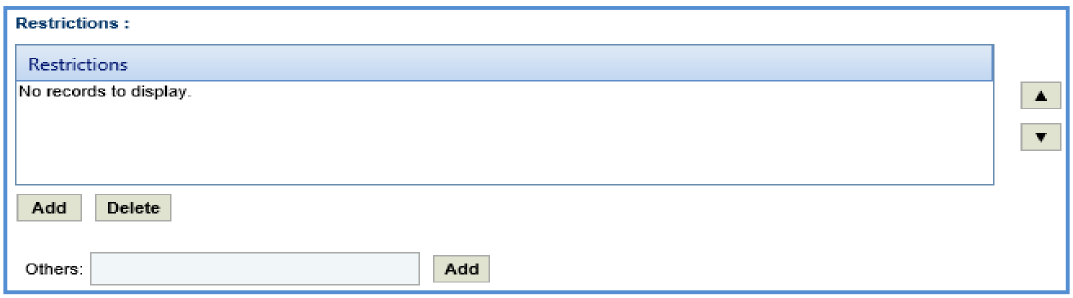
6. In the **Major Items of Work** section, perform the following steps to add major work items for the construction fair package.



- To add items from library:
  a. Click **Add**. The **Major Items of Work** dialog box is displayed listing all the items that are defined in the **Items of Work** catalog of the library.
  b. Select the required items of work and then click **Select**.

- To add items that are not defined in the library:
  a. In the **Others** field, enter the name of the item.
  b. Click **Add.** The item is displayed in the table.

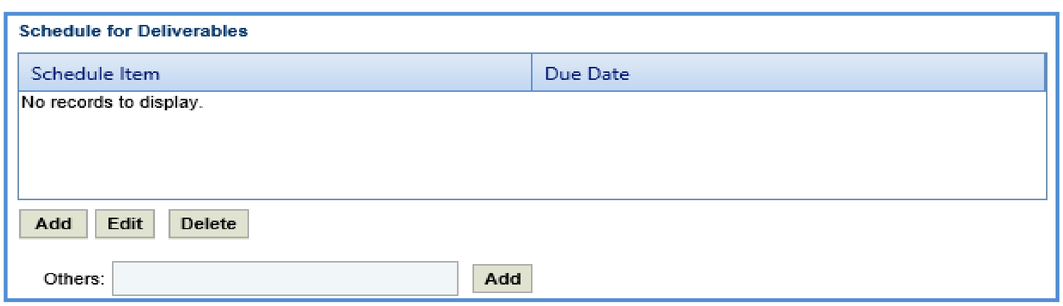
7. In the **Restrictions** section, perform the following steps to add restrictions for the construction fair package.



- To add restrictions from library:
  a. Click **Add**. The **Restrictions** dialog box is displayed listing all the items that are defined in the **Restrictions** catalog of the library.
  b. Select the required items of work and then click **Select**.

- To add restrictions that are not defined in the library:
  a. In the **Others** field, enter the restriction details.
  b. Click **Add.** The restriction is displayed in the table.

8. In the **Schedule for Deliverables** section, perform the following steps to add schedule for deliverable items:

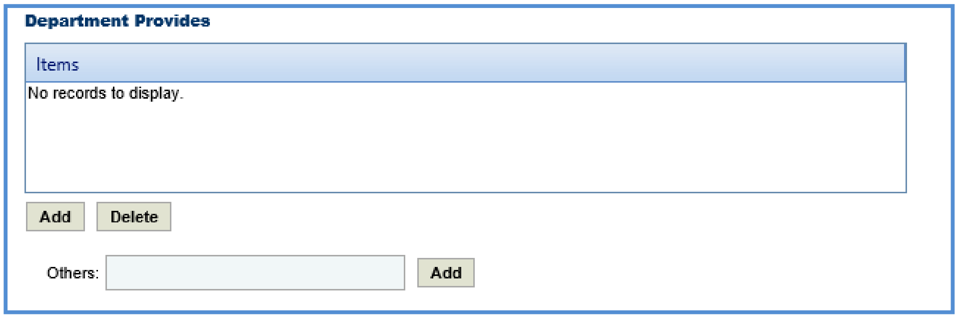


- To add schedule for deliverable items from library:
  a. Click **Add**. The **Schedule for Deliverables** dialog box is displayed listing all the schedule for deliverables that are defined in the **Deliverables** catalog of the library.
  b. Select the required schedule for deliverable items and click **Select**. The selected schedule for deliverables is listed in the table.

- To add schedule for deliverable items that are not defined in the library:
  a. In the **Others** field, enter the schedule for deliverables details.

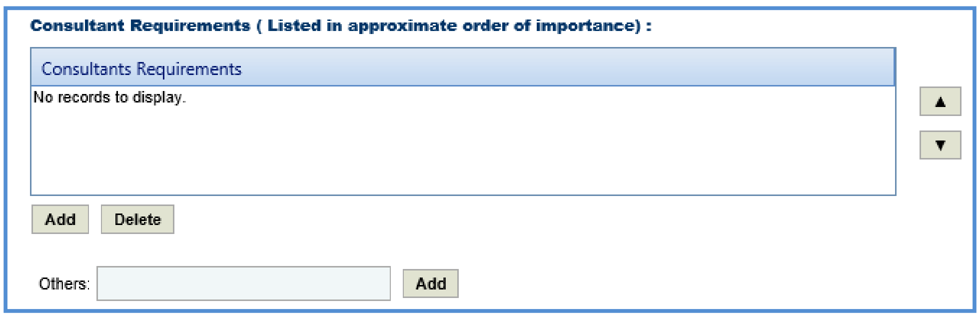
b. Click **Add.** The schedule for deliverables is displayed in the table.

9. In the **Department Provides** section, perform the following steps to add items that are provided by WisDOT.



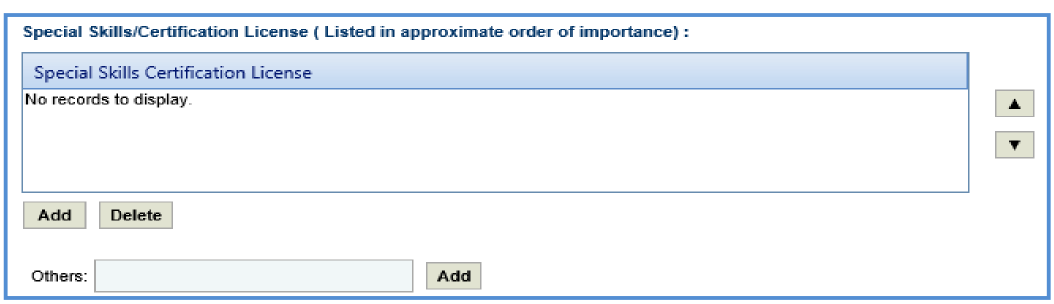
- To add items from library:
  a. Click **Add**. The **Department Provides** dialog box is displayed listing all the items that are defined in the **Department Provides** catalog of the library.
  b. Select the required items and click **Select**. The selected items are listed in the table.
- To add items that are not defined in the library:
  a. In the **Others** field, enter the name of the item. Click **Add.**
  b. The item is displayed in the table.

10. In the **Consultant Requirements (Listed in approximate order of importance)** section, perform the following steps to add consultant requirements.



- To add items from library:
  a. Click **Add**. The **Consultants Requirements** dialog box is displayed listing all the consultants' requirements defined in the **Consultants Requirements** catalog of the library.
  b. Select the required consultant requirements and click **Select**.
- To add items that are not defined in the library:
  a. In the **Others** field, enter the name of the requirement.
  b. Click **Add.** The requirement is displayed in the table.

11. In the **Special Skills/Certification License (Listed in approximate order of importance)** section, perform the following steps to add Special Skills/Certification License details.

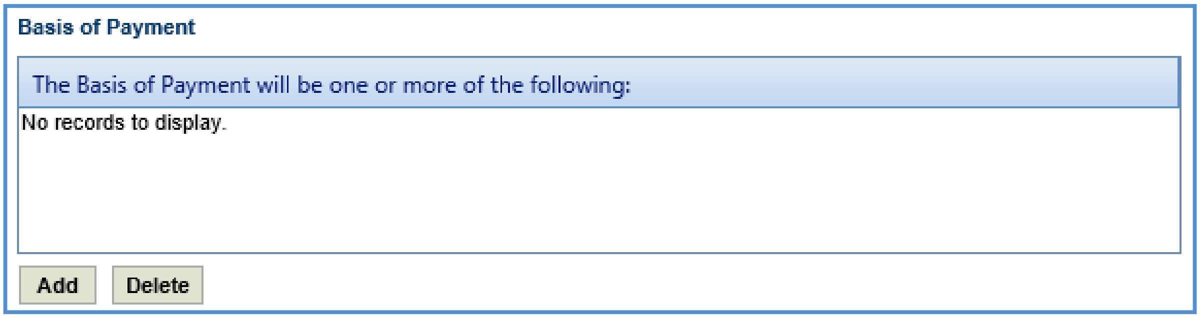


- To add items from library:

   a. Click **Add**. The **Special Skills** dialog box is displayed listing all the special skills/certifications/ licenses defined in the **Special skills-certifications-Licenses** catalog of the library.
   b. Select the required special skills and click **Select**.

- To add items that are not defined in the library:
   a. In the **Others** field, enter the name of the skill/certification.
   b. Click **Add.** The skill/certification is displayed in the table.

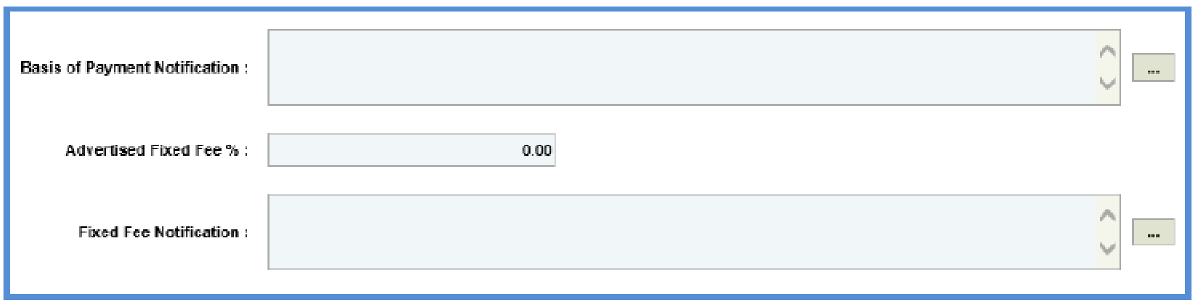
12. In the **Basis of Payment** section, perform the following steps to add basis of payment details.



   a. Click **Add**. The **Basis of Payment will be one or more of the following:** dialog box is displayed listing all the basis of payments defined in the **Basis of Payment** catalog of the library.
   b. Select the required basis of payments and click **Select**. The selected basis of payments is listed in the table.

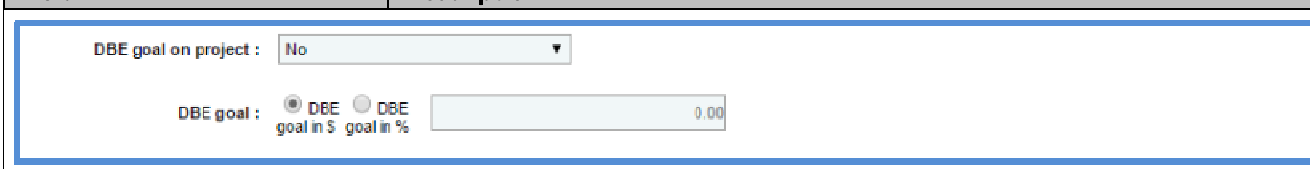
13. Enter information in the other required fields. The fields are described in the following table.

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

Field	Description
	
Basis of Payment Notification	To add basis of payment notification: 1. Click ... The B**asis of Payment Notification** dialog box is displayed listing all the basis of payment notifications defined in the B**asis of Payment Notification** catalog of the library. 2. Select the required basis of payment notification and click **Select**.
Advertised Fixed Fee %	Enter the percentage of advertised fixed fee.
Fixed Fee Notification	To add fixed fee notification: 1. Click ... The **Fixed Fee Notification** dialog box is displayed listing all the fixed fee notifications defined in the **Fixed Fee Notification** catalog of the library. 2. Select the required fixed fee notification and click **Select**.

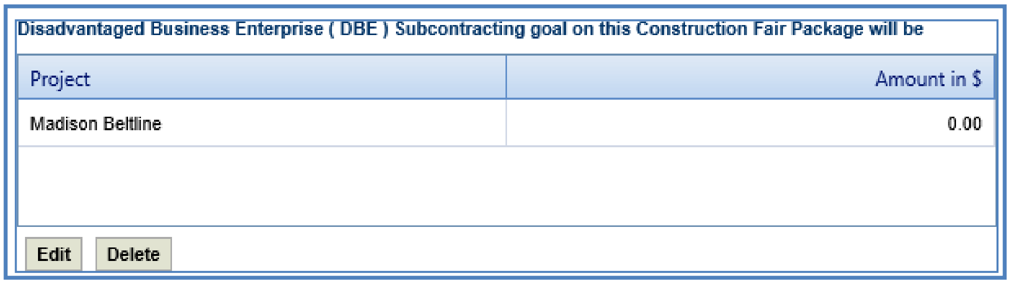
14. Enter information in the required fields. The fields are described in the following table.

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

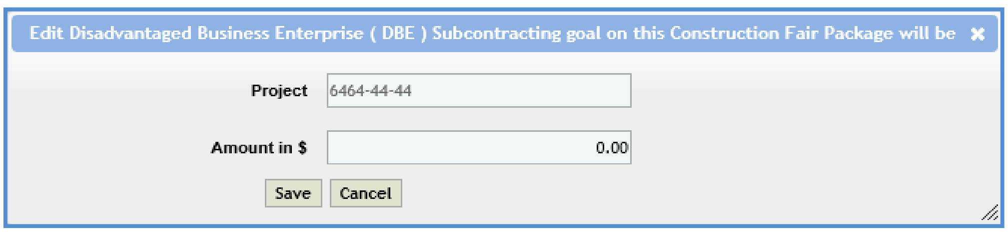
Field	Description
	

Field	Description
DBE goal on project	From the drop-down list, select the required option to indicate if there is a Disadvantaged Business Enterprise (DBE) goal on the projects. • If the selected option is **Yes**, then you can add DBE goal amount or percentage, and projects for the DBE goal • Click ... The Basis of **Payment Notification** dialog box is displayed listing all the basis of payment notifications defined in the B**asis of Payment Notification** catalog of the library.
DBE goal	Click the required option and enter the value accordingly. • **DBE goal in $:** If this option is selected, then enter the DBE goal amount. • **DBE goal in %:** If this option is selected, then enter the DBE goal percentage.

15. In the **Disadvantaged Business Enterprise (DBE) Subcontracting goal on this Construction Fair Package will be** section, perform the following steps to add projects for the DBE Subcontracting goal. This section is displayed only when the Contract Type is Regular.
    a. Click **Add**. The **Project Name** dialog box is displayed listing the projects associated with the construction fair package.
    b. Select the required projects and click **Select**. The project is displayed in the table.



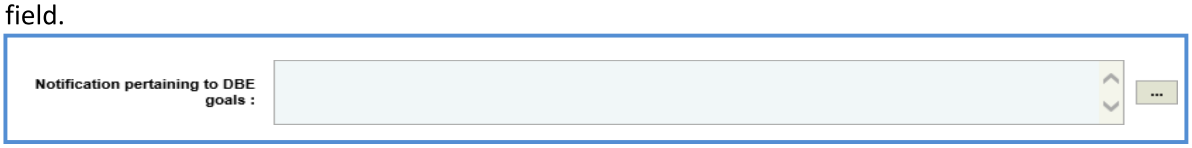
    c. Select the project and click **Edit**. The **Edit Disadvantaged Business Enterprise (DBE) Subcontracting goal on this Construction Fair Package will be** dialog box is displayed.



Note: *The name of the project is auto populated.*

    d. Enter the value in the **Amount in $** field.
    e. Click **Save**.

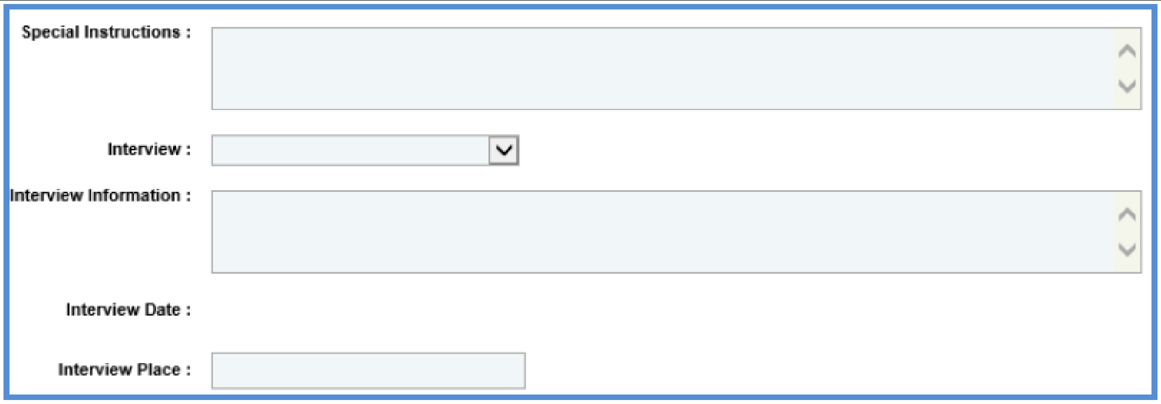
16. In the **Notification pertaining to DBE goals** field, the system allows you to select notifications pertaining to DBE goals in this field.



- To select notification pertaining to DBE goals:
    a. Click ... The **Notification pertaining to DBE goals** dialog box is displayed listing all the notifications pertaining to DBE goals that are defined in the **Notification pertaining to DBE goals** catalog of the library.
    b. Select the required notification pertaining to DBE goals and click **Select.**

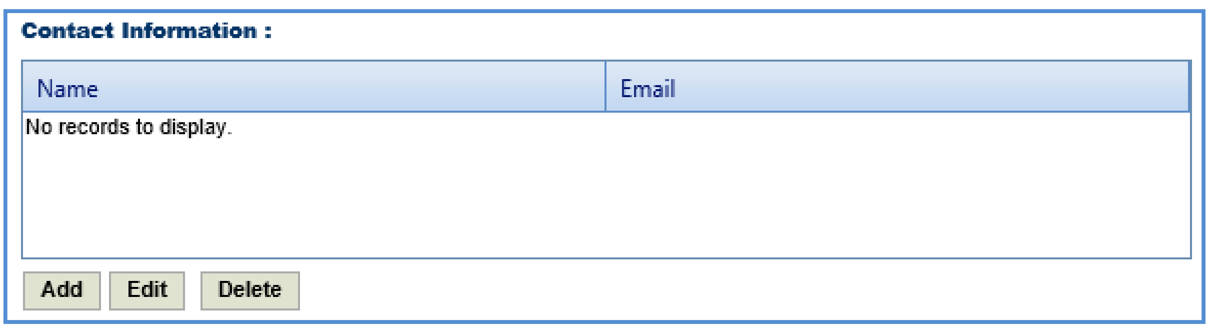
17. Enter information in the required fields. The fields are described in the following table.

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



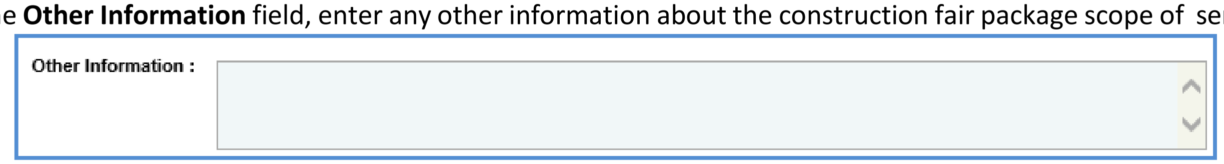
Field	Description
Special Instructions	Enter special instructions about the construction fair package.
Interview	From the drop-down list, select the required option to indicate if an interview will be held with the consultants. If the selected option is **Interviews will be conducted**, then the **Interview Information**, **Interview Date**, and **Interview Place** fields are available.
Interview Information	The field is available only where the value in the **Interview** field is **Yes**. Enter information about the interview.
Interview Date	The field is available only where the value in the **Interview** field is **Yes**. From the drop-down calendar, select the date of interview.
Interview Place	To select an interview region/bureau: 1. Click ... The **Region/Bureau** dialog box is displayed listing all the regions/ bureaus that are defined in the **Region/Bureau** catalog of the library. 2. Select the required region/bureau and click **Select**.

18. In the **Contact Information** section, perform the following steps, to add contact information for consultants.



a. Click **Add**. The **Name** dialog box is displayed listing all the active users from the list of User Accounts in the enterprise.
b. Select the required contact names and click **Select**.

19. In the **Other Information** field, enter any other information about the construction fair package scope of service.



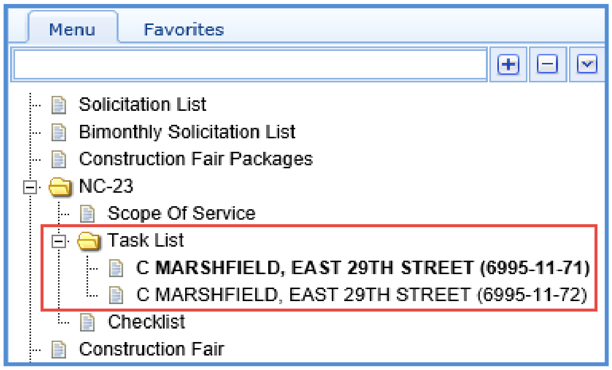
20. Click **Save**.

4.3 Construction Fair Package Task List

The construction fair package task list allows you to define the construction fair package estimate details, tasks, direct costs, fixed fees, indirect costs, and risks. Based on the contract type selected on the **Construction Fair Package** page, the task list is defined.

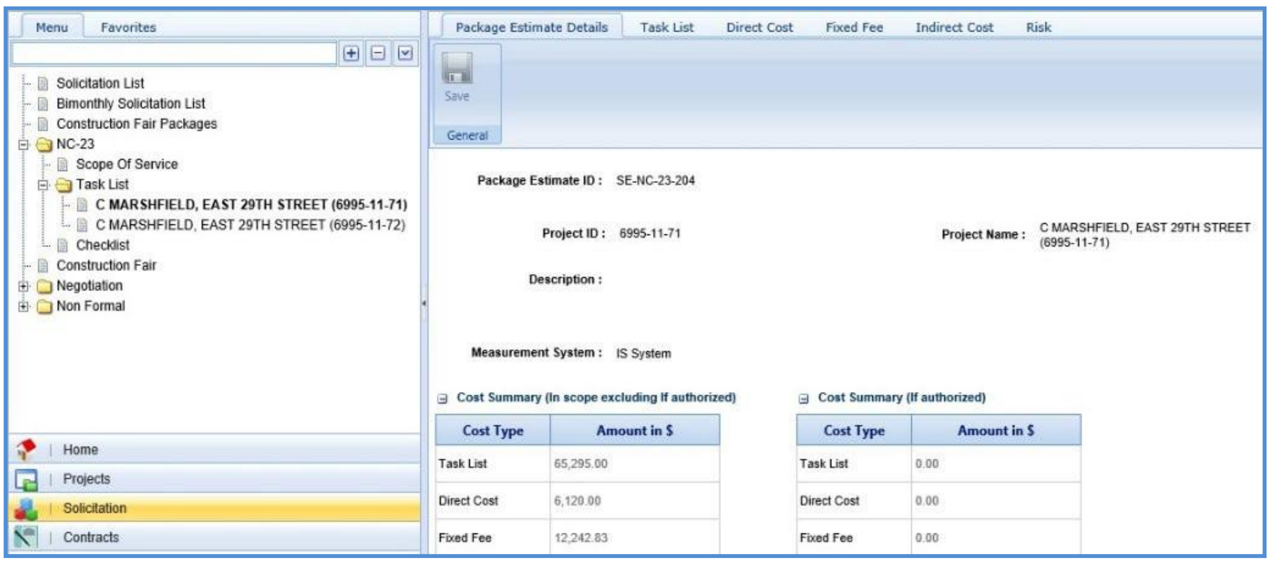
4.3.1 Construction Fair Package Task List for Regular Contract Type

If the construction fair package **Contract Type** is **Regular,** then the task list is displayed separately for each project and the task details displayed are based on the project details.

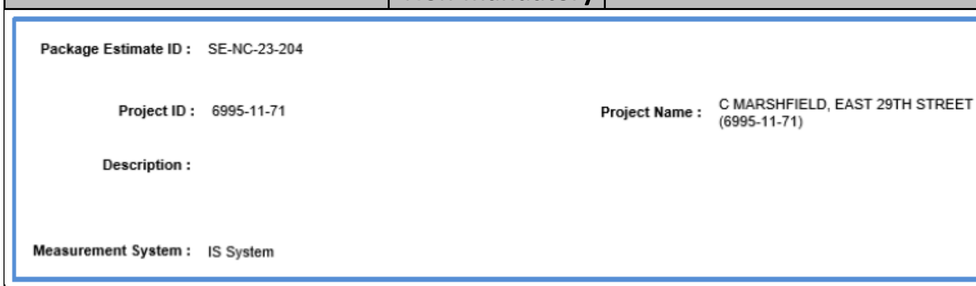


To define the construction fair package task list for regular contract type:

1. Select the construction fair package for which you want to define the task list and click **Edit**.
2. In the navigation pane, expand the construction fair package folder, and then expand the **Task List** folder. The list of projects associated with the construction fair package is displayed.
3. Click the project for which you want to define the task list. The **Package Estimate Details** tab is displayed.



4. In the **Package Estimate Details** tab, perform the following steps:
   a. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Package Estimate ID	-	The package estimate ID is auto-generated.
Project ID	-	The project ID is auto populated.
Project Name	-	The project name is auto populated.
Description	Non-mandatory	Enter description about the package estimate.
Measurement System	-	The measurement system is auto populated.

Note:

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

Cost Summary (In scope excluding If authorized)

Cost Type	Amount in $
Task List	7,048.84
Direct Cost	414.72
Fixed Fee	4,211.12
Indirect Cost	2,800.60
Risk	0.30

Estimate Total in $: 14,475.58

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

Cost Summary (If authorized)

Cost Type	Amount in $
Task List	1,495.00
Direct Cost	22,636.52
Fixed Fee	4,285.87
Indirect Cost	642.85
Risk	0.30

Estimate Total in $: 29,060.54

b. In the **Attachments** section, upload images and files relevant to the construction fair package estimate. For information on attachments, refer *Attachments*.

c. Click **Save.**

5. Click the **Task List** tab and perform the following steps:

Note: *All the tasks that are associated with the project estimate are auto populated. However, you can additional tasks. To add additional tasks, assign resources, and indirect costs, refer to the adding direct labor cost task step described in the **Creating Project Estimates** topic.*

a. To indicate tasks that are in scope of the construction fair package, perform the following steps.

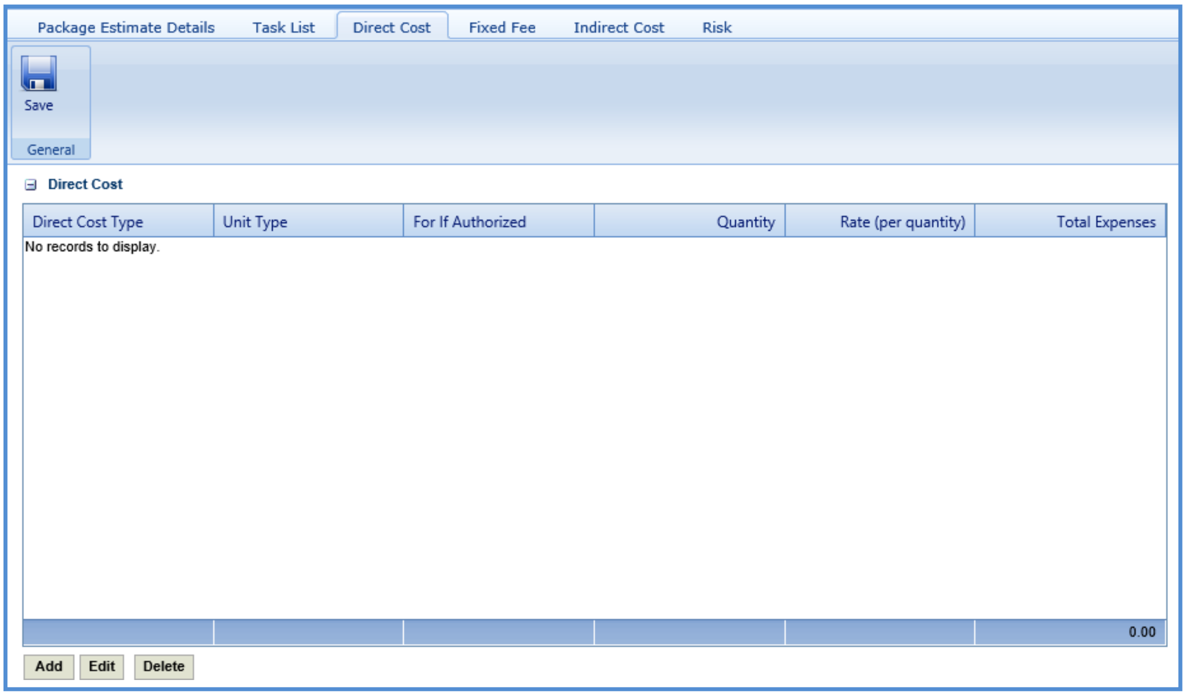
i. Select the tasks and then click **In Scope** in the **Others** group.

ii. From the **In Scope** drop-down list, select **Yes**.

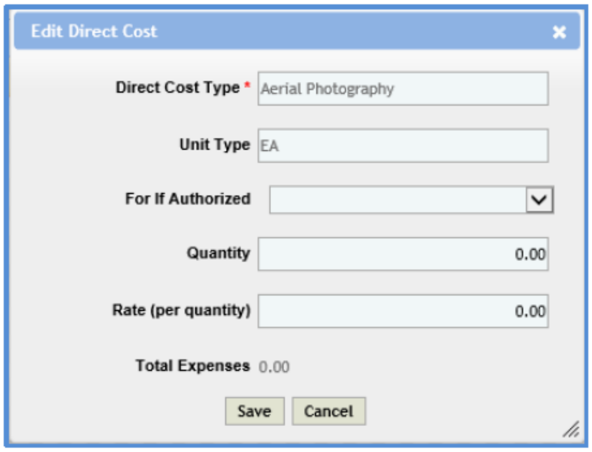
b. The tasks for which cost details are available for future implementation can be marked as authorized. To indicate tasks as authorized, perform the following steps:
   i. Select the tasks and then click **If Authorized** in the **Others** group.
   ii. From the **If Authorized** drop-down list, select **Yes**.

The total of task list costs that are marked as in scope and excluding task list costs that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of task list costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **Package Estimate Details** tab.

6. Click the **Direct Cost** tab to add direct costs to the construction fair package estimate. Perform the following steps:



   a. Click **Add**. The **Direct Cost** dialog box is displayed listing all the direct costs. For availability of direct costs in the dialog box, direct costs must be defined in the **Direct Cost Type** catalog of the library.
   b. Select the required direct costs.
   c. Click **Select**. The selected direct costs are listed in the **Direct Cost** table.
   d. Select the direct cost for which you want to indicate as authorized, add/edit quantity and rate details, and then click **Edit**. The **Edit Direct Cost** dialog box is displayed.
   e. Enter information in the required fields. The fields are described in the following table.

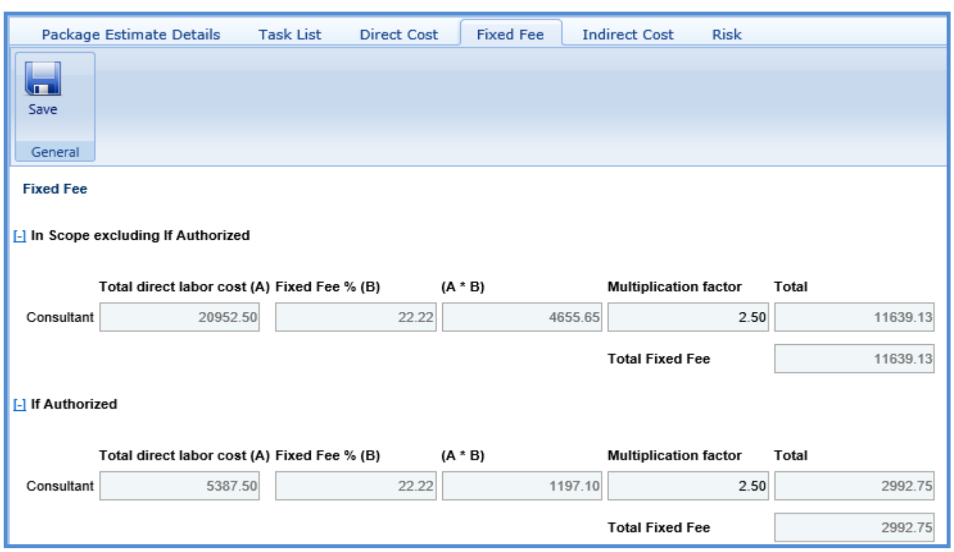
Field	Mandatory / Non-Mandatory	Description
		
Direct Cost Type	**-**	The name of the selected direct cost type is auto populated.
Unit Type	**Non-mandatory**	The unit type of the selected direct cost is auto populated.
For If authorized	**Non-mandatory**	From the drop-down list, select **Yes** or **No** to indicate whether the direct cost is authorized.
Quantity	**Non-mandatory**	Enter quantity for the direct cost.
Rate (per quantity)	**Non-mandatory**	Enter or edit the rate for one quantity of the direct cost.
Total Expenses	**-**	The total direct cost expenses based on the entered quantity and rate is auto calculated and displayed.

***Note**: The total of direct costs that are in scope for the construction fair package is auto calculated and displayed in the **In Scope excluding if authorized** field and the total of direct costs that are indicated as authorized is auto calculated and displayed in the **If authorized** field.*

f. Click **Save**.
The total of direct costs that are marked as in scope excluding direct costs that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of direct costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **Package Estimate Details** tab.

7. Click the **Fixed Fee** tab. The fixed fee details from the project estimate are displayed based on the tasks that are marked **In Scope** and **If Authorized**. The different field details that are displayed are described in the following table.

***Note:** The information in the in the tab is displayed only if the value in the **Advertised Fixed Fee %** field is defined on the **Construction Fair Scope of Service** page.*

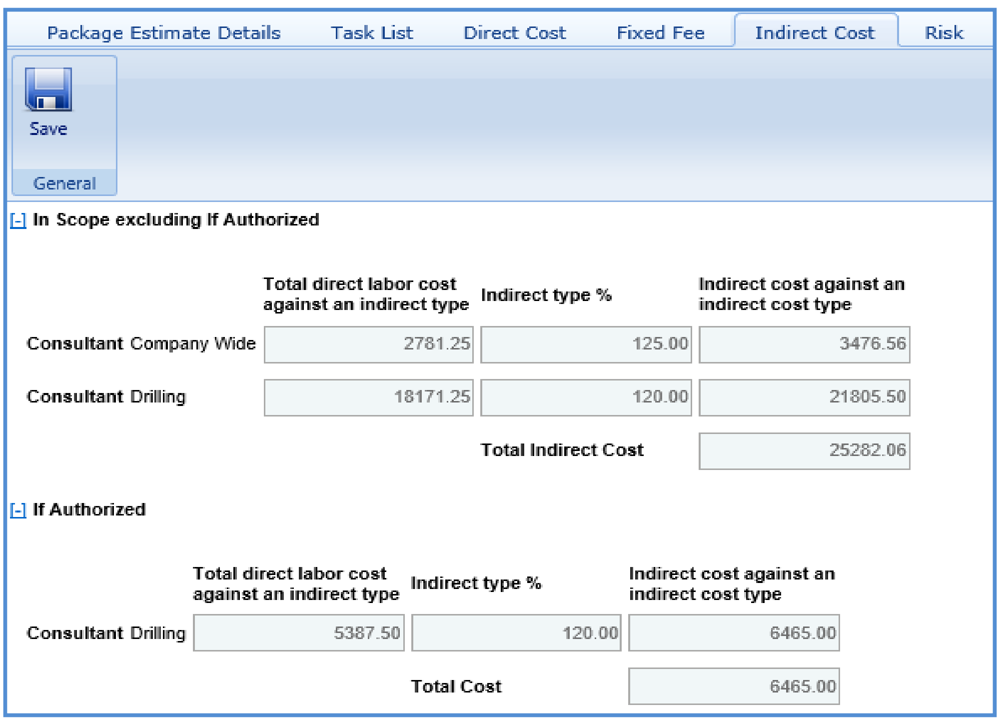


Field	Description
Total direct labor cost	Indicates the total direct labor cost of the resource. The value in this field is auto populated based on the total direct labor cost in the **Task** page of the **Task List** tab.
Fixed Fee %	Indicates the percentage of fixed fee defined in the **Advertised Fixed Fee %** field on the **Construction Fair Scope of Service** page.
(A*B)	The system displays the fixed fee amount, which is auto calculated based on the total direct labor cost and fixed fee percentage.
Multiplication factor	Indicates multiplication factor used to calculate the total fixed fee of a resource. The multiplication factor is auto populated based on the multiplication factor defined for the resource type in the **Resource Type** catalog of the library.
Total	Indicates the total fixed fee for the resource, which is auto calculated based on the fixed fee amount and the multiplication factor.
Total Fixed Fee	Indicates the total fixed fee of the construction fair estimate which is the auto calculated based on the total of fixed fees of all the resources.

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

8. Click the **Indirect Cost** tab. The indirect cost details of the construction fair package are displayed. The different details that are displayed are described in the following table.

***Note**: The Indirect Cost details can be viewed only when the **Indirect Cost** is defined for the resources of the direct labor tasks and the required tasks are marked as **In Scope** and **If Authorized** in the **Task List** tab.*

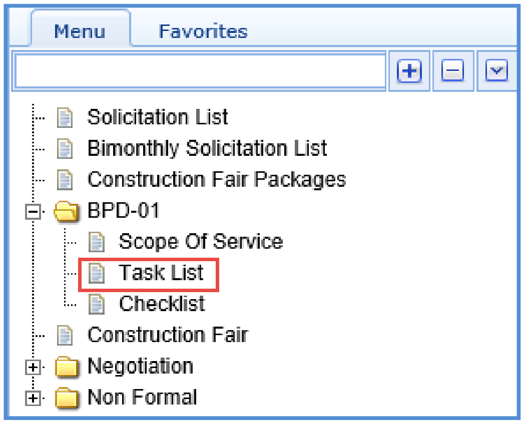


Field	Description
Total direct labor cost against an indirect type	Indicates the total direct labor cost associated with an indirect cost type for the resource. The value in this field is auto populate based on the total direct labor cost associated with an indirect cost type.
Indirect type %	Indicates the percentage of indirect cost defined for the resource.
Indirect cost against an indirect cost type	Indicates the indirect cost amount of a resource and associated indirect cost type, which is auto calculated based on the total direct labor cost and indirect type %.
Total Cost	Indicates the total indirect cost amount of the construction fair package estimate. This is the auto calculated based on the total of indirect costs of all the resource types.

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

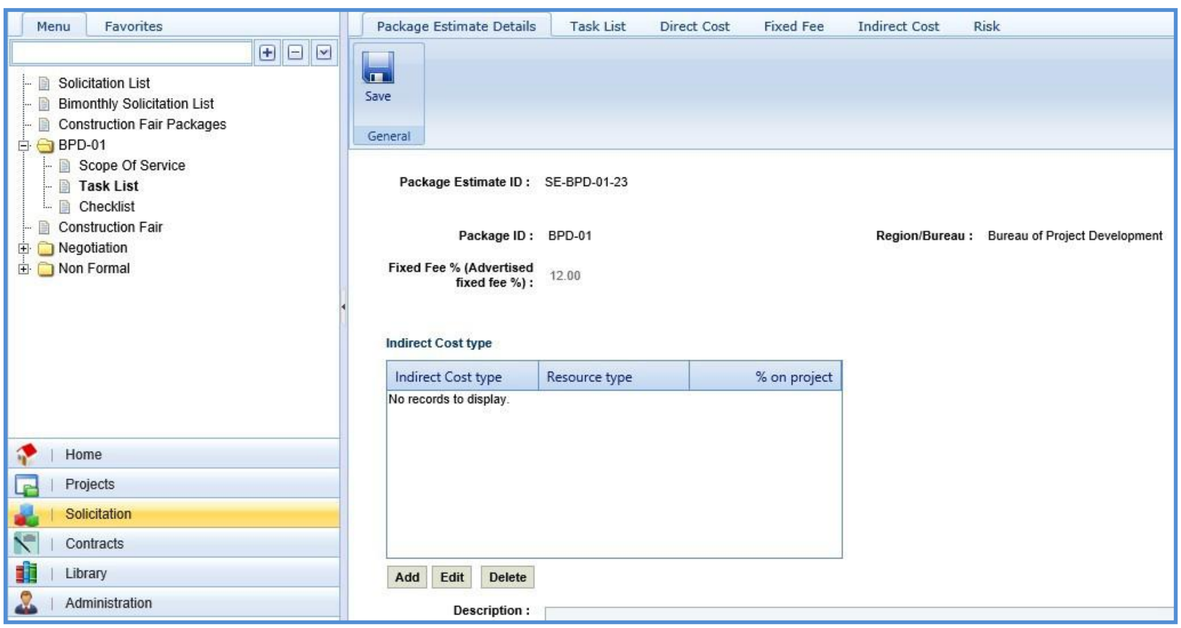
4.3.2 Construction Fair Package Task List for Master Contract Type

If the construction fair package contract type is **Master**, then a task list is displayed to define the task details.



To define the construction fair package task list for master contract type:

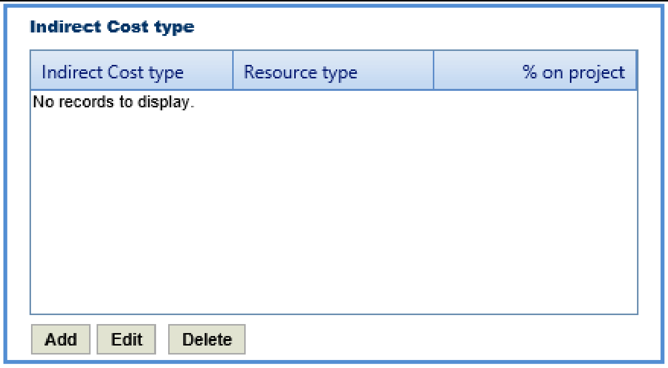
1. Select the construction fair package for which you want to define the task list and click **Edit**.
2. In the navigation pane, expand the construction fair package folder, and then click **Task List**. The **Package Estimate Details** tab is displayed.



3. In the **Package Estimate Details** tab, perform the following steps:

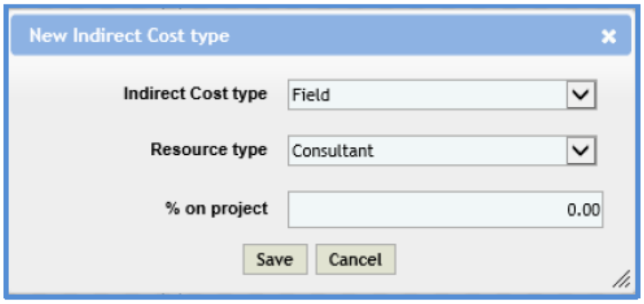
***Note**: The values in the **Package Estimate ID, Package ID, Region/Bureau,** and **Fixed Fee% (Advertised fixed fee %)** fields are auto populated.*

   a. In the **Indirect Cost** type section, perform the following steps to add the indirect cost type for the construction fair package.



i. Click **Add**. The **New Indirect Cost Type** dialog box is displayed.

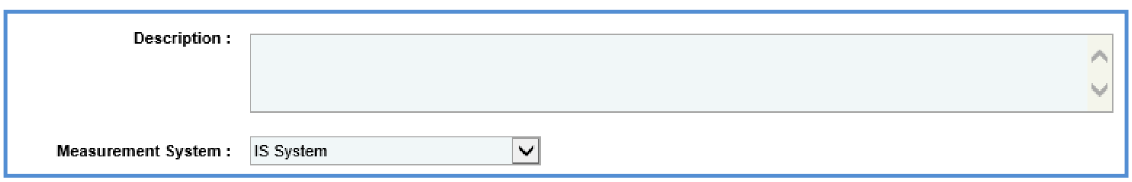
ii. Enter information in the required fields. The fields are described in the following table.

Field	Description
	
Indirect Cost type	From the drop-down list, select the type of indirect cost for the project. For availability of options in the drop-down list, the indirect cost types must be defined in the **Indirect Cost Type** catalog of the library.
Resource type	From the drop-down list, select the resource type associated with the indirect cost. For availability of options in the drop- down list, the resource types must be defined in the **Resource Type** catalog of the library.
% On project	Enter the percentage of project that is associated with the indirect cost.

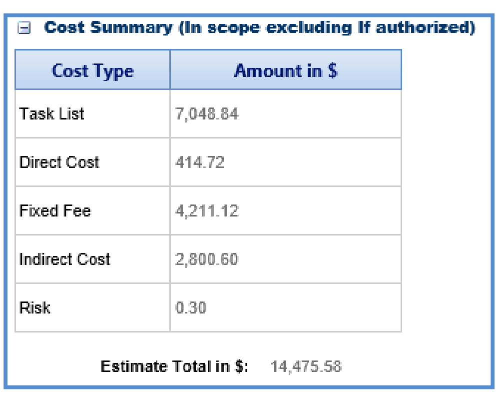
iii. Click **Save**.

b. In the **Description** field, enter the description about the construction fair package estimate.

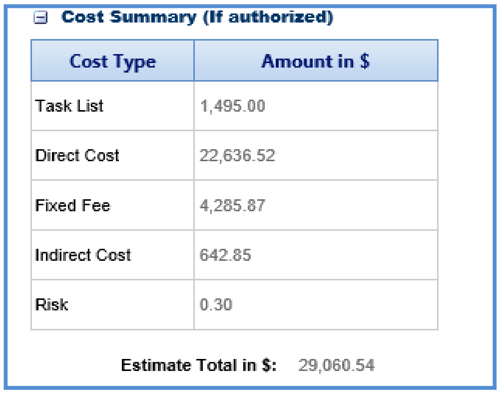
***Note**: The measurement system for the construction fair package is auto populate.*



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



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



Cost Summary (If authorized)

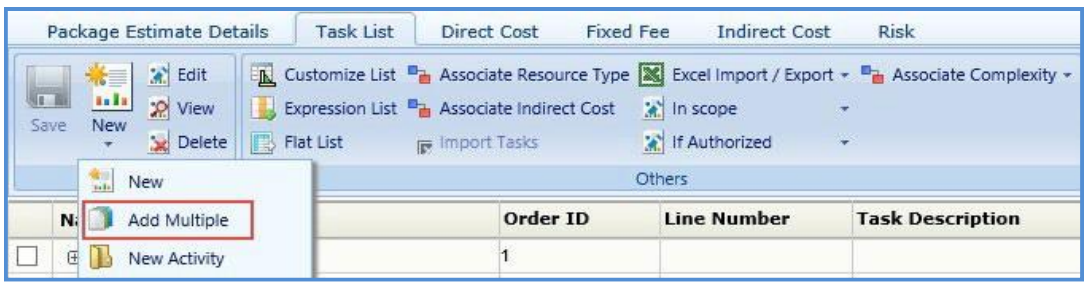
Cost Type	Amount in $
Task List	1,495.00
Direct Cost	22,636.52
Fixed Fee	4,285.87
Indirect Cost	642.85
Risk	0.30

Estimate Total in $: 29,060.54

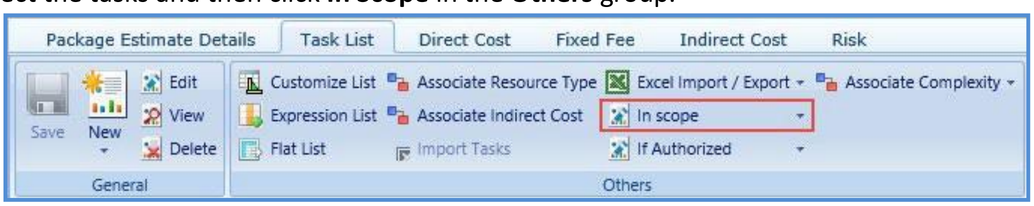
c. In the **Attachments** section, upload images and files relevant to the construction fair package estimate. For information on attachments, refer *Attachments*.

d. Click **Save.**

4. Click the **Task List** tab and perform the following steps:
   a. You can add tasks, assign resources, and indirect costs for construction fair package. To add tasks, refer to the adding multiple direct labor cost tasks step described in the **Creating Project Estimates** topic.



   b. To indicate tasks that are in scope of the construction fair package, perform the following steps.
      i. Select the tasks and then click **In Scope** in the **Others** group.



      ii. From the **In Scope** drop-down list, select **Yes**.

   c. The tasks for which cost details are available for future implementation can be marked as authorized. To indicate tasks as authorized, perform the following steps:
      i. Select the tasks and then click **If Authorized** in the **Others** group.

      ii. From the **If Authorized** drop-down list, select **Yes**.

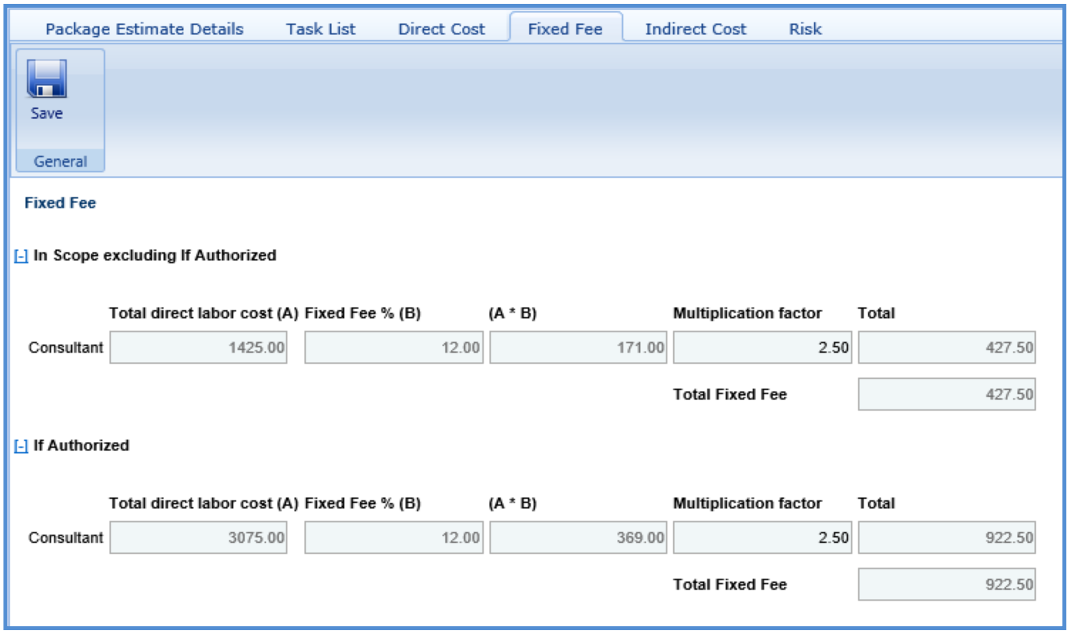
   The total of task list costs that are marked as in scope and excluding task list costs that are marked as if authorized are displayed in the **Cost Summary (In scope excluding if authorized)** section and total of task list costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **Package Estimate Details** tab.

***Note:** The system allows you to bulk associate multiple tasks with the same resource type or indirect cost. For more information, refer to [Bulk Association](#).*

5. Click the **Direct Cost** tab to add direct costs to the construction fair package estimate. Refer to adding direct cost step in **Construction Fair Package Task List for Regular Contract Type**. The total of direct costs that are marked as in scope excluding direct costs that are marked as if authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section. The total of direct costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **Package Estimate Details** tab.

6. Click the **Fixed Fee** tab. The fixed fee details are displayed based on the direct labor tasks added and marked as **In Scope** and **If Authorized** in the **Task List** tab. The different field details that are displayed are described in the following table.

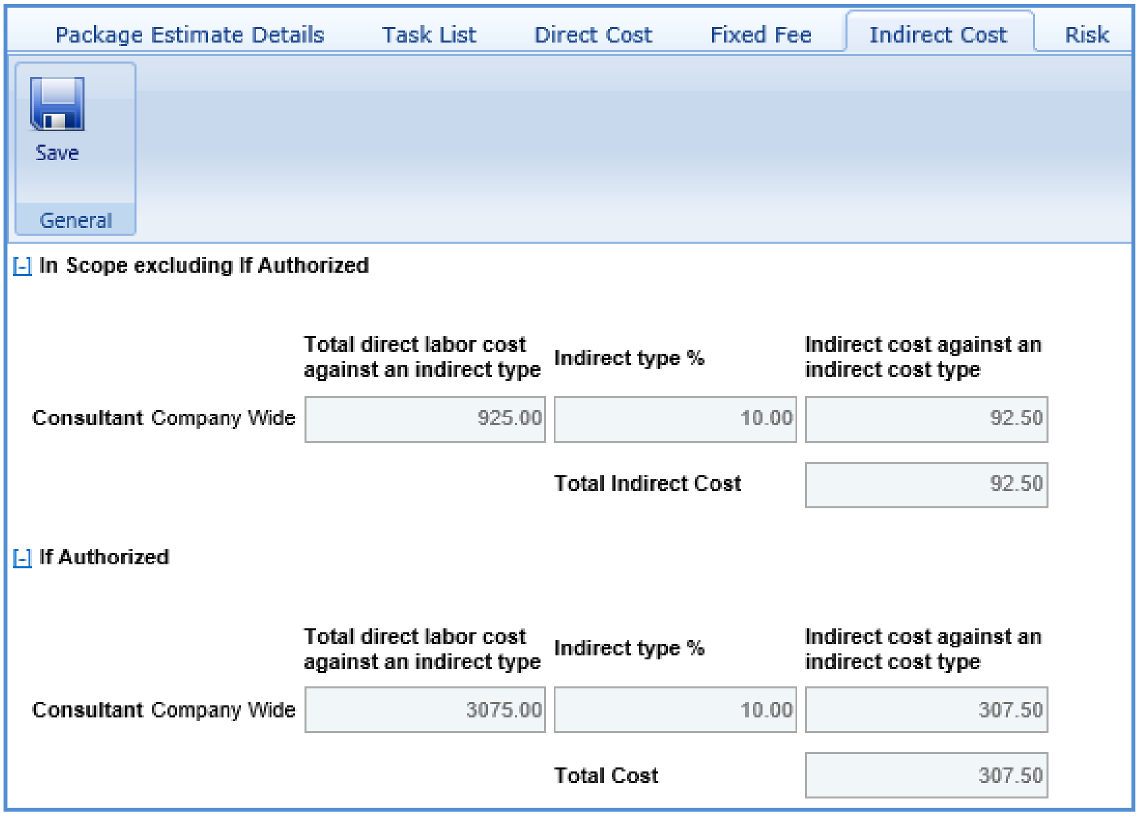
***Note:** The information in the **If Authorized** section in the tab is displayed only if the value in the **Advertised Fixed Fee %** field is defined on the* Construction Fair Scope of Service page.



Field	Description
Total direct labor cost	Indicates the total direct labor cost of the resource. The value in this field is auto populate based on the total direct labor cost in the task page of the **Task List** tab.
Fixed Fee %	Indicates the percentage of fixed fee defined in the **Advertised Fixed Fee %** field on the **Construction Fair Package Scope of Service** page.
(A*B)	The system displays the fixed fee amount, which is auto calculated based on the total direct labor cost and fixed fee percentage.
Multiplication factor	Indicates multiplication factor used to calculate the total fixed fee of a resource. The multiplication factor is auto populate based on the multiplication factor defined for the resource type in the **Resource Type** catalog of the library.
Total	Indicates the total fixed fee for the resource, which is auto calculated based on the fixed fee amount and the multiplication factor.
Total Fixed Fee	Indicates the total fixed fee of the construction fair package estimate which is the auto calculated based on the total of fixed fees of all the resources.

The total of fixed fees that are marked as **in scope** excluding fixed fees marked as **If Authorized** are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of fixed fees that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **Package Estimate Details** tab.

7. Click the **Indirect Cost** tab. The indirect cost details of the construction fair package are displayed. The different details that are displayed are described in the following table.



***Note**: The Indirect Cost details can be viewed only when:*

- *The **Indirect Cost type** is defined on the **Package Estimate Details** tab.*
- *The **Indirect Cost** is defined for the resources of the direct labor tasks and the required tasks are marked as **In Scope** and **If Authorized** in the **Task Lists** tab.*

Field	Description
Total direct labor cost against an indirect type	Indicates the total direct labor cost associated with an indirect cost type for the resource. The value in this field is auto populate based on the total direct labor cost associated with an indirect cost type defined on the **New Task** page of the **Direct Labor Cost** tab.

Field	Description
Indirect type %	Indicates the percentage of indirect cost defined for the resource. The value in this field is auto populate based on the percentage defined in the **Indirect Cost Type** section of the **Package Estimate Details** page.
Indirect cost against an indirect cost type	Indicates the indirect cost amount of a resource and associated indirect cost type, which is auto calculated based on the total direct labor cost and indirect type %.
Total Indirect Cost	Indicates the total indirect cost amount of the construction fair package estimate, which is the auto calculated based on the total of indirect costs of all the resource types.

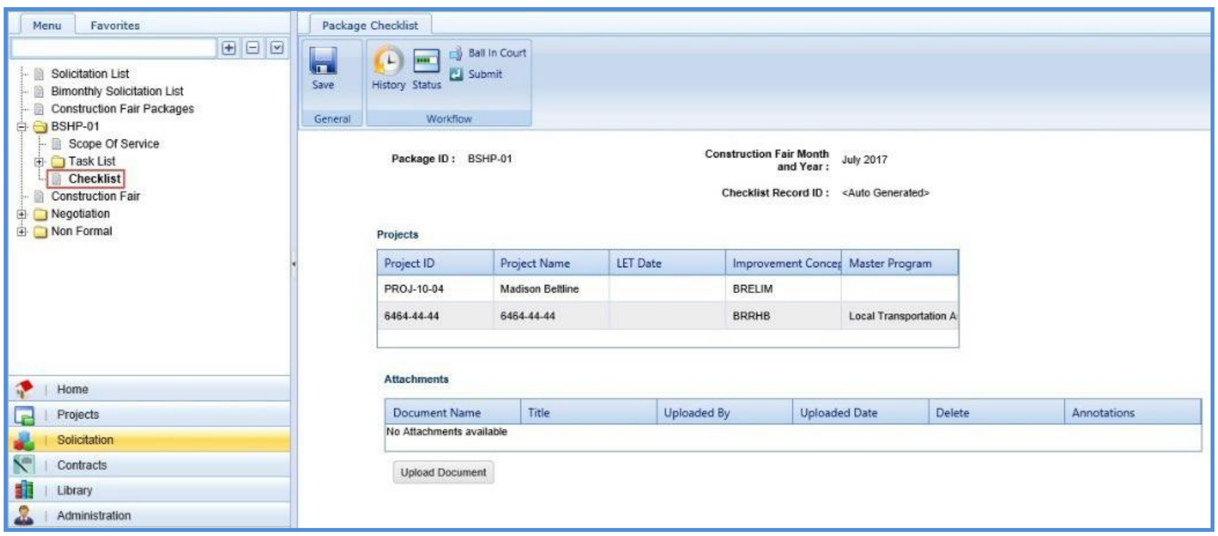
4.4 Submitting Construction Fair Package Checklist

The checklist of the construction fair package allows you to attach any relevant documents for the construction fair package, update the status of the checklist items, and enter comments about the construction fair package checklist.

Pre-requisite: Prior to submitting a checklist, the **Basis of Payment,** and **Advertised Fixed Fee%** for the construction fair package must be defined on the **Construction Fair Scope of Service** page.

To update and submit the construction fair package checklist:

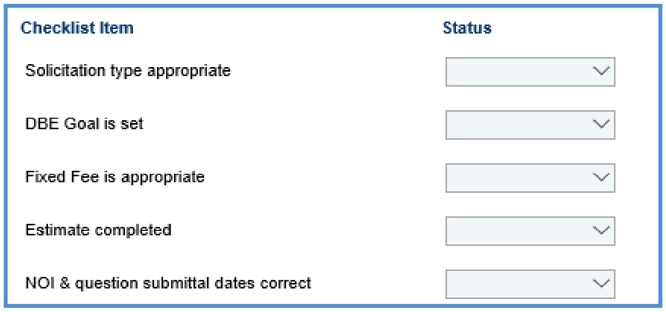
1. Select the construction fair package record, and then click **Edit**.
2. In the navigation pane, expand the construction fair package folder, and then click **Checklist**. The **Package Checklist** page is displayed.



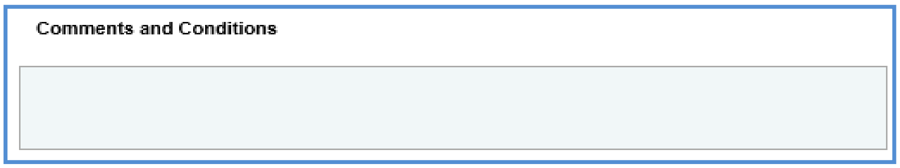
Note:

- *The **Package ID, Construction Fair Month and Year**, and **Checklist Record ID** are auto populated.*
- *If the construction fair package is associated with Master contract type, then, **Master Group Id**, and **Master Group Type** are of the construction fair package is auto populate.*
- *If the construction fair package is associated with Regular contract type, then the projects of the construction fair package is auto populated in the **Projects** section.*

3. In the **Attachments** section, upload images and files relevant to the construction fair package checklist. For information on attachments, refer *Attachments*.
4. From the **Status** drop-down list, select the status for each item. This is mandatory to submit the checklist.



5. In the **Comments and Conditions** section, enter comments and conditions about the construction fair package checklist.



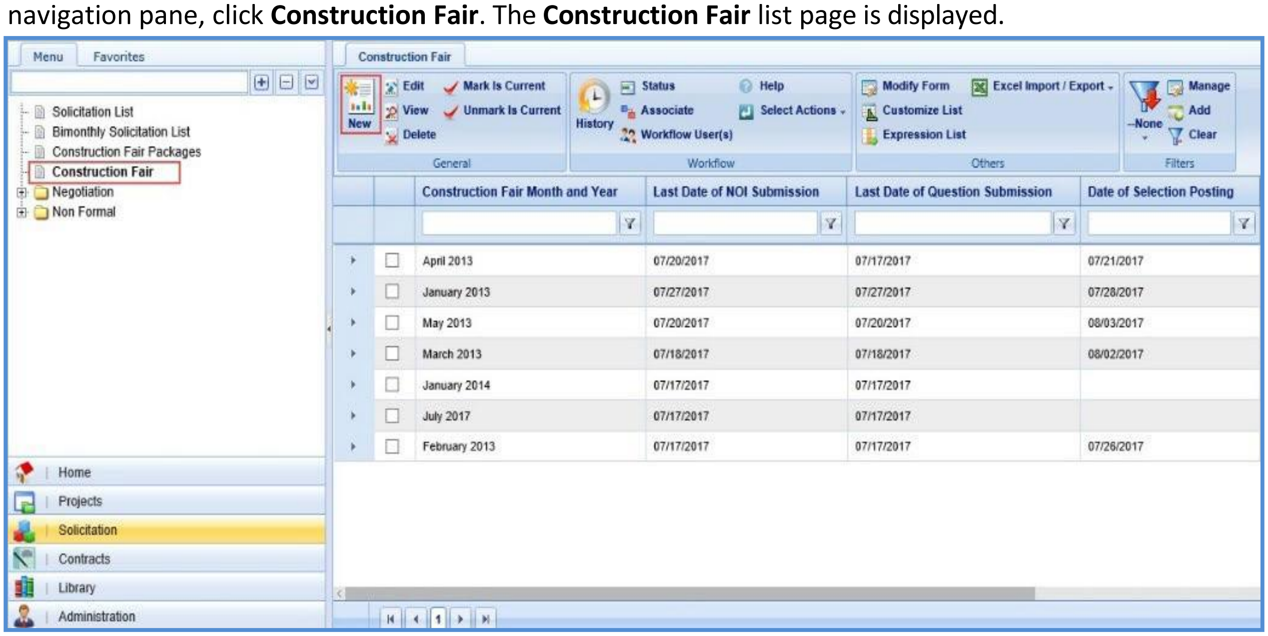
6. Click **Save**.
7. In the **Workflow** group, click **Submit**. The **WisDOT – Masterworks** dialog box is displayed.
8. Enter required information and then click **OK.**
9. Optionally, in the **Workflow** group, you can click **Close** or **Redraft**, enter required information in the dialog box that is displayed, and then click **OK** to close or redraft the record.

***Note:** You can publish a construction fair only when the checklist of the associated construction fair packages is submitted.*

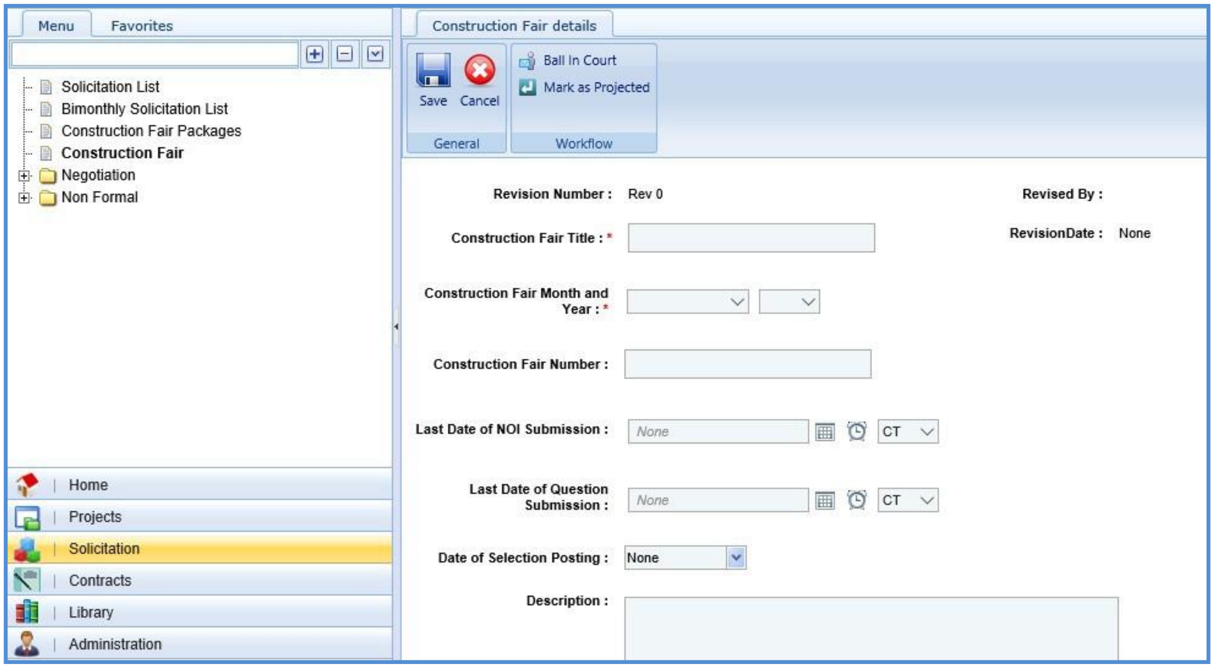
4.5 Creating and Publishing Construction Fair

The system allows you to add multiple construction fair packages to a construction fair and create a construction fair detail that will be published to the consultants. The consultants will provide a response to the NOI questionnaire, based on which consultants are ranked.

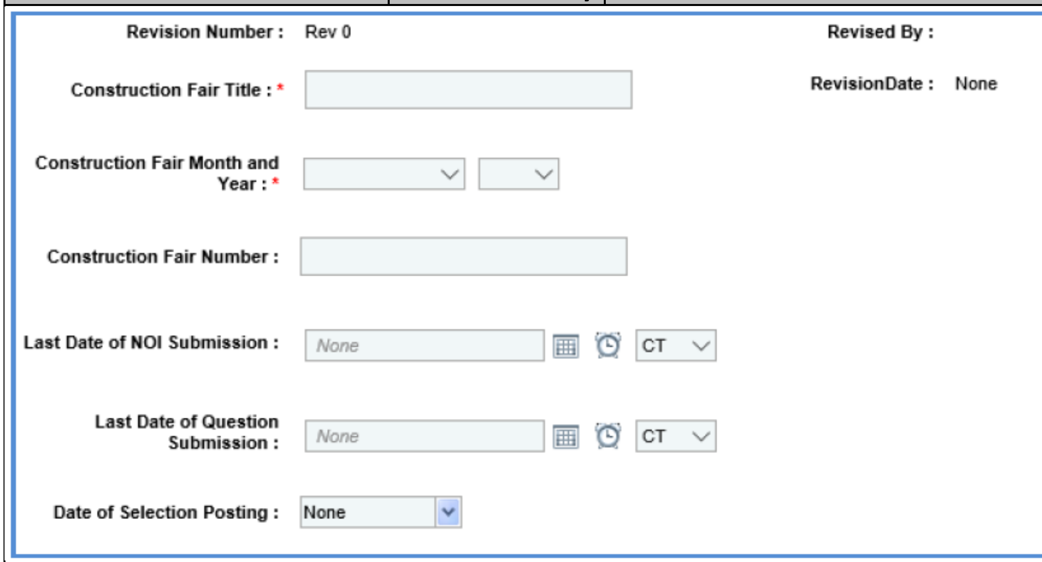
Steps:
1. In the module menu, click **Solicitation**.
2. In the navigation pane, click **Construction Fair**. The **Construction Fair** list page is displayed.



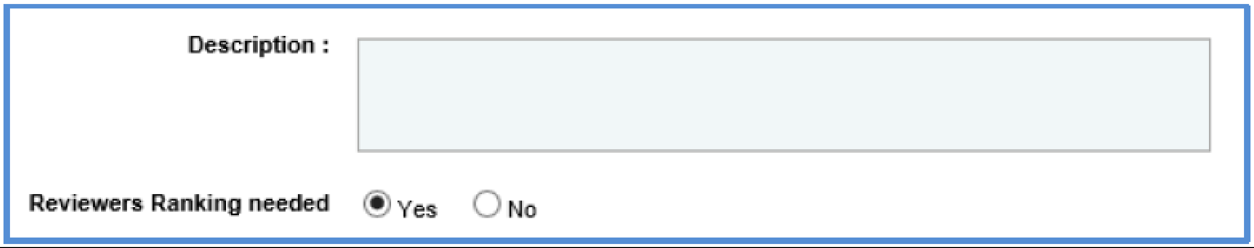
3. Click **New**. The **Construction Fair details** page is displayed.



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

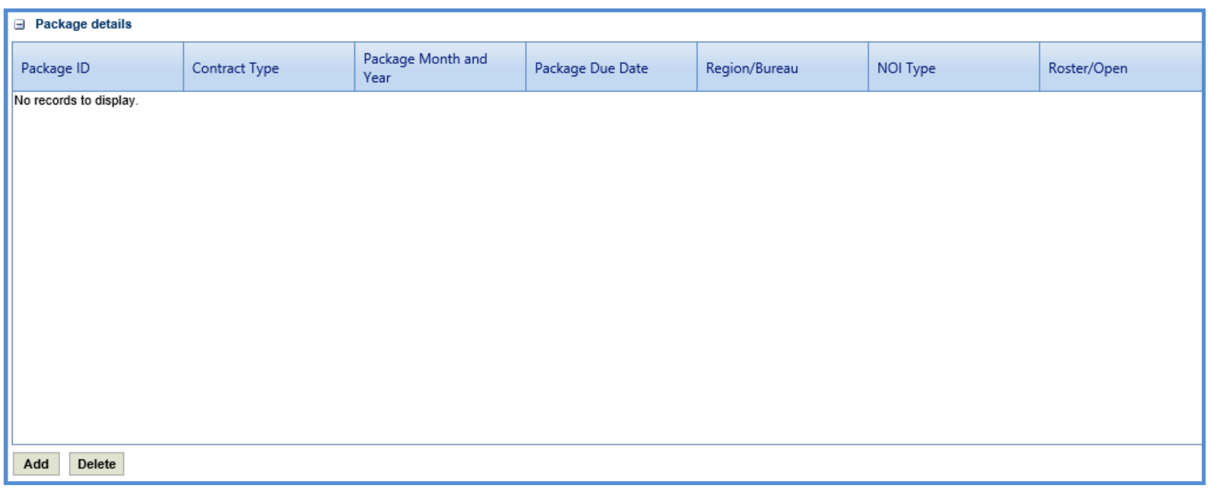
Field	Mandatory / Non-mandatory	Description
		
Revision Number	-	The revision number of the construction fair is auto populated. This is applicable only when a construction fair is revised.
Revised By	-	The name of the person who has revised the construction fair is auto populated. This is applicable only when a construction fair is revised.
Construction Fair Title	Mandatory	Enter the title for the construction fair.
Revision Date	-	The date when the construction fair was revised is auto populated. This is applicable only when a construction fair is revised.
Construction Fair Month and Year	Mandatory	From the drop-down list, select the month and year of the construction fair. You can create only one construction fair for a specific combination of month and year.
Construction Fair Number	Non-mandatory	Enter a unique number for the construction fair.

Field	Mandatory / Non-mandatory	Description
Last Date of NOI Submission	Mandatory	Enter the last date and time for submission of the NOI by the consultant. Alternatively, you can click the calendar icon and clock icon to select the date and time. From the drop-down list, select the time zone.
Last Date of Question Submission	Mandatory	Enter the last date and time for submission of questions related to the NOI by the consultant. Alternatively, you can click the calendar icon and clock icon to select the date and time. From the drop-down list, select the time zone.
Date of Selection Posting	Non-mandatory	From the drop-down calendar, select the date when the consultants will be intimated about their selection.



Description	Non-mandatory	Enter description about the construction fair.
Reviewer's Ranking needed	Non-mandatory	Click **Yes** when the reviewer's ranking is required for the construction fair or click **No** when the reviewer's ranking is not required for the construction fair.

5. In the **Package details** section, perform the following steps to add the construction fair packages.



   a. In the **Package details** section, click **Add**. The **Select Package** dialog box is displayed. The dialog box lists all the construction fair packages that are of the same month and year as that of the construction fair month and year and the construction fair packages are not associated with any other construction fair.
   b. Select the construction fair packages to add to the construction fair.
   c. Click **Select**.
6. Click **Save**. The construction fair is in the **Draft** workflow status.
7. Select the construction fair record and click **Select Actions** in the **Workflow** group.
8. Click **Mark as Projected** and in the **WisDOT Masterworks** dialog box that appears, enter required information, and then click **OK.** The **Workflow Status** of the construction fair is set to **Projected**.
9. Select the projected construction fair record and click **Select Actions** in the **Workflow** group.
10. Click **Publish Construction Fair** to publish the construction fair and in the **WisDOT Masterworks** dialog box that appears, enter information in the required fields, and then click **OK**. The workflow status of the construction fair is set to **Construction Fair Published**. The construction fair is published to the consultants. Once published, the consultant can access the construction fair through the following:

- Masterworks application
- Public Portal

Optionally, in the workflow group, you can click **Redraft** to redraft the construction fair.

Note*: The construction fair can be published only when the checklist of the associated construction fair packages are submitted.*

11. Select the construction fair published record and click **Publish Selection**. In the **WisDOT Masterworks** dialog box that appears, enter information in the required fields, and then click **OK.** The **Workflow Status** of the construction fair is set to **Selection Published**. Optionally, in the workflow group, you can click **Redraft** to redraft the construction fair.
12. Select the construction fair selection published, in the **Workflow** group, click **Complete**. In the **WisDOT Masterworks** dialog box that appears, enter information in the required fields, and then click **OK** to complete or redraft the record.
13. Once the construction fair is published, to mark a construction fair as the current construction fair, on the **Construction Fair** page, select the appropriate published construction fair record and click **Mark Is Current**.

Note: *To mark a different construction fair record as the current construction fair, select the construction fair marked as current, click* ***Unmark Is Current*** *and then perform Step 13.*

4.5.1 Revising Construction Fair

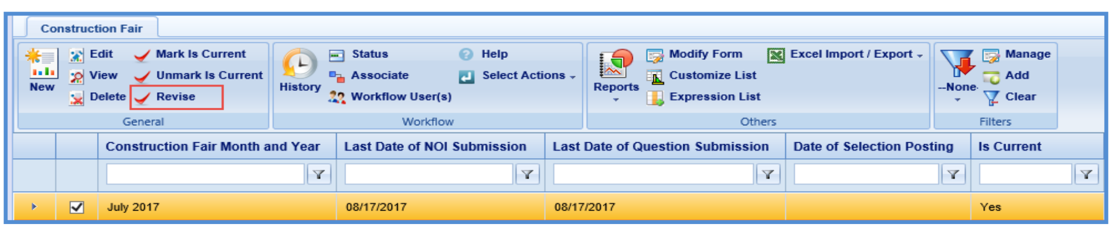
A current construction fair that is published and the NOI submission date of the construction fair has not expired can be revised to include changes. The construction fair packages associated with the construction fair that is being revised, can also be edited.

Pre-requisite:

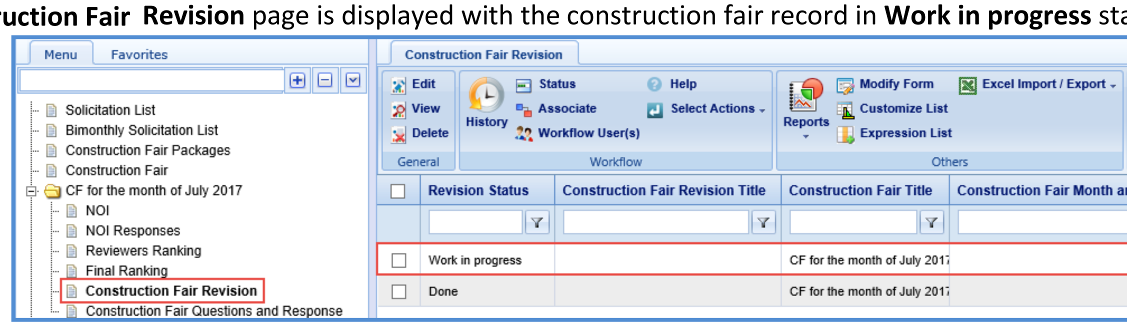
- The construction fair that is revised must be published and marked as current.
- The NOI submission date of the construction fair is valid and has not expired.

The procedure to revise a construction fair is described.

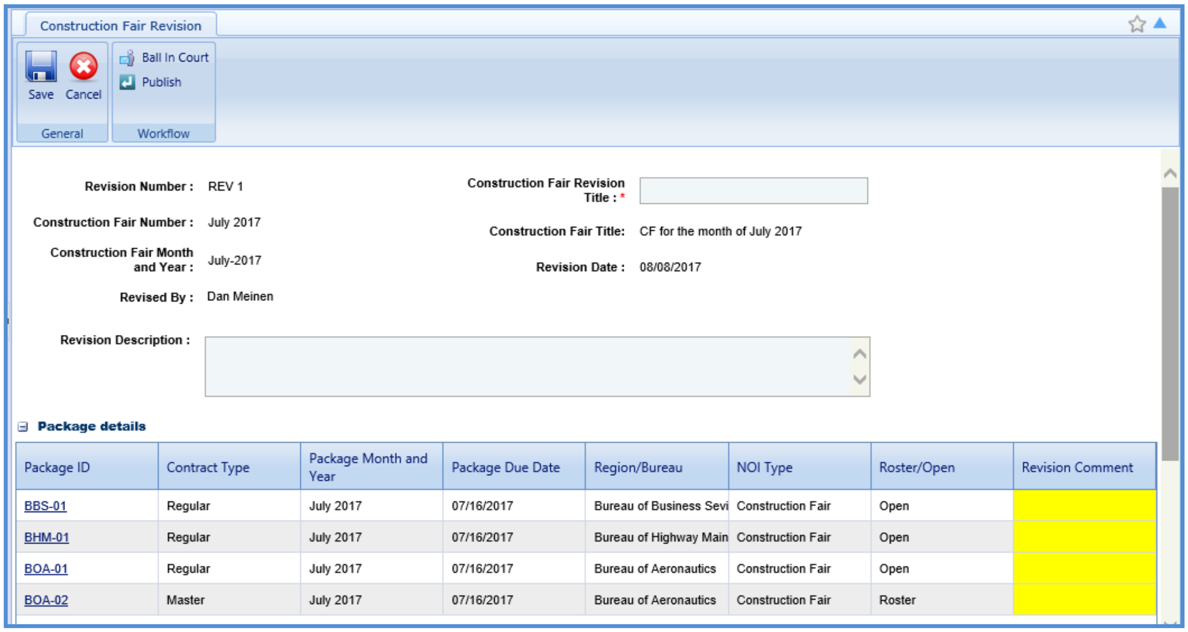
1. On the **Construction Fair** list page, select the published construction fair that is marked as current, and the NOI submission date of the construction fair has not expired for revision.



2. In the **General** group, click **Revise.** The **Construction Fair Revision** page is available in the construction fair folder in the navigation pane.
3. In the navigation pane, expand the construction fair folder and then click the **Construction Fair Revision**. The **Construction Fair Revision** page is displayed with the construction fair record in **Work in progress** status.



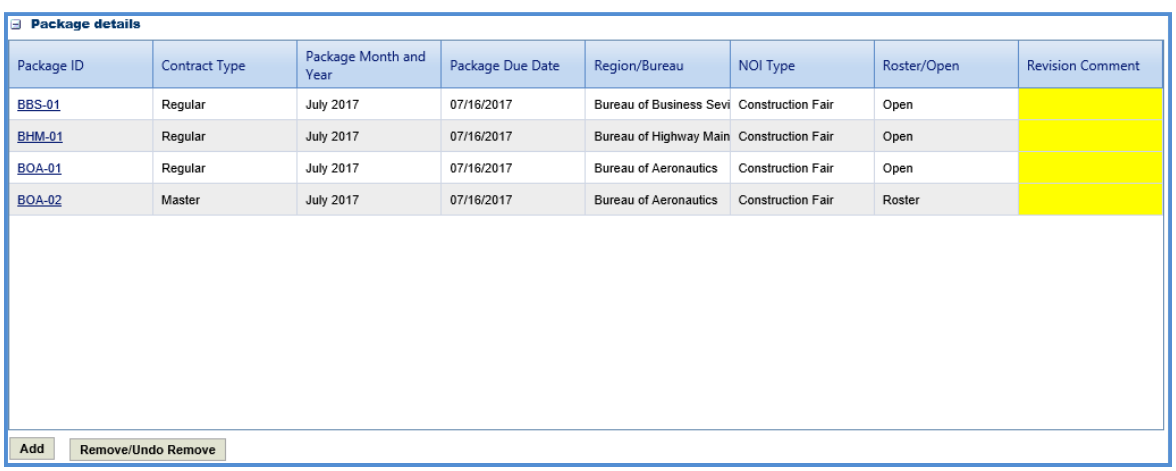
4. Select the record in the **Work in progress** status and click **Edit**. The **Construction Fair Revision** details page is displayed.



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

Field	Mandatory / Non-mandatory	Description
Revision Number	**-**	The **Revision Number** of the construction fair is auto populated.
Construction Fair Revision Title	Mandatory	Enter a title for the construction fair revision.
Construction Fair Number	**-**	The construction fair number is auto populated.
Construction Fair Title	-	The title of construction fair is auto populated.
Construction Fair Month and Year	-	The construction fair month and year is auto populated.
Revision Date	-	The date when the construction fair is revised is auto populated.
Revised By	-	The name of the person who is revising the construction fair is auto populated.
Revision Description	Non-mandatory	Enter description about the construction fair revision.

6. In the **Package details** section, you can perform the following revisions:



- Revise a construction fair package that is associated with the construction fair. Click the link in the **Package ID** column to edit the details of the construction fair package.

- In the **Revision Comment** column, enter comments about the construction fair package revision.

***Note**: It is mandatory to provide revision comments to all the packages associated with the construction fair before publishing the revised construction fair.*

- To add a construction fair package, perform the following steps:
  i. Click **Add**. The **Select Package** dialog box is displayed.
  ii. Select the required packages and click **Select**.
- To remove an existing construction fair package, select the construction fair package, and then click **Remove/Undo Remove**.

7. Click **Save**.
8. Select the revised construction fair record. In the **Workflow** group, click **Select Actions**, click **Publish**.
9. Enter required information in the dialog box that is displayed and then click **OK.** The revised construction fair is published to the consultants and the **Revision Status** of the record on the **Construction Fair Revision** page is set to **Done**. Optionally, in the **Workflow** group, you can click **Close**, enter required information in the dialog box that is displayed, and then click **OK** to close the record.

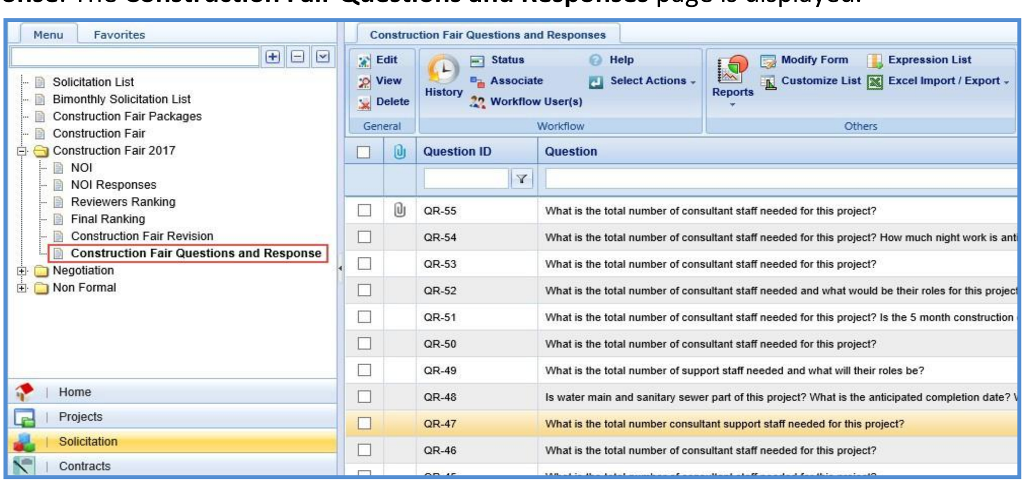
46 Responding to NOI Questions of Construction Fair

The consultants can raise questions related to the construction fair published to them. These questions can be raised before the expiry of the **Last Date of Question Submission** set in the **Construction Fair details** page. You can provide answers to these questions. However, the answers can be published to the consultants only after the expiry of **Last Date of Question Submission.**

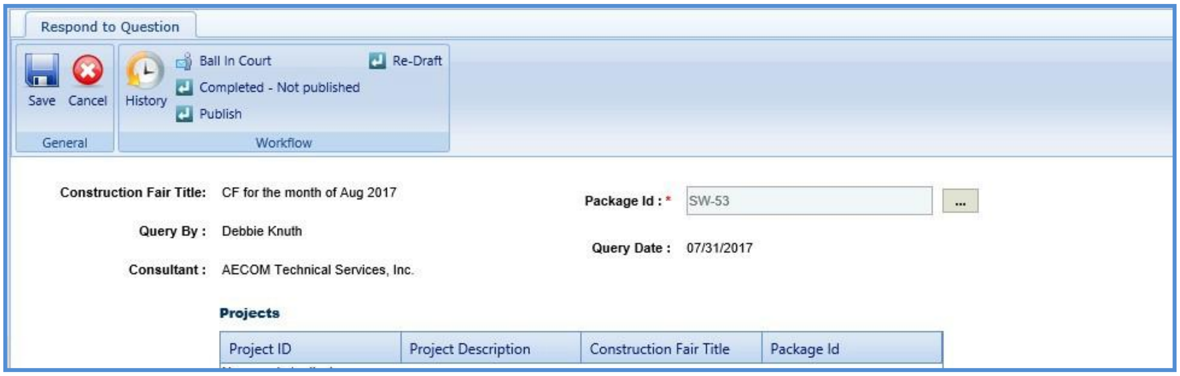
To answer the questions:

1. In the module menu, click **Solicitation**.
2. In the navigation pane, click **Construction Fair**. The **Construction Fair** list page is displayed.
3. Select the construction fair record for which you want to respond to a question, and then click **View**.

4. In the navigation pane, expand the construction fair record folder, and then click **Construction Fair Questions and Response**. The **Construction Fair Questions and Responses** page is displayed.

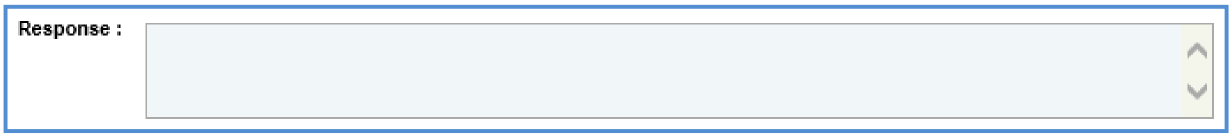


5. Select the question for which you want to respond and click **Edit**. The **Respond to Question** page is displayed.

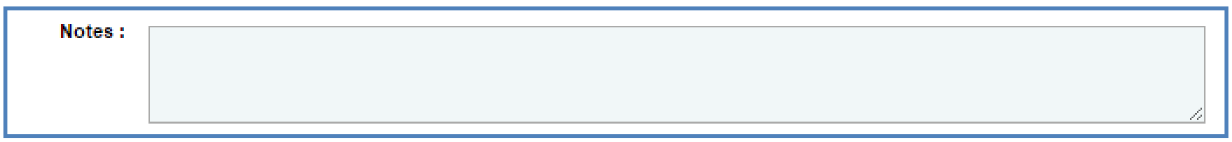


***Note**: The values in the **Construction Fair Title, Package Id, Query By, Query Date, Consultant,** and **Question** fields are auto populated. In the **Projects** section, the projects associated with the Construction Fair is auto populate.*

6. In the **Response** section, enter response to the question.



7. In the **Notes** section, enter notes about the response.

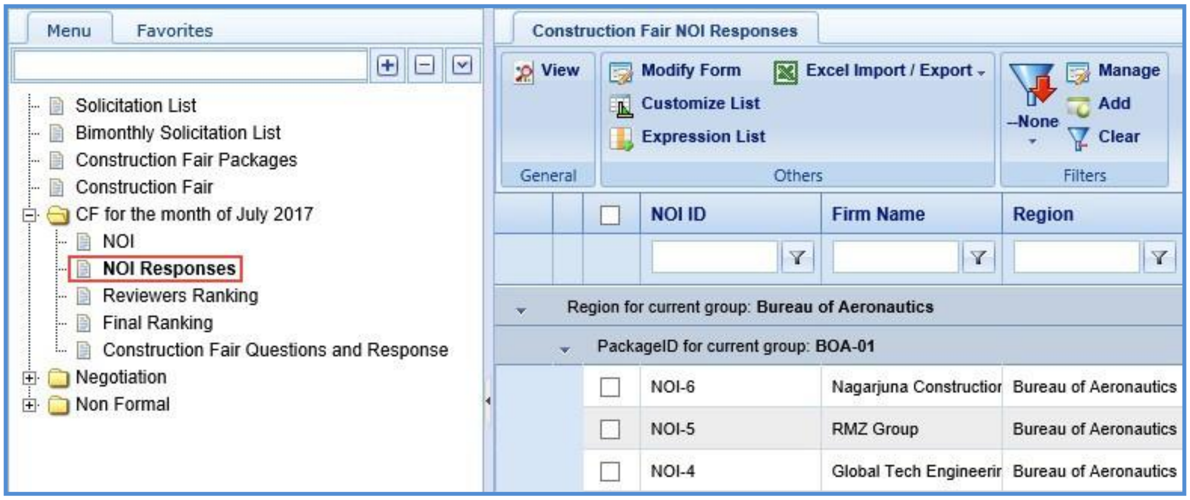


8. In the **Attachments** section, upload images and files relevant to the response. For information on attachments, refer *Attachments*.
9. Click **Save**.
10. Select the question and response record and in the **Workflow** group, click **Select Actions**. Click **Publish.** The **WisDOT – Masterworks** dialog box is displayed.
11. Enter the required information and then click **OK.** The **Workflow Status** of the record is set to **Response Published**. The response to the question is published to the consultants.
12. Optionally, if the response to the question need not be published to the consultants, enter notes in the **Notes** section. In the **Workflow** group, click **Completed – Not Published**, in the dialog box, enter required information, and then click **OK**.
13. In the **Workflow** group, you can also click **Redraft**, enter required information in the dialog box that is displayed, and then click **OK** to close or redraft the record.

4.7 Viewing NOI Responses for Construction Fair

The procedure to view the consultants' responses of NOI Questionnaires is described.

1. Click **Solicitation** in the module menu.
2. In the navigation pane, click **Construction Fair**. The **Construction Fair** list page is displayed.
3. Select the construction fair record for which NOI response must be viewed and click **View**. The **Construction Fair details** page is displayed.
4. In the navigation pane, expand the construction fair folder, and click **NOI Responses**. The **Construction Fair NOI Responses** page is displayed.



***Note**: On the **Construction Fair NOI Responses** page, the NOI responses are grouped based on region and construction fair package.*

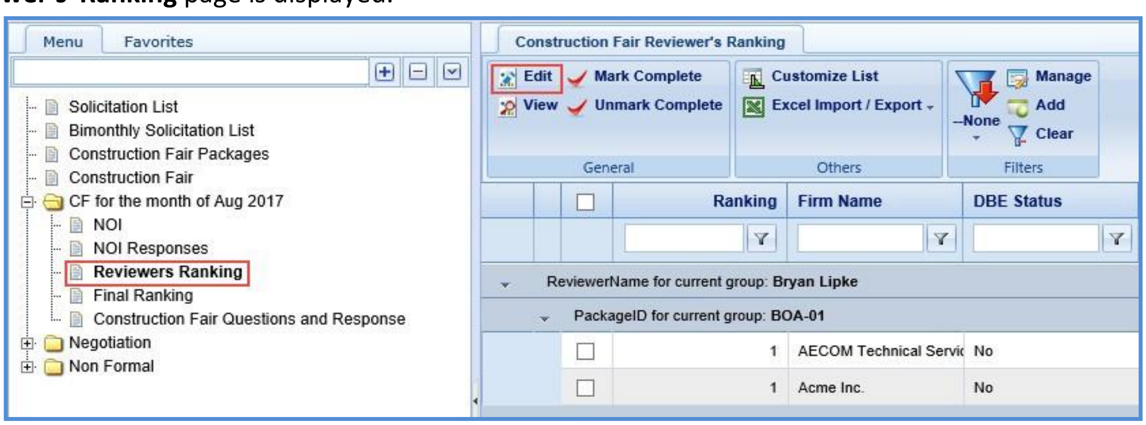
5. Select the **NOI Response** that you want to view and then click **View** in the **General** group. The **Construction Fair NOI** page is displayed. The page displays the duly filled **NOTICE OF INTEREST QUESTIONNAIRE** page.

4.8 Ranking Consultants for Construction Fair

The consultant firms are ranked by the reviewers based on their NOI responses. The NOI responses are auto populated in the **Reviewers Ranking** page once the last date of NOI submission is expired.

The procedure to rank the consultant firms is described.

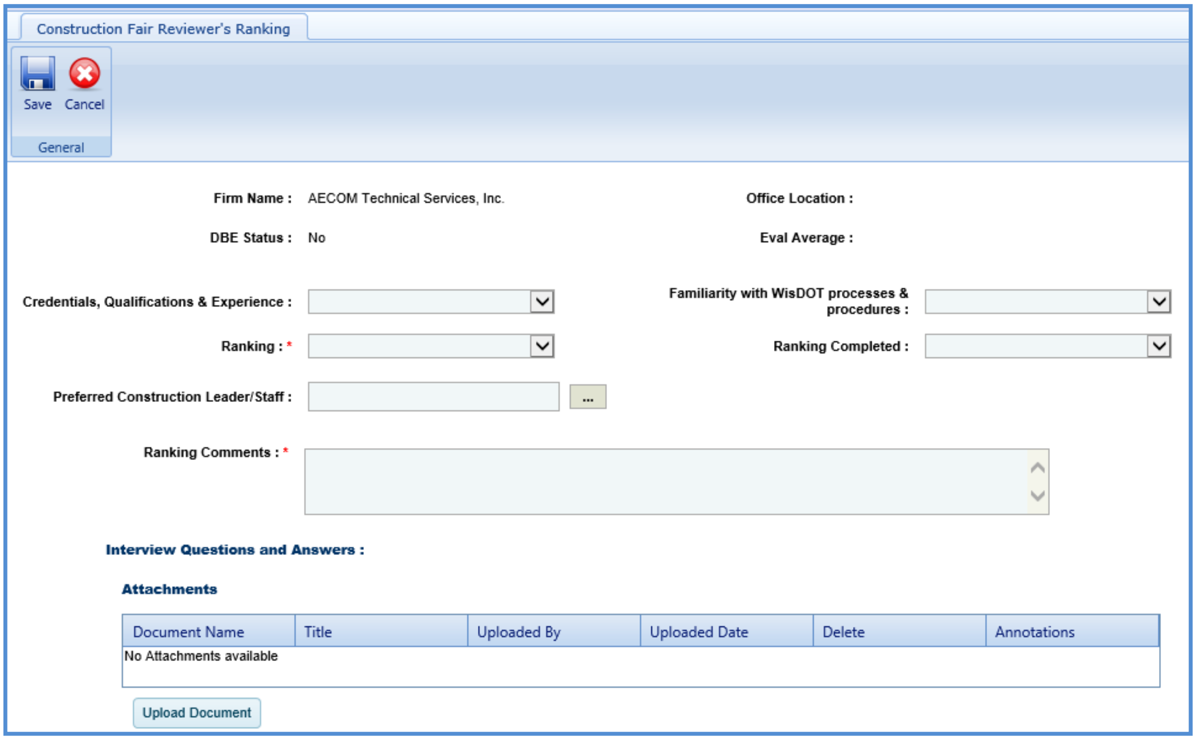
1. Click **Solicitation** in the module menu.
2. In the navigation pane, click **Construction Fair**. The **Construction Fair** list page is displayed.
3. Select the construction fair for which the consultants must be ranked and click **View**. The **Construction Fair details** page is displayed.
4. In the navigation pane, expand the construction fair folder, and then click **Reviewers Ranking**. The **Construction Fair Reviewer's Ranking** page is displayed.



***Note**: On the **Construction Fair Reviewer's Ranking** page, the NOI responses for ranking are grouped based on the reviewer's name and construction fair package.*

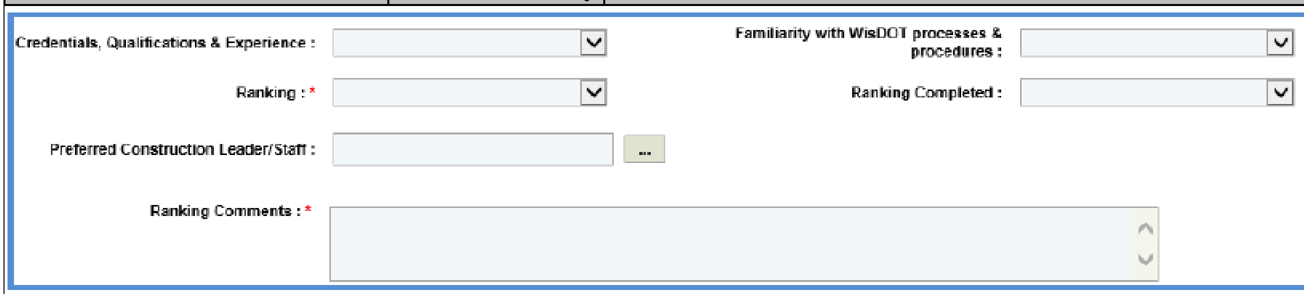
5. Select the consultant firm record that you want to rank, and then click **Edit**. The **Construction Fair Reviewer's Ranking** details page isdisplayed.

***Note**: The **Construction Fair Reviewer's Ranking** details page is available only for the reviewers who are selected for ranking the construction fair package in the **Selection team** section on the **Construction Fair Package** page.*



***Note**: The values in the **Firm Name**, **DBE Status**, **Office Location**, and **Eval Average** are auto populated.*

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

Field	Mandatory/ Non-mandatory	Description
		
Credentials, Qualifications & Experience	Non-mandatory	From the drop-down list, select the required option.
Familiarity with WisDOT processes & procedures	Non-mandatory	From the drop-down list, select the required option.
Ranking	Mandatory	From the drop-down list, select a ranking for the consultant firm. When the contract type is Master for construction fair, then all the contractors are ranked 1.
Ranking Completed	Non-mandatory	From the drop-down list, select **Yes** to indicate that the ranking of the consultant firm is completed or select **No** to indicate that the ranking of consultant firm is not completed. When the contract type is Master, this field is not available. The ranking can be indicated as complete only from the **Construction Fair Reviewer's Ranking list** page. Refer to step 9 for more information.
Preferred Construction Leader/ Staff	Non-mandatory	To select a construction Leader: 1. Click ... and the **Construction Leaders** dialog box is displayed. 2. Select the construction leader for the construction fair and click **Select**.

Field	Mandatory/ Non-mandatory	Description
Master Contract ID	-	The value in this field is auto populate when the contract type is **Master**.
Ranking Comments	Mandatory	Enter comments about ranking the consultant firm. When the contract type is Master for construction fair, then the comments is auto populated as 1.

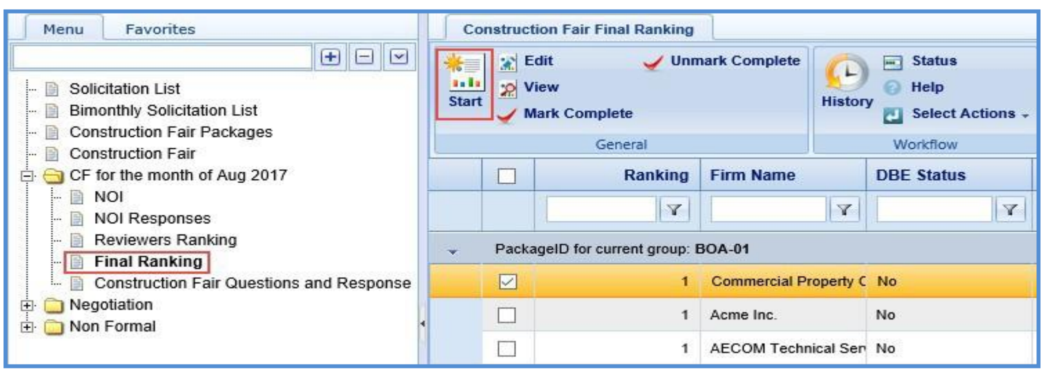
7. In the **Interview Questions and Answers** section, in **Attachments**, upload images and files relevant to the interview questions. For information on attachments, refer *Attachments*.
8. Click **Save.**
9. Select the record which is ranked and click **Mark Complete** to complete the reviewer's ranking of the consultant firms.

***Note**: All the records on the **Construction Fair Reviewer's Ranking** page must be marked as complete to proceed with the final ranking procedure.*

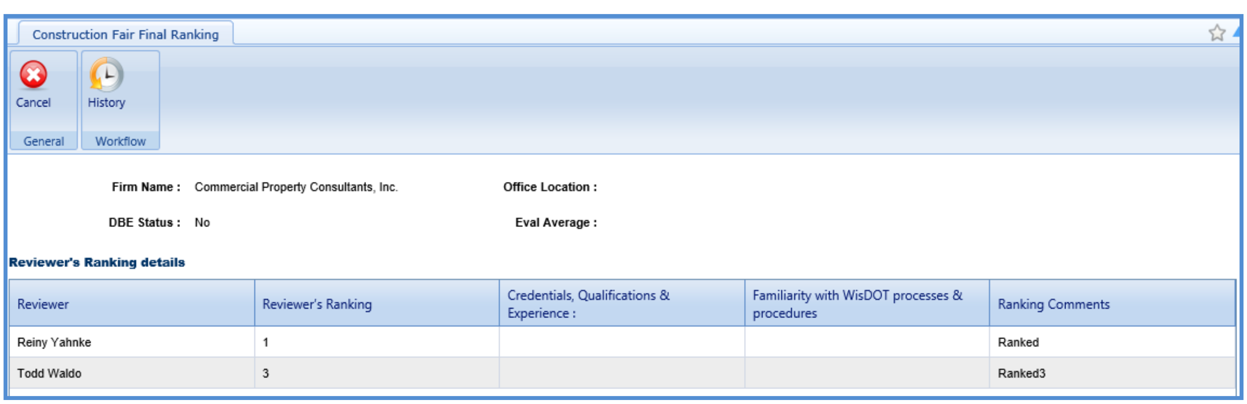
4.9 Final Ranking Consultants for Construction Fair

Pre-requisite: All the consultant firm records on the **Construction Fair Reviewer's Ranking** page must be marked as completed. The procedure to final rank the consultants is described.

1. Click **Solicitation** in the module menu.
2. In the navigation pane, click **Construction Fair**. The **Construction Fair** list page is displayed.
3. Select the construction fair for which the consultants must be ranked and click **View**. The **Construction Fair details** page is displayed.
4. In the navigation pane, expand the construction fair folder, and then click **Final Ranking**. The **Construction Fair Final Ranking** page is displayed.



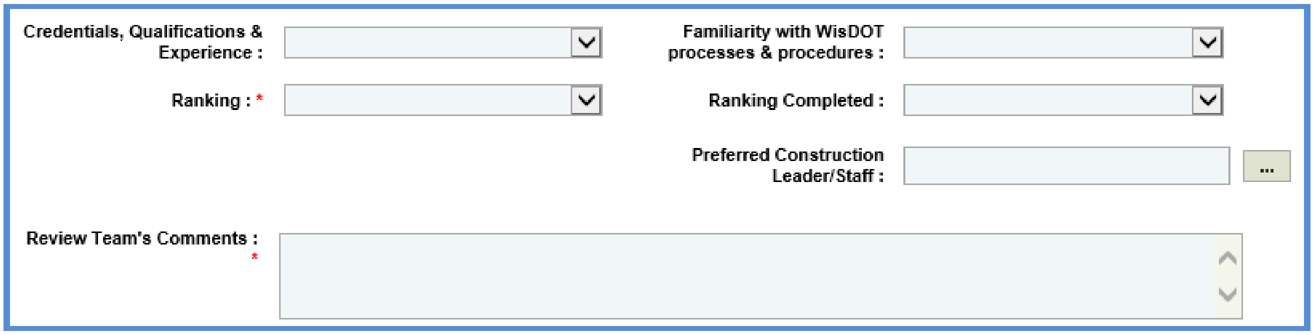
5. Click **Start** in the **General** group. The ranked consultant firm records are listed.
6. Select the consultant firm record that you want to final rank and click **Edit**. The **Construction Fair Final Ranking** details page of the consultant firm is displayed.



Note:

- *The **Construction Fair Reviewer's Ranking** details page is available only for the reviewers who are selected for ranking the construction fair package in the **Selection team** section on the **Construction Fair Package** page.*
- *The values in the **Firm Name, Office Location, DBE Status,** and **Eval Average** fields are auto populated.*
- *The **Reviewers Ranking Details** section auto-populates the reviewer's ranking details of the consultant firm.*

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



Field	Mandatory/ Non-mandatory	Description
Credentials, Qualifications & Experience	Non-mandatory	From the drop-down list, select the required option.
Familiarity with WisDOT processes & procedures	Non-mandatory	From the drop-down list, select the required option.
Ranking	Mandatory	From the drop-down list, select a final rank for the consultant firm. When the contract type is Master for construction fair, then all the contractors are ranked 1.
Ranking Completed	Non-mandatory	From the drop-down list, select **Yes** to indicate that the final ranking of the consultant firm is completed or select **No** to indicate that the final ranking of consultant firm is not completed. When the contract type is Master, this field is not available. The ranking can be indicated as complete only from the **Construction Fair Final Ranking list** page. Refer to step 8 for more information.
Preferred Construction Leader/Staff	Non-mandatory	To select a construction Leader: 1. Click ... and the **Construction Leaders** dialog box is displayed. 2. Select the construction leader for the construction fair and click **Select**.
Review Team's Comments	Mandatory	Enter comments about final ranking of the consultant firm. When the contract type is Master for construction fair, then the comments is auto populated as 1.

8. Click **Save.** The record is in the **Review and Ranking** workflow status.
9. Once the record is ranked, select the record, and then click **Mark Complete** to complete the final ranking of the consultant firms.

Note: *All the records on the **Construction Fair Final Ranking** page should be in the **Review and Ranking** workflow status to proceed with the workflow.*

10. On the **Construction Fair Final Ranking** list page, select the ranking completed record and in the **Workflow** group, click **Ready for BPD Review**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The record is sent to BPD for review. The BPD can defer, accept, or re- evaluate the record.
11. Select the record in the **BPD Review** stage, in the **Workflow** group, click **Accepted**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The record is in the **Accepted** workflow stage.

12. Optionally, click **Deferred** to defer the record or **re-evaluate** to re-evaluate the record.
13. Select the record that is in the **Accepted** or **Deferred** workflow stage, in the **Workflow** group, click **Complete**. The **WisDOT – Masterworks**
    dialog box is displayed. Enter required information and then click **OK.**

5 Non Formal Solicitation

This section describes the procedure to create solicitations for the contract type '**Non-Formal**'. Non formal contracts are further categorized as below:

- Local Design
- Small Purchase
- Sole Source
- RFP (Request for Proposal)
- Work Order Request

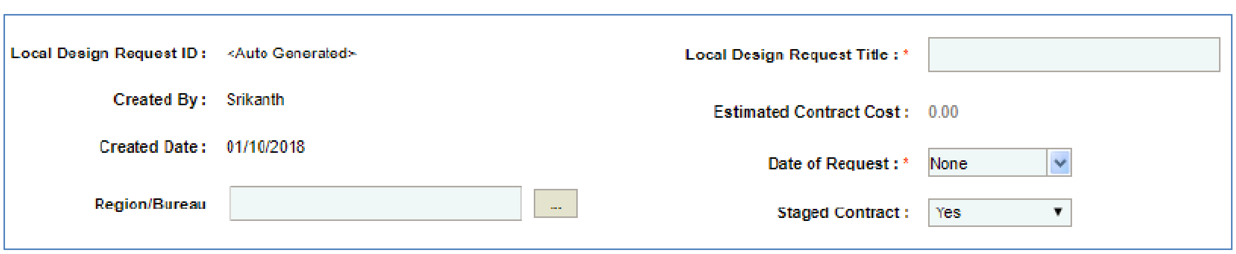
5.1 Functional Flow for Solicitation of Non Formal contracts

The following sequential tasks comprise the functional flow for solicitation of Non-Formal contracts.

1. Create details for the Non-Formal contract type.
2. Add projects and the consulting firms.
3. Rank the consulting firms.
4. Create **Non-Formal Estimate** to measure the work internally and mark '**Is Current**'.
5. Create **Consultant Estimate**.
6. View responses to the **Consultant Estimate**.
7. Approve **Consultant Estimate**.
8. Create a Non-Formal Contract.

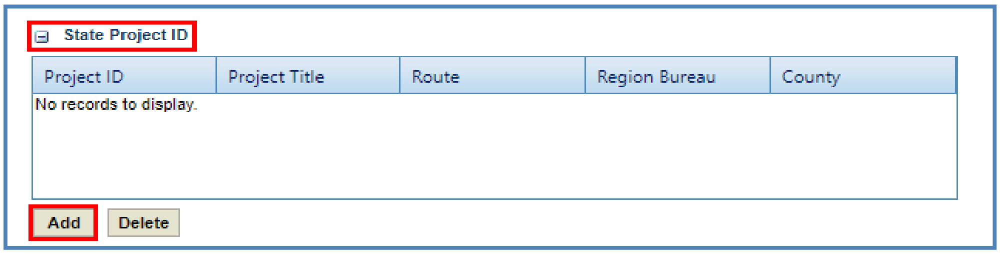
5.2 Creating Local Design Request

1. Click **Solicitation in the module menu.**
2. In the navigation pane, expand **Non Formal** and click **Local Design.** The **Local Design List** page is displayed**.**
3. Click **New.** The **Local Design Request** details page is displayed**.**
4. Provide the information in the fields, as described in the following table:

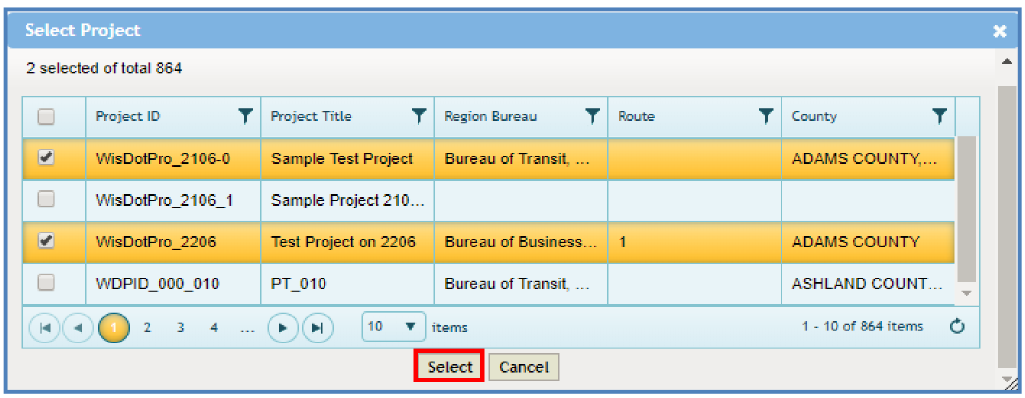
Field	Mandatory / Non-mandatory	Description
		
Local Design Request ID	–	The unique ID for the **Local Design Request** is auto populated.
Local Design Request Title	Mandatory	Enter the title of the **Local Design Request**.
Created By	–	Displays the username of the user creating the record.
Estimated Contract Cost	–	Displays the internal estimate contract amount of the **Local Design Request** that is marked as '**Is Current**'.

Field	Mandatory / Non-mandatory	Description
Created Date	–	Displays the current date from the system calendar.
Date of Request	Mandatory	From the calendar drop-down, select the date of **Local Design Request**.
Region/Bureau	Mandatory	To Enter the region or bureau use the following steps: 1. Click ... and the Region/Bureau dialog box is displayed. For availability of options in the dialog box, region/bureaus must be defined in the **Region-Bureau** catalog of the library. 2. Select the required region/bureau and click **Select**.
Staged Contract	Non-Mandatory	By default, '**Yes**' is selected. • If **Staged Contract** is selected '**Yes**', the user can create multiple contracts for the **Local Design Request ID**. • If **Staged Contract** is selected '**No**', the user can create only one contract for the **Local Design Request ID**.

5. To add the **State Project ID:**

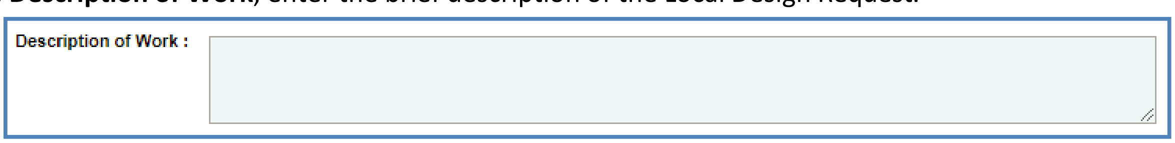


a. Click **Add.** The **Select Project** dialog box is displayed. Based on the Region/Bureau selected, the projects are listed in the dialog box.



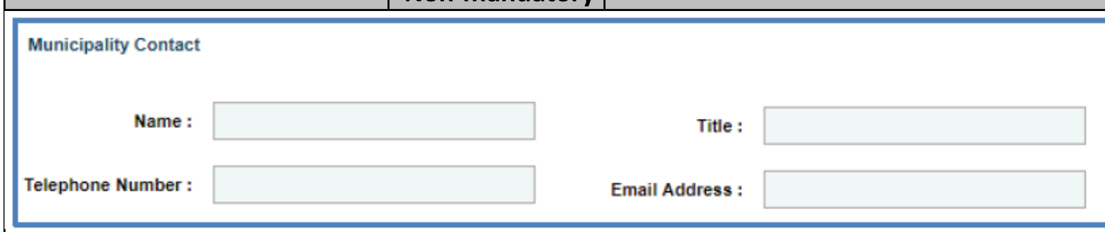
b. Select one or more projects and click **Select**. The selected projects are added to the grid.

6. In the **Description of Work**, enter the brief description of the Local Design Request.



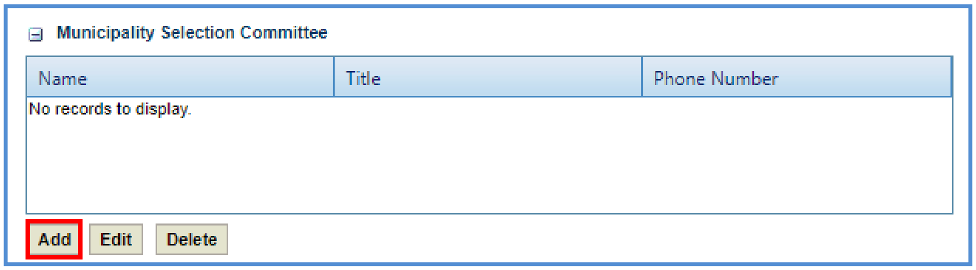
7. In the **Municipality Contact** section, provide the information in the fields, as described in the following table:

Field	Mandatory / Non-mandatory	Description

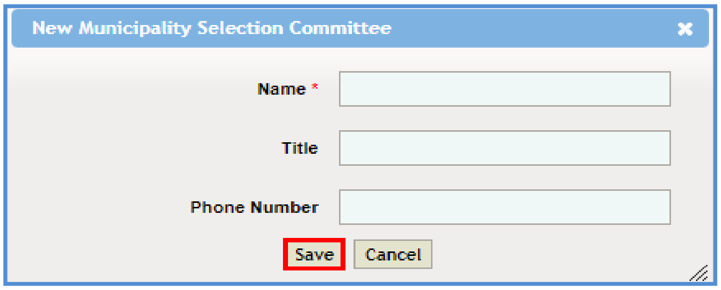


Field	Mandatory / Non-mandatory	Description
Name	Non-Mandatory	Enter the name of the municipality contact.
Telephone Number	Non-Mandatory	Enter the telephone number of the municipality contact.
Title	Non-Mandatory	Enter the title.
Email Address	Non-Mandatory	Enter the email address of the municipality contact.

a. To add Municipality Selection Committee, click **Add.** The **New Municipality Selection Committee** dialog box is displayed.

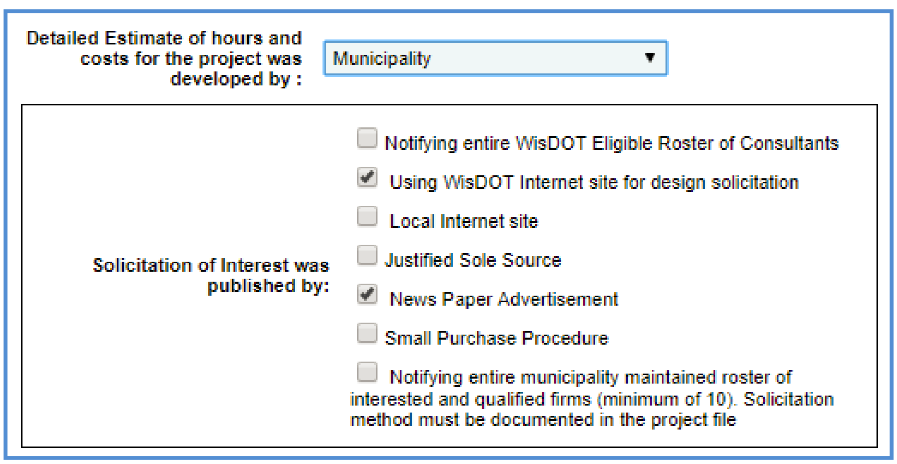


b. Enter the following details:



- Name: Enter the name of the selection committee member.
- Title: Enter the title.
- Phone Number: Enter the phone number of the selection committee member

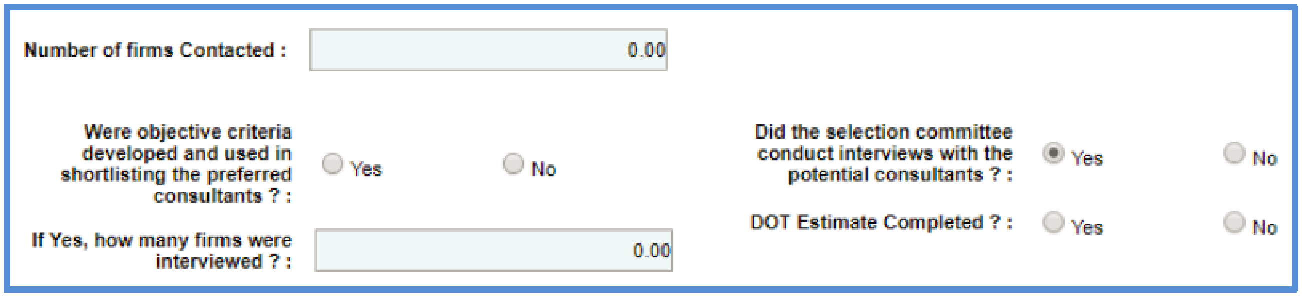
c. Click **Save**. The details are saved in the **Municipality Selection Committee** section.



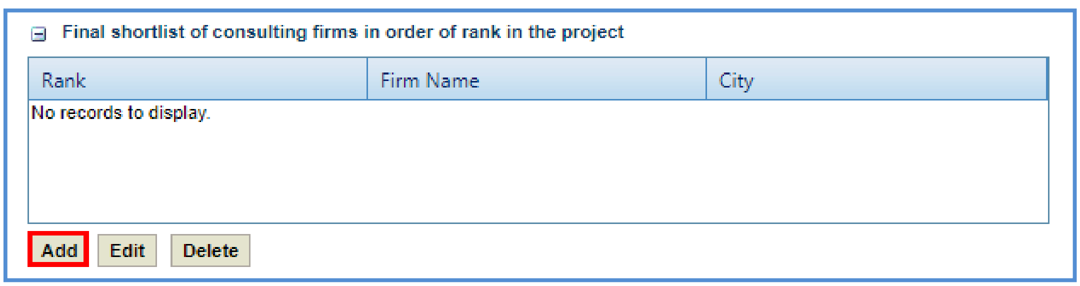
8. In **Detailed Estimate of hours and costs for the project was developed by**, from the drop-down, select the entity which developed the detailed estimate of hours and costs for the project.

9. In **Solicitation of Interest was published by** grid, from the list, select one or more options where the Solicitation of Interest is published.

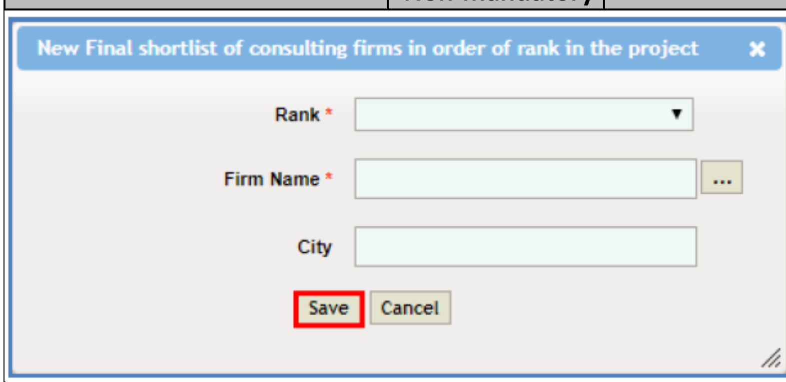
10. Enter the information in the required fields, as described in the following table.

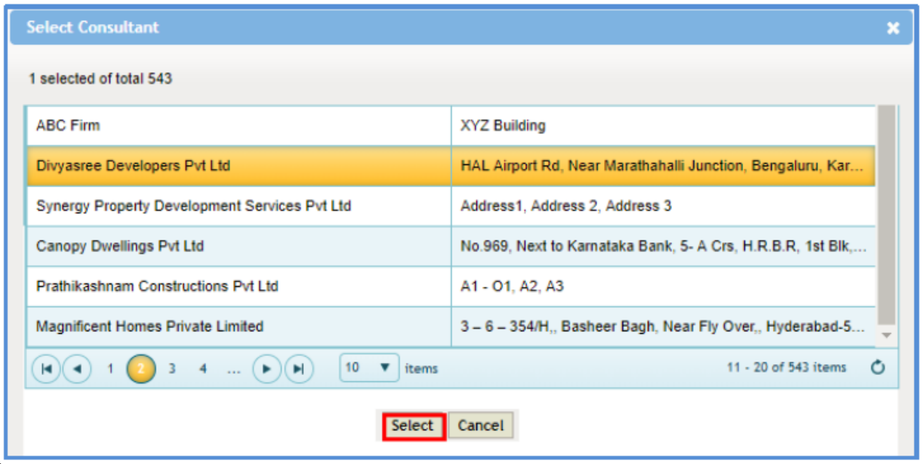
Field	Mandatory / Non-mandatory	Description
		
Number of firms Contacted	Non-mandatory	Enter the number of firms Contacted.
Were objective criteria developed and used in shortlisting the preferred consultants?	Non-mandatory	Select 'Yes' if the objective criteria are developed and used in shortlisting the preferred consultants.
Did the selection committee conduct interviews with the potential consultants?	Non-mandatory	Select 'Yes' if the selection committee has interviewed the potential consultants. The **If Yes, how many firms were interviewed?** field is displayed.
If Yes how many firms were interviewed?	Non-mandatory	Enter the number of firms interviewed.
DOT Estimate Completed?	Non-mandatory	Select 'Yes' if the DOT estimate is completed.

11. In the **Final shortlist of consulting firms in order of rank in the project** section, do the following:
    a. To add the final shortlist of consulting firms, click **Add.** The **New Final shortlist of consulting firms in order of rank in the project** dialog box is displayed.



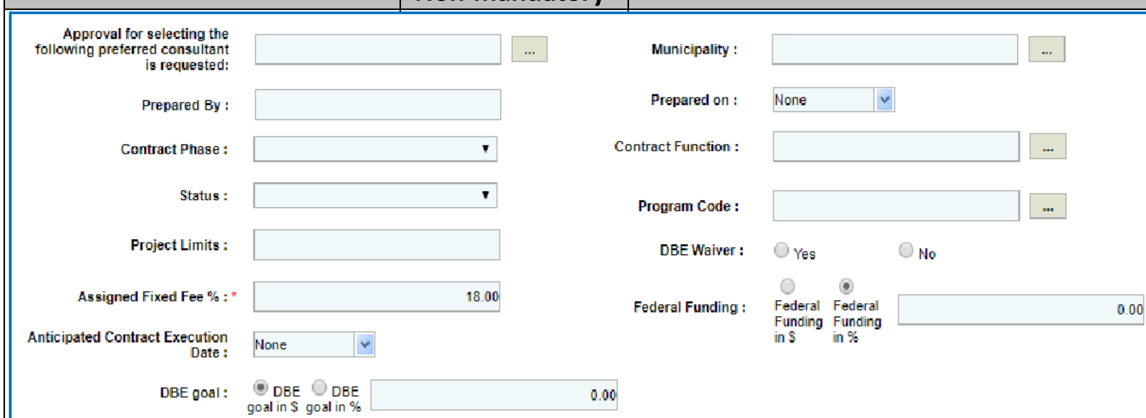
    b. Enter the information in the required fields, as described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Rank	–	From the drop-down, select the number from 1 to 10 to rank the consulting firm.
Firm Name	–	To enter a Firm Name, use the following steps: 1. Click ... . The **Select Consultant** dialog box is displayed. 2. Select the consultant from the list and click **Select**.

Field	Mandatory / Non-mandatory	Description
		
City	–	The city is auto populated.

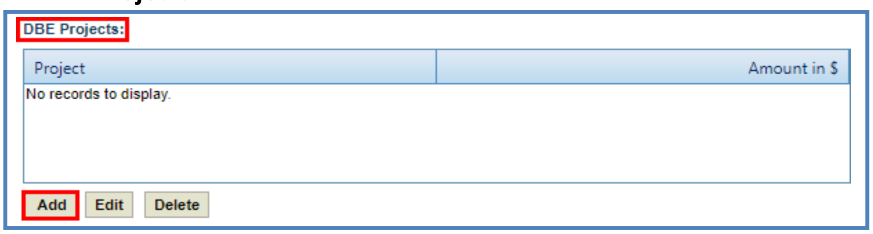
c. Click **Save**. The details are saved in the **Final shortlist of consulting firms in order of rank in the project** section.

12. Enter the information in the required fields, as described in the following table.

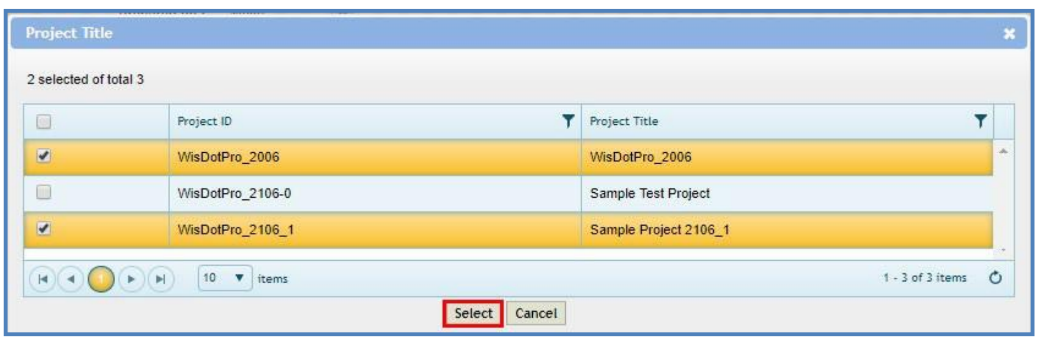
Field	Mandatory / Non-mandatory	Description
		
Approval for selecting the following preferred consultant is requested	Non-mandatory	To add the details: 1. Click ... The **Select** dialog box is displayed. 2. From the list of final shortlisted consulting firms, select the preferred consultant and click **Select**. The selected consulting firm is displayed. 3. From the drop-down, select the number from 1 to 10 to rank the consulting firm.
Municipality	Non-mandatory	To add the Municipality details: 1. Click ... The **Location** dialog box is displayed. 2. From the list of location, select the preferred location and click **Select**. The selected location is displayed.
Prepared By	Non-mandatory	Enter the name of the person preparing the record.
Prepared on	Non-mandatory	From the calendar drop-down, select the date of preparing the record.
Contract Phase	Non-mandatory	From the drop-down, select the relevant phase for the contract.
Status	Non-mandatory	From the drop-down, select the relevant status for the contract.
Contract Function	Non-mandatory	To add the **Contract Function** details: 1. Click ... The **Contract Function** dialog box is displayed. 2. From the list, select the contract function and click **Select**.

Field	Mandatory / Non-mandatory	Description
Program Code	Non-mandatory	To add the Program Code details: 1. Click ... . The **Program Type Code** dialog box is displayed. 2. From the list of program code, select the program code and click **Select**. The selected program code is displayed.
Project Limits	Non-mandatory	Enter the project limits.
DBE Waiver	Non-mandatory	Click Yes to approve DBE Waiver or click No to reject DBE Waiver.
Assigned Fixed Fee %	Non-mandatory	Enter the fixed fee percentage to assign.
Anticipated Contract Execution Date	Non-mandatory	From the drop-down calendar, select the anticipated contract execution date
DBE goal	Non-mandatory	To enter an amount in this field, sue the following steps: • Select DBE goal in $ and enter the amount in the field. • Select DBE goal in % and enter the percentage of the DBE goal.
Federal Funding	Non-mandatory	To enter a federal funding amount, use the following steps: • Select Federal Funding in $ and enter the amount in the field. • Select Federal Funding in % and enter the percentage of the Federal Funding.

13. To add **DBE Projects:**



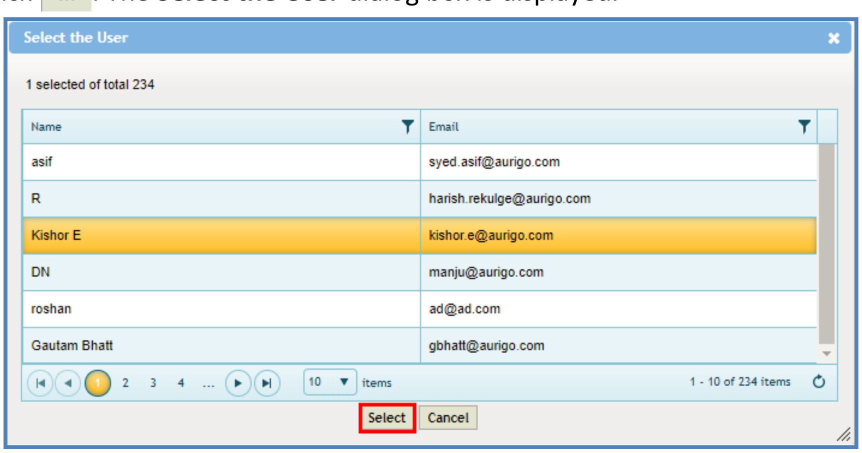
a. Click **Add**. The **Project Title** dialog box is displayed listing the projects associated with the Local Design Request in the State Project ID grid.



b. Select one or more DBE projects and click **Select**. The selected projects are added to the grid.

14. In **Selection for Design by Local Government Contract Approved By** field:

a. Click ... . The **Select the User** dialog box is displayed.

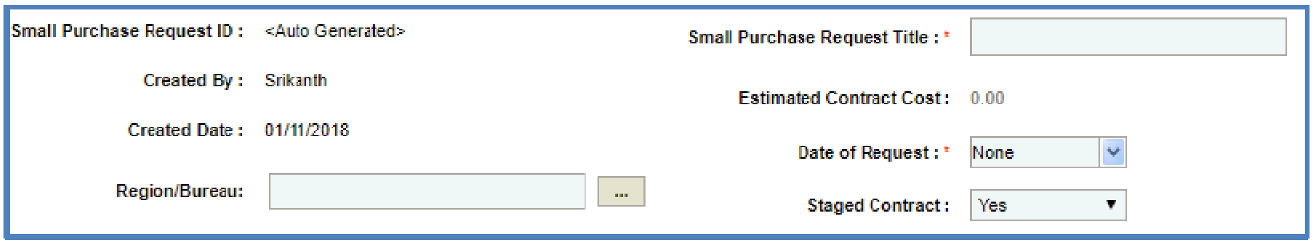


b. Select the WisDOT user from the list and click **Select**. The name of the user is displayed in the box.

15. In the **Attachments** section, upload images and files relevant to the construction fair package. For information on attachments, refer *Attachments*.
16. Click **Save.** The **DBE Project total in % / $** box displays the total of the **DBE goal in % / $.** The new **Local Design Request** is created in **'Draft'** workflow stage.

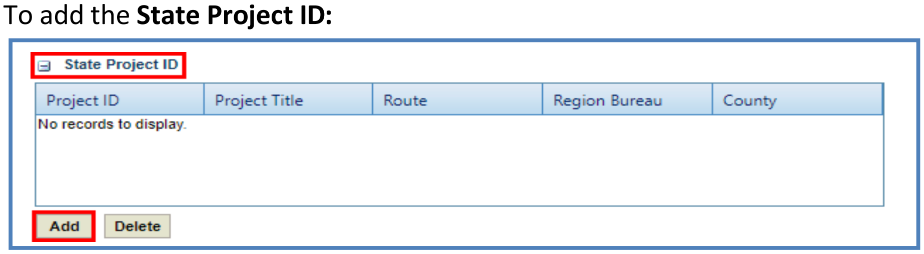
5.3 Creating Small Purchase Contract Request

1. Click **Solicitation** in the module menu.
2. In the navigation pane, expand **Non-Formal** and click **Small Purchase**. The **Small Purchase List** Page is displayed.
3. Click **New**. The **Small Purchase Contract Request** details page is displayed.
4. Provide the information in the fields, as described in the following table:

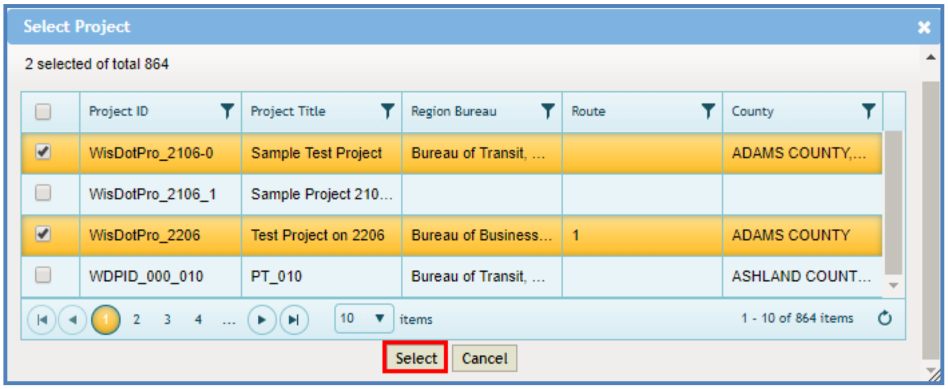


Field	Mandatory / Non-mandatory	Description
Small Purchase Request ID	–	The unique ID for the **Small Purchase Contract Request** is auto populated.
Small Purchase Request Title	Mandatory	Enter the title of the **Small Purchase Contract Request**.
Created By	–	Displays the username of the user creating the record.
Estimated Contract Cost	–	Displays the internal estimate contract amount of the **Small Purchase Contract Request** that is marked as '**Is Current**'.
Created Date	–	Displays the current date from the system calendar.
Date of Request	Mandatory	From the calendar drop-down, select the date of **Small Purchase Contract Request**.
Region/Bureau	Mandatory	To select region/bureau of the **Small Purchase Contract Request**: 1. Click ... and the **Region/Bureau** dialog box is displayed. For availability of options in the dialog box, region/bureaus must be defined in the **Region-Bureau** catalog of the library. 2. Select the required region/bureau and click **Select**.
Staged Contract	Non-mandatory	By default, 'Yes' is selected. • If **Staged Contract** is selected '**Yes**', the user can create multiple contracts for the **Small Purchase Request ID**. • If **Staged Contract** is selected '**No**', the user can create only one contract for the **Small Purchase Request ID**.

- To add the **State Project ID:**

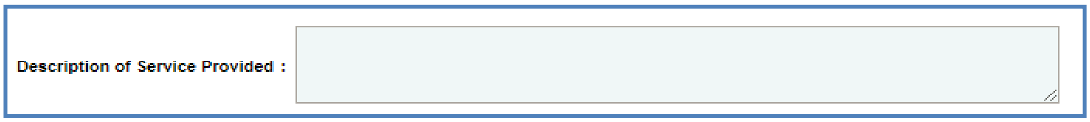


a. Click **Add**. The **Select Project** dialog box is displayed. Based on the Region/Bureau selected, the projects are listed in the dialog box.

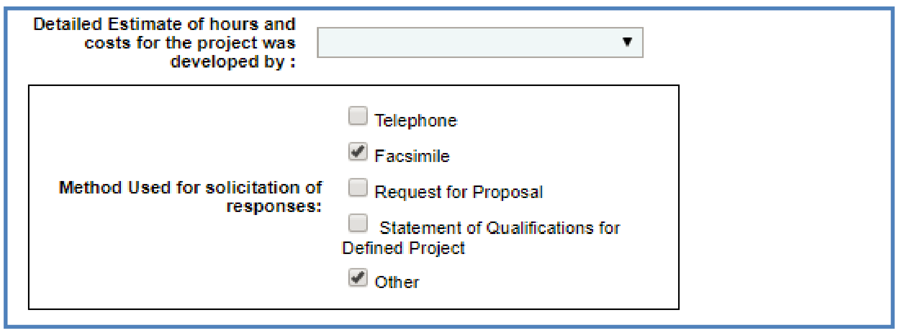


b. Select one or more projects and click **Select**. The selected projects are added to the grid.

c. In the **Description of Service Provided**, enter the brief description of the service provided.

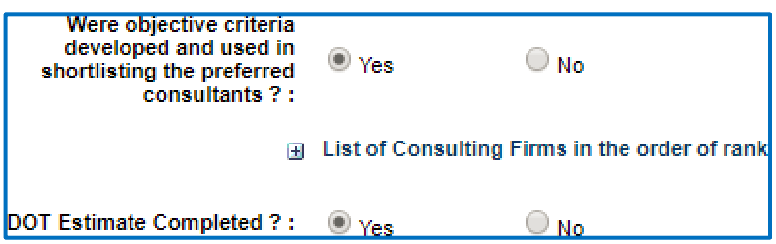


d. In **Detailed Estimate of hours and costs for the project was developed by**, from the drop-down, select the entity which developed the detailed estimate of hours and costs for the project.



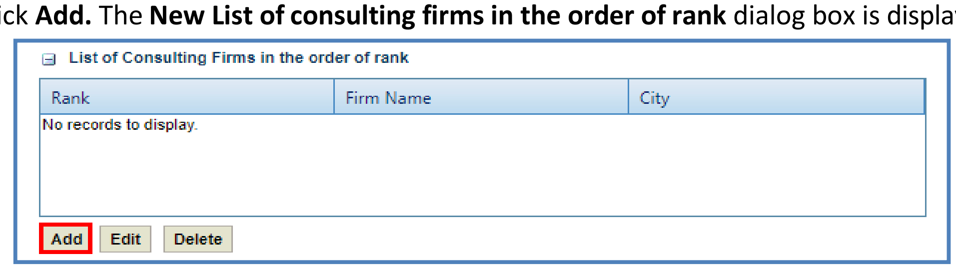
e. In **Method Used for solicitation of responses** grid, from the list, select one or more options where the Solicitation of Interest is published.

f. Enter the information in the required fields, as described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Were objective criteria developed and used in shortlisting the preferred consultants?	Non-Mandatory	Select 'Yes' if the objective criteria are developed and used in shortlisting the preferred consultants.
DOT Estimate Completed?	Non-Mandatory	Select 'Yes' if the DOT estimate is completed.

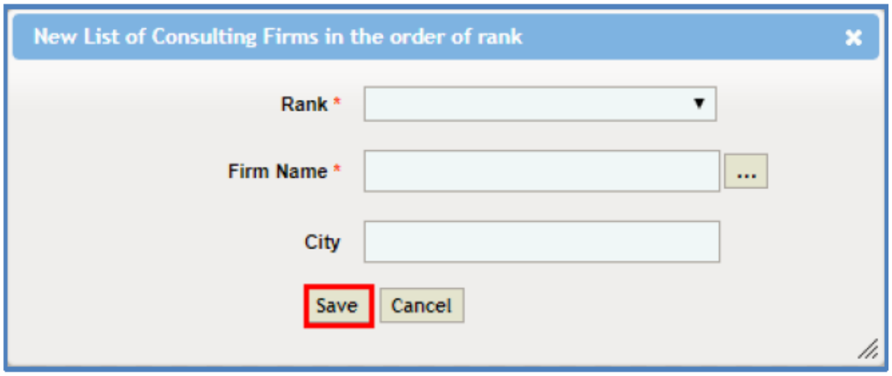
g. In the **List of consulting firms in the order of rank** section:

1. Click **Add.** The **New List of consulting firms in the order of rank** dialog box is displayed.

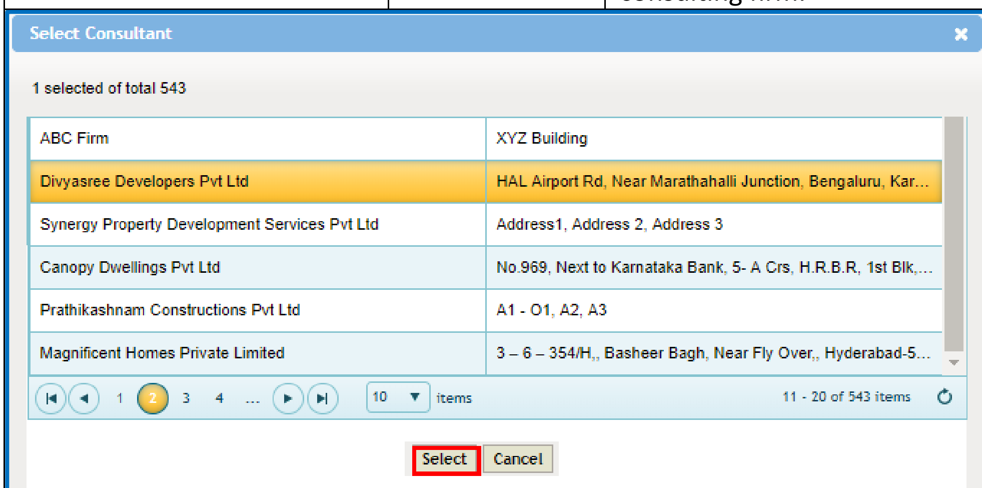


2. Enter the information in the required fields, as described in the following table.

Field	**Mandatory / Non-mandatory**	**Description**



Rank	Mandatory	From the drop-down, select the number from 1 to 10 to rank the consulting firm.

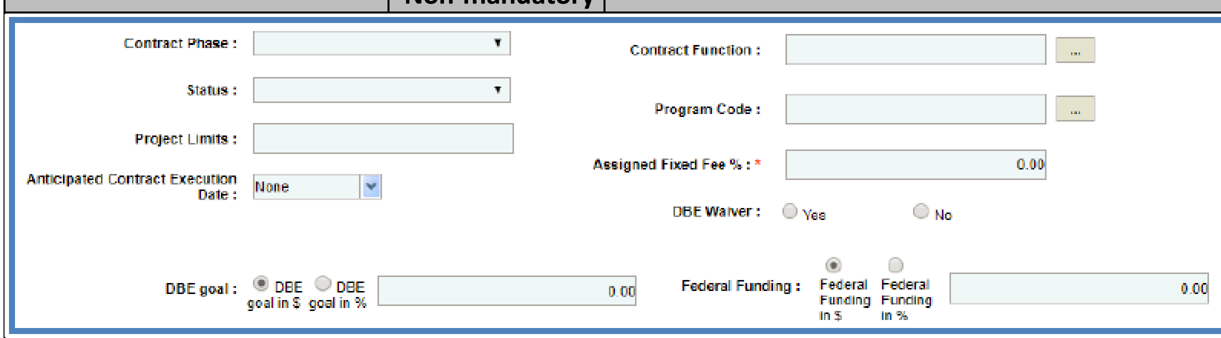


Firm Name	Mandatory	To enter the firm name, use the following steps: 1. Click ... The **Select Consultant** dialog box is displayed. 2. Select the consultant from the list and click **Select**.
City	Mandatory	The city is auto populated.

3. Click **Save**. The details are saved in the **List of consulting firms in the order of rank** section.

5. Enter the information in the required fields, as described in the following table.

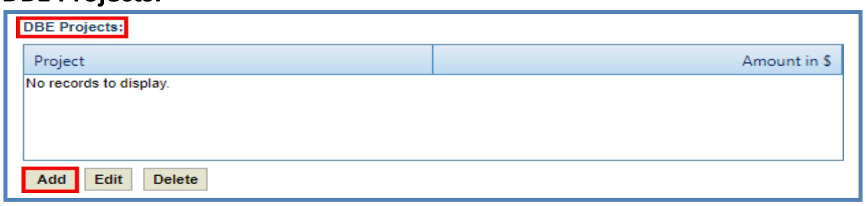
Field	**Mandatory / Non-mandatory**	**Description**



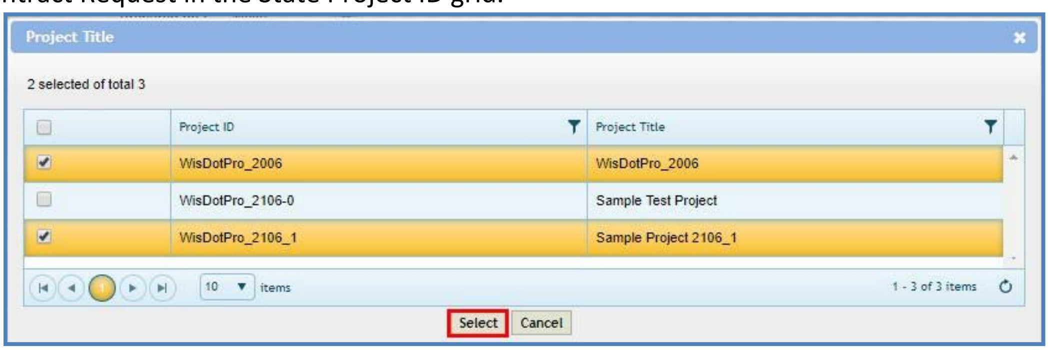
Contract Phase	Non-mandatory	From the drop-down, select the relevant phase for the contract.
Contract Function	Non-mandatory	To select a contract function, use the following steps: a. Click ... The **Contract Function** dialog box is displayed. b. From the list of contract function, select the contract function and click **Select**. The selected contract function is displayed.

Field	Mandatory / Non-mandatory	Description
Status	Non-mandatory	From the drop-down, select the relevant status for the contract.
Project Limits	Non-mandatory	Enter the project limits.
Program Code	Non-mandatory	Use the following steps to select a **Program Code**: a. Click ... The **Program Type Code** dialog box is displayed. b. From the list of program code, select the **Program Code.**
Anticipated Contract Execution Date	Non-mandatory	From the drop-down calendar, select the anticipated contract execution date
Assigned Fixed Fee %	Mandatory	Enter the fixed fee percentage to assign.
DBE Waiver	Non-mandatory	Click **Yes** to approve DBE Waiver or Click **No** to reject DBE Waiver.
DBE goal	Non-mandatory	To enter a DBE goal, use the following steps: • Select DBE goal in $ and enter the amount in the field. • Select DBE goal in % and enter the percentage of the DBE goal.
Federal Funding	Non-mandatory	To enter the federal funding, use the following steps: • Select **Federal Funding in $** and enter the amount in the field. • Select **Federal Funding in %** and enter the percentage of the Federal Funding.

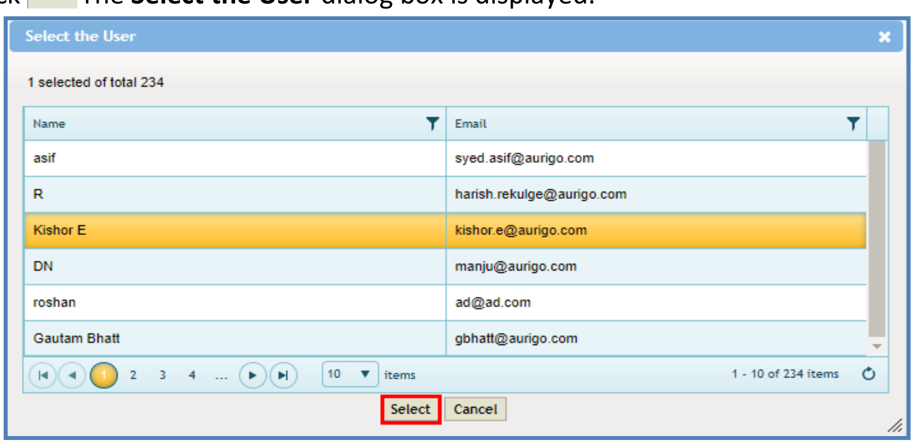
6. To add **DBE Projects:**



a. Click **Add**. The **Project Title** dialog box is displayed listing the projects associated with the Small Purchase Contract Request in the State Project ID grid.



7. Select one or more DBE projects and click **Select**. The selected projects are added to the grid.
8. In **Selection for Design by Local Government Contract Approved By** field complete the following steps:
   a. Click ... The **Select the User** dialog box is displayed.

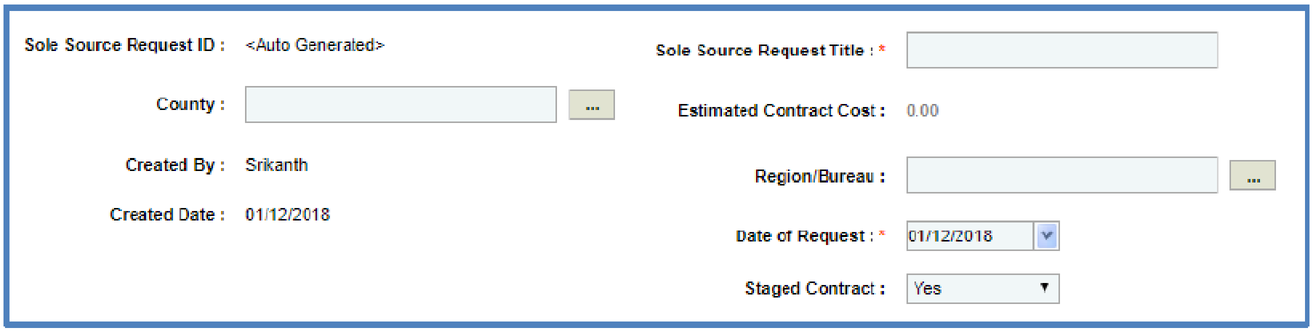


b. Select the WisDOT user from the list and click **Select**. The name of the user is displayed in the box.

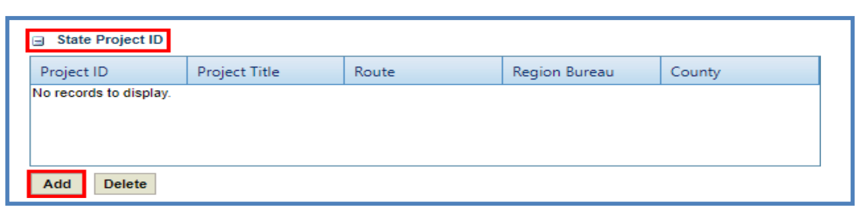
9. In the **Attachments** section, upload images and files relevant to the construction fair package. For information on attachments, refer *Attachments*.
10. Click **Save.** The **DBE Project total in % / $** box display the total of the **DBE goal in % / $**. The new **Small Purchase Contract Request** is created in **'Draft'** workflow stage.

5.4 Creating Sole Source Request

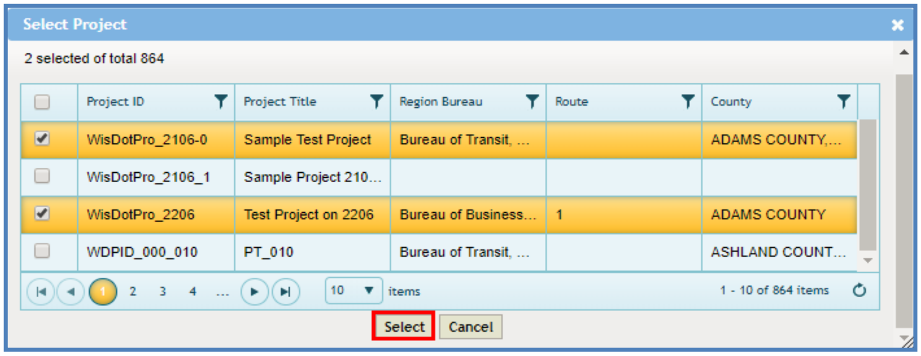
1. Click **Solicitation** in the module menu.
2. In the navigation pane, expand **Non Formal** and click **Sole Source**. The Sole Source List Page is displayed.
3. Click **New**. The **Sole Source Request** page is displayed.
4. Provide the information in the fields, as described in the following table:

Field	Mandatory / Non-mandatory	Description
		
Sole Source Request ID	–	The unique ID for the **Sole Source Request** is auto populated.
Sole Source Request Title	Mandatory	Enter the title of the **Sole Source Request**.
Estimated Contract Cost	–	Displays the internal estimate contract amount of the **Sole Source Request** that is marked as '**Is Current**'.
County	**Non-mandatory**	To assign **County** details for the **Sole Source Request**: 1. Click ... The **County** dialog box is displayed. For availability of options in the dialog box, counties must be defined in the **County** catalog of the library. 2. Select the required counties and then click **Select**.
Created By	–	Displays the username of the user creating the record.
Created Date	–	Displays the current date from the system calendar
Region/Bureau	Mandatory	To select **Region/Bureau** of the **Sole Source Request**: 1. Click ... The **Region/Bureau** dialog box is displayed. For availability of options in the dialog box, region/bureaus must be defined in the **Region-Bureau** catalog of the library. 2. Select the required region/bureau and click **Select**.
Date of Request	Mandatory	By default, current date is displayed. From the calendar drop-down, select the date of **Sole Source Request**.
Staged Contract	Non-Mandatory	By default, 'Yes' is selected.

- To add the **State Project ID:**

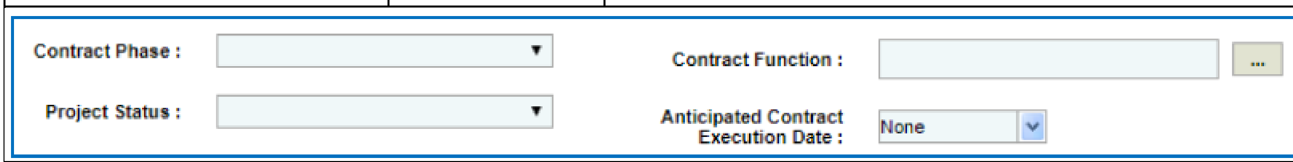


a. Click **Add**. The **Select Project** dialog box is displayed. Based on the Region/Bureau selected, the projects are listed in the dialog box.

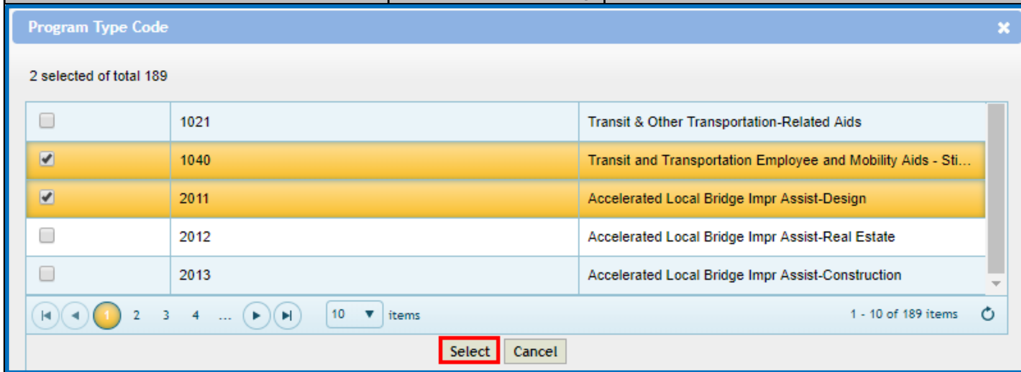


b. Select one or more projects and click **Select**. The selected projects are added to the grid.

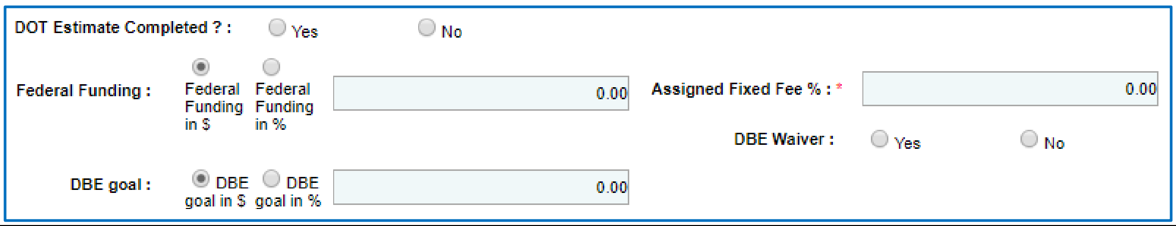
- Enter the information in the required fields, as described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Project Description	Non-Mandatory	Enter the description for the project.
Scope of Service	Non-Mandatory	Enter the scope of service.
Justification for Sole Source Approval	Non-Mandatory	Enter the justification for Sole Source Approval.
If this sole source is unavailable, how would this project be accomplished and who would perform the work	Non-Mandatory	Enter the details of how the project is accomplished and who performs the work, if the sole source is unavailable.
		
Contract Phase	Non-Mandatory	From the drop-down, select the relevant phase for the contract.
Contract Function	Non-Mandatory	To assign a contract function: a. Click ... . The **Contract Function** dialog box is displayed. b. From the list, select the contract function and click **Select**. List of options are defined in **Contract Function** catalog in the library.
Project Status	Non-Mandatory	From the drop-down, select the relevant project status for the **Sole Source request**.
Anticipated Contract Execution Date	Non-mandatory	From the drop-down calendar, select the anticipated contract execution date.

Field	Mandatory / Non-mandatory	Description

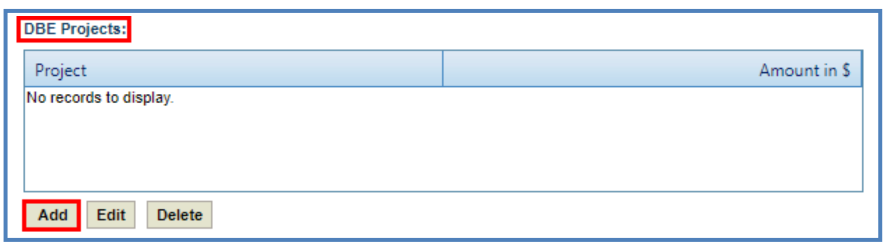


Program Code	Non-Mandatory	To add the Program Code: c. Click **Add**. The **Program Type Code** dialog box is displayed. d. From the list of program code, select the program code and click **Select**

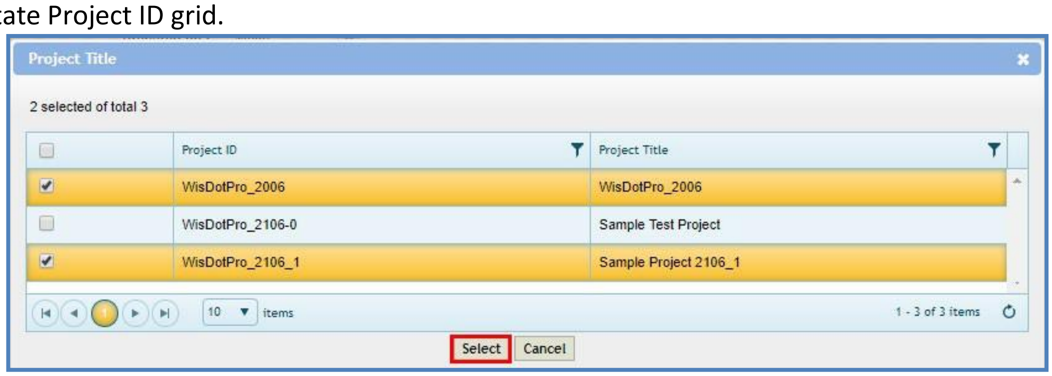


DOT Estimate Completed	Non-mandatory	Select 'Yes' if the DOT estimate is completed.
Federal Funding	Non-mandatory	• Select Federal Funding in $ and enter the amount in the field. • Select Federal Funding in % and enter the percentage of the Federal Funding.
Assigned Fixed Fee %	Mandatory	Enter the fixed fee percentage to assign.
DBE Waiver	Non-Mandatory	Click **Yes** to approve DBE Waiver. Or Click **No** to reject DBE Waiver.
DBE goal	Non-Mandatory	• Select DBE goal in $ and enter the amount in the field. • Select DBE goal in % and enter the percentage of the DBE goal.

- To add **DBE Projects:**

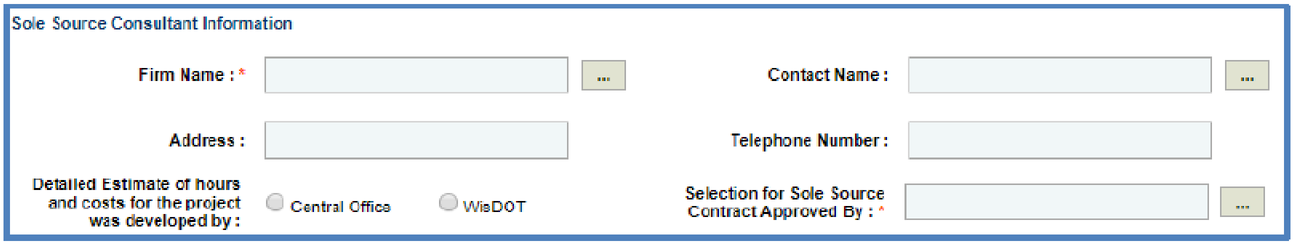


a. Click **Add**. The **Project Title** dialog box is displayed listing the projects associated with the Sole Source Request in the State Project ID grid.



b. Select one or more DBE projects and click **Select**. The selected projects are added to the grid.

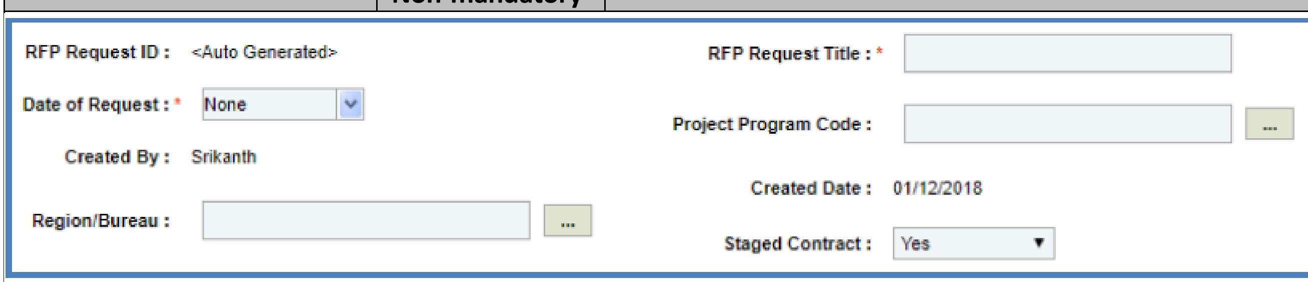
- In the **Sole Source Consultant Information** section, enter the information in the required fields, as described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Firm Name	Mandatory	1. Click ... The **Select Consultant** dialog box is displayed. 2. Select the consultant from the list and click **Select**.
Address	Non-Mandatory	On selecting the firm name, the address of the firm is auto populated. If required, make changes to the address of the firm.
Contact Name	Non-Mandatory	1. Click ... The **Select the User** dialog box is displayed. 2. Select the contact from the list and click **Select**. The name of the user is displayed in the box.
Telephone Number	Non-Mandatory	On selecting the **Contact Name**, the telephone number of the user is auto populated. If required, make changes to the telephone number of the user.
Detailed Estimate of hours and costs for the project was developed by	Non-Mandatory	• Select **Central Office**, if central office has developed the detailed estimate of hours and costs for the project. • Select **WisDOT**, if WisDOT has developed the detailed estimate of hours and costs for the project.
Selection for Sole Source Contract Approved By	Mandatory	1. Click ... The **Select the User** dialog box is displayed. 2. Select the WisDOT user from the list and click **Select**. The name of the user is displayed in the box.

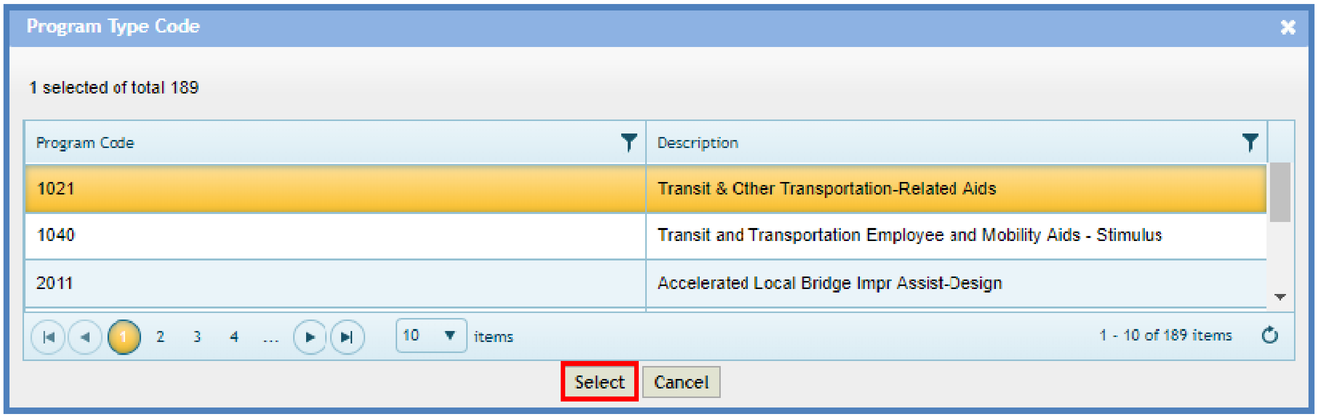
- In the **Attachments** section, upload images and files relevant to the construction fair package. For information on attachments, refer *Attachments*.
- Click **Save.** The **DBE Project total in % / $** box display the total of the **DBE goal in % / $**. The new **Sole Source Request** is created in **'Draft'** workflow stage.

5.5 Creating RFP Request

1. Click **Solicitation** in the module menu.
2. In the navigation pane, expand **Non Formal** and click **RFP**. The RFP list page is displayed.
3. Click **New**. The **RFP Request** details page is displayed.
4. Provide the information in the fields, as described in the following table:

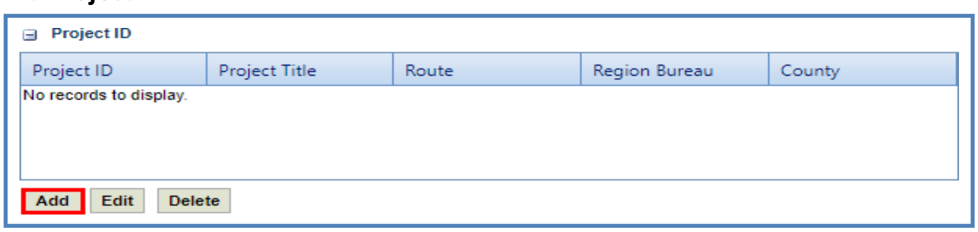
Field	Mandatory / Non-mandatory	Description
		
RFP Request ID	–	The unique ID for the **RFP Request** is auto populated.

Field	Mandatory / Non-mandatory	Description
RFP Request Title	Mandatory	Enter the title of the **RFP Request**.
Date of Request	Mandatory	From the calendar drop-down, select the date of RFP request.

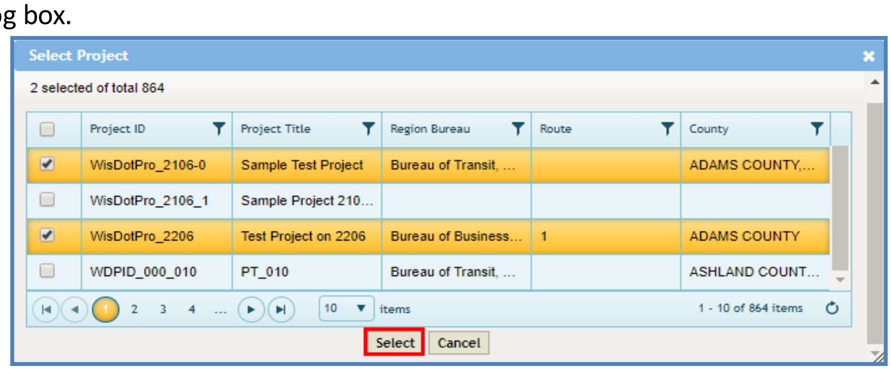


Field	Mandatory / Non-mandatory	Description
Project Program Code	Non-Mandatory	To select Project Program Code: 1. Click ... The **Program Type Code** dialog box is displayed. For availability of options in the dialog box, **Program Type Code** must be defined in the **Program Type Code** catalog of the library. 2. Select the required region/bureau and click **Select**.
Created By	–	Displays the username of the user creating the record.
Created Date	–	Displays the current date from the system calendar.
Region/Bureau	Non-Mandatory	To select region/bureau of the RFP Request: 1. Click ... and the **Region/Bureau** dialog box is displayed. For availability of options in the dialog box, region/ bureaus must be defined in the **Region-Bureau** catalog of the library. 2. Select the required region/bureau and click Select.
Staged Contract	Non-Mandatory	By default, '**Yes**' is selected. • If Staged Contract is selected '**Yes**', the user can create multiple contracts for the **RFP Request ID**. • If Staged Contract is selected '**No**', the user can create only one contract for the **RFP Request ID**.

- To add the **Project ID:**

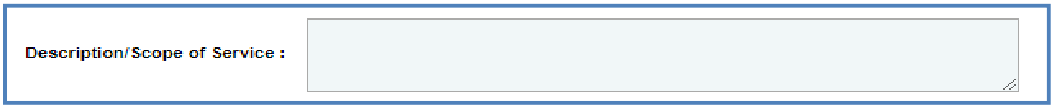


a. Click **Add.** The **Select Project** dialog box is displayed. Based on the Region/Bureau selected, the projects are listed in the dialog box.

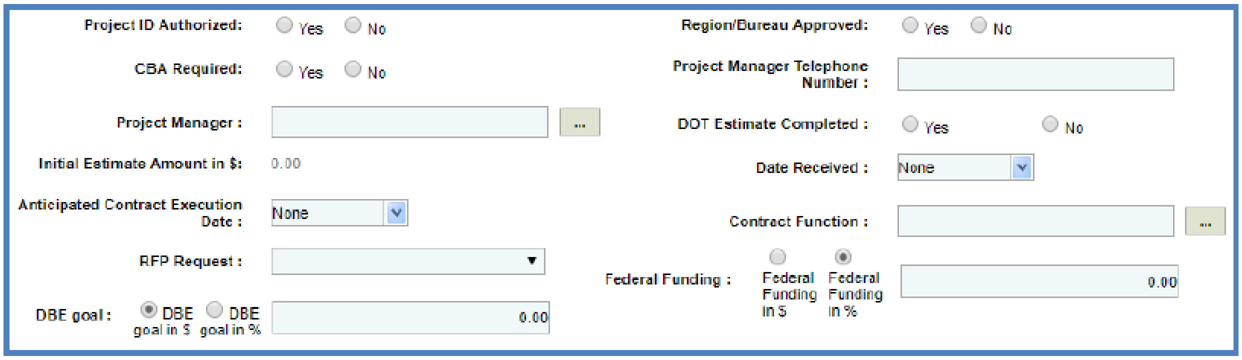


b. Select one or more projects and click **Select**. The selected projects are added to the grid.

- In the **Description / Scope of Service**, enter the brief description of the RFP Request.

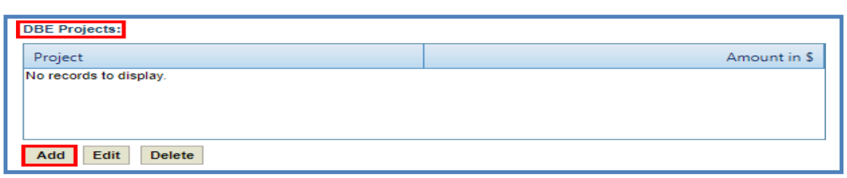


- Enter the information in the required fields, as described in the following table.

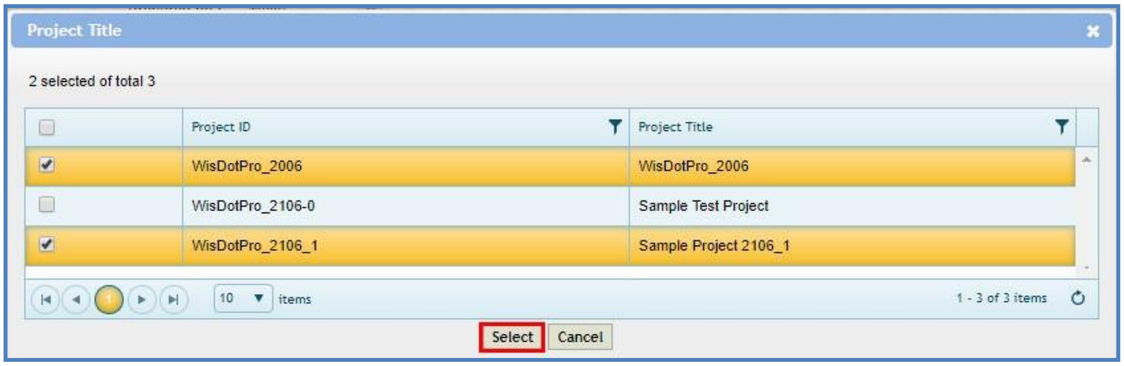


Field	Mandatory / Non-mandatory	Description
Project ID Authorized	Non-mandatory	Select '**Yes**' if the **Project ID** is authorized.
Region/Bureau Approved	Non-mandatory	Select '**Yes**' if the **Region/Bureau** is approved.
CBA Required	Non-mandatory	Select '**Yes**' if CBA is required.
Project Manager Telephone Number	Non-mandatory	On selecting the **Project Manager**, the telephone number is auto populated. If required, make changes to the telephone number of the project manager.
Project Manager	Non-mandatory	To add the project manager: 1. Click ... The **Add Project Manager** dialog box is displayed. 2. Select the contact from the list and click **Select**. The name of the project manager is displayed in the box.
DOT Estimate Completed	Non-mandatory	Select '**Yes**' if the DOT estimate is completed.
Initial Estimate Amount in $	–	Displays the initial estimate of the RFP.
Date Received	Non-mandatory	From the drop-down calendar, select the RFP request received date.
Anticipated Contract Execution Date	Non-mandatory	From the drop-down calendar, select the anticipated contract execution date.
Contract Function	Non-mandatory	To select contract function of the solicitation: 1. Click ... and **Contract Function** dialog box is displayed. For availability of options in the dialog box, contract functions must be defined in the **Contract Function** catalog of the library. 2. Select the required contract function and click **Select**.
RFP Request	Non-mandatory	From the drop-down, select the relevant status for the RFP Request.
Federal Funding	Non-mandatory	• Select **Federal Funding in $** and enter the amount in the field. • Select **Federal Funding in %** and enter the percentage of the Federal Funding.
DBE goal	Non-Mandatory	• Select **DBE goal in $** and enter the amount in the field. • Select **DBE goal in %** and enter the percentage of the DBE goal.

- To add **DBE Projects:**

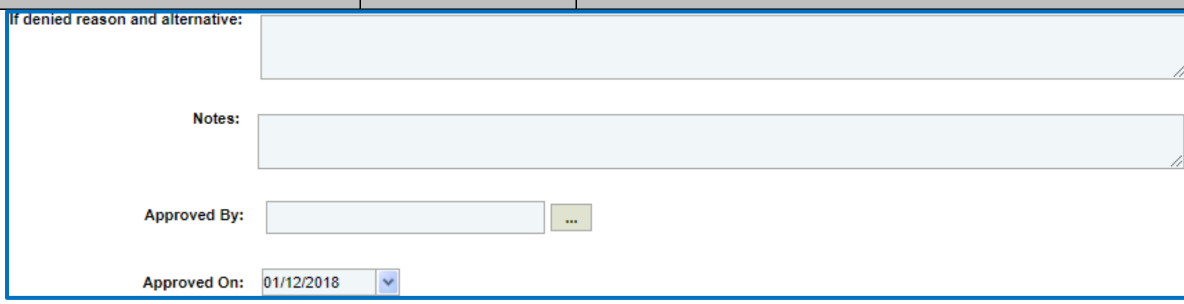
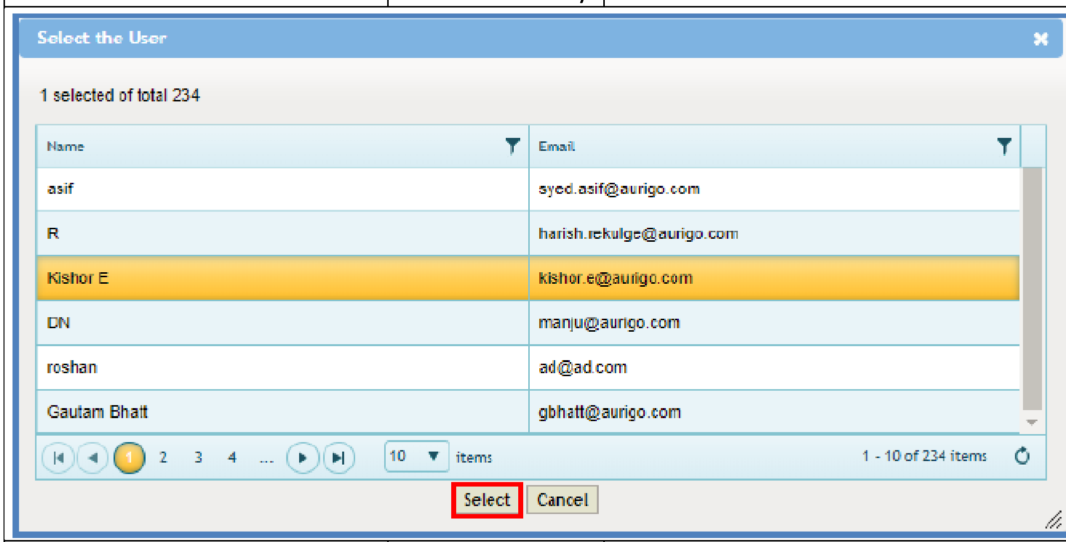


a. Click **Add**. The **Project Title** dialog box is displayed listing the projects associated with the Sole Source Request in the State Project ID grid.



b. Select one or more DBE projects and click **Select**. The selected projects are added to the grid.

- Enter the information in the required fields, as described in the following table.

Field	Mandatory / Non-mandatory	Description
		
If denied reason and alternative	Non-mandatory	If the **RFP Request** is denied, enter the reason for denial and alternative solutions.
Notes	Non-mandatory	Enter the notes.
		
Approved By	Non-mandatory	1. Click ... The **Select the User** dialog box is displayed. 2. Select the WisDOT user from the list and click **Select**. The name of the user is displayed in the box.
Approved On	Non-mandatory	By default, current date is displayed. From the calendar drop-down, select the date of Sole Source Request.

- In the **Attachments** section, upload images and files relevant to the construction fair package. For information on attachments, refer *Attachments*.
- Click **Save.** The new **RFP Request** is created in the **Draft** workflow stage.

5.6 Workflow for Non Formal Solicitation

The workflow table below describes the stages involved in the following Non Formal Solicitation forms:

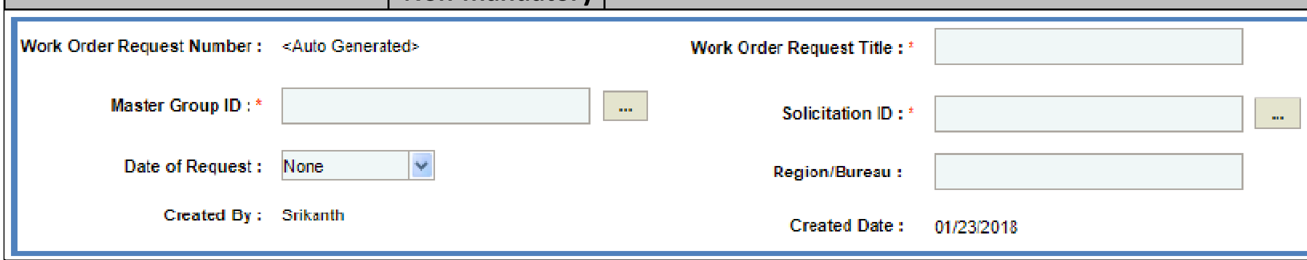
- Local Design
- Small Purchase
- Sole Source
- RFP

Current Stage	Action	Workflow Status (New Stage)	Comments
Draft	Submit for Review		–
Submitted for Review	Submit for Division Review or Approval	Submitted for Division Review / Submitted for Approval.	• If the contract value is greater than $50,000, the record moves to 'Submitted for Division Review' stage. • If the contract value is lesser than $50,000, the record moves to 'Submitted for Approval' stage
	Send Back for Revision	Draft	–
Submitted for Division Review	Submit For Approval	Submitted for Approval	–
	Send Back for Revision	Submitted for Review	
Submitted for Approval	Approved	Approved	–
	Send Back for Revision	Submitted for Review	

5.7 Creating Work Order Request

1. Click **Solicitation** in the **module menu.**
2. In the navigation pane, expand **Non Formal** and click **Work Order Request.** The **Work Order Request List** page is displayed**.**
3. Click **New.** The **Work Order Request Details** page is displayed**.**
4. Provide the information in the fields, as described in the following table:

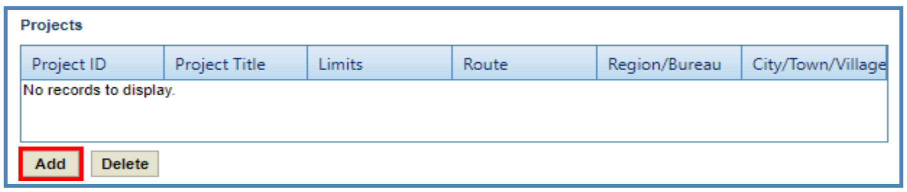
Field	Mandatory / Non-mandatory	Description



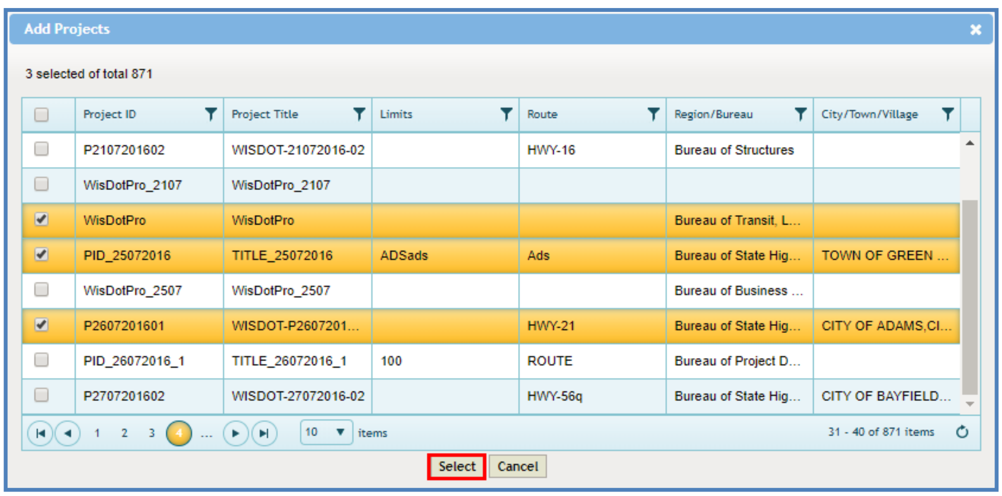
Field	Mandatory / Non-mandatory	Description
Work Order Request Number	–	The unique ID for the **Work Order Request** is auto populated.
Work Order Request Title	Mandatory	Enter the title of the **Work Order Request**.
Master Group ID	Mandatory	To add the Master Group ID: 1. Click ... and the **Select Master Group ID** dialog box is displayed. The list displays the **Master Group ID**s that are in **Contracts** module. 2. Select the required **Master Group ID** and click **Select**.

Field	Mandatory / Non-mandatory	Description
Solicitation ID	Mandatory	To add the Solicitation ID: 1. Click ... and the **Select Solicitation ID** dialog box is displayed. 2. Select the required Solicitation and click **Select**.
Date of Request	Non-mandatory	From the calendar drop-down, select the date of **Work Order Request**.
Region/Bureau	Non-mandatory	To select region/bureau of the Work Order Request: 1. Click ... and the **Region/Bureau** dialog box is displayed. The options in the drop-down list are defined in the **Region-Bureau** catalog of the library. 2. Select the required region/bureau and click **Select**.
Created By	–	Displays the username of the user creating the record.
Created Date	–	Displays the current date from the system calendar.

5. In the **Projects** section, to add the Project ID:

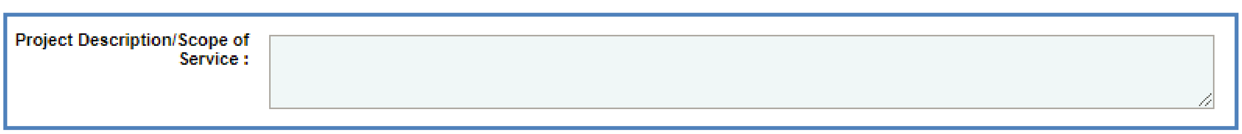


   a. Click **Add.** The **Add Projects** dialog box is displayed.



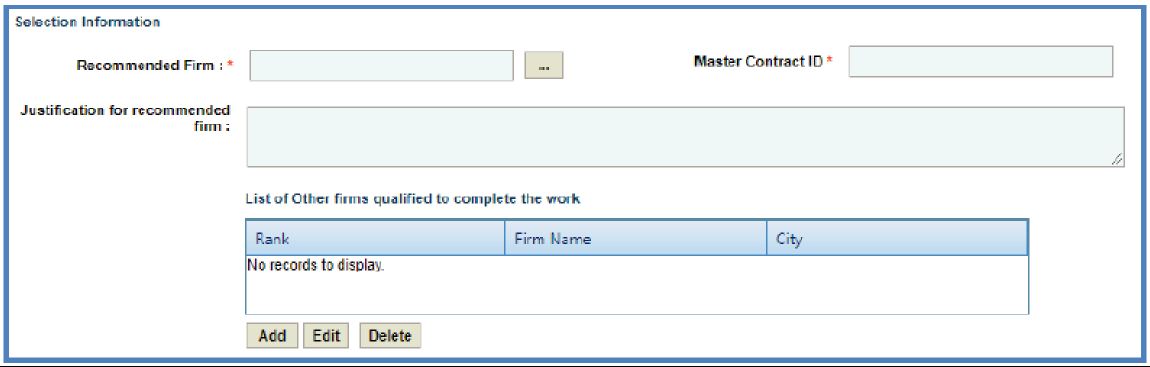
   b. Select one or more projects and click **Select**. The selected projects are added to the grid.

6. In the **Project Description/Scope of Service**, enter the brief project description of the Work Order Request.

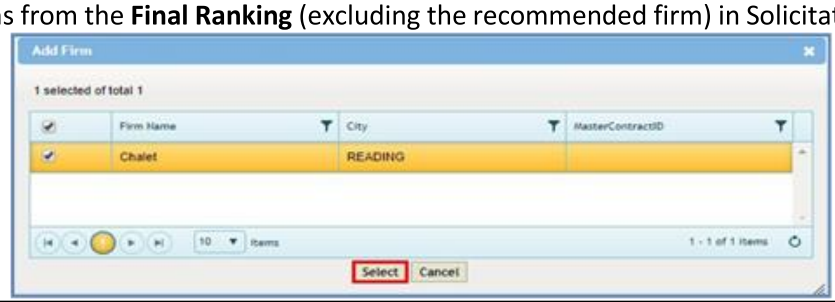


7. Enter the information in the required fields, as described in the following table.

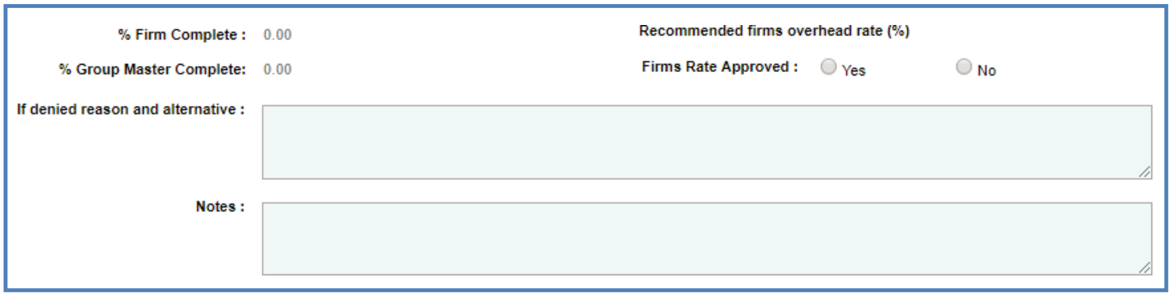
Field	Mandatory / Non-mandatory	Description
Project ID Authorized	Non-mandatory	Select '**Yes**' if the Project ID is authorized.
Region/Bureau Approved	Non-mandatory	Select '**Yes**' if the Region/Bureau is approved.
CBA Required	Non-mandatory	Select '**Yes**' if CBA is required.
Federal Funding	Non-mandatory	• Select **Federal Funding in $** and enter the amount in the field. • Select **Federal Funding in %** and enter the percentage of the Federal Funding.

Field	Mandatory / Non-mandatory	Description
Program Code	Non-mandatory	To add the Program Code details: 1. Click ... The **Program Type Code** dialog box is displayed. The options in the list are defined in the **Program Type Code** catalog of the library. 2. From the list of program code, select the program code and click **Select**. The selected program code is displayed.
Project Manager	Non-mandatory	To add the project manager: 1. Click ... The **Add Project Manager** dialog box is displayed. The dialog box displays all the WisDOT users listed in **User Accounts**. 2. Select the contact from the list and click **Select**. The name of the project manager is displayed in the box.
Project Manager Telephone Number	Non-Mandatory	On selecting the **Project Manager**, the telephone number is auto populated. If required, make changes to the telephone number of the project manager.
		
Initial Estimate Amount	–	Displays the initial estimate of the work order request that is marked '**Is Current**'.
DOT Estimate Completed	Non-Mandatory	Select '**Yes**' if the DOT estimate is completed.
Anticipated Contract Execution Date	Non-Mandatory	From the drop-down calendar, select the anticipated contract execution date.
Advertised Fixed Fee %	Mandatory	The percentage of fixed fee is auto populate based on the value defined in the **Advertised Fixed Fee %** on the **Solicitation Scope of Service** page.
Recommended Firm	mandatory	To add a **Recommend Firm,** follow the below steps: Click . T ... **dd Firm** dialog box is displayed. The list of firms from the approved Master Contracts of the Solicitation are displayed. Select the firm and click Select. The selected firm is displayed.
Master Contract ID	Mandatory	Master Contract associated to the recommended firm is displayed.
Justification for recommended firm	Non-Mandatory	Enter the justification for the recommended firm.

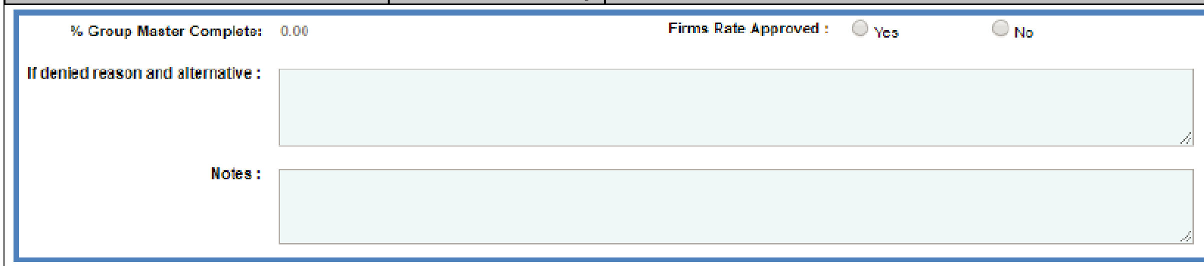
8. In the **List of Other firms qualified to complete the work** section:
   a. Click **Add** to add the other firms qualified to complete the work. The **Add Firm** dialog box is displayed. The list of firms from the **Final Ranking** (excluding the recommended firm) in Solicitation are displayed.



b. Select the firm to add and click **Select**. The values of **% Firm Complete**, **% Group Master Complete** and **Recommended firms overhead rate (%)** are displayed.



9. Enter the information in the required fields, as described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Firms Rate Approved	Non-Mandatory	Select '**Yes**' if the firm's rate is approved**.**
If denied reason and alternative	Non-Mandatory	Enter the reason to deny and alternative.
Notes	Non-Mandatory	Enter the comments.

10. In the **Attachments** section, upload images and files relevant to the construction fair package. For information on attachments, refer *Attachments*.
11. Click **Save.** The new **Work Order Request** is created in **'Draft'** workflow stage.

5.7.1 Workflow for Work Order Request

The workflow table below describes the stages involved in the Work Order Request.

Current Stage	Action	Workflow Status (New Stage)	Comments
Draft	Submit for Review	Submitted for Review	To perform this action, the 'Internal Estimate Amount' in the Work Order Request must not exceed the 'Total Spending Authority Amount Remaining' or the 'Total Master Contract Amount Remaining'.
Submitted for Review	Submit for Division Review or Approval	Submitted for Division Review / Submitted for Approval.	• If the contract value is **greater** than $50,000, the record moves to 'Submitted for Division Review' stage. • If the contract value is **lesser** than $50,000, the record moves to 'Submitted for Approval' stage.
	Send Back for Revision	Draft	–

Current Stage	Action	Workflow Status (New Stage)	Comments
Submitted for Division Review	Submit for Approval	Submitted for Approval	–
	Send Back for Revision	Submitted for Review	
Submitted for Approval	Approved	Approved	–
	Send Back for Revision	Submitted for Review	

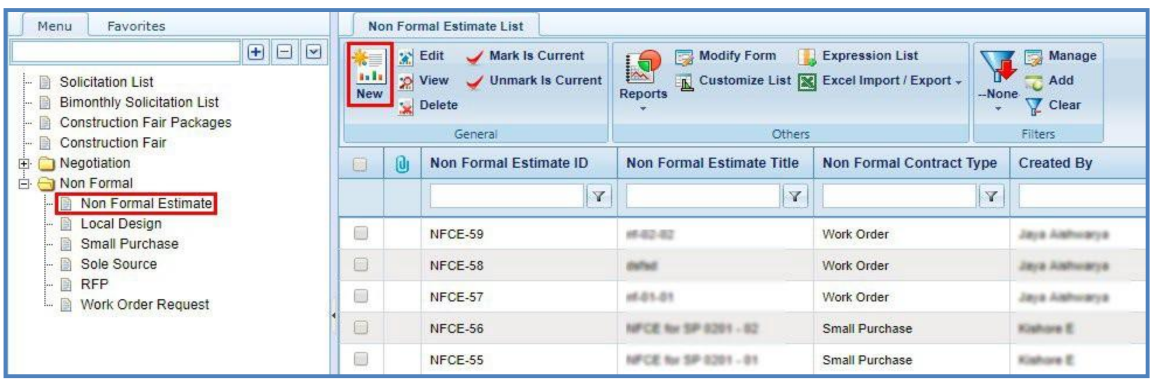
5.8 Creating Non Formal Estimate

Masterworks allow you to create an internal estimate for each of the Non Formal contract type. The functional flow of the Non Formal Estimate is described as below:

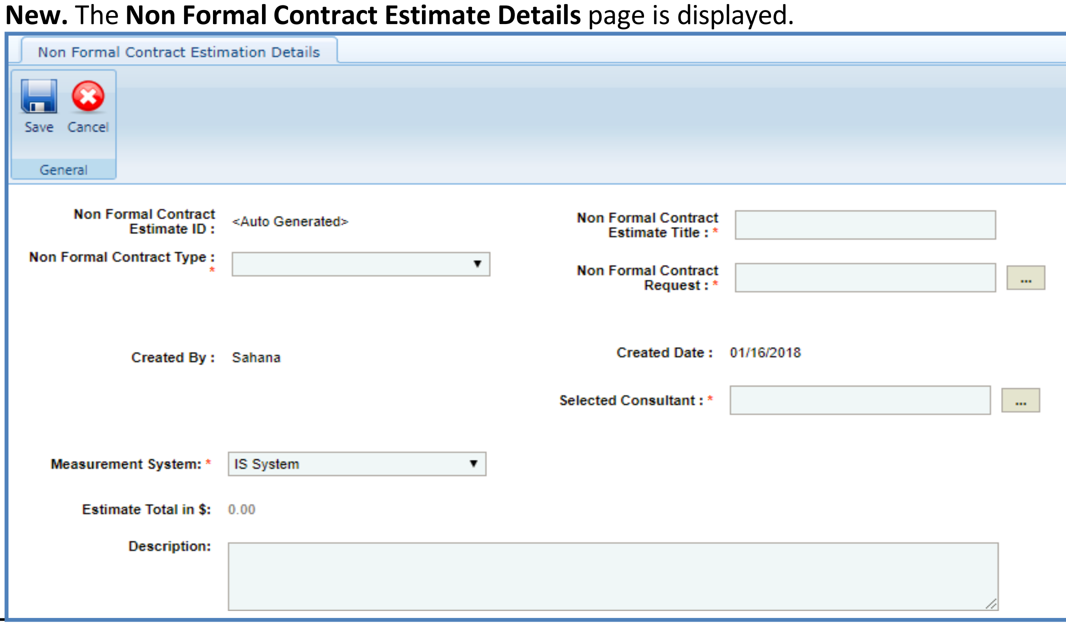
1. Select the **Non Formal** contract type.
2. Associate the required contract **Request ID**.
3. Select the shortlisted consultant for the contract.
4. Mark the estimate as '**Is Current**' in the list page to import the task list to the **Consultant Estimate**.

The procedure below describes the steps to create an internal Non-Formal **Estimate**. Steps:

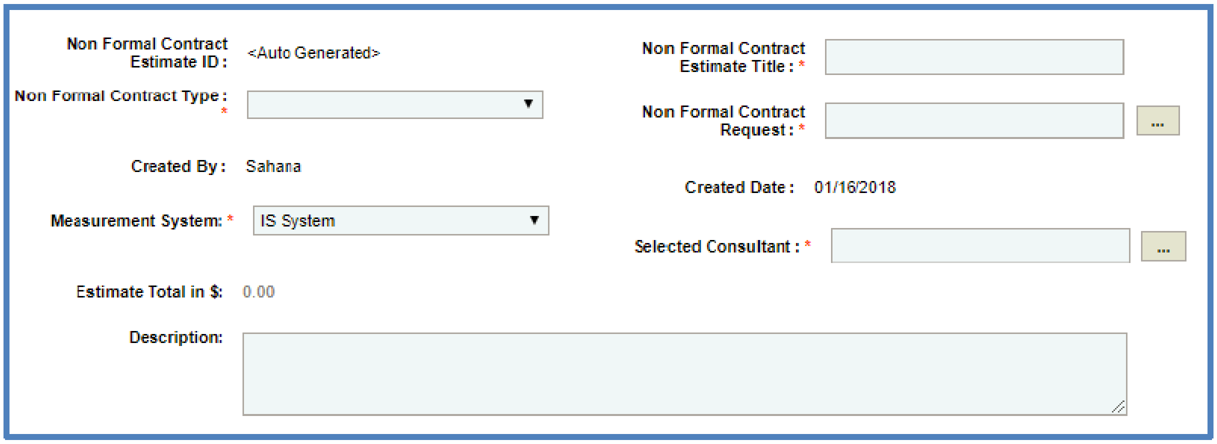
1. In the navigation pane, expand the **Non Formal** folder, and then click **Non Formal Estimate**. The **Non Formal Estimate List** page is displayed.



2. Click **New.** The **Non Formal Contract Estimate Details** page is displayed.



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



Field	Mandatory/ Non-mandatory	Description
Non Formal Contract Estimate ID	-	A unique ID for the **Non Formal Contract Estimate** is auto generated.
Non Formal Contract Estimate Title	Mandatory	Enter a title for the Non Formal Contract Estimate.
Non Formal Contract Type	Mandatory	From the drop-down, select the Non Formal contract type for which the estimate is created.
Non Formal Contract Request	Mandatory	To select a non formal contract for which estimate is being created: 1. Click ... The **Contract Request** dialog box is displayed listing all the non formal contract requests for the selected **Non Formal Contract Type**. 2. Select the required **Non Formal Contract** and click **Select**.
Created By	–	Displays the username of the user creating the record.
Created Date	–	Displays the current date from the system calendar.
Selected Consultant	Mandatory	To select a consultant: 1. Click ... The **Select Consultant** dialog box is displayed listing all the shortlisted consultants associated with the selected contract request. 2. Select the required consultant and click **Select**.
Measurement System	Non-Mandatory	By default, **IS System** is displayed.
Estimated Total in $	Non-Mandatory	Displays the total estimate of all the project budgets as estimate total budget.
Description	Non-Mandatory	Enter description about the project budget estimate.

Note:

- *The **Projects (In scope excluding If authorized)** section auto-populates the total of Direct Labor Cost, Direct Cost, Indirect Cost, Fixed Fee, and Risk associated with the non formal contract. The values displayed are based on the values that are defined and marked **In Scope** as **Yes** on the **Non Formal Contract Project Estimation Details** page of the project. This section excludes the values from tasks that are marked **If authorized** as **Yes**.*

Projects (In scope excluding If authorized)

Project ID	Project Name	Direct Labor Cost in $	Direct Cost in $	Indirect Cost in $	Fixed Fee in $	Risk in $	Total in $
0106-Pr-01	WisDotPro_0	2,375.00	0.00	250.00	1,319.31	0.00	3,944.31
2905-Pr-01	WisDotPro_2	0.00	0.00	0.00	0.00	0.00	0.00
		2375.00	0.00	250.00	1319.31	0.00	3944.31

- *In the* ***Projects (If authorized)*** *section auto-populates the total of Direct Labor Cost, Direct Cost, Indirect Cost, Fixed Fee, and Risk associated with the project of non formal contract. The values displayed are based on the values defined and that are marked* ***If authorized*** *as* ***Yes*** *on the* ***Non Formal Contract Estimate Details*** *page of the project.*

Projects (If authorized)

Project ID	Project Name	Direct Labor Cost in $	Direct Cost in $	Indirect Cost in $	Fixed Fee in $	Risk in $	Total in $
0106-Pr-01	WisDotPro_0	2,645.00	0.00	279.00	1,469.30	0.00	4,393.30
2905-Pr-01	WisDotPro_2	0.00	0.00	0.00	0.00	0.00	0.00
		2645.00	0.00	279.00	1469.30	0.00	4393.30

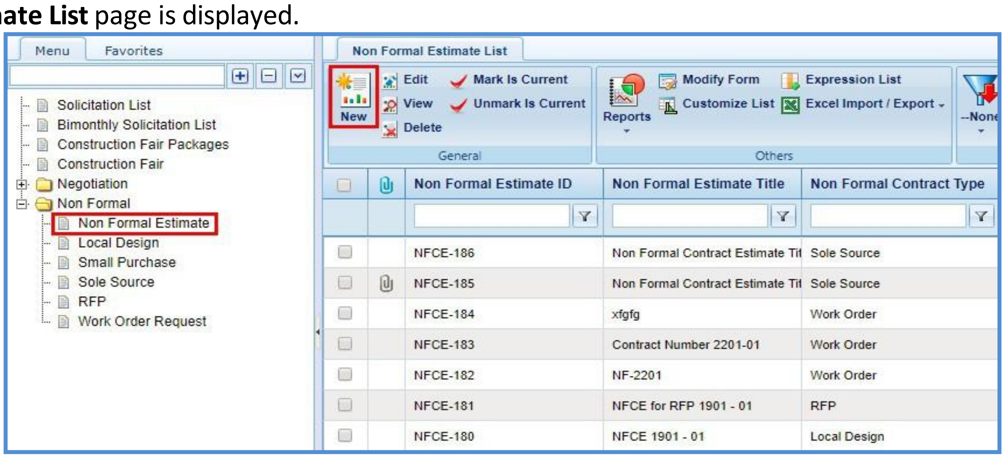
4. Click **Save**.

5.8.1 Defining Non Formal Estimate Details

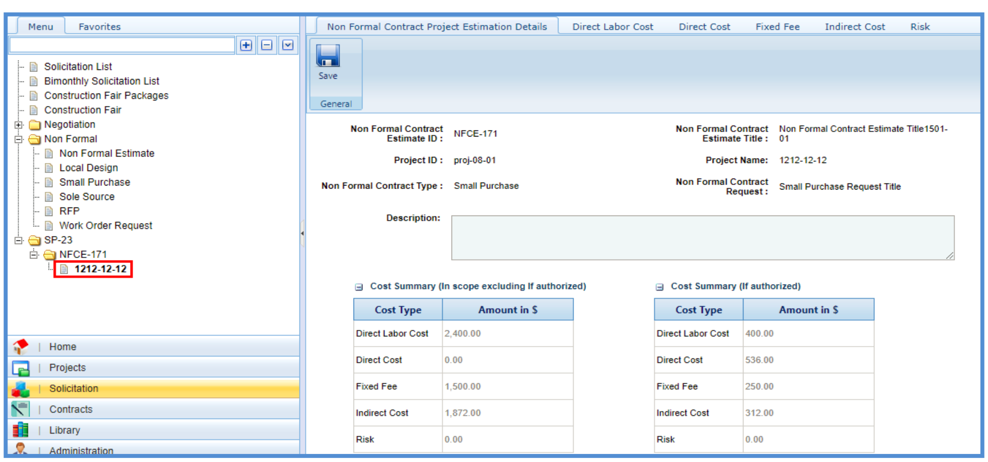
The system allows you to define estimate details for projects associated to the Non Formal contract. By default, the direct labor cost, fixed fee, and indirect costs from the Project Estimate that is marked 'Is Current' is imported to the Non Formal Estimate. The procedure to view or edit the Non Formal contract estimate details is described.

Steps:

1. Click **Solicitation** in the module menu. The **Solicitation List** page is displayed.
2. In the navigation pane, expand the **Non Formal** folder, and then click **Non Formal Estimate**. The **Non Formal Contract Estimate List** page is displayed.



3. Select a Non Formal Estimate to define the estimate details, and then click **Edit**.
4. In the navigation pane, expand the non formal estimate folder, click the project to define the estimate details. The **Non Formal Contract Project Estimate Details** page is displayed.



Note: *The values in the* ***Non Formal Contract Estimate ID, Non Formal Contract Estimate Title, Project ID, Project Name, Non Formal Contract Type*** *and* ***Non Formal Contract Request*** *are auto populate.*

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

Note:

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

Cost Summary (In scope excluding If authorized)

Cost Type	Amount in $
Direct Labor Cost	2,400.00
Direct Cost	0.00
Fixed Fee	1,500.00
Indirect Cost	1,872.00
Risk	0.00

Estimate Total in $: 5,772.00

Estimate Total Hours: 272.00

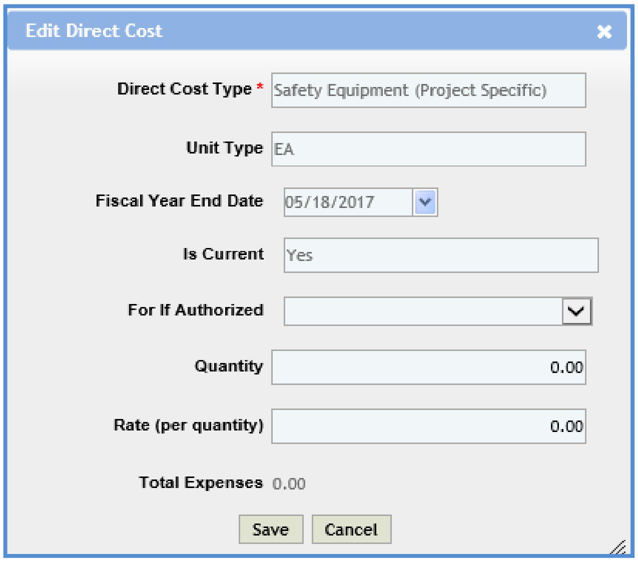
- *The* ***Cost Summary (If authorized)*** *section auto-populates the total of Direct Labor Cost, Direct Cost, Fixed Fee, Indirect Cost, and Risk based on the values entered in the respective tabs and that are marked* ***If authorized*** *as* ***Yes****. The sum of all these costs is also auto calculated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

Cost Summary (If authorized)

Cost Type	Amount in $
Direct Labor Cost	1,495.00
Direct Cost	3,510.00
Fixed Fee	1,255.80
Indirect Cost	224.25
Risk	0.30

Estimate Total in $: 6,485.35

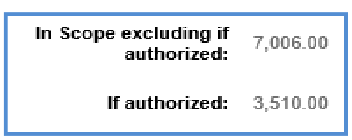
6. In the **Attachments** section, upload images and files relevant to the Non Formal estimate. For information on attachments, refer *Attachments*.
7. Click the **Direct Labor Cost** tab. The direct labor cost tasks that are defined in the project estimate are auto populated. However, you can add additional direct labor cost tasks. For more information on adding direct labor cost tasks, refer Adding Direct Labor Cost Tasks. The total of direct labor costs that are marked as in scope excluding direct labor costs that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of direct labor costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **Negotiation Estimate Details** tab.
8. Click the **Direct Cost** tab to add direct costs associated with the project. Perform the following steps:
   a. Click **Add**. The **Direct Cost** dialog box is displayed listing all the direct costs associated with the consultant and marked as current.
   b. Select the required direct costs.
   c. Click **Select**. The selected direct costs are listed in the **Direct Cost** table.
   d. Select the direct cost for which you want to indicate as authorized, add/edit quantity, and rate details, and then click **Edit**. The **Edit Direct Cost** dialog box is displayed.



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

Field	Mandatory / Non-Mandatory	Description
Direct Cost Type	**-**	The name of the selected direct cost type is auto populated.
Unit Type	**Non-mandatory**	The unit type of the selected direct cost is auto populated.
Fiscal Year End Date	**-**	The fiscal year end date associated with the direct cost is auto populate.
Is Current	**-**	Indicates whether the direct cost is marked as current.
For If authorized	**Non-mandatory**	From the drop-down list, select **Yes** to indicate that for the selected direct cost the **If authorized** is marked as **Yes** or select **No** to indicate that for the selected direct cost type the **If authorized** is marked as **No**.
Quantity	**Non-mandatory**	Enter quantity for the direct cost.
Rate (per quantity)	**Non-mandatory**	Enter or edit the rate for one quantity of the direct cost.
Total Expenses	**-**	The total direct cost expenses based on the entered quantity and rate is auto calculated and displayed.

***Note**: The total of direct costs that are in scope is auto calculated and displayed in the **In Scope excluding if authorized** field and the total of direct costs that are indicated as authorized is auto calculated and displayed in the **If authorized** field.*



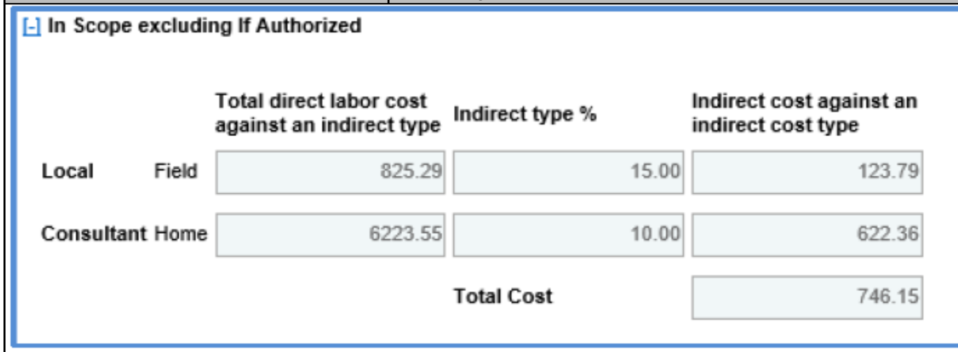
f. Click **Save**. The total of direct costs that are marked as in scope excluding direct costs that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of direct costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **WisDOT Negotiation Estimate Details** tab.

9. Click the **Fixed Fee** tab to view the fixed fee details based on the total direct labor cost defined on the **Direct Labor Cost** tab and fixed fee percentage defined on the **Solicitation Scope of Service** page. For more information on the details that are displayed, refer [Fixed Fee Details] step in Solicitation Task List for Regular Contract Type. The total of fixed fee that are marked as in scope excluding fixed fee that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of fixed fees that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **WisDOT Negotiation Estimate Details** tab.
10. Click the **Indirect Cost** tab. The indirect cost details associated with the consultant and are marked as current are displayed. The different details that are displayed are described in the following table.

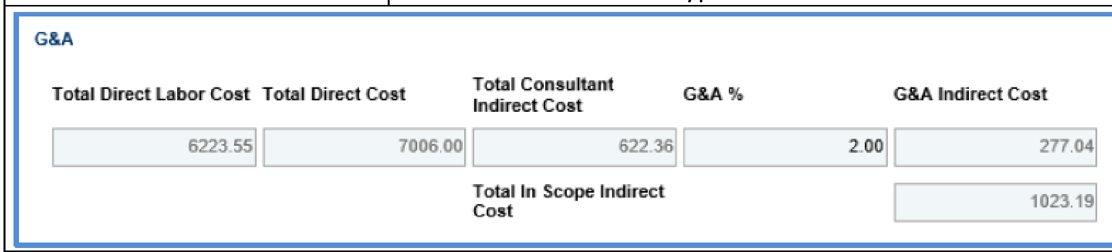
Note:

- *Based on whether the indirect costs are marked as **Yes** for **In Scope** and **If Authorized,** the details are displayed in appropriate sections.*
- *If the consultant is marked as **Yes** in **Is G&A** on the **Consultant\Contractor** page, then **G&A** sub- section with appropriate indirect cost details is displayed in the **In Scope excluding If Authorized** section and **If Authorized** sections.*

Field	Description



Field	Description
Total direct labor cost against an indirect type	The total direct labor cost associated with an indirect cost type for the consultant is auto populated.
Indirect type %	Indicates the percentage of indirect cost defined for the consultant.
Indirect cost against an indirect cost type	Indicates the indirect cost amount of each indirect cost type, which is auto calculated based on the total direct labor cost and indirect type %.
Total Cost	Indicates the total indirect cost amount of all the indirect cost types associated with the consultant. The value is the auto calculated based on the total of indirect costs of all the indirect cost types.



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

11. The total of indirect costs that are marked as in scope excluding indirect costs that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of indirect costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **WisDOT Negotiation Estimate Details** tab.
12. Click the **Risk** tab to add risks associated with the project. To add risks, refer Adding Risks step in Solicitation Task List for Regular Contract Type. The total of risks that are marked as in scope excluding fixed fee that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of risks that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **WisDOT Negotiation Estimate Details** tab.
13. Click **Save**.

6 Negotiations

The procedures to create an internal estimate and finalizing scope for the consultants to submit their estimate for negotiation are described.

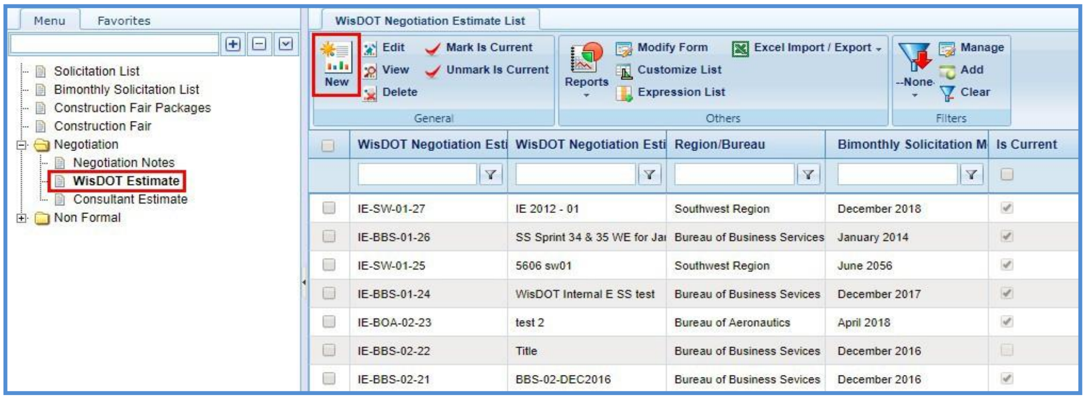
6.1 WisDOT Estimate

6.1.1 Creating WisDOT Estimate

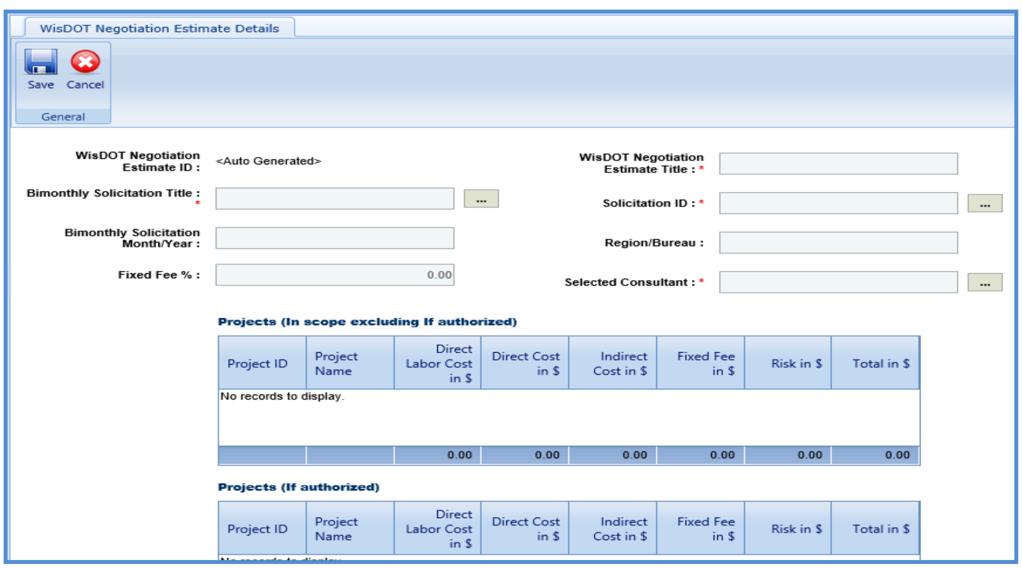
The system allows you to create an internal estimate for each of the finally ranked consultant for negotiation purposes. The internal estimate can be created only for solicitations of Regular Contract Type. The procedure to create an internal WisDOT Estimate is described.

Steps:

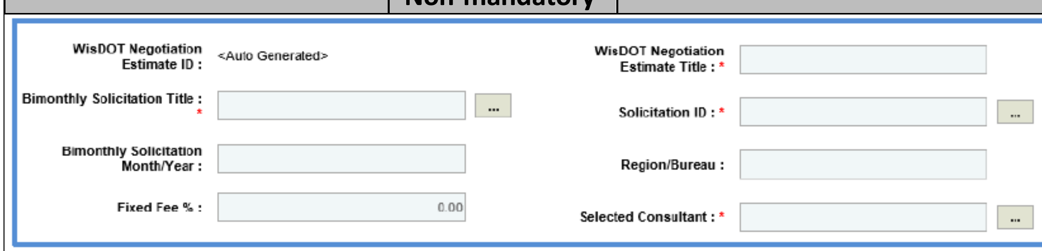
1. Click **Solicitation** in the module menu. The **Solicitation List** page is displayed.
2. In the navigation pane, expand the **Negotiation** folder, and then click **WisDOT Estimate**. The **WisDOT Negotiation Estimate List** page is displayed.



3. Click **New.** The **WisDOT Negotiation Estimate Details** page is displayed.



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

Field	Mandatory/ Non-mandatory	Description
		

Field	Mandatory/ Non-mandatory	Description
WisDOT Negotiation Estimate ID	–	A unique ID for the internal negotiation estimate is auto generated.
WisDOT Negotiation Title	Mandatory	Enter a title for the internal negotiation estimate.
Bimonthly Solicitation Title	Mandatory	To select a Bimonthly Solicitation for which the internal negotiation estimate is being created: 1. Click ... The **Select Bimonthly Solicitation** dialog box is displayed listing all the published bimonthly solicitations. 2. Select the required bimonthly solicitation and click **Select**.
Solicitation ID	Mandatory	To select a Solicitation for which the internal negotiation estimate is being created: 1. Click ... The **Select Solicitation** dialog box is displayed listing all the solicitations associated with the selected bimonthly solicitation and for which the **Contract Type** is Regular. 2. Select the required solicitation and click **Select**. The values in the **Bimonthly Solicitation Month/Year** and **Region/Bureau** fields are auto populate.
Bimonthly Solicitation Month/Year	–	The Bimonthly Solicitation Month/Year is auto populated.
Region/Bureau	–	The region/bureau with which the solicitation is associated is auto populate.
Fixed Fee %	–	The percentage of fixed fee is auto populate based on the value defined in the **Advertised Fixed Fee %** field on the **Solicitation Scope of Service** page.
Selected Consultant	Mandatory	To select a consultant associated solicitation for which the internal negotiation estimate is being created: 1. Click ... The **Select Consultant** dialog box is displayed listing all the finally ranked consultants associated with the selected solicitation. 2. Select the required consultant and click **Select**.

Note:

- *In the **Projects (In scope excluding If authorized)** section auto-populates the total of Direct Labor Cost, Direct Cost, Indirect Cost, Fixed Fee, and Risk associated with the project of solicitation for negotiation. The values displayed are based on the values that are defined and marked **In Scope** as **Yes** on the **WisDOT Negotiation Estimate Details** page of the project. This section excludes the values that are marked **If authorized** as **Yes**.*

Projects (In scope excluding If authorized)

Project ID	Project Name	Direct Labor Cost in $	Direct Cost in $	Indirect Cost in $	Fixed Fee in $	Risk in $	Total in $
0106-Pr-01	WisDotPro_0	2,375.00	0.00	250.00	1,319.31	0.00	3,944.31
2905-Pr-01	WisDotPro_2	0.00	0.00	0.00	0.00	0.00	0.00
		2375.00	0.00	250.00	1319.31	0.00	3944.31

- *In the **Projects (If authorized)** section auto-populates the total of Direct Labor Cost, Direct Cost, Indirect Cost, Fixed Fee, and Risk associated with the project of solicitation for negotiation. The values displayed are based on the values defined and that are marked **If authorized** as **Yes** on the **WisDOT Negotiation Estimate Details** page of the project.*

Projects (If authorized)

Project ID	Project Name	Direct Labor Cost in $	Direct Cost in $	Indirect Cost in $	Fixed Fee in $	Risk in $	Total in $
0106-Pr-01	WisDotPro_01	2,645.00	0.00	279.00	1,469.30	0.00	4,393.30
2905-Pr-01	WisDotPro_29	0.00	0.00	0.00	0.00	0.00	0.00
		2645.00	0.00	279.00	1469.30	0.00	4393.30

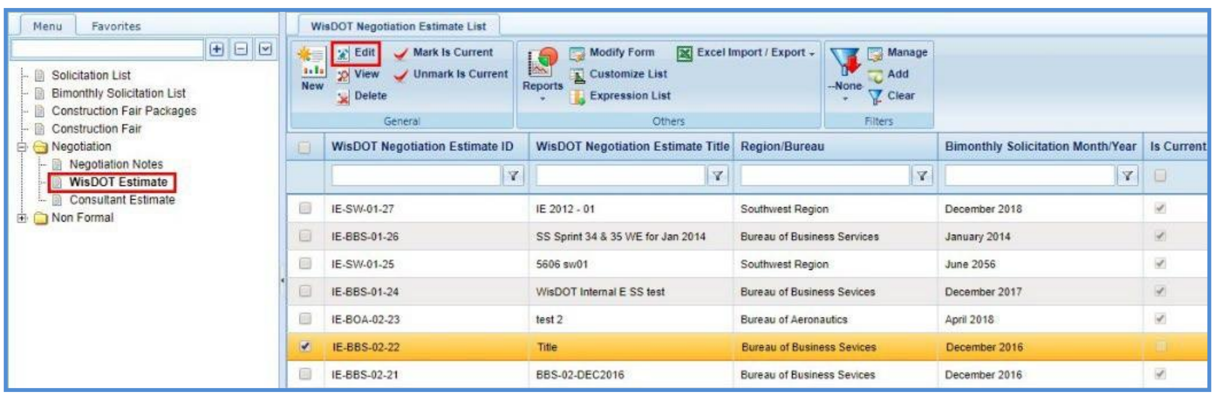
5. Click **Save**.

6.1.2 Defining WisDOT Estimate Details

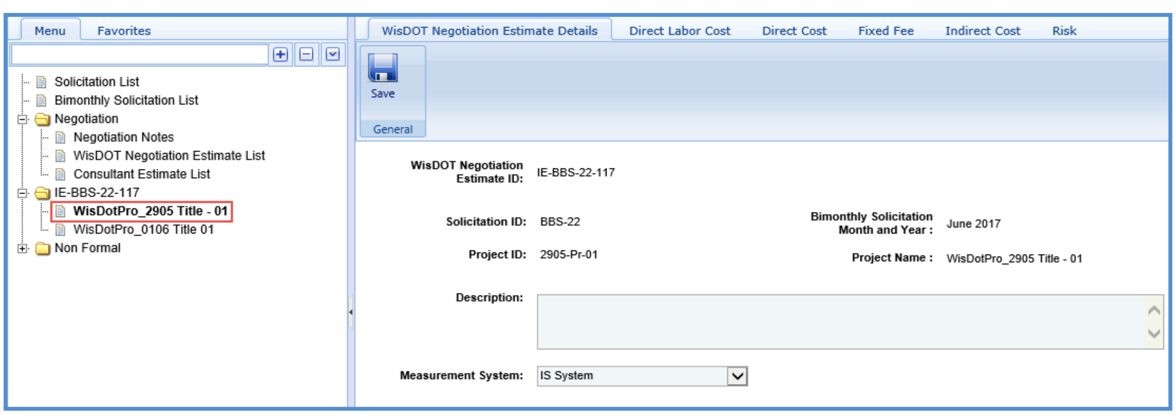
The system allows you to define WisDOT estimate details for projects associated with the selected solicitation for negotiation. By default, the direct labor cost, fixed fee, and indirect costs associated with the project are part of the negotiation estimate. However, additional direct labor costs, direct costs, and risks associated with the project can be added to the negotiation estimate. The procedure to view and define WisDOT estimate details is described.

Steps:

1. Click **Solicitation** in the module menu. The **Solicitation List** page is displayed.
2. In the navigation pane, expand the **Negotiation** folder, and then click **WisDOT Estimate**. The **WisDOT Negotiation Estimate List** page is displayed.



3. Select a WisDOT negotiation estimate for which you want to view or define estimate details, and then click **Edit**.
4. In the navigation pane, expand the negotiation estimate folder, click the project to define the estimate details. The **WisDOT Negotiation Estimate Details** page is displayed.



Note: *The values in the* ***WisDOT Negotiation Estimate ID, Solicitation ID, Bimonthly Solicitation Month and Year, Project ID, Project Name,*** *and* ***Measurement System*** *are auto populated.*

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

Note:

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

Cost Summary (In scope excluding If authorized)

Cost Type	Amount in $
Direct Labor Cost	7,048.84
Direct Cost	7,006.00
Fixed Fee	1,867.08
Indirect Cost	746.15
Risk	0.30

Estimate Total in $: 16,668.37

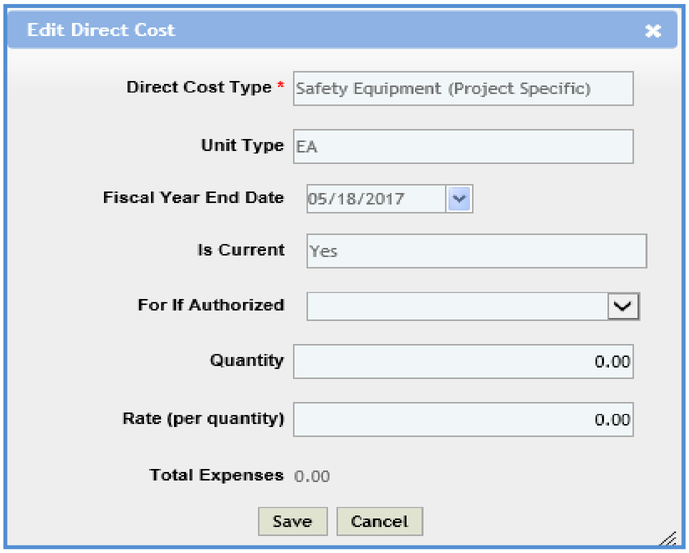
- *The **Cost Summary (If authorized)** section auto-populates the total of Direct Labor Cost, Direct Cost, Fixed Fee, Indirect Cost, and Risk based on the values entered in the respective tabs and that are marked **If authorized** as **Yes**. The sum of all these costs is also auto calculated and displayed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

Cost Summary (If authorized)

Cost Type	Amount in $
Direct Labor Cost	1,495.00
Direct Cost	3,510.00
Fixed Fee	1,255.80
Indirect Cost	224.25
Risk	0.30

Estimate Total in $: 6,485.35

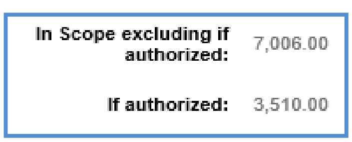
6. In the **Attachments** section, upload images and files relevant to the negotiation estimate. For information on attachments, refer *Attachments*.
7. Click the **Direct Labor Cost** tab. The direct labor cost tasks that are defined in the project estimate are auto populated. However, you can add additional direct labor cost tasks. For more information on adding direct labor cost tasks, refer Adding Direct Labor Cost Tasks. The total of direct labor costs that are marked as in scope excluding direct labor costs that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of direct labor costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **WisDOT Negotiation Estimate Details** tab.
8. Click the **Direct Cost** tab to add direct costs associated with the project. Perform the following steps:
   a. Click **Add**. The **Direct Cost** dialog box is displayed listing all the direct costs associated with the consultant and marked as current.
   b. Select the required direct costs.
   c. Click **Select**. The selected direct costs are listed in the **Direct Cost** table.
   d. Select the direct cost for which you want to indicate as authorized, add/edit quantity, and rate details, and then click **Edit**. The **Edit Direct Cost** dialog box is displayed.



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

Field	Mandatory / Non-Mandatory	Description
Direct Cost Type	**-**	The name of the selected direct cost type is auto populated.
Unit Type	**Non-mandatory**	The unit type of the selected direct cost is auto populated.
Fiscal Year End Date	**-**	The fiscal year end date associated with the direct cost is auto populated.
Is Current	**-**	Indicates whether the direct cost is marked as current.
For If authorized	**Non-mandatory**	From the drop-down list, select **Yes** to indicate that for the selected direct cost the **If authorized** is marked as **Yes** or select **No** to indicate that for the selected direct cost type the **If authorized** is marked as **No**.
Quantity	**Non-mandatory**	Enter quantity for the direct cost.
Rate (per quantity)	**Non-mandatory**	Enter or edit the rate for one quantity of the direct cost.
Total Expenses	**-**	The total direct cost expenses based on the entered quantity and rate is auto calculated and displayed.

Note: *The total of direct costs that are in scope is auto calculated and displayed in the* ***In Scope excluding if authorized*** *field and the total of direct costs that are indicated as authorized is auto calculated and displayed in the* ***If authorized*** *field.*



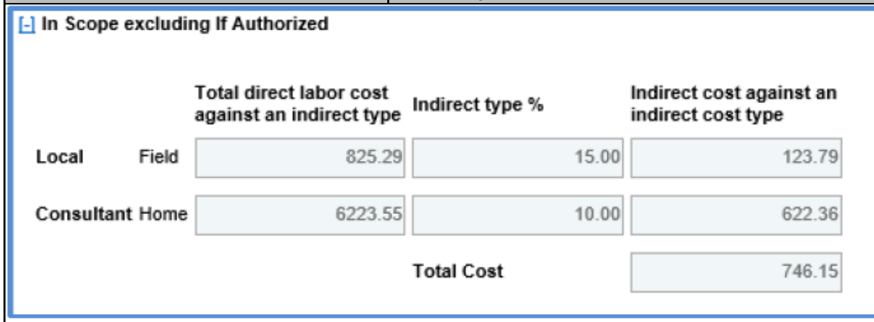
f. Click **Save**. The total of direct costs that are marked as in scope excluding direct costs that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of direct costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **WisDOT Negotiation Estimate Details** tab.

9. Click the **Fixed Fee** tab to view the fixed fee details based on the total direct labor cost defined on the **Direct Labor Cost** tab and fixed fee percentage defined on the **Solicitation Scope of Service** page. For more information on the details that are displayed, refer Fixed Fee Details step in Solicitation Task List for Regular Contract Type. The total of fixed fee that are marked as in scope excluding fixed fee that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of fixed fees that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **WisDOT Negotiation Estimate Details** tab.
10. Click the **Indirect Cost** tab. The indirect cost details associated with the consultant and are marked as current are displayed. The different details that are displayed are described in the following table.

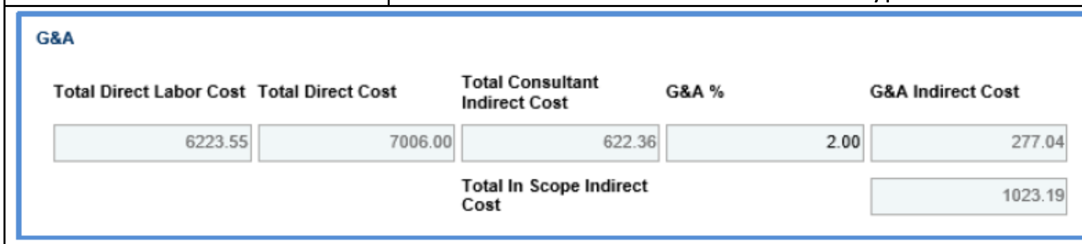
Note:

- *Based on whether the indirect costs are marked as **Yes** for **In Scope** and **If Authorized,*** the details *are displayed in appropriate sections.*
- *If the consultant is marked as **Yes** in **Is G&A** on the **Consultant\Contractor** page, then **G&A** sub- section with appropriate indirect cost details is displayed in the **In Scope excluding If Authorized** section and **If Authorized** sections.*

Field	Description



Total direct labor cost against an indirect type	The total direct labor cost associated with an indirect cost type for the consultant is auto populated.
Indirect type %	Indicates the percentage of indirect cost defined for the consultant.
Indirect cost against an indirect cost type	Indicates the indirect cost amount of each indirect cost type, which is auto calculated based on the total direct labor cost and indirect type %.
Total Cost	Indicates the total indirect cost amount of all the indirect cost types associated with the consultant. The value is the auto calculated based on the total of indirect costs of all the indirect cost types.



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

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

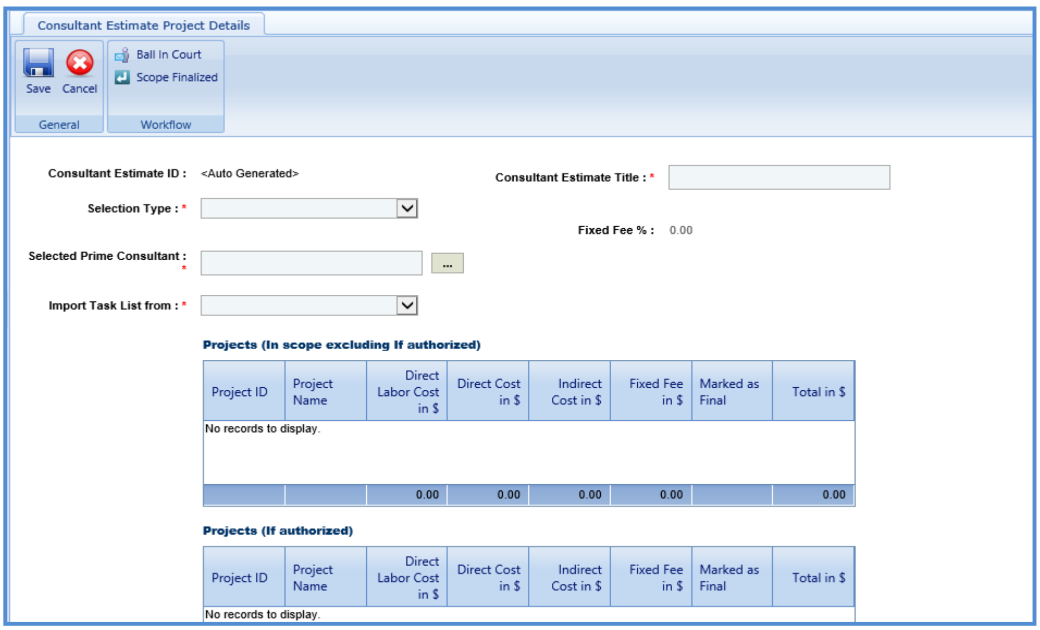
6.2 Consultant Estimate

6.2.1 Finalizing the Scope of Consultant Estimate

The system allows you to finalize the scope items for the consultants to provide their estimate for these scope items.
Steps:

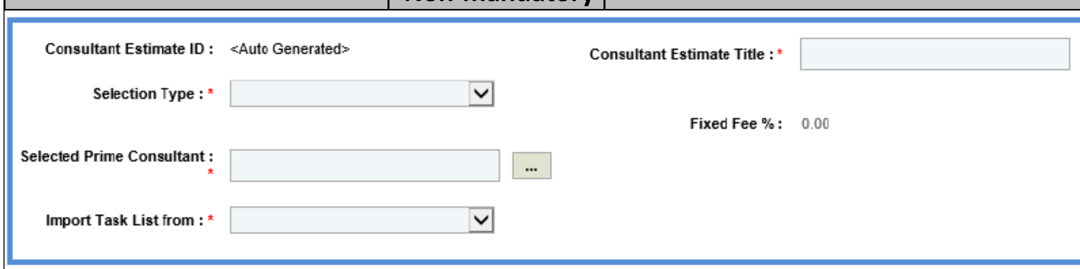
1. Click **Solicitation** in the module menu. The **Solicitation List** page is displayed.
2. In the navigation pane, expand the **Negotiation** folder, and then click **Consultant Estimate List**. The **Consultant Estimate List** page is displayed.

3. Click **New**. The **Consultant Estimate Project Details** page is displayed.



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

Field	Mandatory / Non-mandatory	Description



Field	Mandatory / Non-mandatory	Description
Consultant Estimate ID	-	A unique ID for the consultant estimate is auto- generated.
Consultant Estimate Title	Mandatory	Enter a title for the consultant estimate.
Selection Type	Mandatory	From the drop-down list, select the required option. • **Solicitation: Select this option. The Bimonthly Solicitation Title, Bimonthly Solicitation Month/Year, Solicitation ID, and Region/Bureau fields are displayed.**
Bimonthly Solicitation Title	Mandatory	This field is displayed only when the value in the **Selection Type** field is **Solicitation**. To select a bimonthly solicitation associated with the solicitation: 1. Click . The **Select Bimonthly Solicitation** dialog box is displayed listing all the finally ranked bimonthly solicitations. 2. Select the required bimonthly solicitation and click **Select**.
Solicitation ID	Mandatory	This field is displayed only when the value in the **Selection Type** field is **Solicitation**. To select a solicitation associated with the bimonthly solicitation: 1. Click ... The **Select Solicitation** dialog box is displayed listing all the solicitations that are associated with the selected bimonthly solicitation and the contract type is regular. 2. Select the required solicitation and click **Select**.
Bimonthly Solicitation Month/Year	-	When solicitation is selected, the month and year of the bimonthly solicitation is auto populated.
Region/Bureau		When solicitation is selected, the region/bureau associated with the selected solicitation is auto populated.
Fixed Fee %	-	The fixed fee percentage of the consultant is auto populated.
Selected Prime Consultant	Mandatory	To select a prime consultant: 1. Click ... The Select Prime Consultant dialog box is displayed listing all the consultants listing all consultants who are finally ranked. Select the required consultant and click Select.
Import Task List from	Mandatory	From the drop-down list, select the required option from where the tasks must be imported for the consultant estimation.

***Note**: When a solicitation is selected in the **Solicitation ID** field, the system auto-populates the projects associated with the selected solicitation in the **Projects (In scope excluding If authorized)** and **Projects (If authorized)** sections. The projects are listed in the appropriate section based on the project tasks are marked as **Yes** for In Scope and If Authorized.*

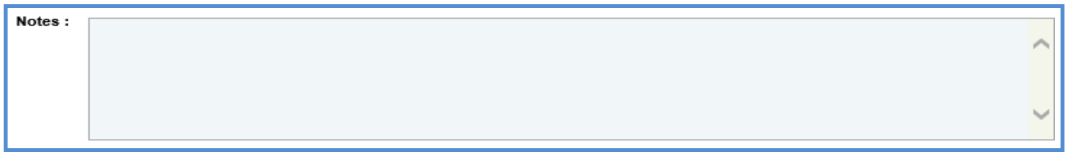
Projects (In scope excluding If authorized)

Project ID	Project Name	Direct Labor Cost in $	Direct Cost in $	Indirect Cost in $	Fixed Fee in $	Marked as Final	Total in $
WD001	Budget Estim	0.00	0.00	0.00	0.00		0.00
2313-12-32	3423423	0.00	0.00	0.00	0.00		0.00
		0.00	0.00	0.00	0.00		0.00

Projects (If authorized)

Project ID	Project Name	Direct Labor Cost in $	Direct Cost in $	Indirect Cost in $	Fixed Fee in $	Marked as Final	Total in $
WD001	Budget Estim	0.00	0.00	0.00	0.00		0.00
2313-12-32	3423423	0.00	0.00	0.00	0.00		0.00
		0.00	0.00	0.00	0.00		0.00

5. In the **Notes** field, enter notes about the scope items for consultant estimation.



6. In the **Attachments** section, upload images and files relevant to the scope items for consultant estimate. For information on attachments, refer *Attachments*.
7. Click **Save**.
8. In the **Workflow** group, click **Select Actions**, and then click **Scope Finalized**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The scope of work is available for consultants to provide their estimation.

6.2.2 Completing Negotiation and Approving Estimates

Once all the estimates are received from consultants, you can close the negotiation by either approving or rejecting the consultant estimates.
Steps:

1. On the **Consultant Estimate List** page, select the record that is in the **Published** stage.
2. In the **Workflow** group, click **Select Actions**, and then click **Negotiation Completed**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** Optionally, you can click **Reject** to reject the consultant estimation.
3. Select the record in the **Negotiation Completed** stage and in the **Workflow** group, click **Select Actions**, and then click **Approved for Contract**. Optionally, you can click **Reject** to reject the consultant estimation or Redraft to redraft the consultant estimation.

7 Contracts

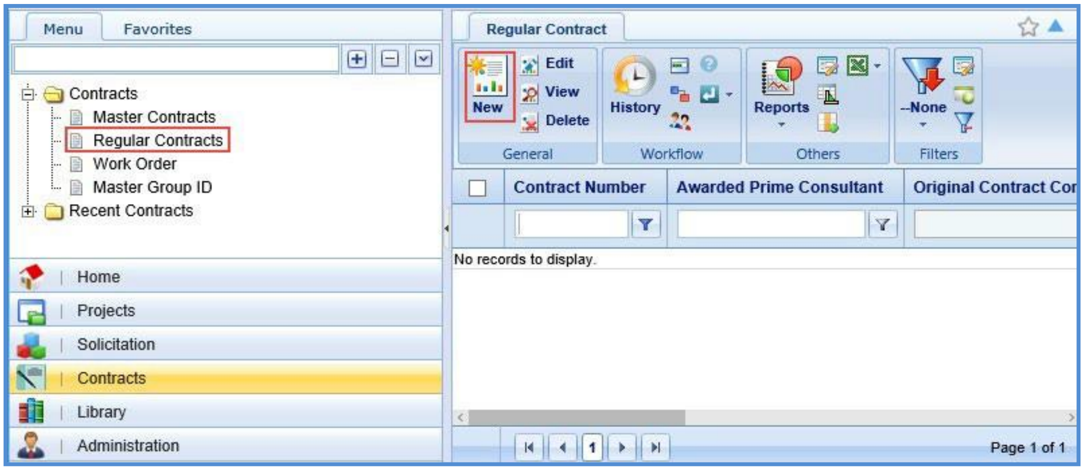
Once the negotiation with consultants is completed, based on the contract type associated with the solicitation, regular or master contracts are created and approved. The procedure to create and approve regular and master contracts are described.

7.1 Creating Regular Contracts

Based on the selection type, the system allows you to create regular contracts, which has consultant estimate in the **Approved for Contract** stage. Each of these selection types is discussed below:

Pre-requisite: The consultant estimate must be in the **Approved for Contract** stage.
Steps:

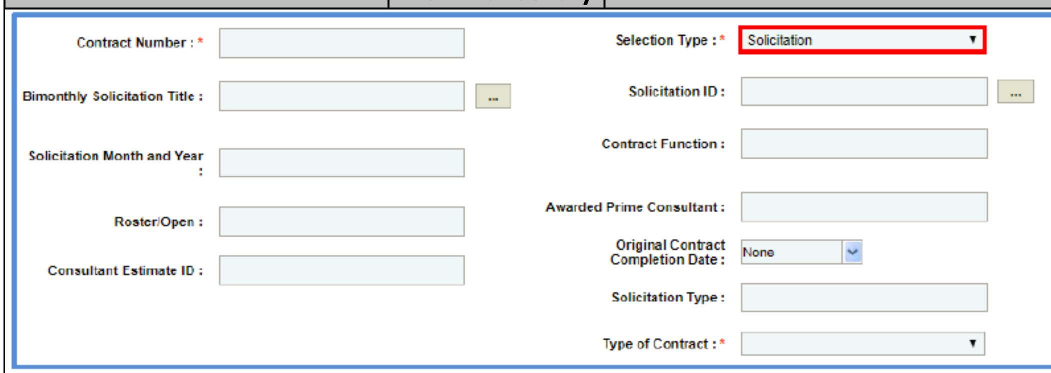
1. In the module menu, click **Contracts**.
2. In the navigation pane, expand the **Contracts** folder, and then click **Regular Contracts**. The **Regular Contract** page is displayed.



3. Click **New**. The **Regular Contract** page is displayed.

7.1.1 For Solicitation:

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

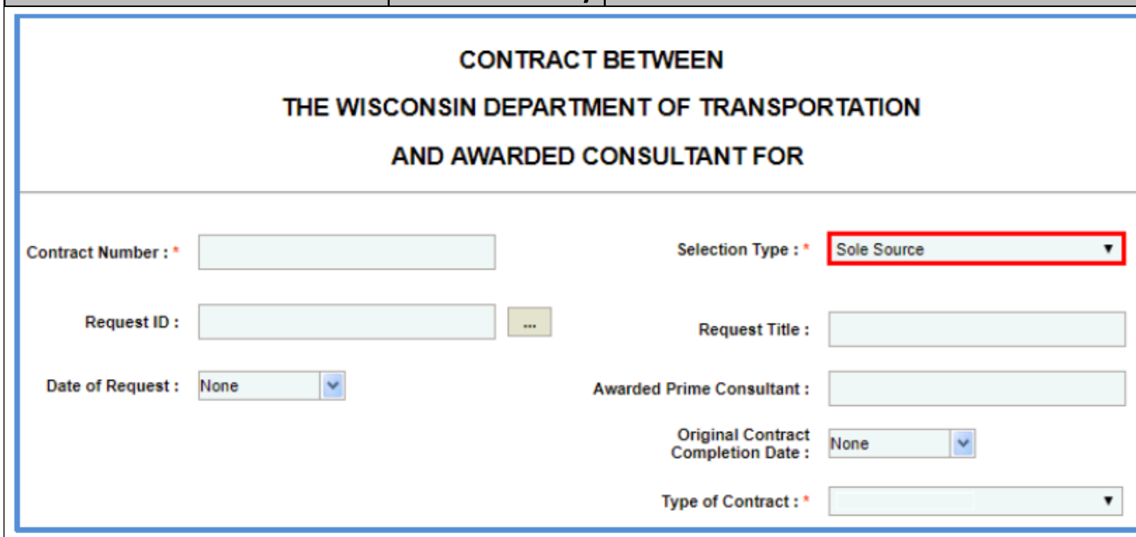
Field	Mandatory / Non-mandatory	Description
		
Contract Number	Mandatory	Enter a unique number for the contract.
Selection Type	Mandatory	From the drop-down list, select **Solicitation**.
Bimonthly Solicitation Title	Non-mandatory	This field is displayed only when the **Selection Type** is **Solicitation**. To select the bimonthly solicitation: 1. Click ... The Select Bimonthly Solicitation dialog box is displayed listing all the published bimonthly solicitations. 2. Select the required bimonthly solicitation and click Select.

Field	Mandatory / Non-mandatory	Description
Solicitation ID	Mandatory	This field is displayed only when the **Selection Type** is **Solicitation**. To select a solicitation: 1. Click ... The Select Solicitation dialog box is displayed listing all the solicitations associated with the selected bimonthly solicitation and for which the consultant estimate is in the Approved for Contract stage. 2. Select the required solicitation and click Select. The values in the Solicitation Month/Year, Roster/Open, Awarded Prime Consultant, and Solicitation Type fields are auto populated.
Solicitation Month and Year	–	This field is displayed only when the **Selection Type** is **Solicitation**. The month and year of the selected solicitation is auto populated.
Awarded Prime Consultant	–	The name of the prime consultant firm to whom the contract is awarded is auto populated.
Original Contract Completion Date	Non-mandatory	From the drop-down calendar, select the original completion date of the contract.
Roster/Open	–	This field is displayed only when the **Selection Type** is **Solicitation**. The value in this field is auto populated indicating whether the solicitation is associated with Roster/Open.
Solicitation Type	–	This field is displayed only when the **Selection Type** is **Solicitation**. The type of selected solicitation is auto populated.

7.1.2 For Sole Source:

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

Field	Mandatory / Non-mandatory	Description



Contract Number	Mandatory	Enter a unique number for the contract.
Selection Type	Mandatory	From the drop-down list, select **Sole Source**.

Field	Mandatory / Non-mandatory	Description
Request ID	Non-mandatory	To select the Request ID: 1. Click ... The Select Solicitation dialog box is displayed listing all the published solicitations. 2. Select the required solicitation and click Select. The values in the **Request Title** and **Awarded Prime Consultant** fields are auto populated.
Request Title	Non-Mandatory	The title of the request is auto populated.
Date of Request	–	From the drop-down calendar, select the date of request.
Awarded Prime Consultant	–	The name of the prime consultant firm to whom the contract is awarded is auto populated.
Original Contract Completion Date	Non-mandatory	From the drop-down calendar, select the original completion date of the contract.
Type of Contract	–	From the drop-down list, select the type of contract.

7.1.3 For Small Purchase:

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

Field	Mandatory / Non-mandatory	Description
		
Contract Number	Mandatory	Enter a unique number for the contract.
Selection Type	Mandatory	From the drop-down list, select **Small Purchase**.
Request ID	Non-mandatory	To select the Request ID: 1. Click ... The Select Solicitation dialog box is displayed listing all the published solicitations. 2. Select the required solicitation and click Select. The values in the **Request Title** and **Awarded Prime Consultant** fields are auto populated.
Request Title	Non-mandatory	The title of the request is auto populated.
Date of Request	–	From the drop-down calendar, select the date of request.
Awarded Prime Consultant	–	The name of the prime consultant firm to whom the contract is awarded is auto populated.
Original Contract Completion Date	Non-mandatory	From the drop-down calendar, select the original completion date of the contract.
Type of Contract	–	From the drop-down list, select the type of contract.

7.1.4 For Request for Proposal:

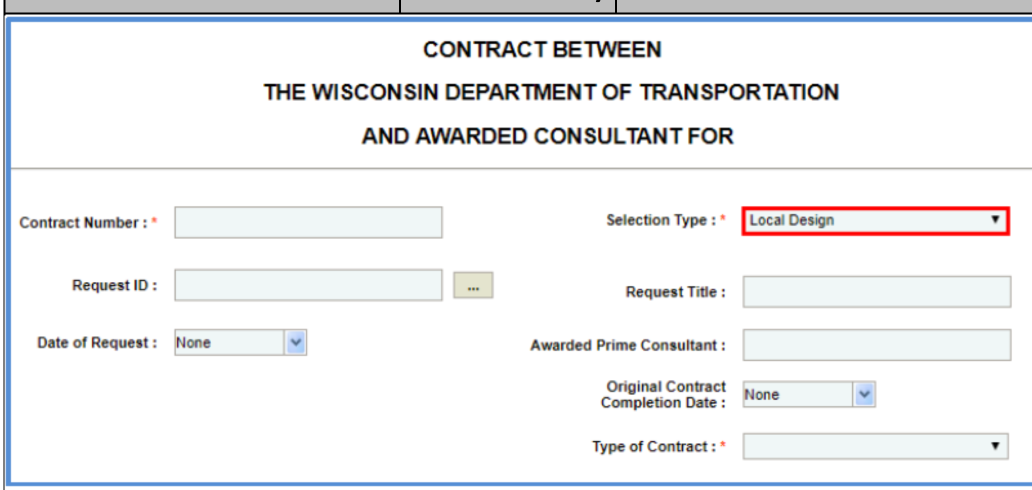
Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
Contract Number	Mandatory	Enter a unique number for the contract.
Selection Type	Mandatory	From the drop-down list, select **Request for Proposal**.
Request ID	Non-mandatory	To select the Request ID: 1. Click ... The Select Solicitation dialog box is displayed listing all the published solicitations. 2. Select the required solicitation and click Select. The values in the **Request Title** field are auto populated.
Request Title	Non-mandatory	The title of the request is auto populated.
Date of Request	–	From the drop-down calendar, select the date of request.
Original Contract Completion Date	Non-mandatory	From the drop-down calendar, select the original completion date of the contract.
Type of Contract	–	From the drop-down list, select the type of contract.

7.1.5 For Local Design:

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

Field	Mandatory / Non-mandatory	Description



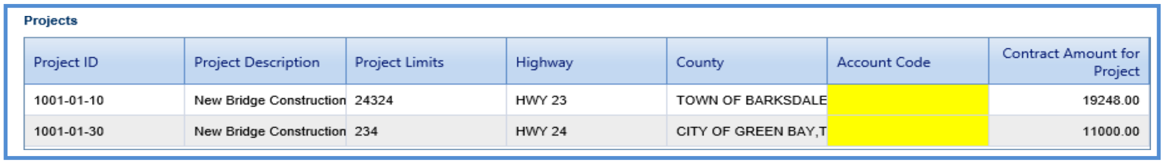
Field	Mandatory / Non-mandatory	Description
Contract Number	Mandatory	Enter a unique number for the contract.
Selection Type	Mandatory	From the drop-down list, select **Local Design**.
Request ID	Non-mandatory	To select the Request ID: 1. Click ... The Select Solicitation dialog box is displayed listing all the published solicitations. 2. Select the required solicitation and click Select. The values in the **Request Title** and **Awarded Prime Consultant** fields are auto populated.
Request Title	Non-Mandatory	The title of the request is auto populated.
Date of Request	–	From the drop-down calendar, select the date of request.
Awarded Prime Consultant	–	The name of the prime consultant firm to whom the contract is awarded is auto populated.
Original Contract Completion Date	Non-mandatory	From the drop-down calendar, select the original completion date of the contract.
Type of Contract	–	From the drop-down list, select the type of contract.

7.1.6 For Construction Fair:

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

Field	Mandatory / Non-mandatory	Description
Contract Number	Mandatory	Enter a unique number for the contract.
Selection Type	Mandatory	From the drop-down list, select **Construction Fair**.
Construction Fair Title	Non-mandatory	To select the Construction Fair title: 1. Click ... The **Select Construction Fair** dialog box is displayed listing all the published solicitations. 2. Select the required solicitation and click **Select**.
Construction Fair Month and Year	–	The month and year of the construction fair is auto populated.
Construction Fair Number	–	The construction fair number is auto populated.
Package ID	Non-mandatory	To select the Package ID: 1. Click ... The Select Solicitation dialog box is displayed listing all the published solicitations. 2. Select the required solicitation and click **Select**. The values in the **Construction Fair Month and Year** and **Construction Fair Number** fields are auto populated.
Region/Bureau	–	The region or bureau of the construction fair is auto populated.
Awarded Prime Consultant	–	The name of the prime consultant firm to whom the contract is awarded is auto populated.
Consultant Estimate ID	–	The consultant estimate ID is auto populated.
Original Contract Completion Date	Non-mandatory	From the drop-down calendar, select the original completion date of the contract.
Type of Contract	–	From the drop-down list, select the type of contract.

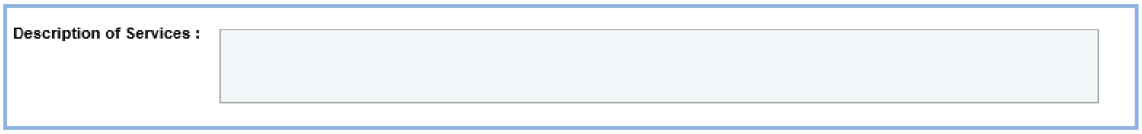
1. In the **Projects** section, the project details for which the consultant estimate is approved for contract is auto populated. Corresponding to a project, click in the **Account Code** column to enter the accounting code for the project.



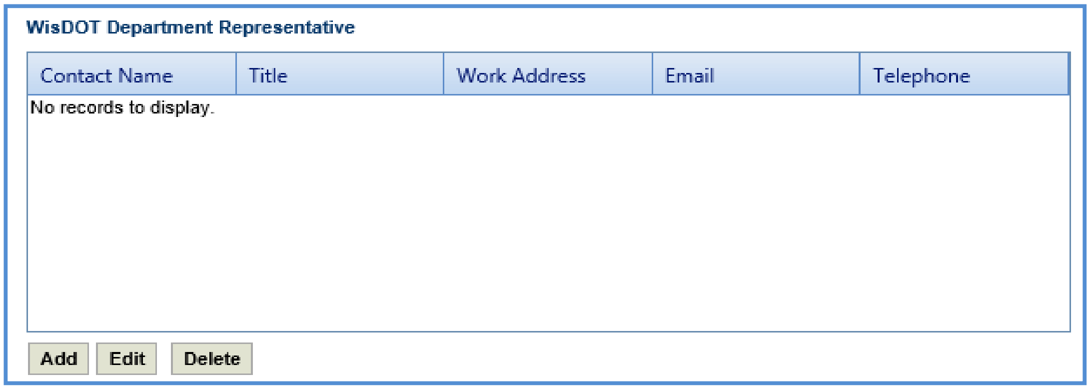
Projects

Project ID	Project Description	Project Limits	Highway	County	Account Code	Contract Amount for Project
1001-01-10	New Bridge Construction	24324	HWY 23	TOWN OF BARKSDALE		19248.00
1001-01-30	New Bridge Construction	234	HWY 24	CITY OF GREEN BAY,T		11000.00

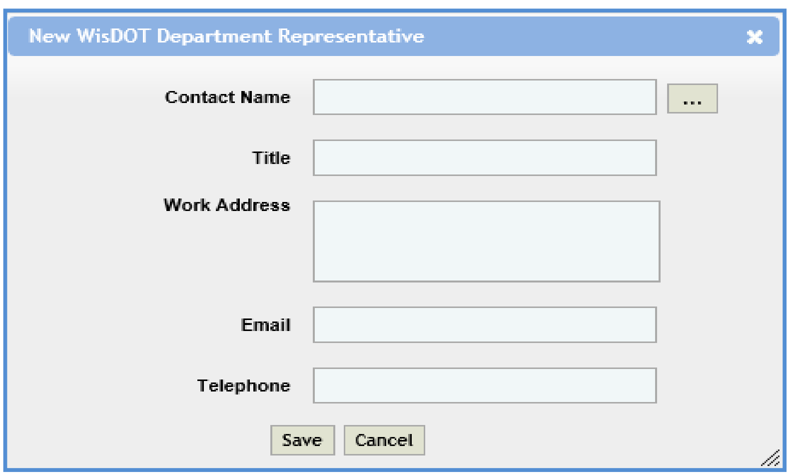
2. In the **Description of Services** section, enter description about the services associated with the contract.



3. In the **WisDOT Department Representative** section, perform the following steps to add WisDOT representatives for the contract.



a. Click **Add.** The **New WisDOT Department Representative** dialog box is displayed.



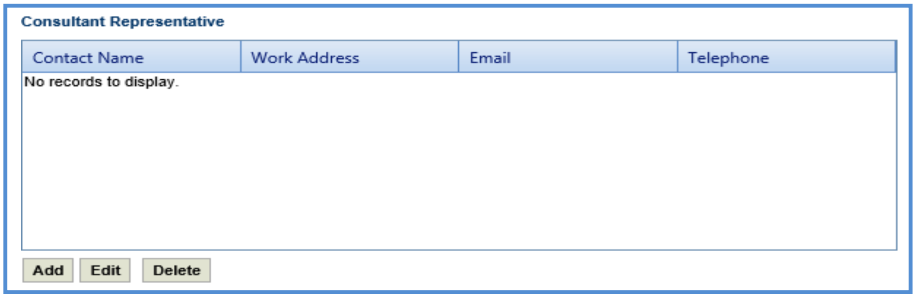
b. Enter information in the required fields. The fields are described in the following table.

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

Field	Description
Contact Name	To select a WisDOT contact: 1. Click ... The **Select WisDOT Representative** dialog box is displayed listing all the active users from the list of User Accounts in the enterprise. 2. Select the required contact details and click **Select**. The values in the **Email**, **Work Address,** and **Telephone** fields are displayed.
Title	Enter title of the selected contact.
Work Address	The work address of the selected contact is auto populated.
Email	The e-mail address of the selected contact is auto populated.
Telephone	The telephone number of the selected contact is auto populated.

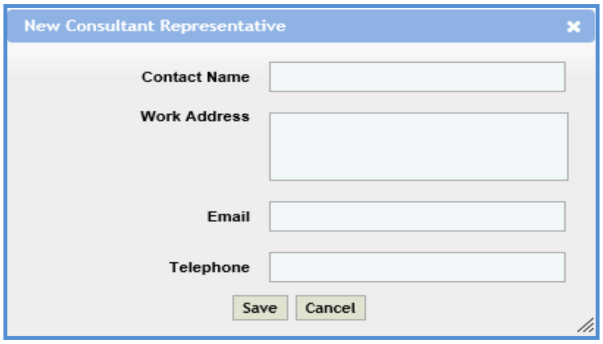
c. Click **Save**.

4. In the **Consultant Representative** section, perform the following steps to add consultant representatives for the contract.



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

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

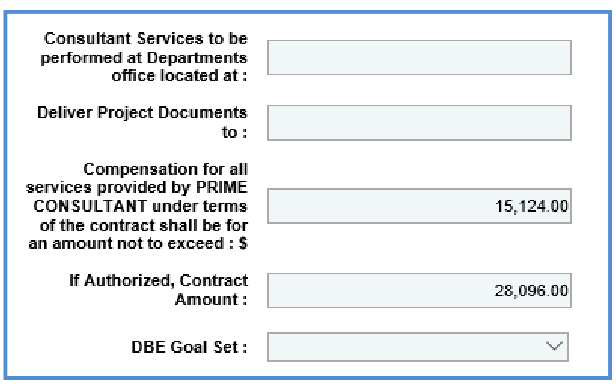


***Note**: All fields described in the below table are non-mandatory.*

Field	Description
Contact Name	Enter the name of the consultant representative.
Work Address	Enter work address of the consultant representative.
Email	Enter e-mail address of the consultant representative.
Telephone	Enter telephone number of the consultant representative.

c. Click **Save**.

5. In the next section, enter information in the required fields. The fields are described in the following table.



Field	Description
Consultant Services to be performed located at Department's office	Enter the location details of the department office where consultant services are to be performed.
Deliver Project Documents to	Enter the location details where the project documents are to be delivered.
Compensation for all services provided by PRIME CONSULTANT under terms of the contract shall be for an amount not to exceed	The total contract amount of all the projects is auto populated. The break-up of the contract amount based on basis of payment can viewed. For more information, refer Viewing Basis of Payment Details.
If Authorized, Contract Amount	The total contract amount of all the projects and marked as **If Authorized** as **Yes** is auto populated.

Field	Description
***Note**: All the contracts that exceed the total value of $3000 must be approved by the Secretary and Governor. The DT 25 form consisting of the contract details is submitted for approval. For more information, refer Submitting D25 form for Approval.*	
DBE Goal Set	From the drop-down list, select **Yes** or **No** to indicate if the project is associated with the contract that has DBE Goal or not. If the selected option is **Yes**, then the **DBE** section is displayed.

***Note**: When the value for **DBE Goal Set** is **Yes**, then the **DBE** section is displayed listing the projects and amount associated with DBE based on the DBE details defined on the Solicitation Scope of Service.*

6. In the **Attachments** section, upload images and files relevant to the regular contract. For information on form attachments, refer *Attachments*.
7. Click **Save**.
8. On the **Regular Contract** list page, select the record that is in the **Draft** stage. In the **Workflow** group, click **Select Actions**, and then click **Submit for Consultant Review**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The record is sent to the consultant for review.
9. Once the record is reviewed by consultant, select the record that is in the **Reviewed by Consultant** stage. In the **Workflow** group, click **Select Actions**, and then click **Submit for Approval**. The **WisDOT – Masterworks** dialog box is displayed.
10. Enter required information and then click **OK.** The record is submitted for approval.

***Note**: If the contract is associated with a D25 form, then the D25 form must be approved prior to submitting for approval.*

11. Optionally, you can click **Redraft** to redraft the record.

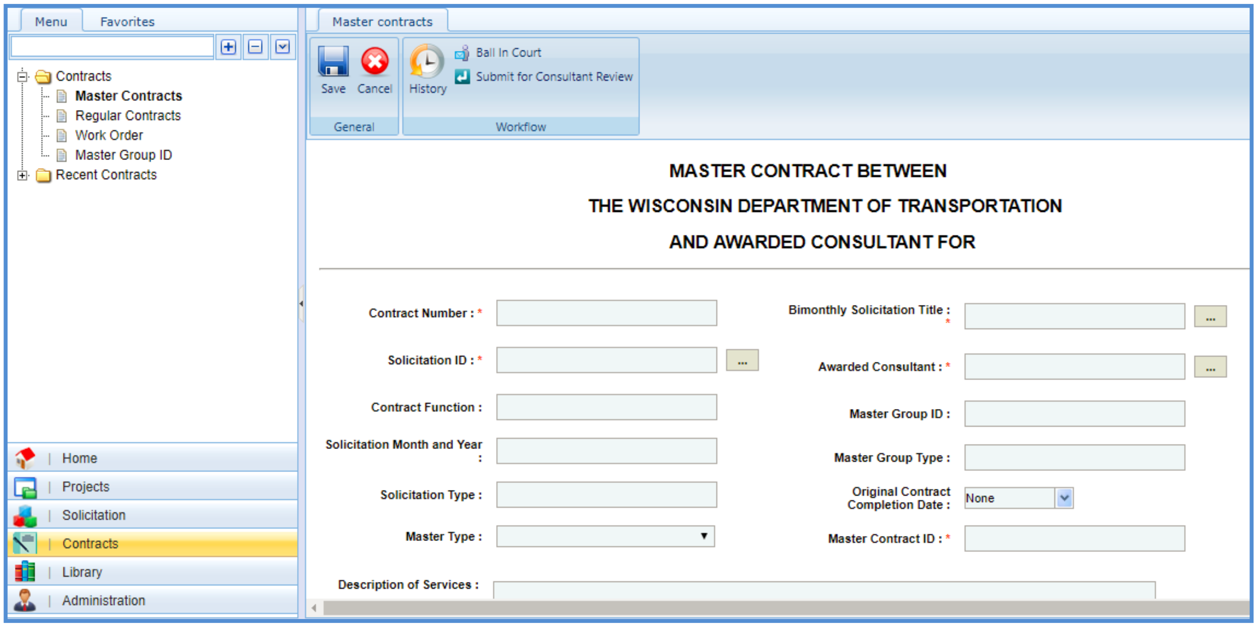
7.2 Creating Master Contracts

The Master Group IDs are created and associated with solicitations of master contract type. To create master group IDs, refer Creating Master Group ID. All the contractors who are shortlisted for Master Contract Type solicitations are awarded with the master contract. The procedure to create master contracts is described.

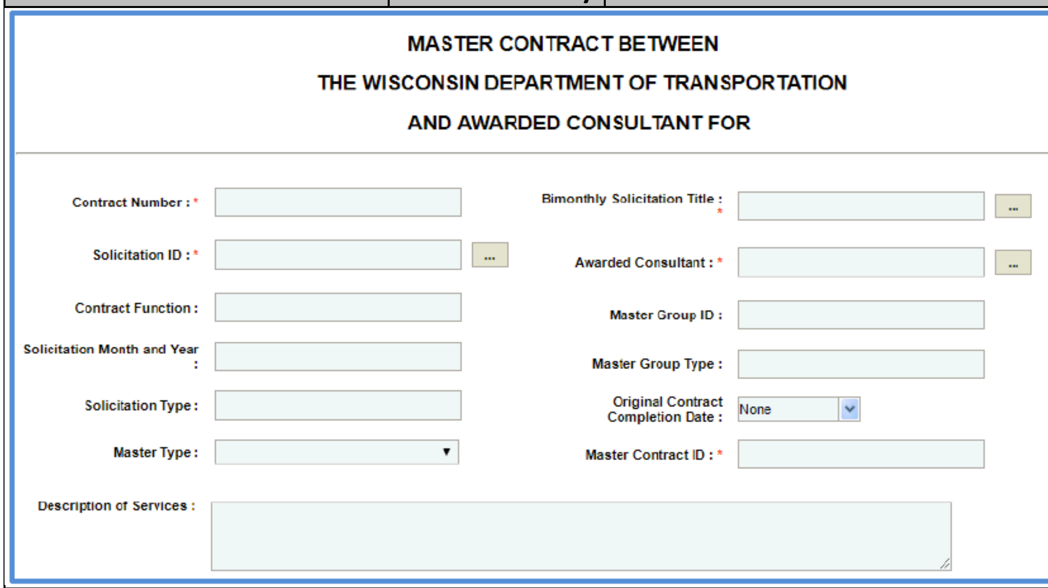
Steps:

5. In the module menu, click **Contracts**. The **Master Contracts** list page is displayed. Alternatively, in the navigation pane, in the **Contracts** folder, click **Master Contracts**.

6. Click **New**. The **Master Contracts** details page is displayed.

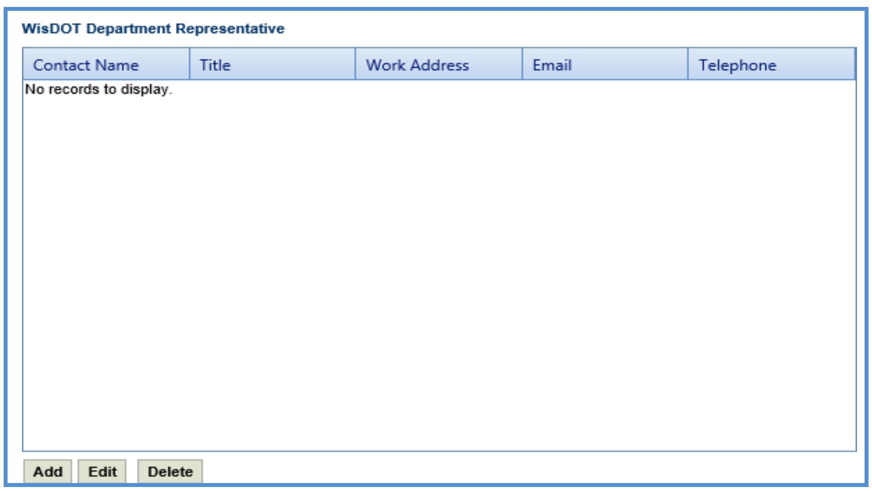


3. Enter information in the required fields. The fields are described in the following table.

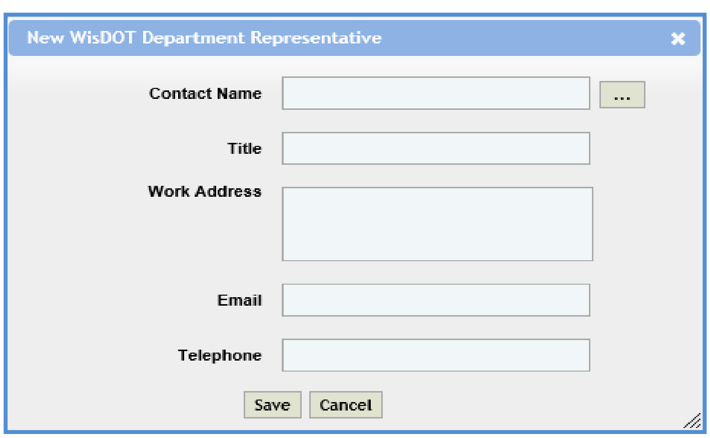
<table>
<tr><th>Field</th><th>Mandatory / Non-mandatory</th><th>Description</th></tr>
<tr><td colspan="3">
</td></tr>
<tr><td>Contract Number</td><td>Mandatory</td><td>Enter a unique number for the contract.</td></tr>
<tr><td>Bimonthly Solicitation Title</td><td>Mandatory</td><td>To select the bimonthly solicitation:
1. Click ... The Select Bimonthly Solicitation dialog box is displayed listing all the published bimonthly solicitations.
2. Select the required bimonthly solicitation and click Select.</td></tr>
<tr><td>Solicitation ID</td><td>Mandatory</td><td>To select a solicitation:
1. Click ... The Select Solicitation dialog box is displayed listing all the solicitations associated with the selected bimonthly solicitation and for which the consultant estimate is in the Approved for Contract stage.
2. Select the required solicitation and click Select. The values in the Solicitation Month/Year, Solicitation Type, Contract Function, Master Group ID, and Master Group Type fields are auto populated.</td></tr>
</table>

Field	Mandatory / Non-mandatory	Description
Awarded Consultant	Mandatory	To select awarded consultant: 1. Click ... The Select Solicitation dialog box is displayed listing all the consultants who are shortlisted for the solicitation. 2. Select the required solicitation and click Select.
Contract Function	-	The contract function is auto populated.
Master Group ID	-	The master group ID is auto populated.
Solicitation Month and Year	Non-mandatory	The month and year of the selected solicitation is auto populated.
Master Group Type	Non-mandatory	From the drop-down list, select the required type of master group for the contract. For availability of options in the drop-down list, the master group types must be defined in the **Master Group Type** catalog of the library.
Solicitation Type	Non-mandatory	The type of selected solicitation is auto populated.
Original Contract Completion Date	Non-mandatory	From the drop-down calendar, select the original completion date of the contract.
Master Type	Non-mandatory	From the drop-down list, select the master type for the contract. For availability of options in the drop- down list, master types must be defined in the **Master Type** catalog of the library.
Master Contract ID	Non-mandatory	Enter a unique ID for the contract.
Description of Services	Non-mandatory	Enter description about the services associated with the contract.

4. In the **WisDOT Department Representative** section, perform the following steps to add WisDOT representatives for the contract.



a. Click **Add.** The **New WisDOT Department Representative** dialog box is displayed.
b. Enter information in the required fields. The fields are described in the following table.

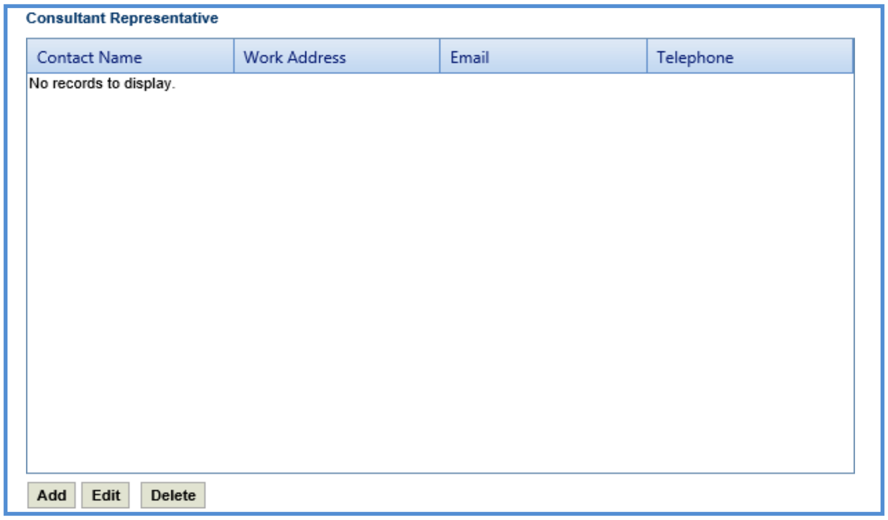


***Note**: All fields described in the below table are non-mandatory.*

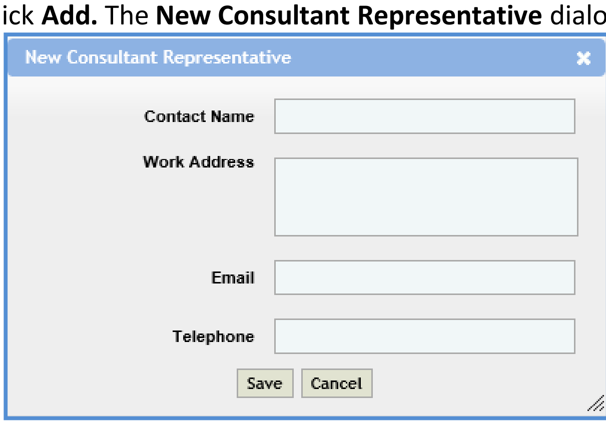
Field	Description
Contact Name	To select a WisDOT contact: 1. Click ... The **Select WisDOT Representative** dialog box is displayed listing all the active users from the list of **User Accounts** in the enterprise database. 2. Select the required contact details and click Select. The values in the Email, Work Address, and Telephone fields are displayed.
Title	Enter title of the selected contact.
Work Address	The work address of the selected contact is auto populated.
Email	The e-mail address of the selected contact is auto populated.
Telephone	The telephone number of the selected contact is auto populated.

c. Click **Save**.

4. In the **Consultant Representative** section, perform the following steps to add consultant representatives for the contract.



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



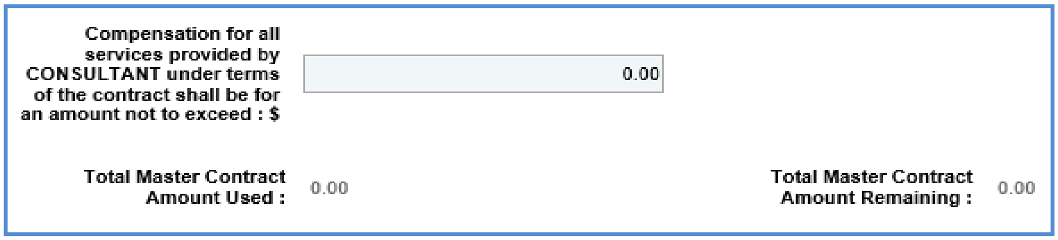
b. Enter information in the required fields. The fields are described in the following table.

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

Field	Description
Contact Name	Enter the name of the consultant representative.
Work Address	Enter work address of the consultant representative.
Email	Enter e-mail address of the consultant representative.
Telephone	Enter telephone number of the consultant representative.

c. Click **Save**.

5. In the **Compensation for all services provided by CONSULTANT under terms of the contract shall be for an amount not to exceed: $** field, enter the total amount of the contract.



   a. The values in the **Total Master Contract Amount Used** and **Total Master Contract Amount Remaining** fields are displayed.
   b. The value in the **Total Master Contract Amount Used** field is auto calculated and displayed. The total contract amount of all the approved work orders of the selected master contract is displayed.
   c. The value in the **Total Master Contract Amount Remaining** field is auto calculated and displayed. The difference of **Compensation for all services provided by consultant under terms of the contract shall be for an amount not to exceed** and **Total Master Contract Amount Used** fields is displayed.

Note*: All the contracts that exceed the total value of $3000 must be approved by the Secretary and Governor. The DT 25 form consisting of the contract details is submitted for approval. For more information, refer Submitting D25 form for Approval.*

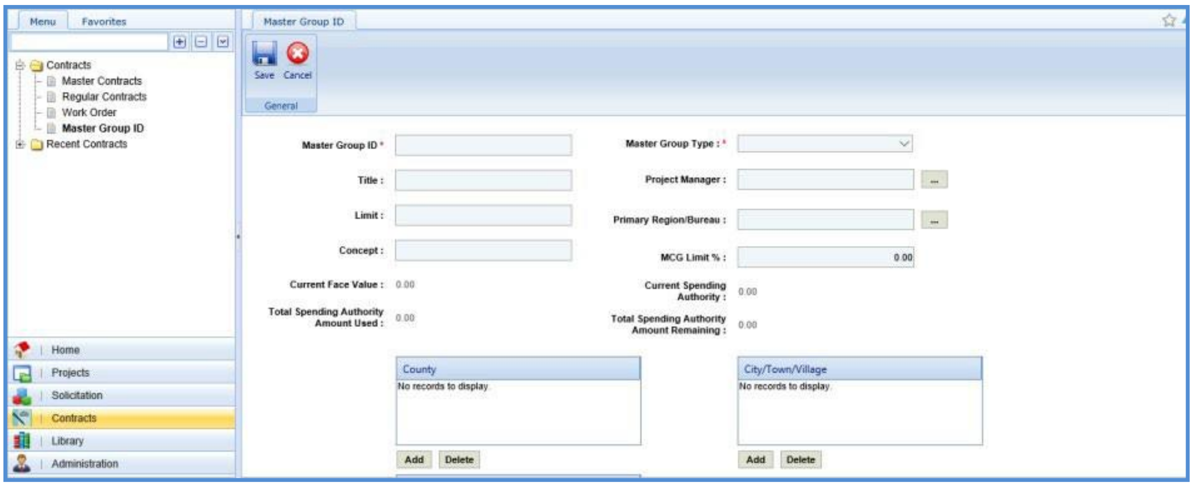
6. In the **Attachments** section, upload images and files relevant to the master contract. For information on form attachments, refer *Attachments*.
7. Click **Save**.
8. On the **Master contracts** list page, select the record that is in the **Draft** stage. In the **Workflow** group, click **Select Actions**, and then click **Submit for Consultant Review**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The record is sent to the contract specialist for review.
9. A contract specialist reviews the master contract and then in the **Workflow** group, can click **Select Actions**, and then click **Reviewed**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** Optionally, click **Request to Revisit** to revisit the record.
10. Once the record is reviewed, select the record that is in the **Reviewed by Consultant** stage. In the **Workflow** group, click **Select Actions**, and then click **Submit for Approval**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The record is submitted for approval to the contract manager. Optionally, you can click **Redraft** to redraft the record.
11. The contract manager, in the **Workflow** group, can click **Select Actions**, and then click **Approve**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** Optionally, click **Deny** denying the approval for the contract record or click **Redraft** to redraft the contract record.

7.2.1 Creating Master Group ID

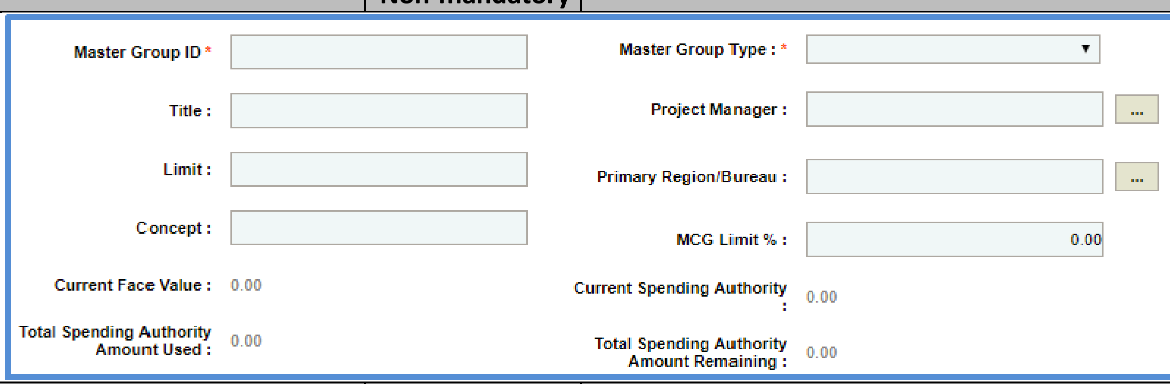
Master Contract IDs are created and associated with solicitations of Master Contract Type.

1. In the module menu, click **Contracts**.
2. In the navigation pane, click **Master Group ID**. The **Master Group ID** page is displayed.

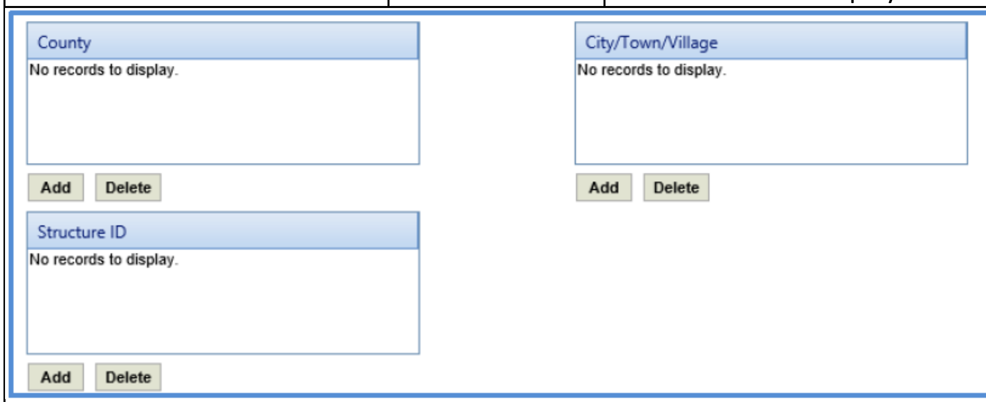
3. Click **New**. The **Master Group ID** page is displayed.



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

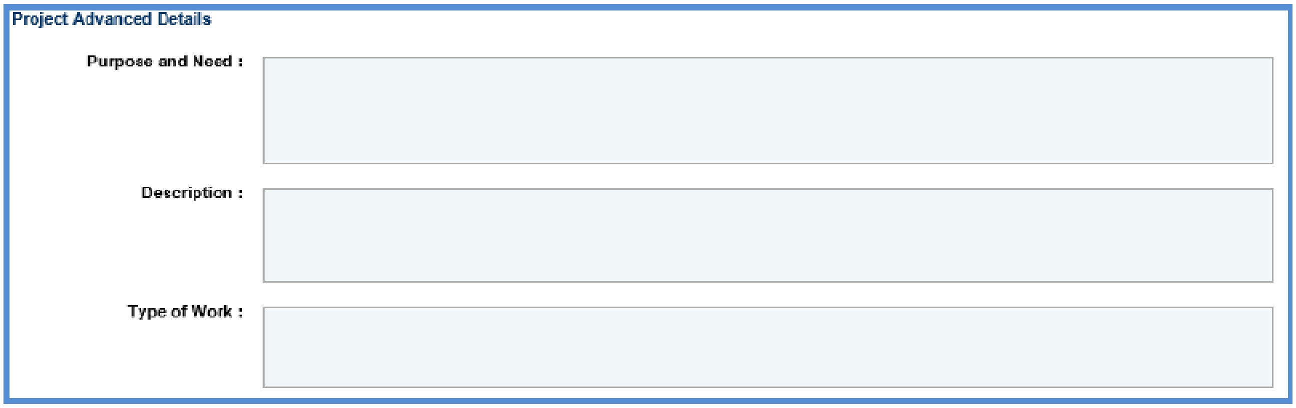
Field	Mandatory / Non-mandatory	Description
		
Master Group ID	Mandatory	Enter a unique ID for the master group.
Master Group Type	Mandatory	From the drop-down list, select a type for the master group. For availability of options in the drop-down list, master group types must be defined in the **Master Group Typ**e catalog of the library.
Title	Non-mandatory	Enter a title for the master group ID.
Project Manager	Non-mandatory	To select a project manager for the master group: 1. Click ... and the **Project Manager** dialog box is displayed. The dialog box lists users who are in the **Project Manager** role from the list of **User Accounts** in the enterprise. 2. Select a user and click **Select**.

Field	Mandatory / Non-mandatory	Description
Limit	Non-mandatory	Enter limit of the master group ID.
Primary Region/Bureau		To select primary region/bureau for the master group: 1. Click ... and the **Region/Bureau** dialog box is displayed. For availability of options in the dialog box, regions/ bureaus must be defined in the **Region-Bureau** catalog of the library. 2. Select a region/bureau and click **Select**.
Concept	Non-mandatory	Enter the concept for the master group ID.
MCG Limit %	Non-mandatory	Enter the MCG limit percentage.
Current Face Value	-	The value is auto calculated and displayed. The sum of all the contract values of the approved master contracts associated with the master group ID is displayed.
Current Spending Authority	-	The value is auto calculated and displayed. The product of MCG limit percentage and current face value is displayed.
Total Spending Authority Amount Used	-	The value is auto calculated and displayed. The sum of contract values of all the approved work order contracts of the selected master contract associated with the master group is displayed.
Total Spending Authority Amount Remaining	-	The value is auto calculated and displayed. The difference between the current spending authority value and total spending authority amount value is displayed.



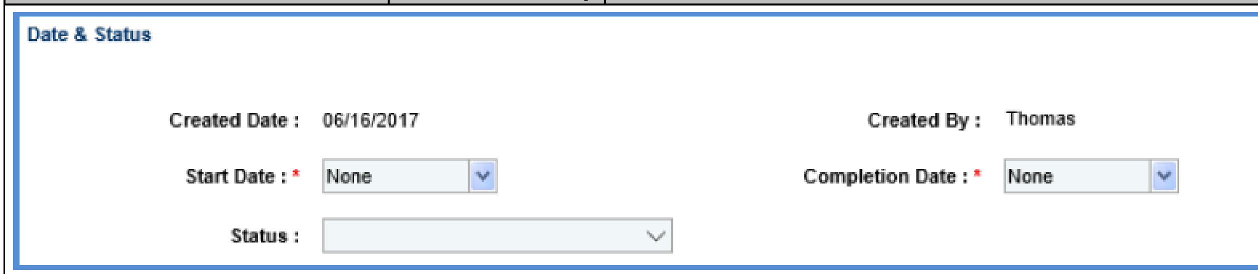
County	Mandatory	To add **County** details for the master group: 1. In the **County** section, click **Add**. The **County** dialog box is displayed. For availability of options in the dialog box, counties must be defined in the **County** catalog of the library. 2. Select the required counties and then click **Select**.
City/Town/Village	Mandatory	To add City/Town/Village details of the selected counties: 1. In the **City/Town/Village** section, click Add. The **City/Town/ Village** dialog box is displayed listing all the cities/towns/villages of the selected counties. For availability of options in the dialog box, cities/towns/villages must be defined in the **City-Town-Village** catalog of the library. 2. Select the required cities/towns/villages and then click **Select**.
Structure ID	Non-mandatory	To add Structure ID details of the master group: 1. In the **Structure ID** section, click **Add**. The **Structure ID** dialog box is displayed. For availability of options in the dialog box, structure IDs must be defined in the **Structure ID** catalog of the library. 2. Select the required structure IDs and then click **Select**.

5. In the **Project Advanced Details** section, provide information in the required fields. The fields in the section are described in the following table:



Field	Mandatory/ Non-mandatory	Description
Purpose and need	Non-mandatory	Enter purpose and need details of the master group ID.
Description	Non-mandatory	Enter a brief description about the master group ID.
Type of Work	Non-mandatory	Enter details about the type of work associated with the master group ID.

6. In the **Date & Status** section, provide information in the required fields. The fields in the section are described in the following table:



Field	Mandatory / Non-mandatory	Description
Created Date	-	The date when the master group ID was created is auto populated.
Created By	-	The name of the person who created the master group ID is auto populated.
Start Date	Mandatory	From the drop-down calendar, select the commencement date of the master group ID.
Completion Date	Mandatory	From the drop-down calendar, select the completion date of the master group ID.
Status	Non-mandatory	From the **Status** drop-down list, select the current status of the master group ID.

7. In the **Notes** section, provide information in the required fields. The fields in the section are described in the following table:

Field	Mandatory / Non-Mandatory	Description
Notes	Non-mandatory	Enter notes about the project.
Last updated by	-	The name of the person who has last updated the master group ID details is auto populated.
Last updated on	-	The date and time when the master group ID details were last updated is auto populated.

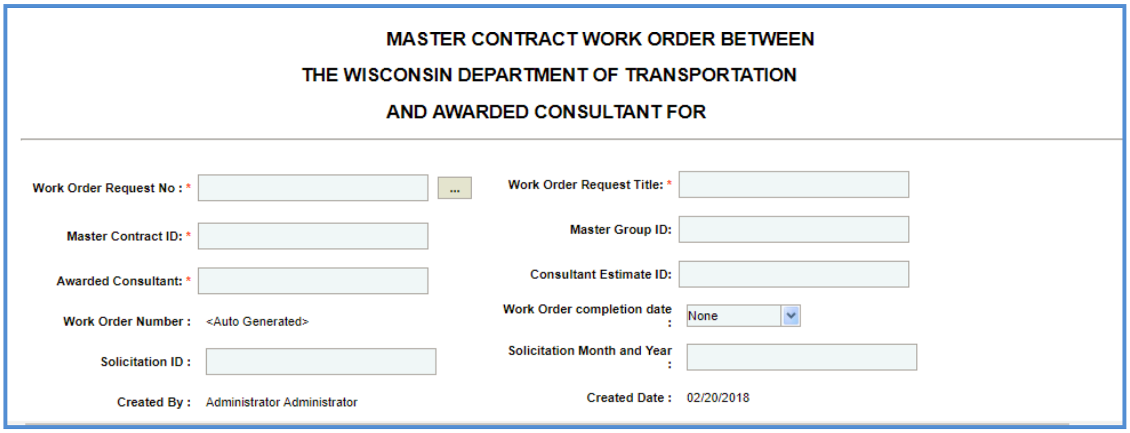
7.3 Creating Work Order Contract

The system allows you to create work order contracts for which the consultant estimate is in the **Approved for Contract** stage.

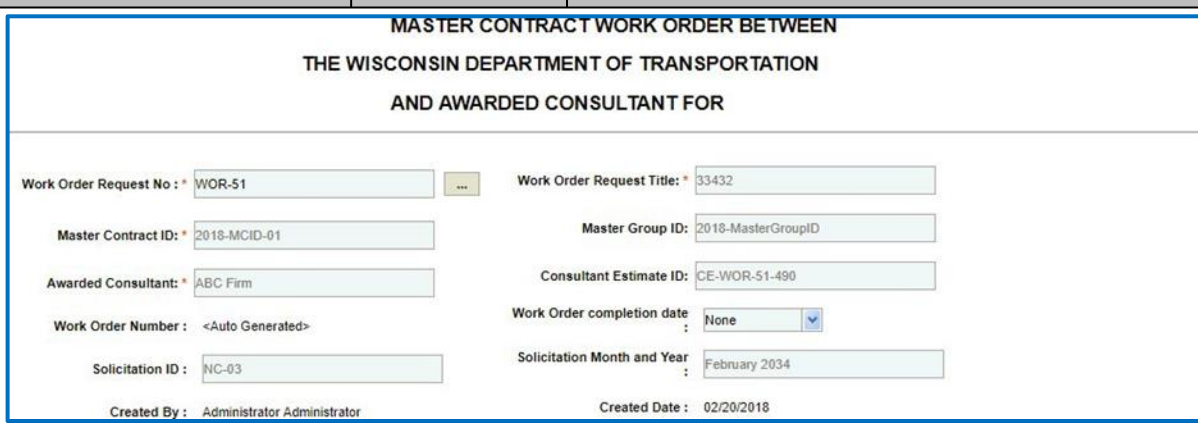
Pre-requisite: The consultant estimate must be in the **Approved for Contract** stage. The procedure to create work order contracts is described.

Steps:

7. In the module menu, click **Contracts**. The **Master contracts** list page is displayed.
8. In the navigation pane, expand **Contracts** folder, and then click **Work Order**. The **Work Order List** page is displayed.
3. Click **New**. The **Work Order** details page is displayed.

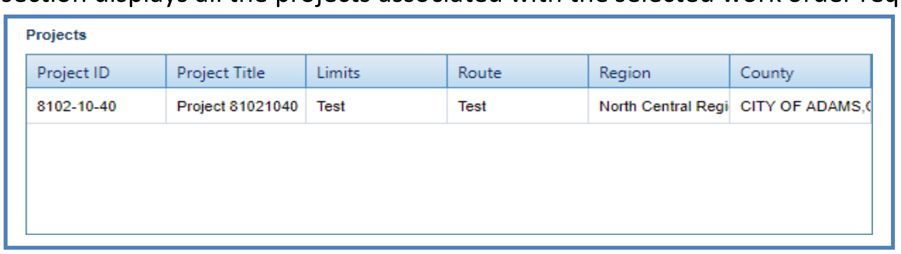


4. Enter information in the required fields. The fields are described in the following table.

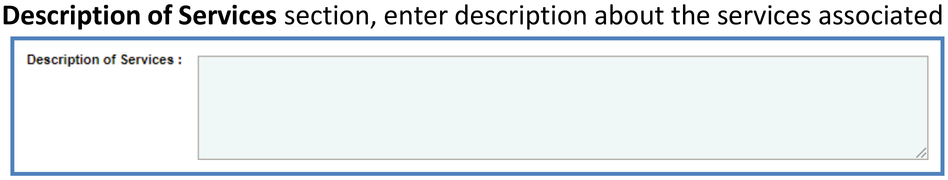
Field	Mandatory / Non-mandatory	Description
 		
Work Order Request No	Mandatory	To select the required work order request number: 1. Click ... .The **Select Work Order Request** dialog box is displayed listing all the work order requests of the master contract for which the consultant estimate is approved for contract. 2. Select the required work order request and click **Select**. The values in the **Work Order Request Title, Master Contract ID, Master Group ID, Awarded Consultant, Consultant Estimate ID, Solicitation ID, Solicitation Month and Year, and Projects** are displayed
Work Order Request Title	Mandatory	The value in this field is auto populated when the **Work Order Request No** is selected. The title of the work order request is displayed.

Field	Mandatory / Non-mandatory	Description
Master Contract ID	Mandatory	The value in this field is auto populated when the **Work Order Request No** is selected. The unique ID of the master contract to which the work order request is associated is displayed.
Master Group ID	Non-Mandatory	The value in this field is auto populated when the **Work Order Request No** is selected. The unique ID of the master group to which the work order request is associated is displayed.
Awarded Consultant	Mandatory	The value in this field is auto populated when the **Work Order Request No** is selected. The name of the consultant who is assigned with the work order request is displayed.
Consultant Estimate ID	Non-Mandatory	The value in this field is auto populated when the **Work Order Request No** is selected. The unique ID of the consultant estimate associated with the work order request is displayed.
Work Order Number	Non-Mandatory	The work order number is auto generated when the work order contract record is saved.
Work Order completion date	Non-Mandatory	From the drop-down calendar, select the completion date of the work order.
Solicitation ID	Non-Mandatory	The value in this field is auto populated when the **Work Order Request No** is selected. The unique ID of the Solicitation of the master contract associated with the work order request is displayed.
Solicitation Month and Year	Non-Mandatory	The value in this field is auto populated when the **Work Order Request No** is selected. The solicitation month and year of the master contract associated with the work order request is displayed
Created By	Non-Mandatory	Displays the username of the user creating the record.
Created Date	Non-Mandatory	Displays the date when the work order contract is created.

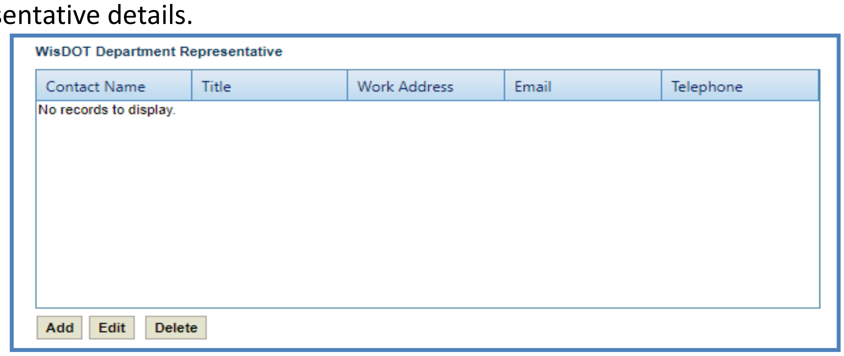
The **Projects** section displays all the projects associated with the selected work order request.



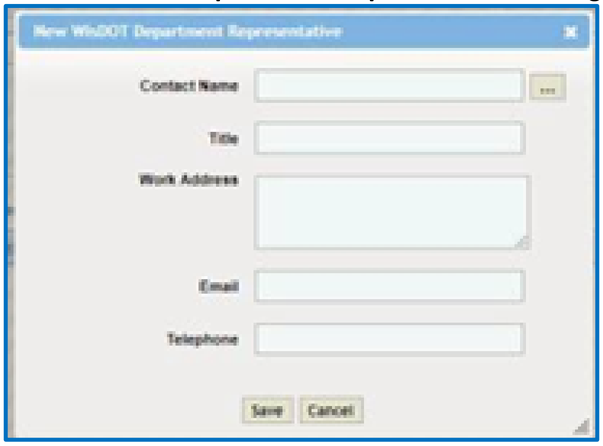
5. In the **Description of Services** section, enter description about the services associated with the contract.



6. In the **WisDOT Department Representative** section, perform the following steps to add WisDOT department representative details.



a. Click **Add**. The **New WisDOT Department Representative** dialog box is displayed.

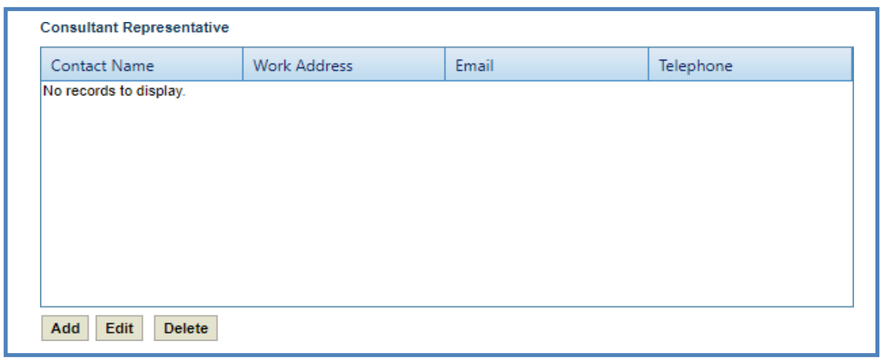


b. In the **Contact Name** field, perform the following steps to select the contact details:
   i. Click ... The **Select WisDOT Representative** dialog box is displayed.
   ii. Select the required contact details and click **Select**. The **Work Address**, **Email**, and **Telephone** details of the selected contact are displayed.

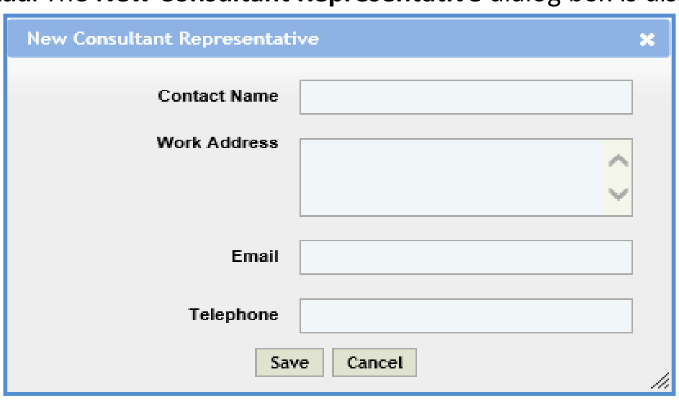
c. In the **Title** field, enter the title of the selected contact.

d. Click **Save**.

7. In the **Consultant Representative** section, perform the following steps to add consultant representative details.



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



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

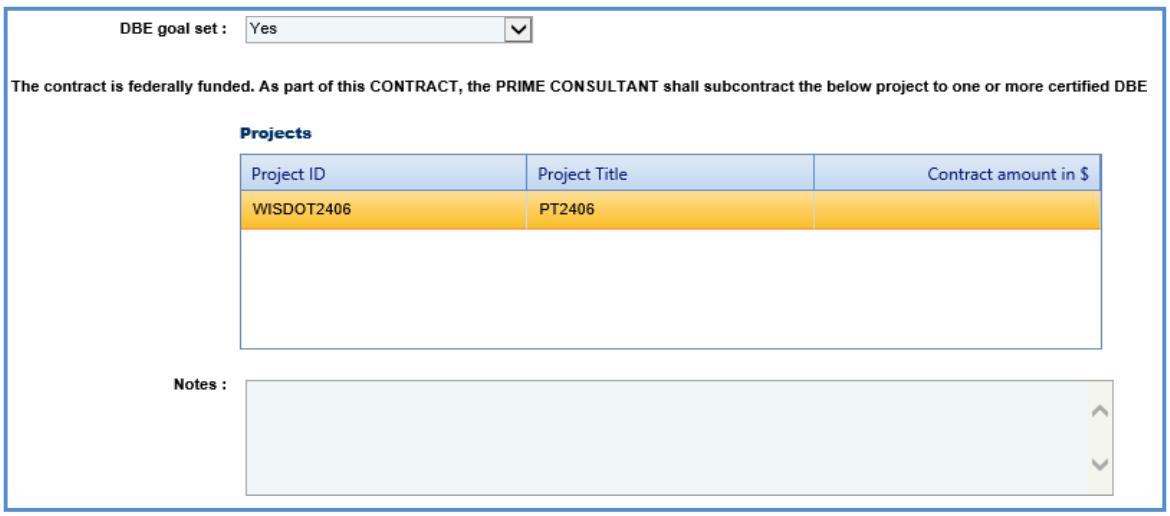
Field	Mandatory / Non-mandatory	Description
Contact Name	Non-mandatory	Enter the name of the consultant representative.
Work Address	Non-mandatory	Enter the work address of the consultant representative.
Email	Non-mandatory	Enter the e-mail address of the consultant representative.
Telephone	Non-mandatory	Enter the telephone number of the consultant representative.

c. Click **Save**.

8. Provide information in the required fields as described below.

Field	Mandatory / Non-mandatory	Description
Consultant Services to be performed at Departments office located at	Non-mandatory	Enter the location details of the department office where the consultant services are to be performed.
Deliver Project Documents to	Non-mandatory	Enter the delivery details of the project documents.
Compensation for all services provided by CONSULTANT under terms of the contract shall be for an amount not to exceed	-	The field displays the total amount of all the projects, defined on the **Consultant Estimate** page in the **Projects (in scope excluding if authorized)** section.
Note: *The total amount displayed in the field includes both prime consultant and sublet consultant projects.*		
If Authorized, Contract Amount	-	The field displays the total contract amount of all the projects defined on the **Consultant Estimate** in the **Projects (If authorized)** section.
Note: *The total amount displayed in the field includes both prime consultant and sublet consultant projects.*		
DBE goal set	Non-mandatory	From the drop-down list, select **Yes** or **No** to indicate DBE goal set on the work order contract. If the selected option is **Yes**, then the **Projects** section and **Notes** field are displayed.

9. If the selected option in the **DBE goal set** field is **yes**, the **Projects** section and the **Notes** field are displayed. The projects section lists all the projects that are displayed in the **Projects** section.



To define DBE related details, perform the following steps:

a. In the **Projects** section, to define DBE related contract amount, corresponding to the projects, click in the **Contract amount in $** column and enter the DBE contract amount.

b. In the **Notes** field, enter notes about DBE goal set.

10. In the **Attachments** section, upload images and files relevant to the construction fair package. For information on attachments, refer *Attachments*.
11. Click **Save**. The new **Work Order Contract** is created and is in the **Draft** workflow stage.

7.3.1 Workflow for Work Order Contract

The workflow table below describes the stages involved in the Work Order Contract.

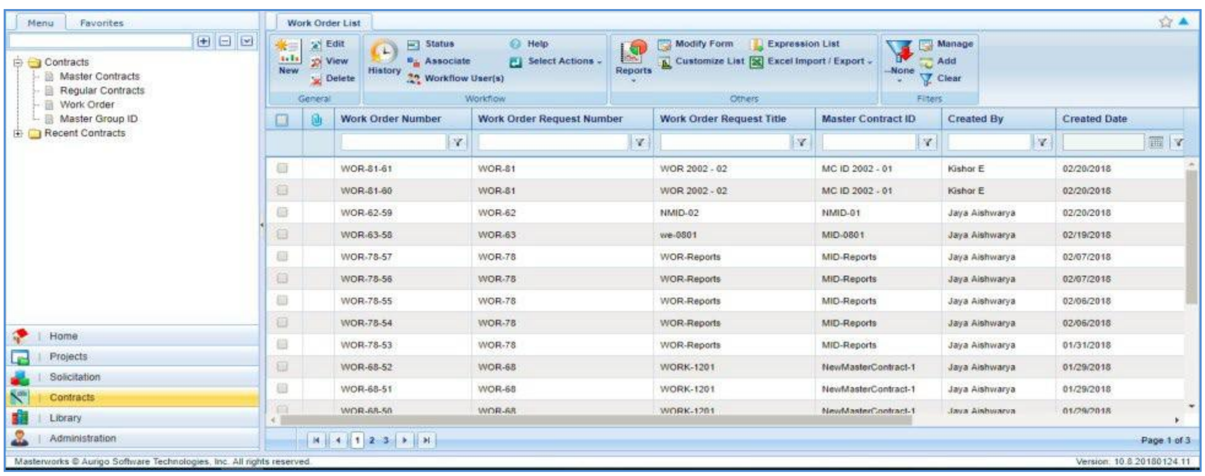
Current Stage	Action	Workflow Status (New Stage)	Comments
Draft	Submit for Consultant Review	Submitted for Consultant Review	The work order contract is submitted to the consultant for review.
Submitted for Consultant Review	Request to Revisit	Draft	–
	Reviewed	Reviewed by Consultant	
Reviewed by Consultant	Redraft	Submitted for Consultant Review	-
	Submit for Approval	Submitted for Approval	
Submitted For Approval	Approve	Approved	-
	Deny	Denied	
Denied	Redraft	Submitted for Approval	-

7.3.2 Viewing Basis of Payment Details of the Work Order Contract

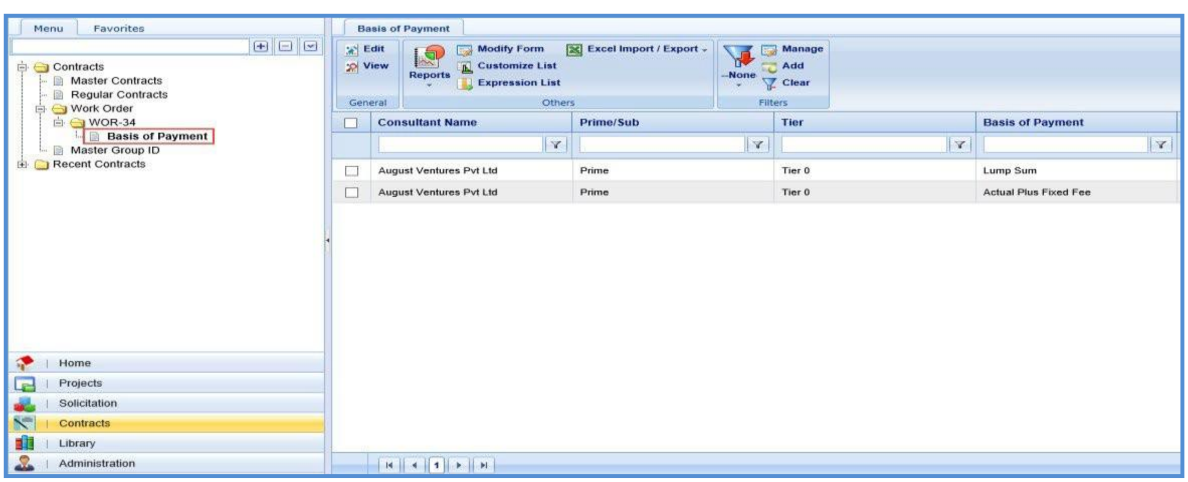
The system allows you to view the break-up cost details of direct labor cost, direct cost, indirect cost, and fixed fee cost that are in scope for each basis of payment associated with a work order contract.

Steps:

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



11. Select a work order for which you want to view the break-up cost based on basis of payments and then click **View** or **Edit**.



12. In the navigation pane, expand the selected **Work Order** folder, and then click **Basis of Payment.** The **Basis of Payment** list page is displayed. The information displayed is described in the following table.

Column	Description
Consultant Name	Indicates the name of the consultant firm.
Prime/Sub	Indicates whether the consultant firm is a prime consultant or a subconsultant firm.
Tier	Indicates the hierarchical level of the consultant. For example, Tier 0 indicates that the consultant firm is a prime consultant, Tier 1 indicates that the consultant firm is a subconsultant firm for prime consultant, and so on.
Basis of Payment	Indicates the basis of payment of the associated cost.
Amount in $	Indicates the total cost associated with direct labor cost, direct cost, indirect cost, and fixed fee for the selected basis of payment.

Note*: Select a record and click* ***View*** *to view the details of the basis of payment record.*

7.4 Submitting DT25 form for Approval

The regular and master contracts that exceed the total contract value of $3000 is approved by the Secretary and Governor. The DT25 form consisting of the contract details that is submitted for approval to the Secretary and Governor.

Steps:

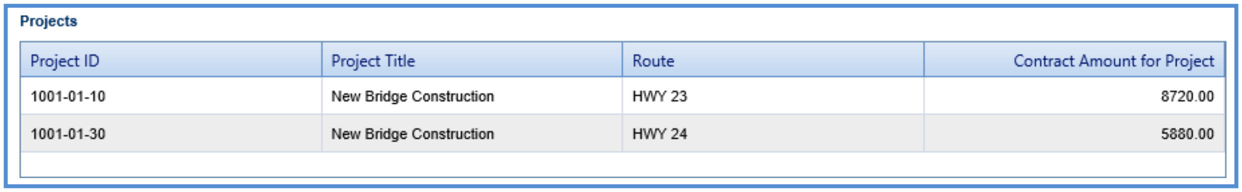
13. In the module menu, click **Contracts**. The **Master Contracts** list page is displayed.
14. In the navigation pane, expand contracts folder. Click **Master Contracts** or **Regular Contracts,** which has a contract that must be submitted for approval.
15. Select the contract record for which the contract value exceeds $3000 and click **Edit**.

4. In the navigation pane, expand the selected contract record folder, and then click **Recommendation to Governor**. The **Recommendation to Governor for Contract and Bond Approval** page is displayed.

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

Field	Mandatory / Non-mandatory	Description
DT25 Record ID	-	The unique ID of the DT25 record is auto populated.
DT25 Record Title	Mandatory	Enter a title for the DT25 record.
Let Proposal Number	-	The **LET Proposal Number** of the DT25 record is auto populated.
Organization Division	Mandatory	To select the organization division associated with the DT25 record: 1. Click ... and the **Select Organization Division** dialog box is displayed. For availability of options in the dialog box, organization divisions must be defined in the **Organization Division** catalog of the library. 2. Select the required organization division and click **Select**.
Created By	-	The name of the person who has created the DT25 record is auto populated.
Created On	-	The date when the DT25 record was created is auto populated.
Created by User Title	Mandatory	Enter the title of the person who has created the DT25 record.
Contract ID	-	The unique ID of the contract is auto populated.
Region/Bureau	-	
Prime Consultant/Contractor	-	
Type of Contract	Mandatory	To select the type of contract associated with the DT25 record: 1. Click ... and the **Select Type of Contract** dialog box is displayed. For availability of options in the dialog box, type of contracts must be defined in the **Type of Contract** catalog of the library. 2. Select the required type of contract and click **Select**.
WisDOT Confidential Estimate	-	The WisDOT confidential estimate number associated with the project is auto populated.
Contract Amount	-	The total contract value is auto populated.
Contract Approval Date	Mandatory	This field is displayed only for the regular contracts. From the drop-down calendar, select the date when the contract was approved.
Solicitation Month and Year	-	The solicitation month and year is auto populated.
Date Awarded	Mandatory	This field is displayed only for the regular contracts. From the drop-down calendar, select the date when the contract was awarded to the consultant.
Bond Required	Mandatory	From the drop-down list, select Yes or No to indicate if a bond is required for the contract or not.
Date Let	Mandatory	This field is displayed only for the regular contracts. From the drop-down calendar, select the let date of the contract.

***Note**: The **Projects** section is displayed only for the regular contracts. The section lists the projects associated with the contract.*

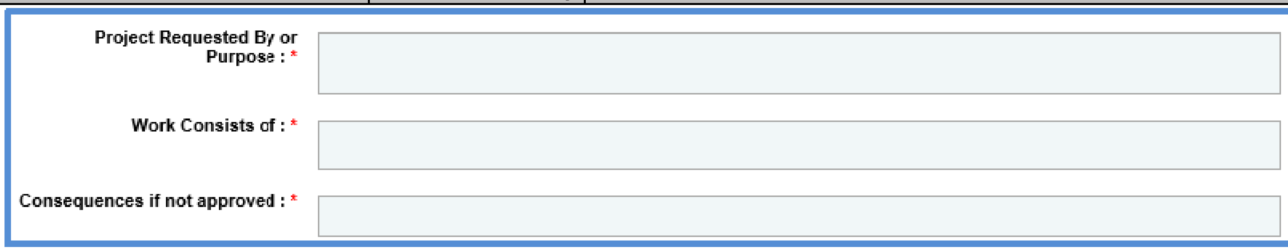


Projects

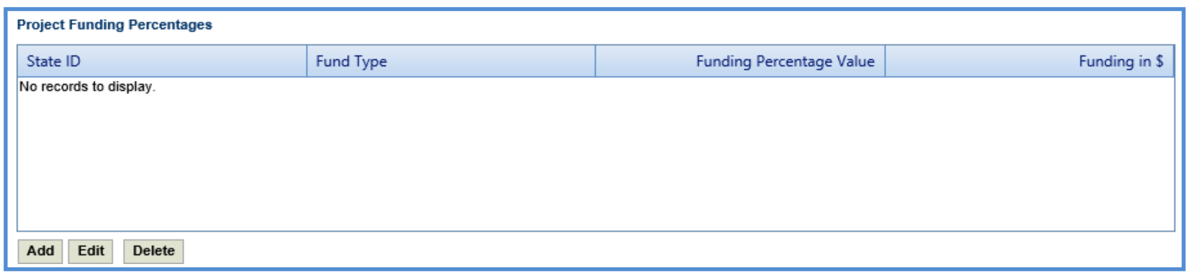
Project ID	Project Title	Route	Contract Amount for Project
1001-01-10	New Bridge Construction	HWY 23	8720.00
1001-01-30	New Bridge Construction	HWY 24	5880.00

6. Enter information in the fields described below.

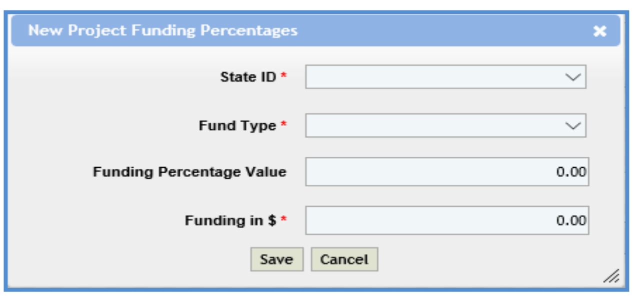
***Note**: All the fields described below are mandatory fields.*

Field	Mandatory/ Non-Mandatory	Description
		
Project Requested by or Purpose	Mandatory	Enter details about the project.
Work Consists of	Mandatory	Enter work details of the contract.
Consequences if not approved	Mandatory	Enter details about the result or effect if the contract is not approved by the Secretary and Governor.

7. In the **Project Funding Percentages** section, perform the following steps to add funding details for the project.



a. Click **Add**. The **New Project Funding Percentages** dialog box is displayed.



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

Field	Mandatory/ Non-Mandatory	Description
State ID	Mandatory	From the drop-down list, select the state ID.
Fund Type	Mandatory	From the drop-down list, select the required fund source type. For availability of options in the drop-down list, fund source types must be defined in the **Fund Source Type** catalog of the library.
Funding Percentage Value	Non-mandatory	Enter percentage of the contract value that will be funded by the selected fund type.
Funding in $	Mandatory	Enter the contract amount that will be funded by the selected fund type.

8. Click **Save.**

***Note**: The total of **Funding Percentage Value** should be 100% for each of the projects associated with the selected contract and the **Funding in $** should add to the total **Contract Amount**.*

9. In the **Workflow** group, click **Submit for Approval**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The record is sent to the Secretary for approval. Once the Secretary approves the DT25 form, it is sent to the Governor's office for approval. Alternatively, the Secretary can click **Redraft** to redraft the form.

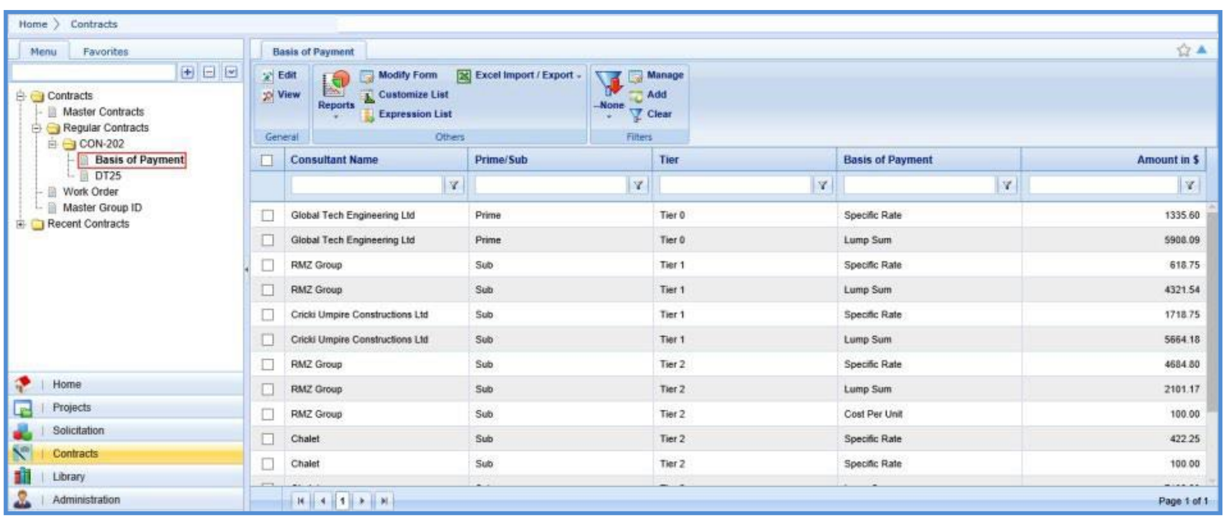
7.5 Viewing Basis of Payment Details

The system allows you to view the break-up cost details of direct labor cost, direct cost, indirect cost, and fixed fee cost that are in scope for each basis of payment associated with a regular contract.

Steps:

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

17. Select a contract for which you want to view the break-up cost based on basis of payments and then click **View** or **Edit**.



3. In the navigation pane, expand the **Regular Contracts** folder, and then in the selected contract folder, click **Basis of Payment.** The **Basis of Payment** list page is displayed listing the break-up of costs based on basis of payment. The information displayed is described in the following table.

Column	Description
Consultant Name	Indicates the name of the consultant firm.
Prime/Sub	Indicates whether the consultant firm is a prime consultant or subconsultant firm.

Column	Description
Tier	Indicates the hierarchical level of the consultant. For example, Tier 0 indicates that the consultant firm is a prime consultant, Tier 1 indicates that the consultant firm is a subconsultant firm for prime consultant, and so on.
Basis of Payment	Indicates the basis of payment of the associated cost.
Amount in $	Indicates the total cost associated with direct labor cost, direct cost, indirect cost, and fixed fee for the selected basis of payment.

Note*: Select a record and click* ***View*** *to view the details of the basis of payment record.*

8 Contract Amendment

If there are any changes in approved regular contracts, master contracts, and work orders, the changes can be made by amending the contracts. A user may be negotiating more than one amendment on the same contract at a time. When negotiating, there is not a contract amendment number assigned. Only one Contract Amendment can be created and going through the formal approvals. Once that amendment is "Approved," the next Contract Amendment can be start.

The steps to amending a contract is dependent upon the sort of amendment required. There are four main types of contract amendments.

1. **Update Contract**: The contract needs to be changed for any reason other than updating the completion date or discontinuing the contract. This is the most common type of amendment.
2. **Update Contract Completion Date**: The only item changing on the contract is the completion date.
3. **Cancel Contract**: The contract needs to be discontinued and NO payment has been or will be made to the consultant.
4. **Terminate Contract**: The contract needs to be discontinued and payment has been or will be made to the consultant.

Note: *Terminate Contract is rarely used.*

When the type of amendment is **Update Contract** or **Terminate Contract** a contract amendment estimate is needed. Follow the steps in section **9.1** to create a contract amendment estimate. If the type of contract amendment is Update Contract Completion Date or Cancel Contract, an estimate for the amendment is not needed. Jump to section **9.2** and follow the steps to **Creating a Contract Amendment**.

8.1 Creating and Approving a Contract Amendment Estimate

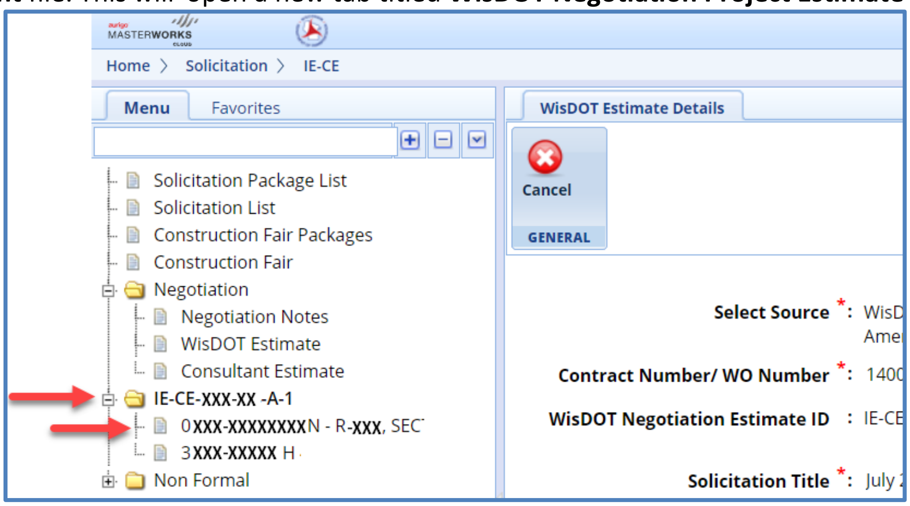
8.1.1 Creating a WisDOT Contract Amendment Estimate

Steps:

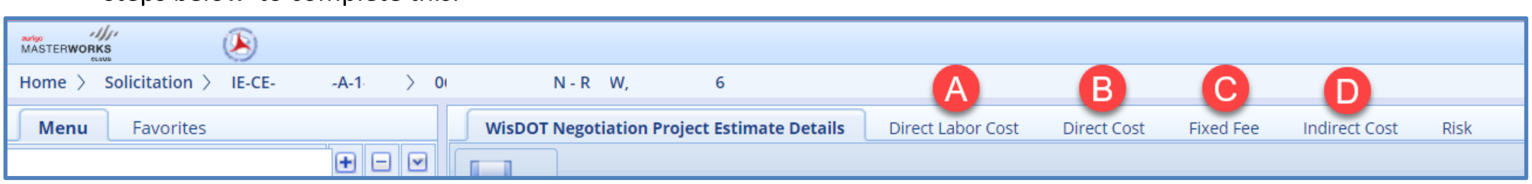
1. In the module menu, click **Solicitation**.
2. In the navigation pane, under the **Negotiation** folder, click **WisDOT Estimate**. The **WisDOT Negotiation Estimate List** page is displayed.
3. Select the **New** button. This will display a new tab titled **WisDOT Estimate Details**.
4. From the drop-down menu in the field titled **Select Source**, choose option **WisDOT Estimate for Amendments.**
5. Click the three dots button next to the **Contract Number/WO Number** field. A new window will open. Use the filters as necessary to select the contract that is being amended. Click the **Select** button. This will populate the **WisDOT Estimate Details** form with the associated information.
6. Confirm the **Contract Type** and **Fixed Fee %** fields are correct. Adjust if needed.
7. Verify the auto populated fields are correct. Fill in all required fields that have not been auto populated. Required fields have a red asterisk. Complete all optional fields as needed. See the following table for explanation of fields and actions that aren't auto populated.

Field	Mandatory / Non-mandatory	Description
WisDOT Negotiation Estimate Title	Mandatory	Type in a unique name for the amendment.
Contract Amendment Reason	Optional	Select an **Amendment Reason** by clicking the three dots button next to the field. Use the filters as needed to find the reason and click the **Select** button.
Comments	Optional	Enter in any further notes on why the amendment is needed.

8. Update or Review the Projects sections. Review the **Projects (IN SCOPE EXCLUDING IF AUTHORIZED)** and **Projects (IF AUTHORIZED)** sections. Use the **Add** and **Delete** buttons as necessary to update the information.
9. Select the **Save** button in the tool bar at the top of the screen. The current tab will close and will be navigated back to the **WisDOT Negotiation Estimate List**.
10. Find the amendment estimate that was just created in the list. Select it and click the **Edit** button in the tool bar at the top of the screen.
11. Under the navigation pane, select the plus sign next to the **WisDOT Estimate ID** to expand the folder. Select the **Amendment** file. This will open a new tab titled **WisDOT Negotiation Project Estimate Details**.



Five new tabs will appear. Go through each and update the amendment estimate with the desired changes. Follow the steps below to complete this.



NOTE: *If the amendment is to modify an existing Direct Labor Cost task or Direct Cost that already is part of the current contract, select the* ***Modify Current*** *buttons on the appropriate tabs.*

- **Direct Labor Cost**
  - i. Modifying an existing task on the current contract (This is the most common)
    1. From the **Direct Labor Cost** tab, select the **New** button, then **Modify Current** from the drop down.
    2. The **Select Tasks** dialog box will open. Check the box next to the task that needs to be modified and click the **Select** button.
    3. Click **Modify Current** (or **Add**, as applicable) under the **Resources in Amendment** table**.** The **Resource** dialog window will open.
    4. Select the resource to be added from the list and click **Select**. The resource will appear in the **Resources in Amendment** table. Click into the table to edit each field highlighted in yellow.
    5. Select **Save & Back** in the tool bar at the top of the page.
  - Adding a task that is not on the current contract for either the prime or the sub
    1. From the **Direct Labor Cost** tab, select the **New** button, then **Add Multiple** from the drop down.

2. Select the **Add** button. A new window will open. Use the filters as needed to find the desired task to be added. Check the box next to the task and click the **Select** button.
3. Click **Add** under the **Resources in Amendment** table**.** The **Resource** dialog window will open.
4. Select the resource to be added from the list and click **Select**. The resource will appear in the **Resources in Amendment** table. Click into the table to edit each field highlighted in yellow.
5. Select **Save & Back** in the tool bar at the top of the page.

- For further information on adding direct labor cost tasks, refer to **Adding a direct labor cost task**, on page 81 of this manual.

- **Direct Cost**
  i. Follow the steps starting on page 86 of this manual for further instructions on how to add a new direct cost line Item.
- **Fixed Fee**
  i. Follow the steps starting on page 87 of this manual for further instructions on how to add details to the **Fixed Fee** tab.
- **Indirect Cost**
  i. Follow the steps starting on page 88 of this manual for further instructions on how to add details to the **Indirect Cost** tab.

11. Navigate to the **WisDOT Negotiation Project Estimate Details** Tab. Upload documents as needed. Review the page for accuracy. Select the **Save** button in the tool bar at the top of the screen.
12. Return to the **WisDOT Negotiation Estimate List**. Find the amendment estimate in the list and select it. Click **Mark as Current** button in the tool bar at the top of the screen. The consultant estimate can now be created.

8.1.2 Creating a Consultant Contract Amendment Estimate

Steps:

2. In the navigation pane, under the **Negotiation** folder, click **Consultant Estimate**. Select the **New** button. This will display a new tab titled **Consultant Estimate Details.**
3. From the drop-down menu in the field titled **Select Source**, choose option **Consultant Estimate for Amendment Negotiations**.
4. Click the three dots button next to the **Contract Number/WO Number** field. A new window will open. Use the filters as necessary to select the WisDOT amendment estimate that was just created. Click the **Select** button. This will populate the **WisDOT Estimate Details** form with the associated information.
5. Confirm the **Contract Type** and **Fixed Fee %** fields are correct. Adjust if needed.
6. Verify the auto populated fields are correct. Fill in all required fields that have not been auto populated. Required fields have a red asterisk. Complete all optional fields as needed. See the following table for explanation of fields and actions that aren't auto populated.

Field	Mandatory / Non-mandatory	Description
Consultant Estimate Title	Mandatory	Type in a unique name for the amendment.
Negotiation Submission Due Date	Mandatory	From the drop-down calendar, select the amendment estimate should be returned to WisDOT.
Contract Amendment Reason	Optional	Select an **Amendment Reason** by clicking the three dots button next to the field. Use the filters as needed to find the reason and click the **Select** button.
Comments	Optional	Enter in any further notes on why the amendment is needed.

7. Update or review the Projects sections. Review the **Projects (IN SCOPE EXCLUDING IF AUTHORIZED)** and **Projects (IF AUTHORIZED)** sections. Use the **Add** and **Delete** buttons as necessary to update the information.

8. Next to the **DBE Goal on Project** field, select an answer from the drop down. This drop down defaults to No. If the answer is something else (a rare occurrence), contact consultant services for further assistance.
9. Complete the **Attachments** section. This section is optional and should be used to provide supporting documentation to explain the amendment. Use the **Link Document** or **Upload Document** buttons as needed to upload the supporting documentation.
10. Select the **Save** button in the tool bar at the top of the screen, then the **Scope Finalized** button. The estimate has now been sent to the consultant for review. They will receive an email notifying them that there is an item for review in Masterworks.

8.1.3 Reviewing and Approving a Contract Amendment Estimate

Once the amendment estimate has been published by the consultant, the WisDOT user who marked the estimate as "Scope Finalized" will receive an email notification.

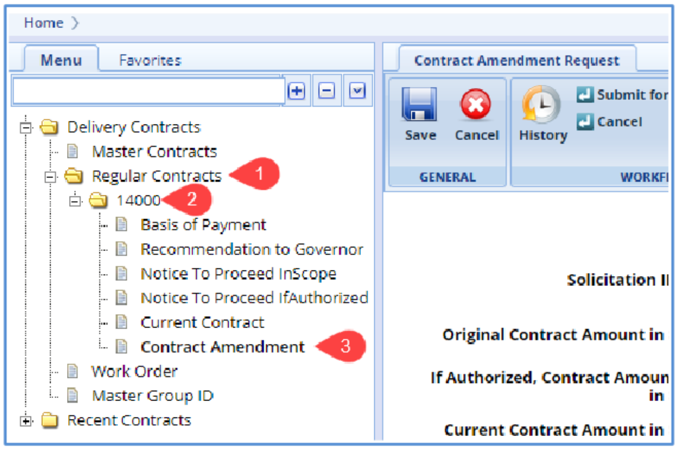
11. Under the **Solicitation** module, open the **Negotiation** folder in the navigation pane by clicking the plus sign next to the folder. Select the **Consultant Estimate** file.
12. Find the newly published consultant amendment estimate in the list and select it so it is highlighted yellow. Click the **Edit** button in the tool bar at the top of the screen. Review and confirm any changes made to the estimate by the consultant.
13. If more changes need to be made, follow the steps on page 200 of this manual. If no further adjustments are needed, navigate back to the **Consultant Estimate List** tab.
14. In the tool bar at the top of the page click **Select Actions**. From the drop down, select one of the following:
    - **Negotiation Complete**
      This is to be used when there is an internal agreement and no further adjustments to the estimate are needed.
    - **Back to Scope Finalized**
      This is to be used when the estimate needs to be adjusted by the consultant again.
    - **Redraft**
      This should be used when adjustments need to be made by WisDOT staff or the negotiations need to be paused.
15. When **Negotiation Complete** has been selected, a new window will open. Add any final notes or upload any final documents as needed. Select **Ok** when finished.
16. Email notifications will be sent to both WisDOT staff and the consultant. The page will refresh.
17. In the tool bar at the top of the screen click the **Select Actions** button. From the drop down, select one of three options.
    - **Approved for Contract**
      To be used when all negotiations are finalized, and a contract amendment should be created.
    - **Send Back to Publish**
      To be used to return the contract amendment to a **Published** status.
    - **Cancel**
      To be used when it is decided that the estimate should be discontinued.
18. When the **Approved for Contract** option is selected a new window will open. The opportunity to leave notes and upload documents is allowed. Add as needed. Select the **Ok** button when finished. Email notifications will be sent to both WisDOT staff and the consultant.

8.2 Creating a Contract Amendment

8.1.2 Creating a Contract Amendment for Updating a Contract Completion Date or Canceling a Contract

Steps:

1. In the module menu, click **Delivery Contracts**.
2. In the navigation pane, under the **Delivery Contracts** folder, click **Regular Contracts**. The **Regular Contract List** page is displayed. If it is a work order or master contract that is being amended, select the appropriate contract type.
3. Find the contract in the list, using the filters as needed. Select the contract needing to be amended and then click **View**.
4. In the navigation pane, select the plus sign next to the **Contract ID** to expand the folder. Select the **Contract Amendment** file. This will open a new tab titled **Contract Amendment Request.**
5. Click **New**. A blank amendment form will populate.



6. Fill in all required fields. Required fields have a red asterisk. Complete all optional fields as needed. See the following table for explanation of fields and actions.

***Note**: The **Select Amendment Type** field determines what other fields populate and if they are required. Although the **Update Contract** and **Terminate Contract** appear as options, they cannot be used at this time.*

Field	Mandatory / Non-mandatory	Description
Select Amendment Type	Mandatory	From the drop down select one of the following: 1. **Update Contract Completion Date:** To be used when only the contract completion date needs to be updated. 2. **Cancel Contract:** To be used when the contract needs to be discontinued and NO payment has been or will be made to the consultant.
Contract Amendment Title	Mandatory	Type in a unique name for the amendment.
Contract Amendment Reason	Optional	Enter a brief description of why an amendment is needed. ***NOTE:*** *This field is auto populated for amendment type Amendment Completion Date.*
New Contract Completion Date	Mandatory	From the drop-down calendar, select the contract amendment date. (If applicable)
Contract Function	Mandatory	This field will auto populate based on the contract function stated on the original contract. Confirm the function listed is correct or uses the following steps to update. 19. Select the three dots next to the field and choose the associated contract function from the list. 20. Click the **Select** button.
Governor's Approval Required	Not Used	This field is currently not in use and should be left unchecked.

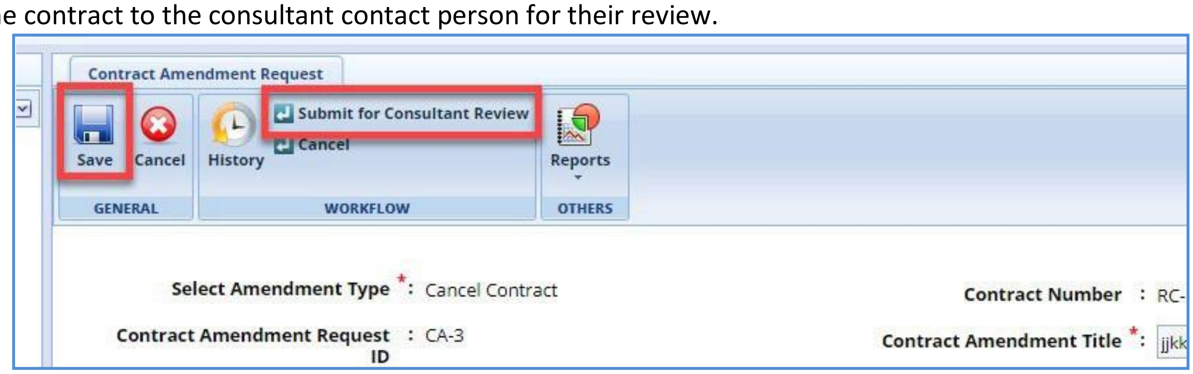
7. Complete the **Projects** section. This section will auto populate with the projects associated with the contract. To edit the account code for a project, use the following steps.
   - Select the project line item, then click **Edit**.
   - A new window will open. Click the button with the three dots and select the desired account code. Select **Save**.
8. Review and edit if needed the **WISDOT Department Representative** section and the **Consultant Representative** sections. These two sections function the same. Each section should populate with the same information from the original contract or most recent amendment. Use the buttons at the bottom of the section to **Add**, **Edit** or **Delete** a contact person.

- To Add a contact person:
  a. Click the **Add** button. This will open a new window.
  b. Click the button with the three dots next to the **Contact Name** field. This will open a new library of contact people. Filter as need be and select the desired representative. If the representative is not listed, contact Consultant Services at WisDOTmasterworks@dot.wi.gov for further assistance.
  c. Click the **Select** button, then the **Save** button.
- To Edit a contact person:
  a. Select the contact person line you wish to edit so it is highlighted. Then click the **Edit** button. This will open a new window.
  b. Click the button with the three dots next to the **Contact Name** field. This will open a new library of contact people. Filter as need be and select the desired representative. Click the **Select** button.
  c. Click the **Save** button.
- To Delete a contact person:
  a. Select the contact person line you wish to delete so it is highlighted. Then click the **Delete** button. This will open a new window.
  b. Click **Okay** to remove the contact person or **Cancel** to leave as is.

9. Fill in the **Comments** box as needed. This space is provided to allow for further explanation of any changes made to the contract contact persons.
10. Complete the **Attachments** section. This section is optional and should be used to provide supporting documentation to explain changes made to the completion date or reason for canceling the contract. Use the **Add**, **Edit**, **View**, and **Delete** buttons as needed to upload the supporting documentation.

Note: *The only uploaded or linked document types that Masterworks currently supports are PDFs.*

11. Select **Save** in the tool bar at the top of the screen to save as a draft or select **Submit for Consultant Review** to send the contract to the consultant contact person for their review.



8.1.3 Creating a Contract Amendment for Updating a Contract or Terminating a Contract

Steps:

21. In the module menu, click **Delivery Contracts**.
22. In the navigation pane, under the **Delivery Contracts** folder, click **Regular Contracts**. The **Regular Contract List** page is displayed. If it is a work order or master contract that is being amended, select the appropriate contract type.
23. Find the contract in the list, using the filters as needed. Select the contract needing to be amended and then click **View**.
24. In the navigation pane, select the plus sign next to the **Contract ID** to expand the folder. Select the **Contract Amendment** file. This will open a new tab titled **Contract Amendment Request.**
25. Click **New**. A blank amendment form will populate.
26. Fill in all required fields. Required fields have a red asterisk. Complete all optional fields as needed. See the following table for explanation of fields and actions.

Field	Mandatory / Non-mandatory	Description
Select Amendment Type	Mandatory	From the drop down select one of the following:
Consultant Amendment Estimate ID	Mandatory	Click on the button with the three dots next to the field. A new window will open. Select the consultant estimate previously created. Once selected, the form will populate with the associated information.
Contract Amendment Title	Mandatory	Type in a unique name for the amendment.
Contract Amendment Reason	Non-mandatory	Enter a brief description of why an amendment is needed.
New Contract Current Contract Completion Date	Mandatory	From the drop-down calendar, select the date that the project should be completed by. (If applicable)
Contract Function	Mandatory	This field will auto populate based on the contract function stated on the original contract. Confirm the function listed is correct or use the following steps to update. 1. Select the three dots next to the field and choose the associated contract function from the list. 2. Click the **Select** button.
Governor's Approval Required	Not Used	This field is currently not in use and should be left unchecked.

27. Complete the **Projects** section. This section will auto populate with the projects associated with the contract. To edit the account code for a project, use the following steps.
    - Select the project line item, then click **Edit**. A new widow will open.
    - Click the button with the three dots and select the desired account code. Select **Save**.
28. Review and edit if needed the **WISDOT Department Representative** section and the **Consultant Representative** sections. These two sections function the same. Each section should populate with the same information from the original contract. Use the buttons at the bottom of the section to **Add**, **Edit** or **Delete** a contact person.

- To Add a contact person:
  a. Click the **Add** button. This will open a new window.
  b. Click the button with the three dots next to the **Contact Name** field. This will open a new library of contact people. Filter as need be and select the desired representative. If the representative is not listed, contact Consultant Services at WisDOTmasterworks@dot.wi.gov for further assistance.
  c. Click the **Select** button and then click the **Save** button.

- To Edit a contact person:
  a. Select the contact person line you wish to edit so it is highlighted. Then click the **Edit** button. This will open a new window.
  b. Click the button with the three dots next to the **Contact Name** field. This will open a new library of contact people. Filter as need be and select the desired representative. Click the **Select** button.
  c. Click the **Save** button.

- To Delete a contact person:
  a. Select the contact person line you wish to delete so it is highlighted. Then click the **Delete** button. This will open a new window.
  b. Click **Okay** to remove the contact person or **Cancel** to leave as is.

9. Review the **DBE Goal Set field**. This is auto populated. If this field needs to be adjusted, contact consultant services for further assistance. This is a rare occurrence.
10. Fill in the **Comments** box as needed. This space is provided to allow for further explanation of any changes made to the contract contact persons.
11. Complete the **Attachments** section. This section is optional and should be used to provide supporting documentation to explain changes made to the contract or reason for terminating the contract. Use the **Add**, **Edit**, **View**, and **Delete** buttons as needed to upload the supporting documentation.

Note: *The only uploaded or linked document types that Masterworks currently supports are PDFs.*

12. Select **Save** in the tool bar at the top of the screen to save as a draft or select **Submit for Consultant Review** to send the contract to the consultant contact person for their review.

8.3 Reviewing and Approving a Contract Amendment

Steps:

1. When the notification email is received that the consultant has reviewed the contract amendment, navigate to **Delivery Contracts** in the module menu.
2. In the navigation pane, under the **Delivery Contracts** folder, click **Regular Contracts.** The **Regular Contract List** page is displayed. If it is a work order or master contract that is being amended, select the appropriate contract type.
3. Find the contract in the list, using the filters as needed. Select the contract needing to be amended and then click **View.**
4. In the navigation pane, select the plus sign next to the **Contract ID** to expand the folder. Select the **Contract Amendment** file. This will open a new tab titled **Contract Amendment Request**.
5. In the tool bar at the top of the screen, click the **Select Actions** button. Select one of two options from the drop down.
   a. **Redraft**
      To be used if the consultant is requesting a change or if any other change needs to be made.
   b. **Submit for Approval**
      To be used by the WisDOT Contract Specialist, when the amendment is deemed correct and the submission timing is correct, they will submit **for Approval.**
6. Once the contract has been submitted for approval, the page will refresh. In the tool bar at the top of the screen, click the **Select Actions** button. Select one of three options from the drop down.
   a. **Approve**
      To be used when the contract amendment is finalized, and no further actions need to be taken on it.
   b. **Redraft**
      To be used if further adjustments need to be made before the contract amendment should be finalized.
   c. **Cancel**
      To be used if the contract amendment should be discontinued.
7. When the contract amendment is in the **Approved** status, the contract amendment process is complete.

9 Schedule Work Breakdown Structure (WBS)

The Schedule WBS feature enables you to organize project tasks into deliverable-oriented manageable sub- components and tasks. The Schedule feature is integrated with potent scheduling capabilities to schedule project tasks and track project progress.

The Masterworks Schedule provides you with the following functionalities:

- Create a hierarchical structure of tasks without any level limitations.
- Define tasks with information such as scheduled begin and end dates, actual begin and end dates, task duration, prioritization, and weightage.
- Schedule tasks. Define dependencies.
- Illustrate task progress. Illustrate critical path.

9.1 Adding Tasks to Schedule

You can add tasks to the Schedule in the following two modes:

- Import items as tasks to the Schedule:
    - Standard Item Tables catalog in the Library Project Estimates
- Add tasks and define additional information:

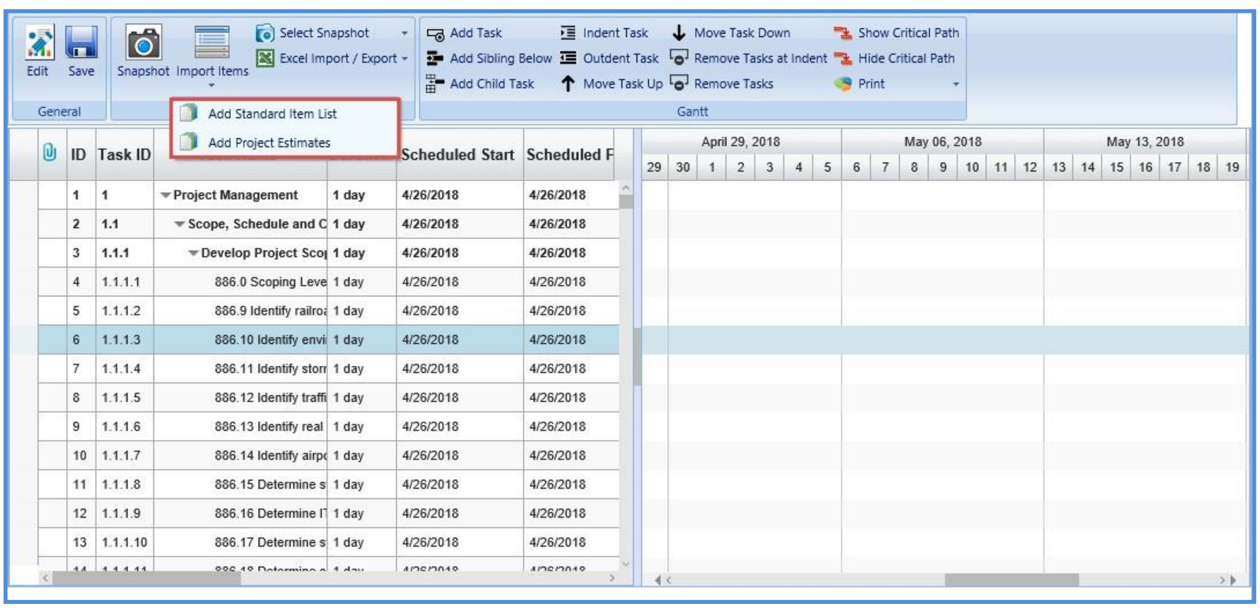
You can define additional information such as scheduled begin and end dates, actual begin and end dates, task duration, prioritization, and weightage for every task.

For information on adding sibling tasks and child tasks, refer Other Gantt Schedule Activities.

9.2 Importing Items as Tasks to the Schedule

Steps:

29. In the module menu, click **Projects**. The **Projects** list page is displayed.
30. Double-click the project for which the tasks must be scheduled.
31. In the project navigation pane, click **Schedule-WBS**. The **Work Breakdown Structure** page is displayed.



32. In the **Others** group, click **Import Items**, and then perform either of the following steps:
    - To add items from standard item list:

   a. Click **Add Standard Item List**. The **Select Items** dialog box is displayed. For availability of options in the dialog box, the Standard Items must be defined in the **WBS Type** library. The items are defined in the **Task List** of the **WBS Type.**
   b. Select the required standard item list. Click **Select**. All items defined in the **Task List** of the selected **WBS Type** are added as tasks in the schedule. The hierarchy of containers and items are retained as in the selected standard items tables.

- To add items from a project estimate:
   a. Click **Add Project Estimates**. The **Select Items** dialog box is displayed listing all the project estimates of the selected project**.** Select the required project estimate.
   b. Click **Select**. All items defined in the selected project estimate are added as tasks in the schedule. The hierarchy of containers and items are retained as in the selected project estimate.

5. Click **Save**. To modify or add additional task information, refer Editing Task Details.

9.3 Editing Task Details

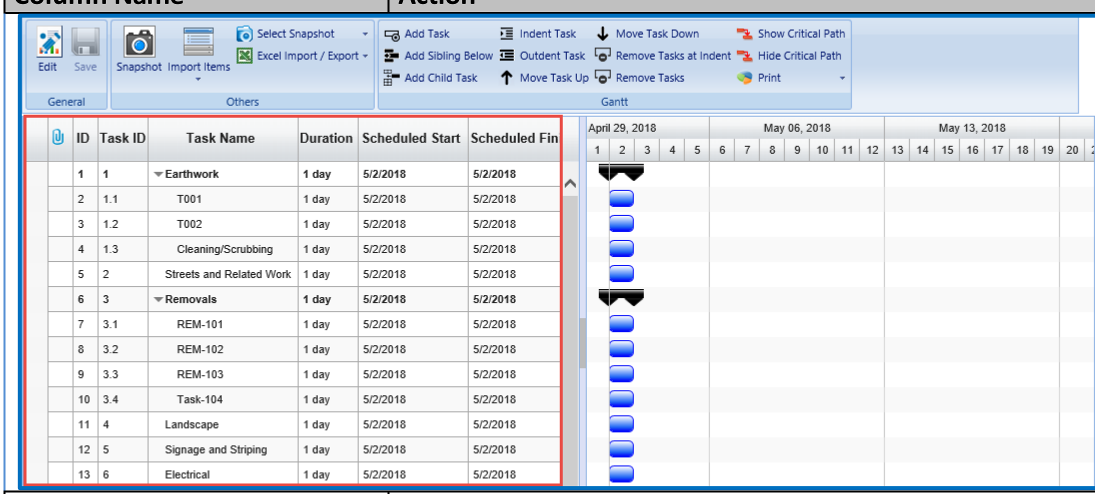
You can edit existing details and define additional information such as scheduled begin and end dates, actual begin and end dates, task duration, prioritization, and weightage for every task. You can edit/update task details in the following modes:

- Schedule table
- Gantt chart
- Schedule form

9.3.1 Updating Task Details from the Schedule Table

Steps:

1. From the project navigation pane, click **Schedule-WBS**. The **Work Breakdown Structure** page is displayed.

Column Name	Action
	
Task Name	Double-click in the column and enter the task name.
Duration	Double-click in the column and enter the task duration in days.
Scheduled Start	Double-click in the column and select the start date.
Scheduled Finish	Double-click and select the task completion date.
Actual Start	Double-click and select the actual start date of the task.
Actual Finish	Double-click and select the actual task completion date.
Note*: Based on the duration and dates selected for the child task, the duration and dates of the parent tasks are automatically updated. You cannot edit the duration and dates of parent tasks.*	
Predecessor	Double-click and enter the IDs of the task predecessors.

% Complete	Double-click and enter the completion percentage of the task.

2. The following table describes the steps to update each column in the **Schedule** table:

Note: *The **Resources**, **Resource Name**, **Hours**, and **Resource Type** columns are updated when a resource is added to a task. For more information, refer [Updating Task Details in the Schedule Form](#).*

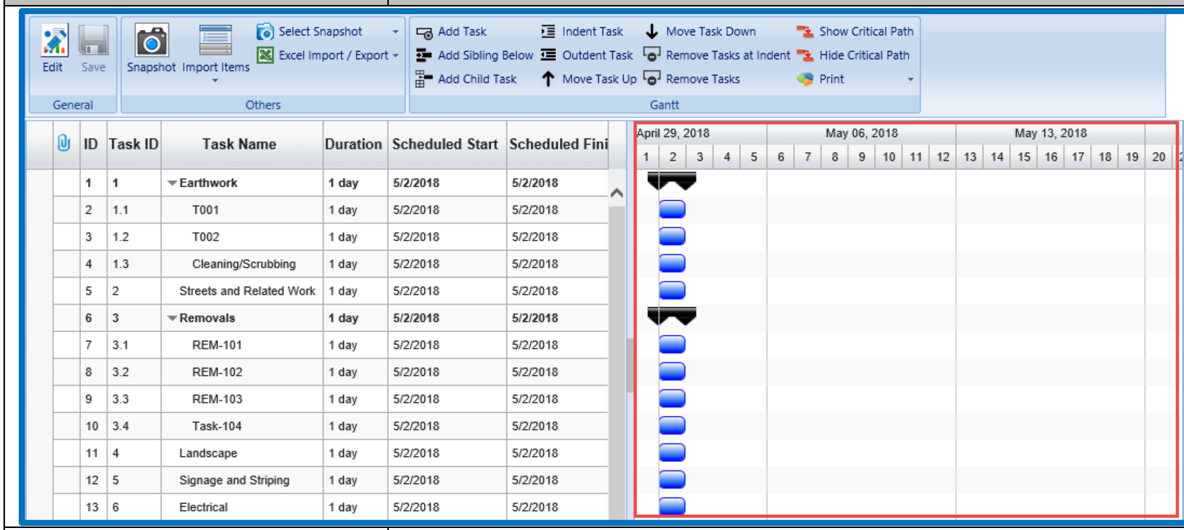
3. Click **Save**. The Gantt chart is updated according to the values defined in the Schedule table.

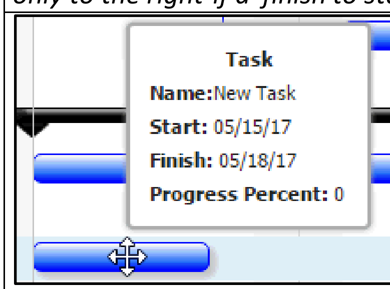
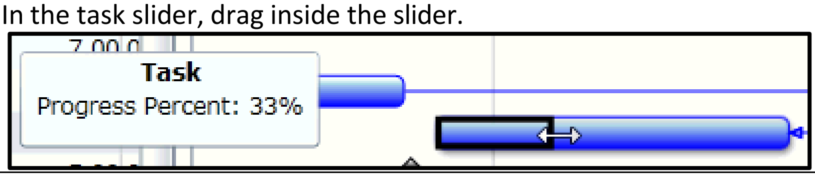
9.3.2 Updating Task Details from the Gantt Chart

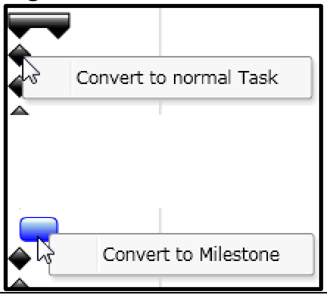
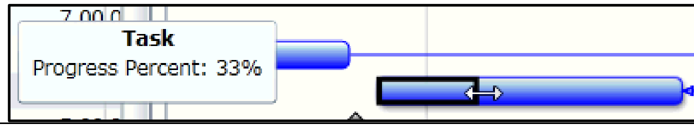
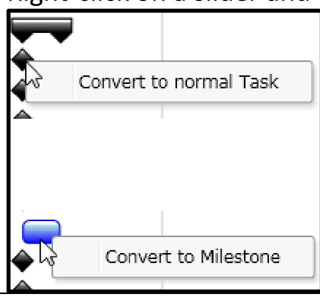
Steps:

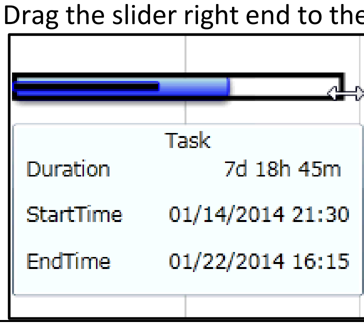
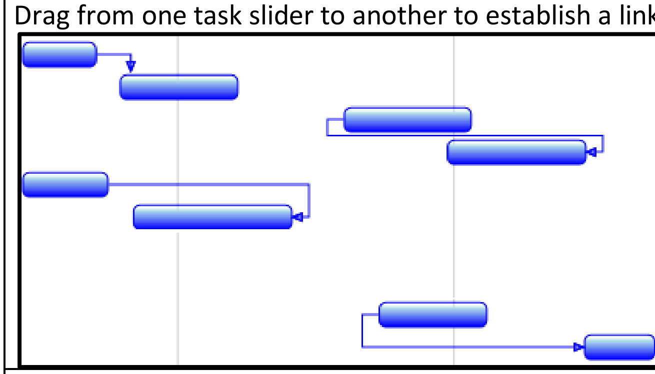
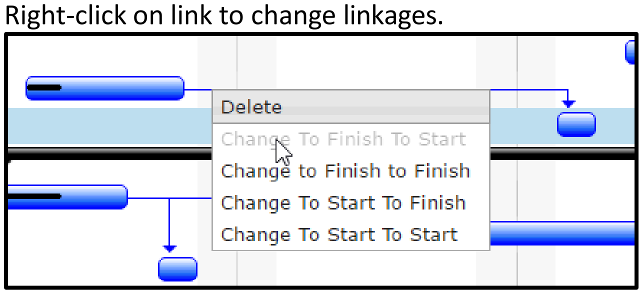
1. From the project navigation pane, click **Schedule-WBS**. The **Work Breakdown Structure** page is displayed.
2. The following table describes the steps to update task details from the Gantt chart:

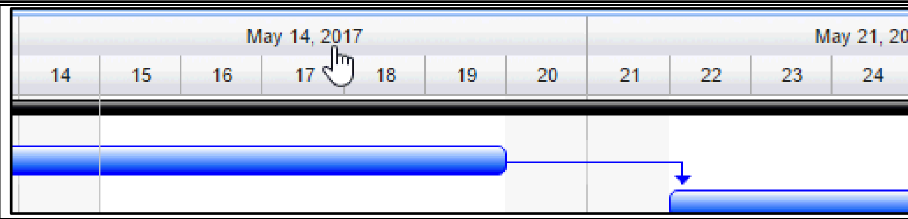
Task	Action



Update task dates	Move the task slider to the left or right to update task dates. ***Note***: *You can move the slider only if the task progress is zero. You can move the slider only to the right if a finish to start task link is defined.* 
Update task progress	In the task slider, drag inside the slider. 

Convert milestones to tasks, and tasks to milestones	Right-click on a slider and click the required option. 
Update task progress	In the task slider, drag inside the slider. 
Convert milestones to tasks, and tasks to milestones	Right-click on a slider and click the required option. 

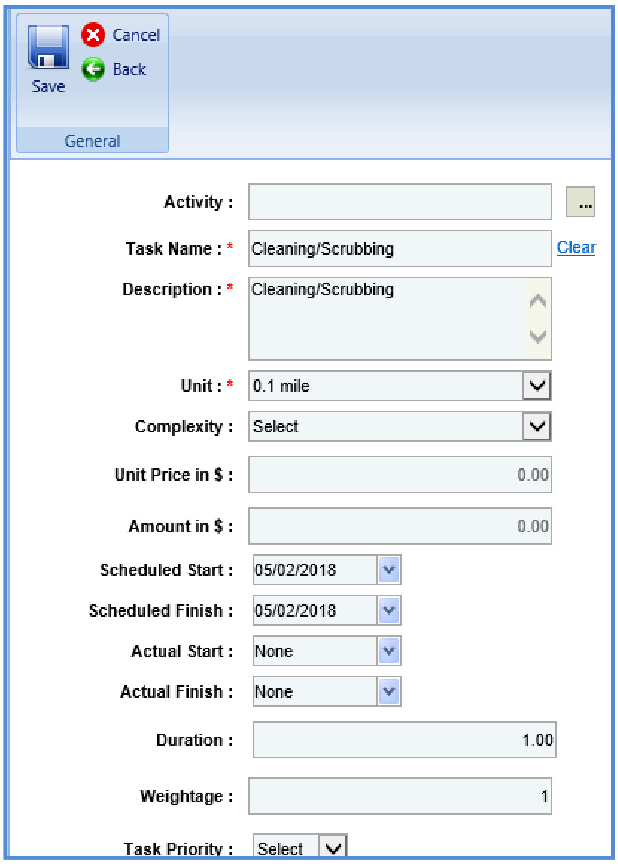
Task	Action
Extend finish date	Drag the slider right end to the right. 
Task links	Drag from one task slider to another to establish a link. 
	Right-click on link to change linkages. 
Zoom in/out	Drag right or left on the date row to zoom in or out.



3. Click **Save**. The Schedule table is updated as defined in the Gantt chart.

9.3.3 Updating Task Details in the Schedule Form

1. From the project navigation pane, click **Schedule-WBS**. The **Work Breakdown Structure** page is displayed.
2. Click a task, and then click **Edit**. The **Edit Work Breakdown Structure Task** page is displayed.



3. Provide the required information in the fields, as described in the following table:

Field Name	Description
Activity	To select activity: 1. Click the button with the three dots next to the Activity field. The **Select Activity** dialog box is displayed. 2. Select the required activity and click **Select**.
Task Name	Enter the name of the task.
Description	Enter the description of the task
Unit	From the drop-down list, select the unit of measurement. For availability of options in the drop-down list, the unit of measurements must be defined for the **IS System** in the **Measurement Systems** catalog of the library.
Complexity	From the drop-down list, select the complexity level of the task.
Unit Price in $	The unit price is displayed when resources are added in the **Resources** section.

4. In the **Resources** section, you can add a resources to a task. To add resources, refer Adding Resources section.

Note: *You can add only one resource for a task.*

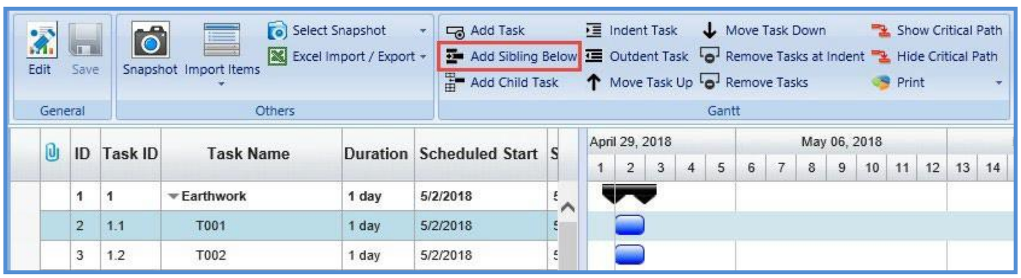
5. In the **Attachments** section, upload images and files relevant to the task. For information on form attachments, refer *Attachments*.
6. Click **Save**.

9.4 Other Gantt Schedule Activities

In addition to adding tasks, you can perform other Schedule task related activities such as adding tasks at a selected hierarchical level, adding tasks at the next level of hierarchy, moving tasks in the structure, remove tasks, and so on.

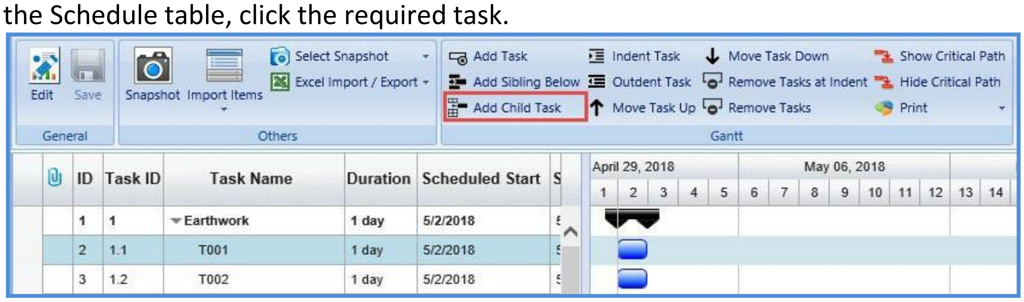
Steps:

- To add a task at a particular hierarchical level:
  1. In the Schedule table, click the required task.



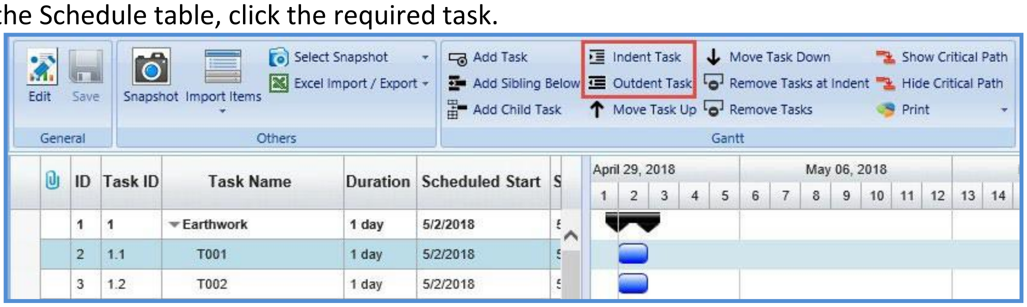
  2. In the **Gantt** group, click **Add Sibling Below**. A task is added at the same level as the selected task.

- To add a sub-task:
  1. In the Schedule table, click the required task.



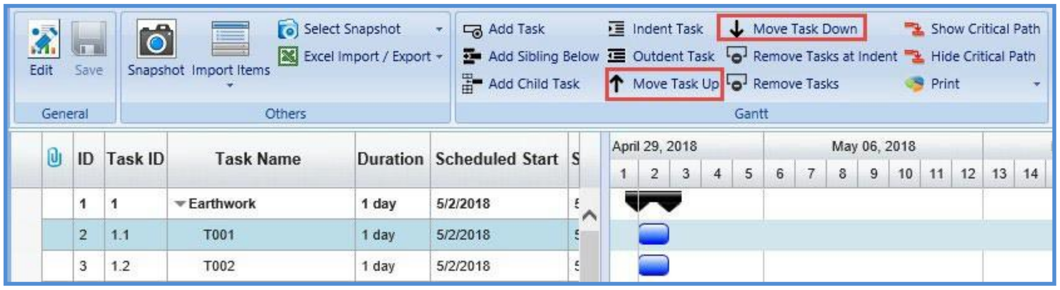
  2. In the **Gantt** group, click **Add Child Task**. A task is added at the subsequent sub-level of the selected task.

- To modify the hierarchical level of a task:
  1. In the Schedule table, click the required task.



  2. In the **Gantt** group, perform either of the following steps:

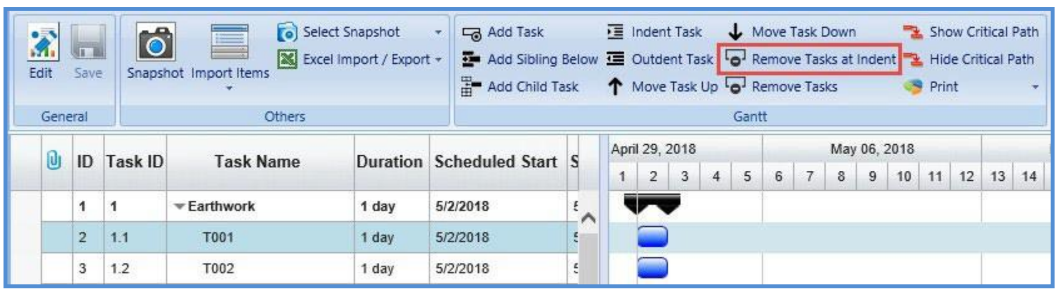
a. To lower the hierarchical level of the task, click **Indent Task**. The selected task is set as the subsequent sub-level task.
b. To increase the hierarchical level of the task, click **Outdent Task**. The selected task is set to the previous task level.
c. To move a task in task list sequence:
   i. In the **Schedule** table, click the required task.



   ii. In the **Gantt** group, perform either of the following steps:
d. To move a task up the list, click **Move Task Up**. The selected task is moved one level up in the task sequence.

e. To move the task down the list, click **Move Task Down**. The selected task is moved one level down in the task sequence.

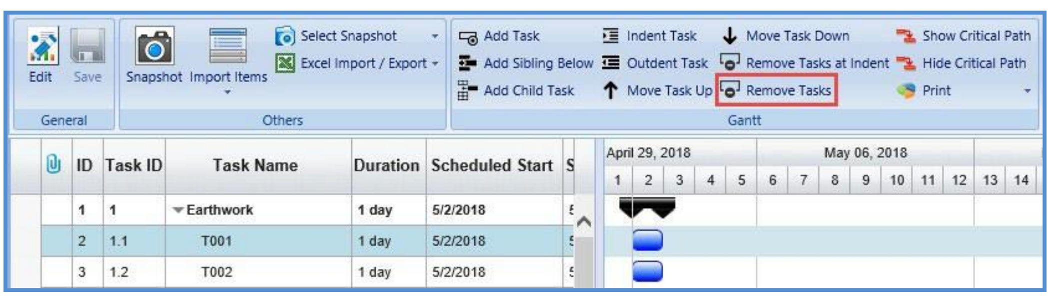
f. To remove tasks below an indent level:
   i. In the **Schedule** table, click the required task.



   ii. In the **Gantt** group, click **Remove Tasks at Indent**.
   iii. Click **Save**. The sub-level tasks under the selected task are removed.

- To remove selected tasks:

1. In the **Schedule** table, click the required task.

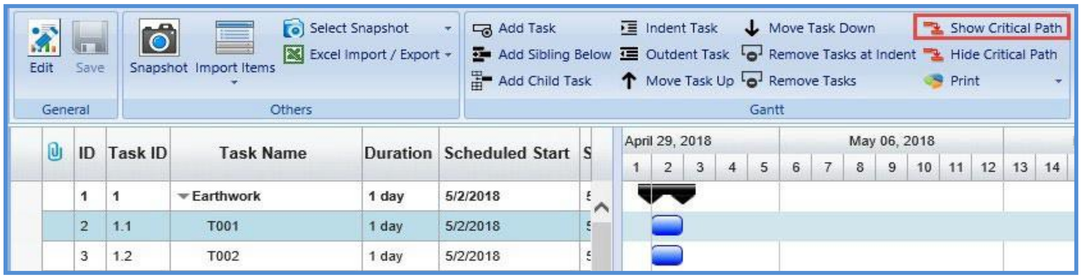


   i. To select multiple tasks, perform either of the following steps:
      a. Press CTRL, and then click the required tasks.
      b. Press SHIFT, and then click the first task and the last task. All tasks between the first and last tasks are selected.
2. In the **Gantt** group, click **Remove Tasks**.
3. Click **Save**.

9.4.1 Viewing the Critical Path

The critical path of the project is highlighted.
Steps:

1. From the project navigation pane, click **Schedule-WBS**. The **Work Breakdown Structure** page is displayed.

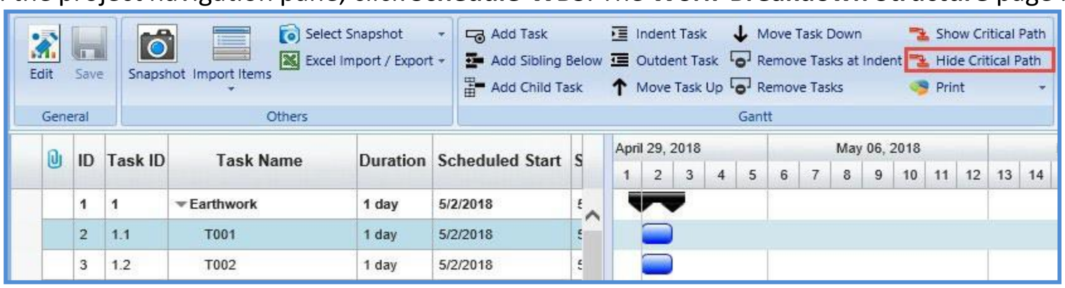


2. In the **Others** group, click **Show Critical Path**. The critical path of the project is highlighted.

9.4.2 Hiding the Critical Path

If the critical path of the project is highlighted, you can hide the critical path highlights.
Steps

1. From the project navigation pane, click **Schedule-WBS**. The **Work Breakdown Structure** page is displayed.



2. In the **Others** group, click **Hide Critical Path**. The highlights of the critical path removed.

10 Generating Reports

You can generate various reports that comprise information of various projects and enterprise reports that comprise information on various modules. You can view selected information on the reports using filters. Additionally, you can generate reports in different formats and also print these reports. Availability of reports to generate and the information displayed in the reports are based on the roles assigned to the user, and the projects the user is invited to.

10.1 Enterprise Reports

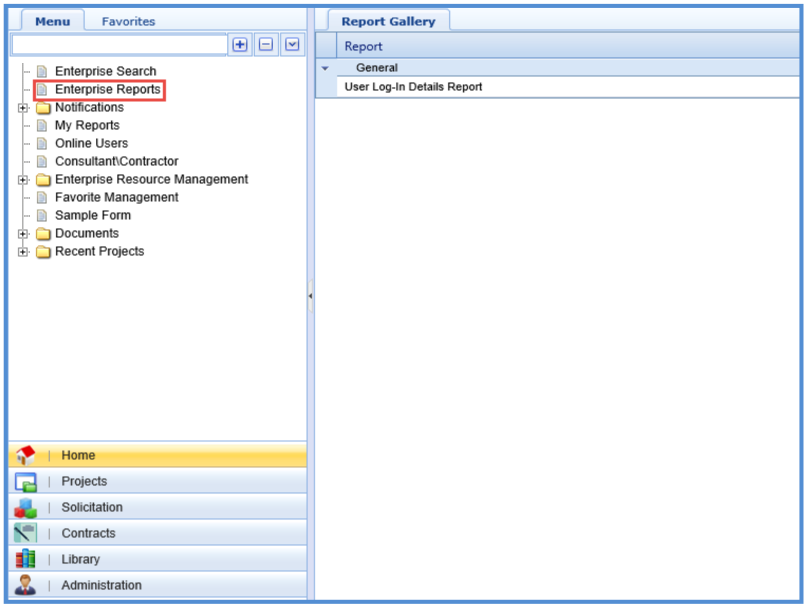
You can generate enterprise level reports that comprise information of various projects. You can view selected information using filters and generate reports in multiple report formats and print options.

Prerequisites

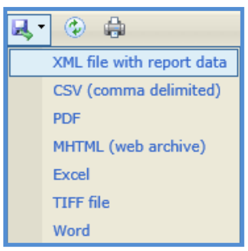
- You are invited to projects.
- You are invited to projects in the roles that have access permissions to the report.

Steps:

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



2. In the navigation pane, click **Enterprise Reports**. The **Report Gallery** page is displayed listing the reports that can be generated.
3. Double-click the required report.
4. Select the filter criteria to generate the report.
5. Click **View** Report. The report is displayed.
6. To print the report or view the report in various other formats, click **Export**, and then click the required option.



10.2 My Reports

You can create quick ad hoc reports. Based on requirements, an ad hoc report can be created at any time by specifying a field set. Once a field set is defined, any user can generate the report. Ad hoc reports are displayed in table mode only but provide the ease of use for rapid report creation. You can custom build your reports easily and quickly. Information for a report is selected from the Masterworks database.

The task sequence to create custom reports is:

1. Select data views.
2. Define the required fields from the selected data view.
3. Specify report summary details to define calculations, grouping, and sorting.
4. Select various displays with charts.
5. Specify report style, formatting, and data filters.
6. Display a preview of the report you created.
7. Group your reports into custom categories.

The following procedure describes the steps to create a simple report and save it. For additional information on creating reports, see http:// wiki.izenda.us/Home. You can create reports in the following modes:

- New Instant Report

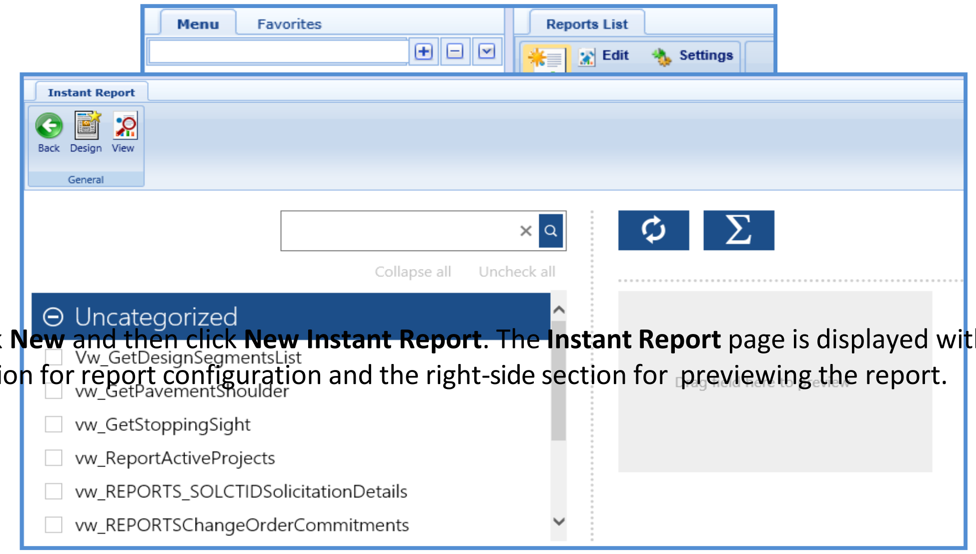
- New Report

10.2.1 Creating New Instant Reports

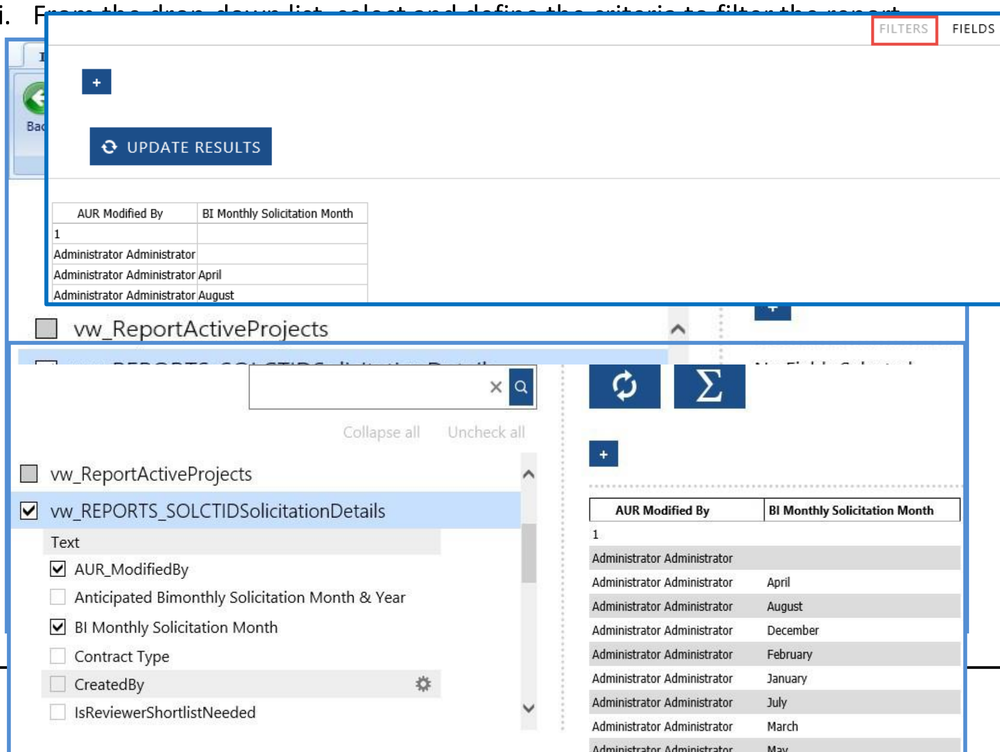
You can use the New Instant Report feature to create simple reports.

Steps:

1. On the **Home** menu, in the navigation pane, click **My Reports**. The **Reports List** page is displayed.



2. Click **New** and then click **New Instant Report**. The **Instant Report** page is displayed with two sections. The left side section for report configuration and the right-side section for previewing the report.
3. In the left side section, select a data source. The data sources are tables and views of the database. The fields in the selected data source is displayed.
4. Select the required fields for the report. The fields with the data defined in the selected data source is displayed in the **Preview** section.
5. Click **Design** in the toolbar to design the report. For more information, refer [Creating New Reports]
6. Click **View** in the tool bar to view the report. The **Report Viewer** page is displayed.
7. On the **Report Viewer** page, perform the following steps to filter and/or add additional fields to the report.
   a. On the **Report Viewer** page, perform the following steps to filter and view required information on the report.
      i. Click the **Filters** tab.
      ii. Then click the plus button.
      iii. From the drop-down list, select and define the criteria to filter the report.

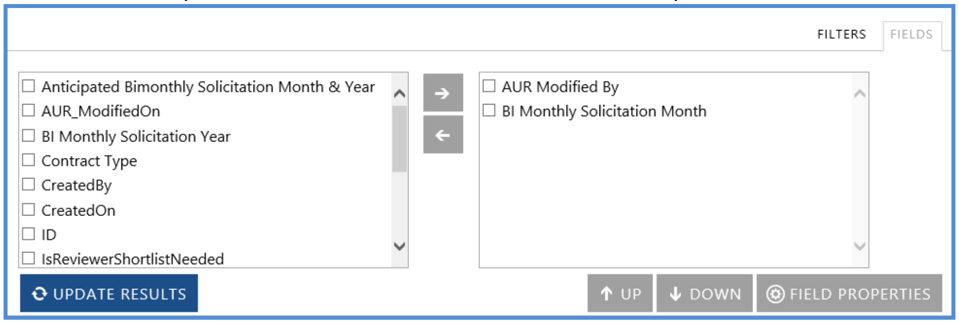


   iv. Click **UPDATE RESULTS**. The report is updated and displayed.

b. Click the **Fields** tab and perform the following steps to add additional fields to the report.

   i. Click the **Fields** tab.

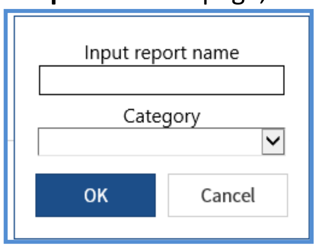
   ii. Select the required fields that must be added to the report.



   Optionally, select a field, and then click the **UP** or **DOWN** button to align the fields and click **FIELD PROPERTIES** to view/edit the properties of a field.

   iii. Click **UPDATE RESULTS**. The report is updated and displayed.

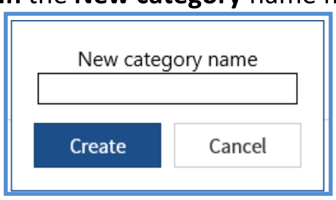
8. On the **Report Viewer** page, click **Save**. A dialog box to enter the report name and select category is displayed.



9. Enter the **Input report name** and from the **Category** drop-down list, select the category of the report. You can either select from the existing categories or create a new category. Optionally, perform the following steps to add a new category.

   a. From the Category drop-down list, select the **(Create New). A dialog box to enter category name is displayed.**

   b. **In** the **New category** name field, enter the name of the category.

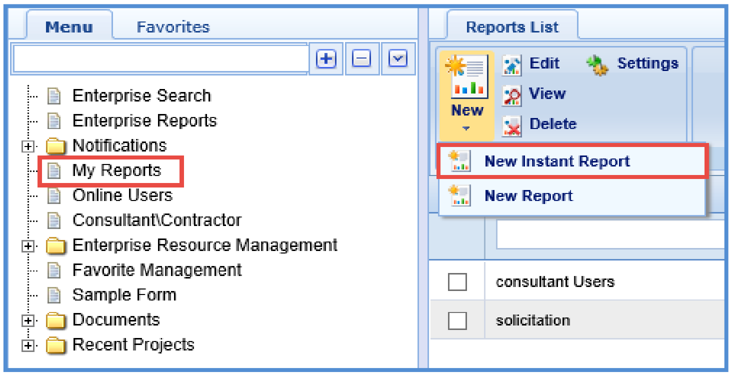


   c. Click **Create.** The category is created and displayed in the **Category** drop-down list. The report is available on the **My Reports** page.

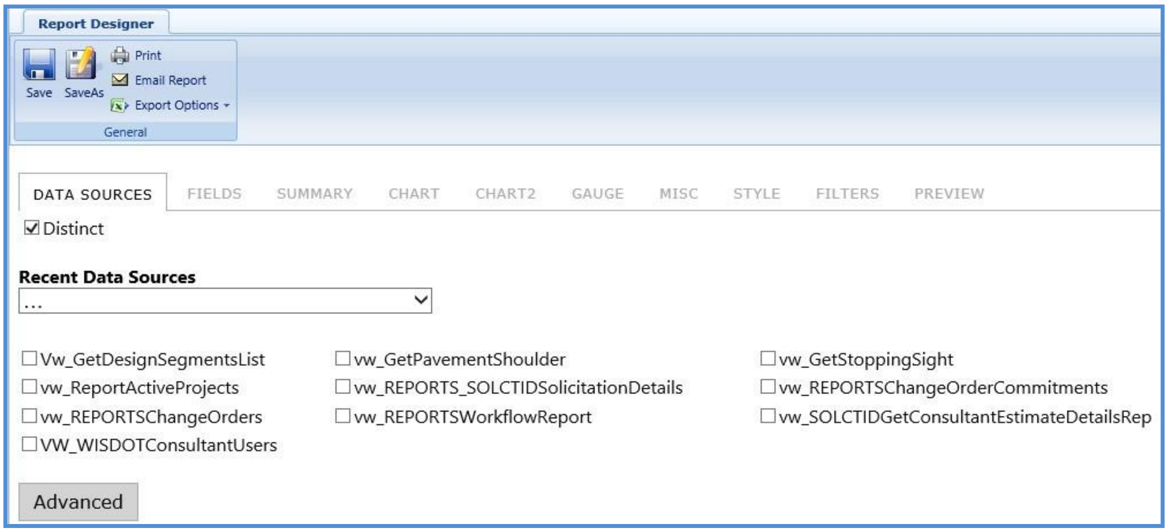
10.2.2 Creating New Reports

Steps:

1. On the **Home** menu, in the navigation pane, click **My Reports**. The **Reports List** page is displayed.



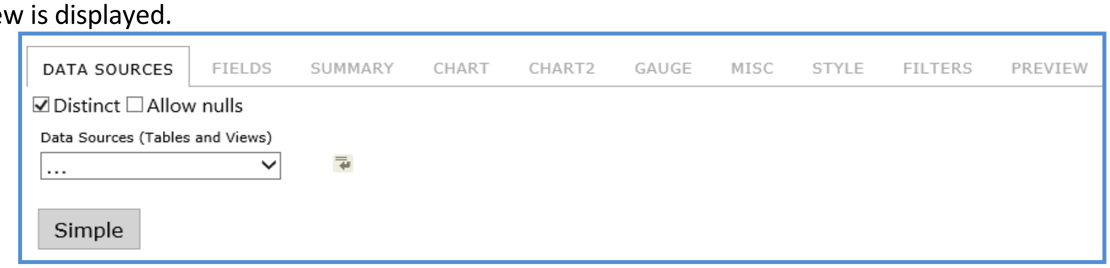
2. Click **New** and then click **New Report**. The **Report Designer** page is displayed with different tabs to enable create and design a new report.



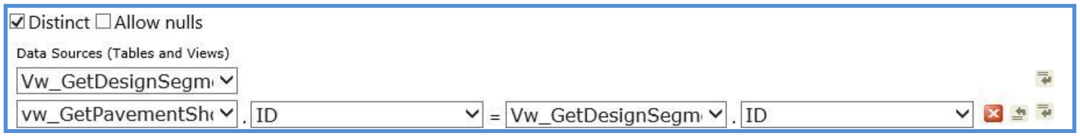
3. In the **DATA SOURCES** tab, perform the following steps to select data sources for which the report must be generated:
   a. By default, the **Distinct** check box is selected indicating that the distinct condition is applied for the report. For example, for multiple records with same data, only one instance of the data is displayed on the report. However, you can clear the check box.
   b. Select a data source check box. Alternatively, from the **Recent Data Sources** drop-down list, select the required data source. The data sources are tables and views of the database.

***Note**: By default, the data source tab is displayed in the **Simple** View mode in which only one data source can be selected.*

   c. Optionally, click **Advanced** to select more than one data source and relate the selected data sources. The advanced view is displayed.



   d. In the advanced view, perform the following steps to select more than one data source and relate the selected data sources.
      i. From the Data Sources (Tables and Views) drop-down list, select the required data source.
      ii. Click . The Data Sources (Tables and Views) drop-down is displayed.



iii. Select the required data source to connect with the initially selected data source. The drop-down boxes to connect the selected data sources based on a common field are displayed.
   - The second drop-down box lists all the fields associated with the selected second data source.
   - The third drop-down box, by default, displays the data source that was initially selected.
   - The fourth drop-down box lists all the fields associated with the initially selected data source.

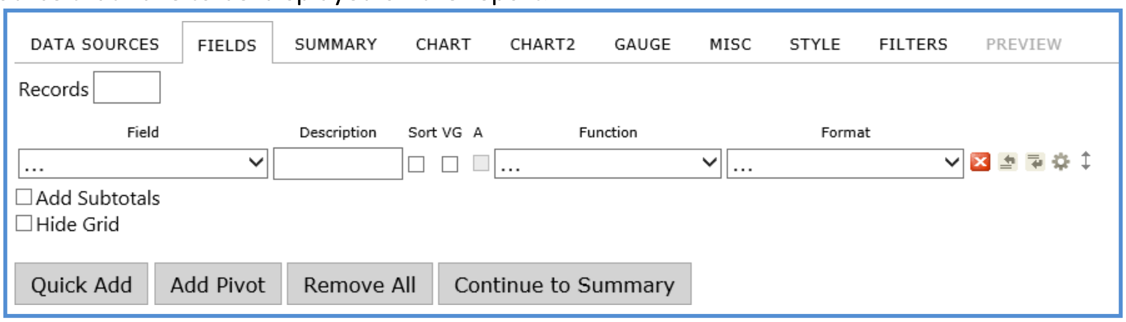
iv. From the second drop-down box, select the required field of the selected second data source. The drop-down box lists all the fields of the selected second data source.

v. In the fourth drop-down box, select the required field of the initially selected data source. The drop-down box lists all the fields of the initially selected data source.

vi. Repeat steps ii to V to add and connect multiple data sources.

vii. Select the **Allow Nulls** check box to display all the records on the report including the records without values.

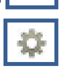
4. Click the **FIELDS** tab and perform the following steps to select and format fields of the selected data source that have to be displayed on the report.



a. In the **Records** box, enter the number of records to be displayed on the report.

b. From the **Field** drop-down list, select the required field. The drop-down lists all the fields of the selected data source.

c. Alternatively, click **Quick Add** to add multiple fields at a time. The **Description** of the selected field is displayed. Optionally, corresponding to a field, you can select the following:
   - Select the **Sort** checkbox to sort the field in ascending order on the report.
   - Select the **A** check box to select the required arithmetic function for the field.
   - From the **Function** drop-down list, select the required function of the selected field. The drop-down list options vary based on the whether the field is a numeric field, date field, and so on.
   - The **Format** field is applicable for numeric functions. From the **Format** drop-down list, select the required format for display of the field values on the report.

d. Optionally, corresponding to a field, use the following buttons to insert new fields, configure field properties, realign fields, and delete existing fields.
   - Click  to delete the existing field.
   - Click  to insert a field above the existing field.
   - Click  to insert a field below the existing field.
   - Drag  to realign the field.
   - Click  to configure advanced properties of the field.

e. Select the **Add Subtotals** check box to display subtotal on the report. The **Hide Grid** check box is applicable only for chart reports.

f. Select the **Hide Grid** check box to display only the chart on the report without the field information table.

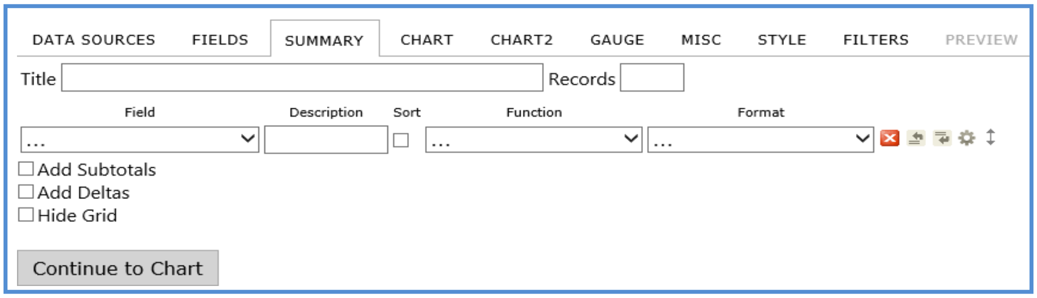
g. You can add a pivot table on reports. For example, a pivot table can be added when for every project you want to view the monthly payouts through the pay estimates. To create pivot, perform the following steps.

   i. Click **Add Pivot**. The **Add pivot columns for** and **using** drop-down boxes are displayed.

ii. In the **Add pivot columns for** drop-down list, select the required field and in the **using** drop-down list, select the required function based on which pivot must be created.

h. Click **Preview** to preview the report.

5. Click the **SUMMARY** tab and perform the following steps to include summary of required records on the report.



a. In the **Title** field, enter the title of the summary.

b. In the **Records** field, enter the number of records to be displayed in the summary on the report. From the **Field** drop-down list, select fields to include in the summary.

c. The **Description** of the selected field is displayed. Optionally, corresponding to a field, you can select the following:
   - Select the **Sort** checkbox to sort the field in ascending order in the summary of the report. From the **Function** drop-down list, select the required function of the selected field.
   - The drop-down list options vary based on the whether the selected field is a numeric field, date field, and so on.
   - The **Format** field is applicable for numeric functions. From the **Format** drop-down list, select the required format for display of the field values in the summary.

d. Optionally, corresponding to a field, use the following buttons to insert new fields, configure field properties, realign fields, and delete existing fields.
   - Click to delete the existing field.
   - Click to insert a field above the existing field.
   - Click to insert a field below the existing field.
   - Drag to realign the field.
   - Click to configure advanced properties of the field.

e. Select the **Add Subtotals** check box to display subtotal in the summary.

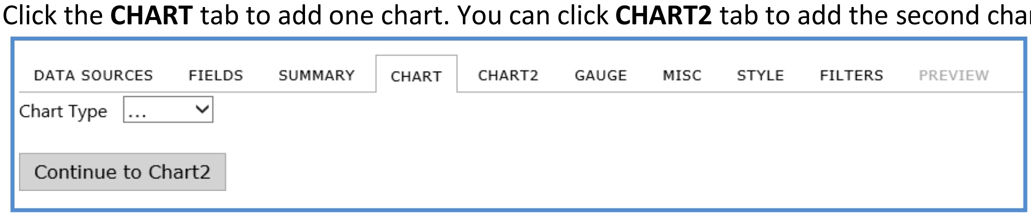
f. Select the **Add Deltas** check box to display difference in values between the current row and the previous row. The difference value is displayed in a separate row.

g. The **Hide Grid** check box is applicable only for chart summaries. Select the **Hide Grid** check box to display only the chart in the h. summary without the field information table.

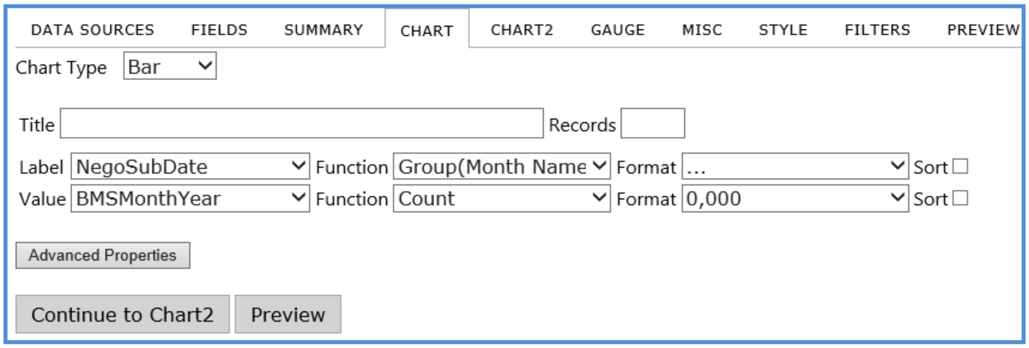
h. Click **Preview** to preview the report.

6. You can generate a Trend, Bar, Pie, or Funnel charts. You can add a maximum of two charts to a report. Perform the following steps to display chart of the required records on the report.

a. Click the **CHART** tab to add one chart. You can click **CHART2** tab to add the second chart.

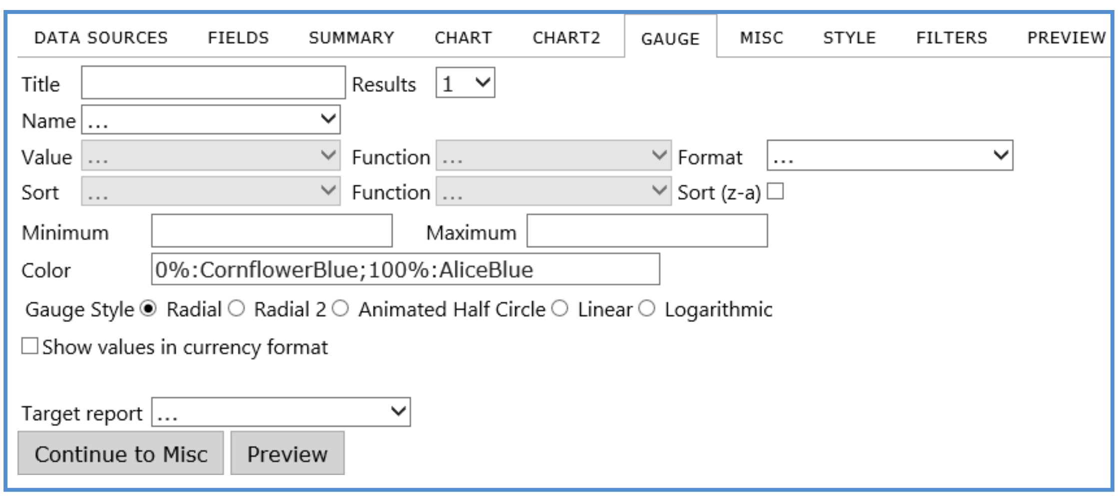


b. From the **Chart Type** field, select the required type of chart to be displayed on the report. The fields to configure the chart is displayed.



c. Enter **Title** of the chart.
d. In the **Records** field, enter the number of records to be displayed on the chart.
e. From the **Label** drop-down field, select the required label for the chart. The label of the chart is the name of the value on the chart. The label indicates slice, bar, time point, or other elements on the chart.
f. Optionally, corresponding to a selected label, you can select the following:
   - From the **Function** drop-down list, select the required function of the selected label. The drop-down list options vary based on the whether the selected label is a numeric field, date field, and so on.
   - The **Format** field is applicable for numeric functions. From the **Format** drop-down list, select the required format for display of the values in the summary.
   - Select the **Sort** checkbox to sort the field in ascending order in the summary of the report. From the **Value** drop-down field, select the required field value for the chart. The selected field value is the number that is displayed within each Label. The size of a pie slice, the size of a bar, or the height of a point on a line will be represented by the values of this field.
g. Optionally, corresponding to a selected value, select the following:
   - From the **Function** drop-down list, select the required function of the selected value. The drop-down list options vary based on the whether the selected value is a numeric field, date field, and so on.
   - The **Format** field is applicable for numeric functions. From the **Format** drop-down list, select the required format for display of the values in the summary.
   - Select the **Sort** checkbox to sort the field in ascending order in the chart of the report.
h. Click **Advanced Properties** to configure advanced properties for the chart.
i. Click **Preview** to preview the report.

7. Click the **GAUGE** tab and perform the following steps to add panel of gauges on the report.

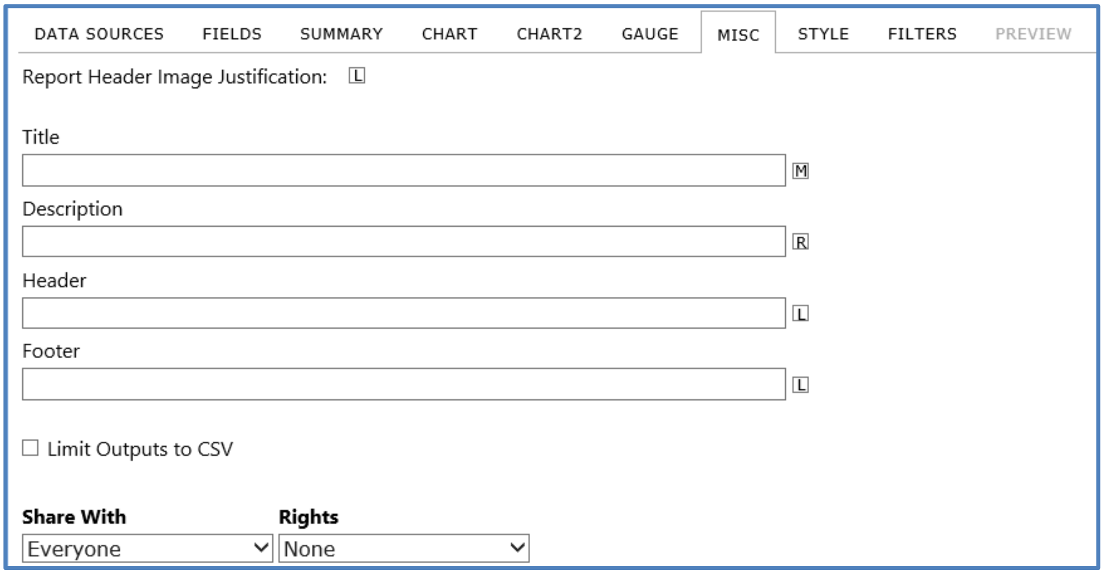


a. Enter **Title** of the gauge.
b. From the **Results** drop-down list, select the number of results to be set up in the panel of gauges. A maximum of 12 gauges can be set up on a report.
c. From the **Name** drop-down field, select the required field for the gauge. From the **Value** drop-down field, select the value for the gauge.
d. From the **Sort** drop-down field, select the required field based on which you want to arrange the gauges.
e. Optionally, corresponding to a selected sort value, select the following:

i. From the **Function** drop-down list, select the required function of the selected value. The drop-down list options vary based on the whether the selected sort value is a numeric field, date field, and so on.
ii. Select the **Sort (z-a)** checkbox to arrange gauges in descending order.

f. In the **Minimum** and **Maximum** fields, enter the minimum and maximum values of the gauge.
g. In the **Color** field, enter details colors for each percentage on the gauge. Additionally, enter details about transitioning of the colors between the mentioned colors.
h. Click the required **Gauge Style**. If the selected field is a currency field, then select the **Show values in currency format** to add currency format to the gauge.
i. From the **Target report** drop-down list, select the sub-report that must be displayed when you hover over the gauge on the report.
j. Click **Preview** to preview the report.

8. Click the **MISC** tab and perform the following steps to configure title, header, footer, and so on for the report:



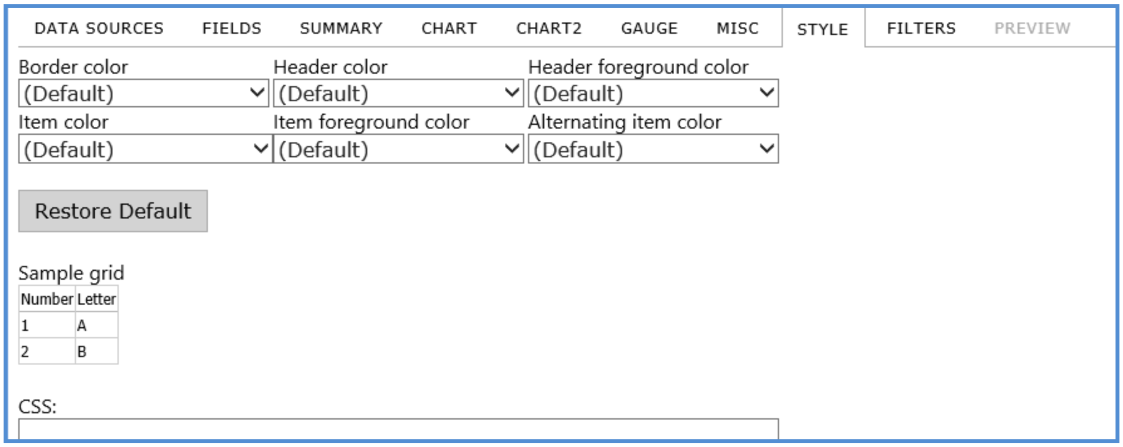
a. Enter the Title of the report and click to set the alignment of the title on the report.
b. Enter the Description of the report and click .to set the alignment of the description on the report.
c. Enter the Header of the report and click L to set the alignment of the header on the report.
d. Enter the Footer of the report and click L .to set the alignment of the footer on the report.

***Note**: The **L** indicates left alignment, **M** indicates middle alignment, and **R** indicates right alignment.*

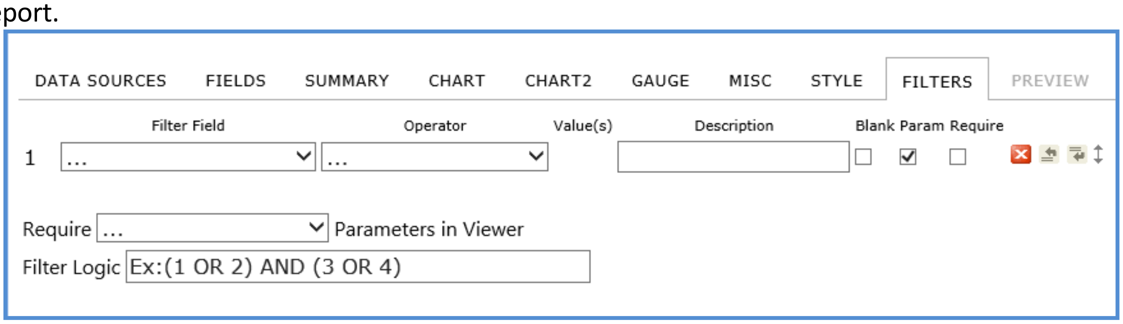
e. Select the **Limit Outputs to CSV** check box to view the above configured data of the report only when exported to CSV file.
f. From the **Share With** drop-down list, select the required users with whom you want to share the report.
g. Corresponding to the selected users with whom the report is shared, from the **Rights** drop down list, select the one of the following options:
   - **Full Access**: Select this option to provide rights to view, modify, and save the changes made to the report.
   - **Read Only**: Select this option to provide rights to view, add or remove filters, and modify the existing filter values. Users can modify the design of the report and save it as a new report but cannot overwrite the existing report.
   - **View Only:** Select this option to provide rights only to view the report and the report cannot be modified.
   - **Locked:** Select this option to provide rights only to view, and existing filters' values can be modified, but cannot add or remove filters or fields. The changes made to the report cannot be saved.

h. In the **Schedule** field, select time and date for delivery of the report.
i. From the **Repeat** drop-down list, select the schedule for repeat delivery of the report.
j. From the **Send Email as** drop-down list, select the mode of sending the report by email.
k. In the **Recipients** box, enter the details of recipients.

9. Click the **STYLE** tab and configure the required style for the report.

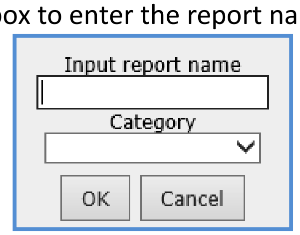


10. You can add multiple filters for a report. Click the **FILTERS** tab and perform the following steps to configure filters for the report.

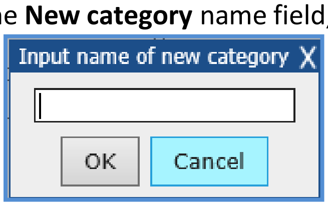


   a. From the **Filter Field** drop-down list, select the required field for the filter.
   b. From the **Operator** drop-down list, select the required operator for the filter. Based on the selected operator, enter appropriate value(s) for the filter.
   c. In the **Description** field, enter description about the filter.
   d. Corresponding to a filter field, select the required check boxes to set mandatory rules for the filter.
   e. From the **Require** drop-down list, select the required parameters.
   f. In the **Filter Logic** field, enter logic for the filter.
   g. Click **Save**.

11. A dialog box to enter the report name and select category is displayed.



12. Enter the **Input report name** and from the **Category** drop-down list, select the category of the report. You can either select from the existing categories or create a new category. Optionally, perform the following steps to add a new category.
   a. From the Category drop-down list, select the **(Create New). A dialog box to enter category name is displayed.**
   b. In the **New category** name field, enter the name of the category.



   c. Click **Create.** The category is created and displayed in the **Category** drop-down list. The report is available on the **My Reports** page.

10.3 Other Reports

You can generate reports with different views for all the pages in Masterworks. You can use filters to view specific information on reports. In addition to customized reports, two standard reports are available:

- List Page Report displays the list of all the records on the selected page.
- Details Report displays all the details of the selected record on a page.

Steps:

- To generate a customized report, perform the following steps:
  1. On the required list page, in the **Others** group, click **Reports**.
  2. Select the report that you want to generate.

- To generate a list page report, perform the following steps:
  1. On the required list page, in the **Others** group, click **Reports**.
  2. Click **List Report**.

- To generate a details report, perform the following steps:
  1. On the required list page, select the required form record.
  2. In the **Others** group, click **Reports**.
  3. Click **Details Report**.

10.3.1 Printing Other Reports

Steps:

1. From the form list page, generate the required report.
2. In the report toolbar, click **Print Report** ().

11 Attachments

11.1 Attaching a File to a Form

You can attach files to a form. You can also link a file in the document management folders to a form.
Steps:

- To upload files to a form, perform the following steps in the **Attachments** section:
  1. Click **Add**. The **New Attachments** window appears.
  2. Click **Upload Document**. The **Choose File to Upload** dialog box is displayed. To upload a single file, click the required file.
  3. Alternatively, to upload multiple files, press CTRL, and then click the required files.
  4. Click **Open**. The files are uploaded to the form and are displayed in the attachment grid.
  5. In the **Title** column, enter the titles for the files attached.

- To link files in the Masterworks **Documents** folders to a form, perform the following steps:
  1. In the **Attachments** section, click **Link Document**.
  2. From the **Folder** drop-down box, select the required folder where the files exist. The list of files in that folder are displayed.
  3. From the list of files, select the required files.
  4. Click **OK**.
  5. The files are linked to the form and are displayed in the attachment grid. In the **Title** column, enter the titles for the linked files.

11.2 Accessing Attached Files

Files attached to a form can be accessed from the list page of the form.

Steps**:**

1. From the navigation tree, click the required form. The form list page is displayed.
2. In the tool bar, in the **Other** group, click **Attachments**. The attachments of all the forms are listed.