aurigo®

MASTERWORKS

CLOUD

Consultant Guide

Aurigo® Software Technologies, Inc.

www.aurigo.com

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1 Getting Started

Masterworks an application run by the Consultant Services section at WisDOT. The primary function is to manage the consulting contracting process. From beginning to end there are three main steps in this process. They are the Negotiation and Solicitation, the Estimate, and the Contract. Use the steps in this manual to walk through each of these phases of the contracting process.

1.1 Logging on to Masterworks

1. Open to a new page in the web browser of your choice. Chrome and Microsoft Edge are the recommend browsers.
2. In the address bar, type https://wisdot.masterworkslive.com, and then press **Enter** on the keyboard.
   The **Masterworks Login** page is displayed.
3. Enter the associated information the following fields:
   - **Username or Email Address**.
   - **Password**

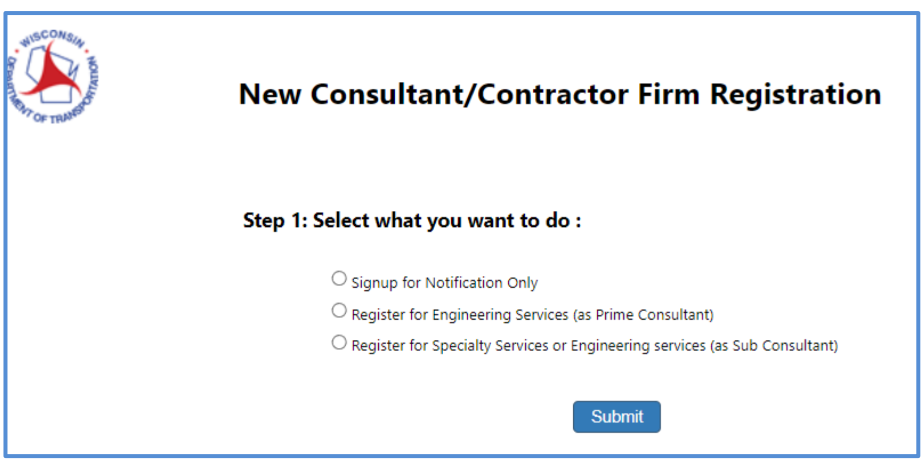
Note: *The password is case sensitive.*

4. Click **Login**.
   Or
   Press Enter on the keyboard.
   The Masterworks home page is displayed.

1.2 Registering a New Consultant Firm

If you are a new consultant firm and do not have a Masterworks account to login to the application, register yourself to request access to the Masterworks portal.

1. Open to a new page in the web browser of your choice. Chrome and Microsoft Edge are the recommend browsers.
2. In the address bar, type the below URL.
   https://wisdot.masterworkslive.com/Modules/MWISDOT/ConsultantRegistration.aspx
3. Press **ENTER**.



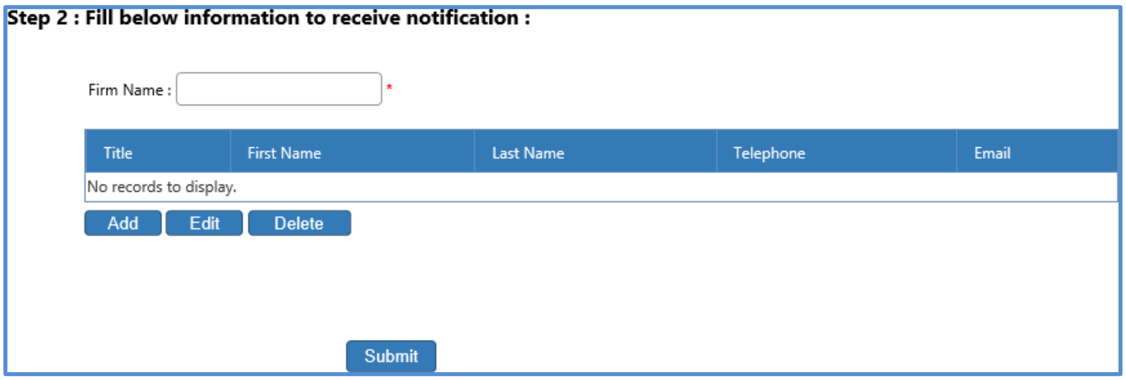
The Masterworks **New Consultant/Contractor Firm Registration** page is displayed.

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

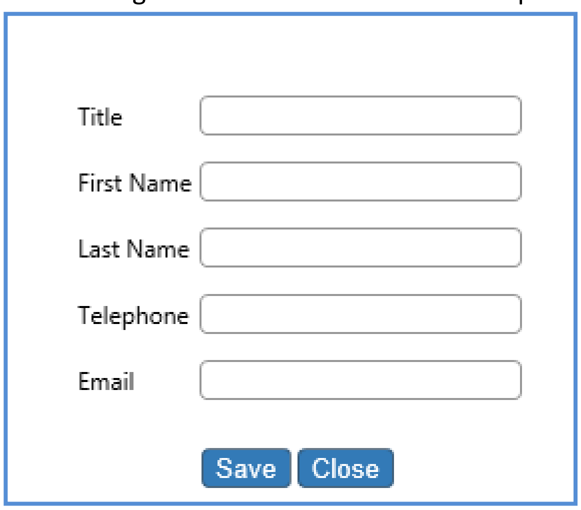
    Once an option is selected, **Step 2** is displayed.

5. Enter the following information base on the previous selection.

    A. **Signup for Notification Only**



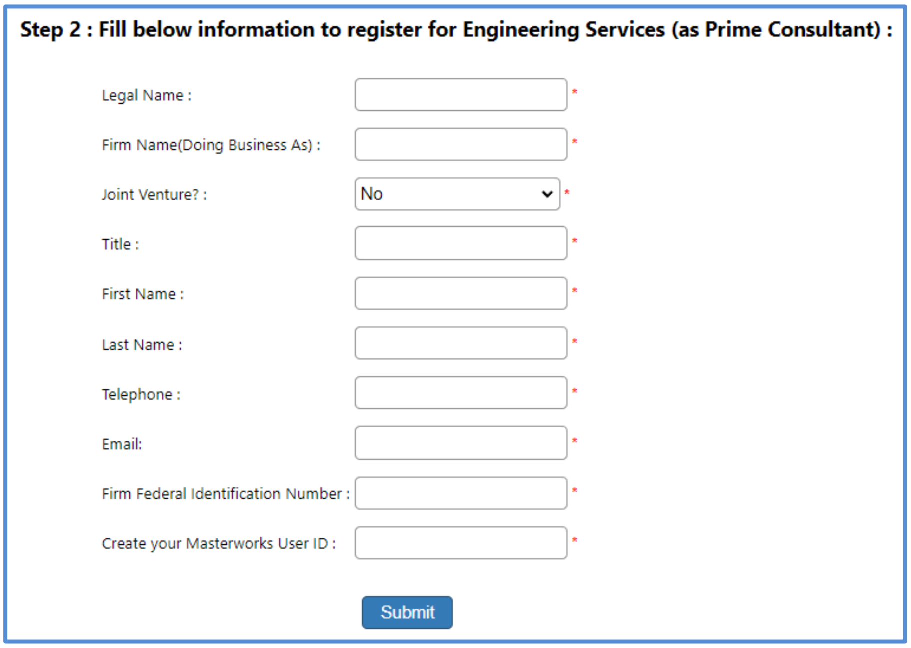
i. Click **Add**. The dialog box to enter information will open.



ii. Enter the information in the fields provided. All fields are required.

iii. Click **Save**.

B. **Register for Engineering Services (as Prime Consultant)**


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

Legal Name : *

Firm Name(Doing Business As) : *

Joint Venture? : No *

Title : *

First Name : *

Last Name : *

Telephone : *

Email: *

Firm Federal Identification Number : *

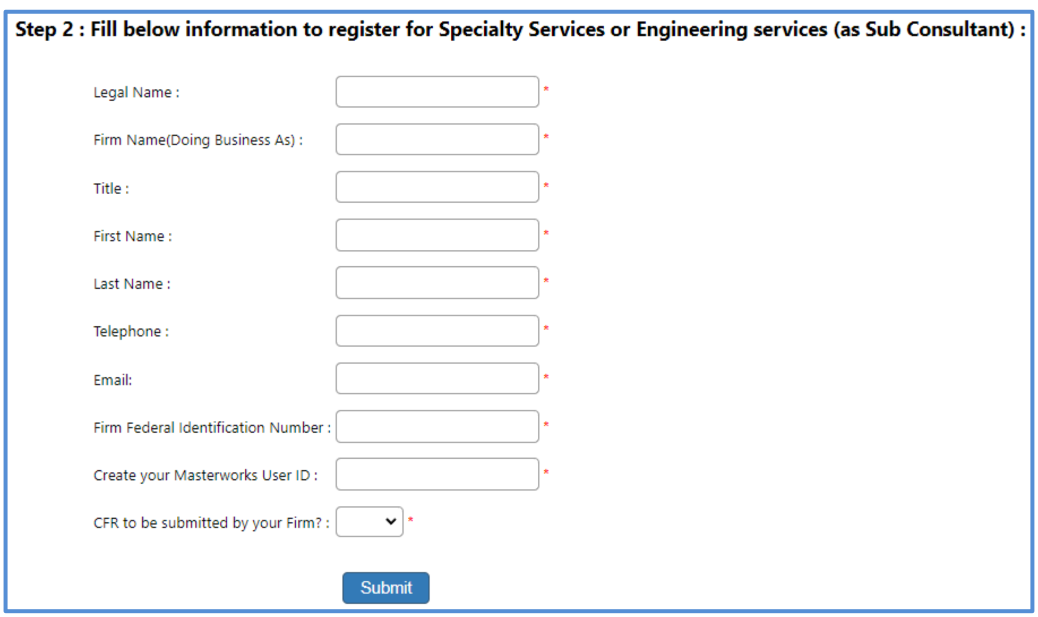
Create your Masterworks User ID : *

Submit

i. Enter the information in the fields provided. All fields are required.

ii. Click **Save**.

C. **Register for Specialty Services or Engineering services (as Sub Consultant)**


Step 2 : Fill below information to register for Specialty Services or Engineering services (as Sub Consultant) :

Legal Name : *

Firm Name(Doing Business As) : *

Title : *

First Name : *

Last Name : *

Telephone : *

Email: *

Firm Federal Identification Number : *

Create your Masterworks User ID : *

CFR to be submitted by your Firm? : *

Submit

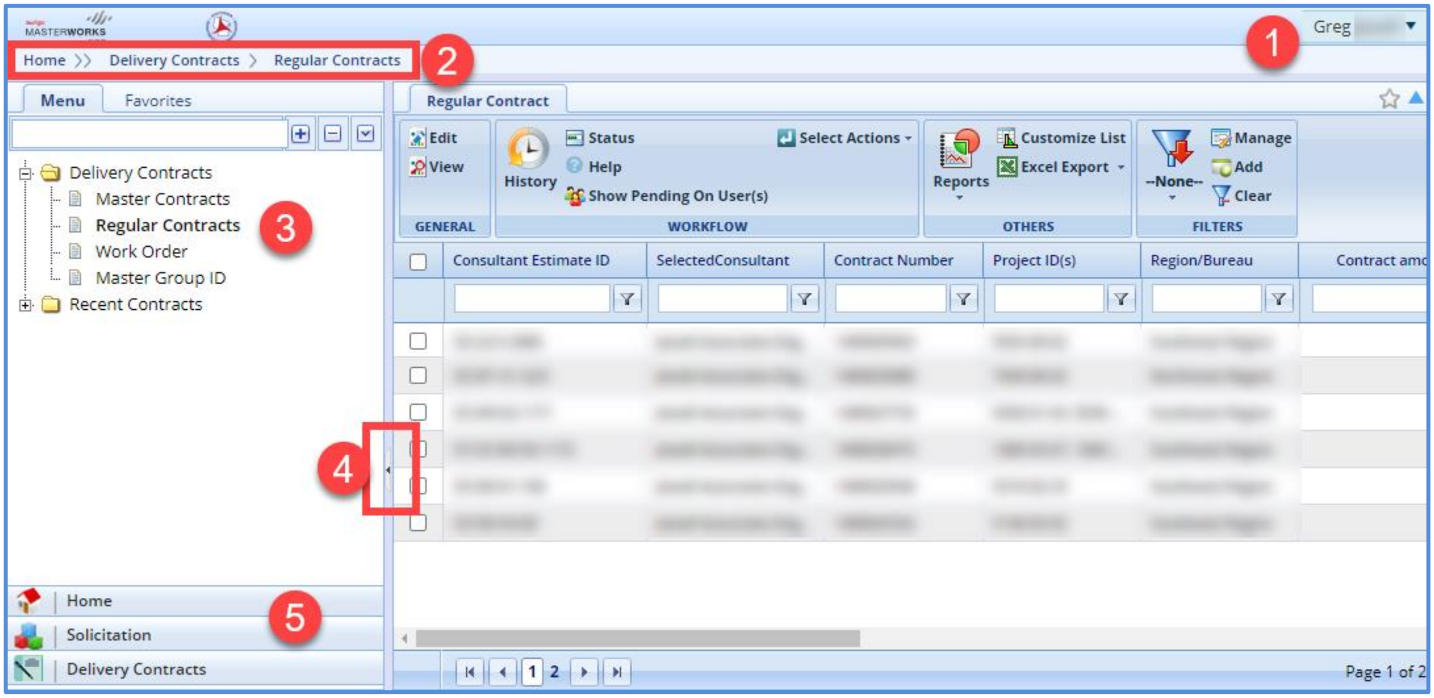
i. Enter the information in the fields provided. All fields are required.

ii. Click **Save**.

iii. Click **Submit**.

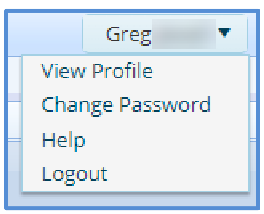
1.3 Understanding the User Interface

This section describes the elements of the Masterworks user interface.



The user interface of Masterworks contains various elements each are described below:

1. User Account: Use the drop-down menu to navigate to the pictured areas

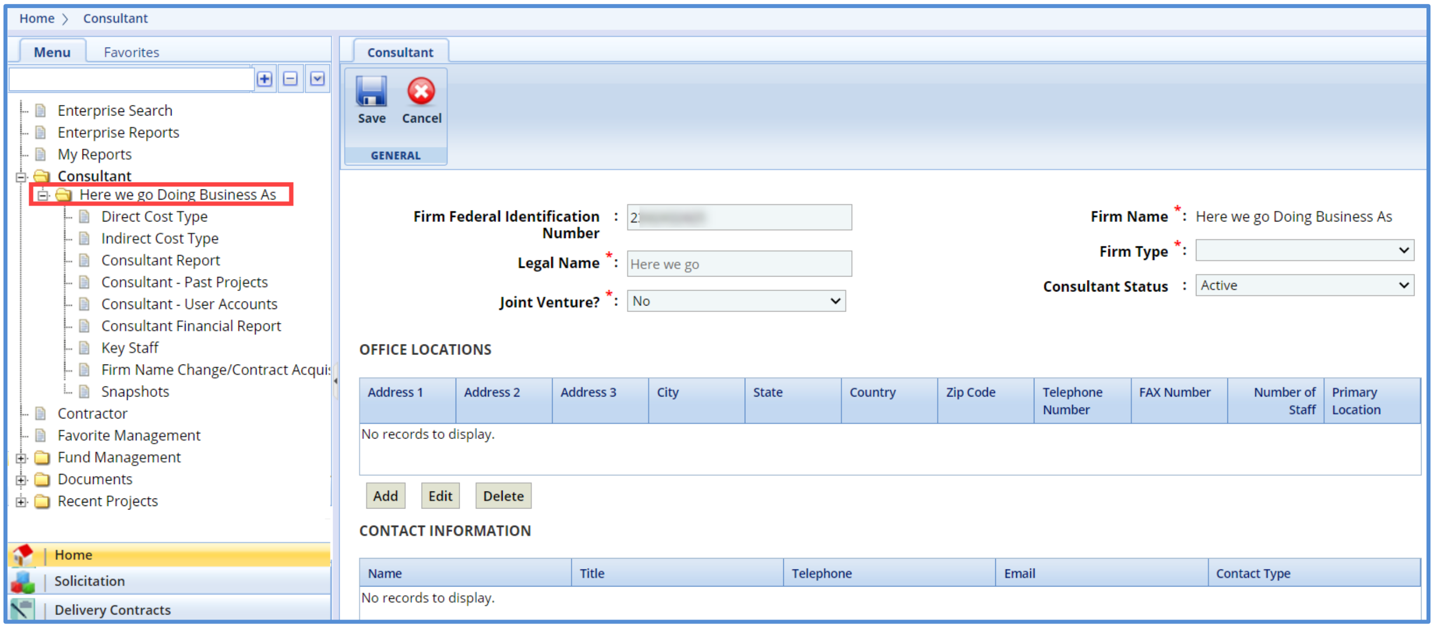


2. Breadcrumbs: Displays the navigation path to current page. Each breadcrumb is an active link to the specific page.
3. Navigation Pane: Displays the pages available to view. This is set up like a filing cabinet, folders, and files.
4. Toggle button: This button allows for the navigation pane to be minimized or expanded.
5. Module Menu: An area to navigate Masterworks on a macro level. Using the above analogy, this section is the drawers of the filing cabinet.

2 Consultant Details

To view the Consultant details, perform the following steps:

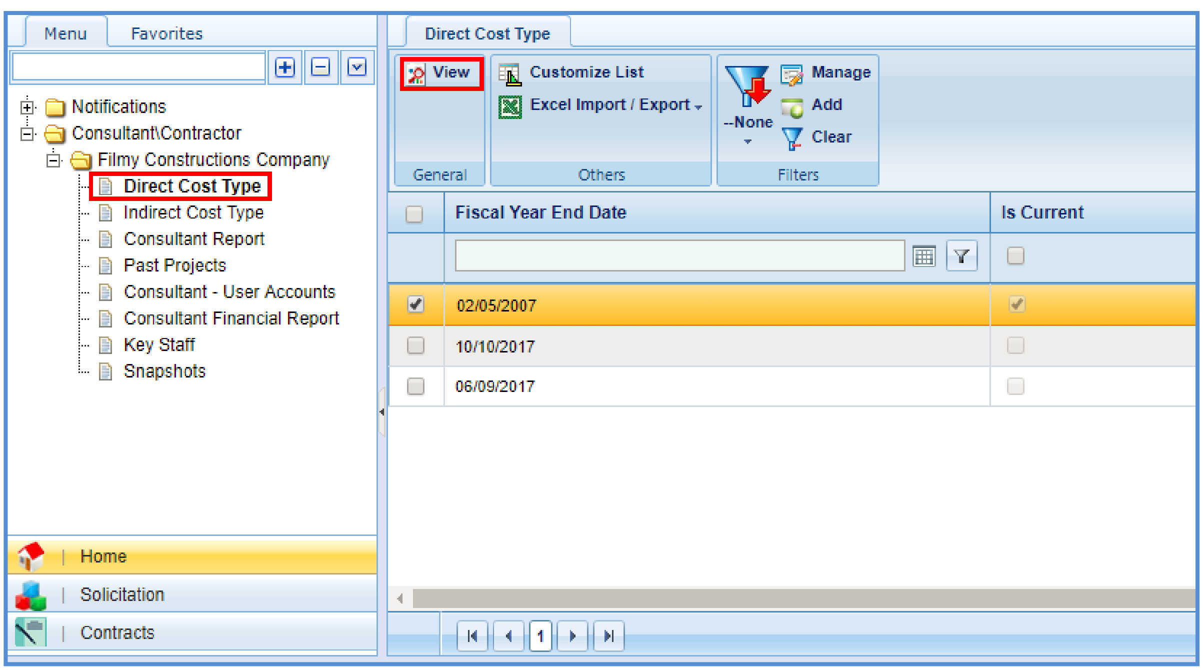
1. In the **Home** module, click **Consultant**. The Consultant page displays the consultant details of the logged in user.
2. Select the firm and click **View**. The consultant details are displayed.
3. In the navigation pane, expand the consultant folder. The list of consultant library forms is displayed.



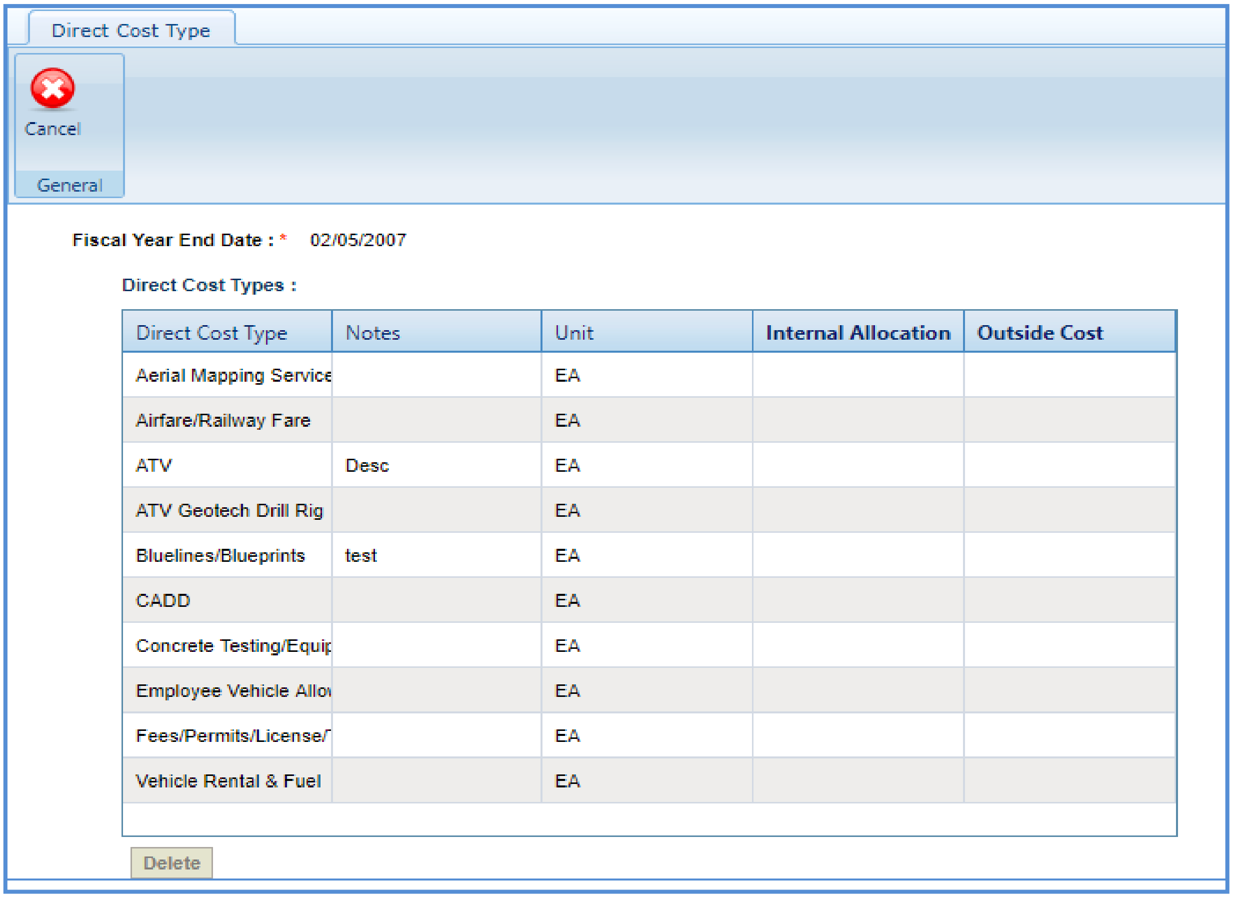
2.1 Viewing Direct Cost Type

To view the Direct Cost Type details.

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



The Direct Cost Type page is displayed.



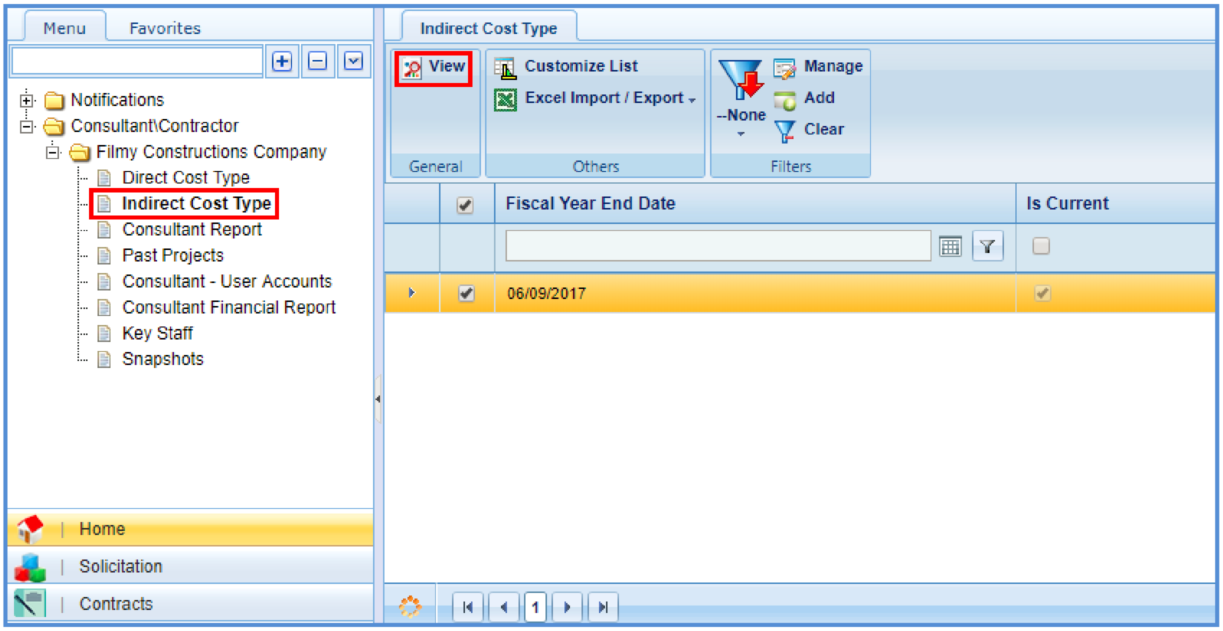
Direct Cost Type	Notes	Unit	Internal Allocation	Outside Cost
Aerial Mapping Service		EA		
Airfare/Railway Fare		EA		
ATV	Desc	EA		
ATV Geotech Drill Rig		EA		
Bluelines/Blueprints	test	EA		
CADD		EA		
Concrete Testing/Equip		EA		
Employee Vehicle Allo		EA		
Fees/Permits/License/		EA		
Vehicle Rental & Fuel		EA		

2.2 Viewing Indirect Cost Type

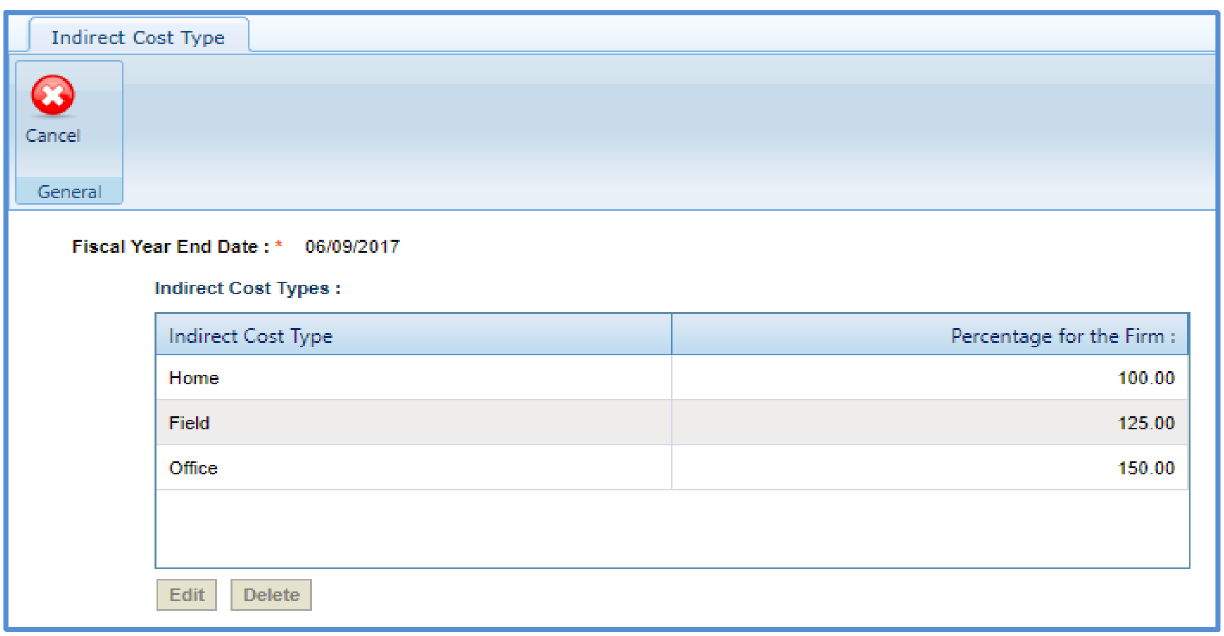
To view the Indirect Cost Type details.

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

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



The Indirect Cost Type page is displayed.



2.3 Creating Consultant Report

To complete a consultant report, click on the following link which will redirect you to our Complete a Consultant Report Manual.

https://wisconsindot.gov/Documents/doing-bus/eng-consultants/cnslt-rsrces/contracts/masterworks/quick-guides/report.pdf

3 Solicitation

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

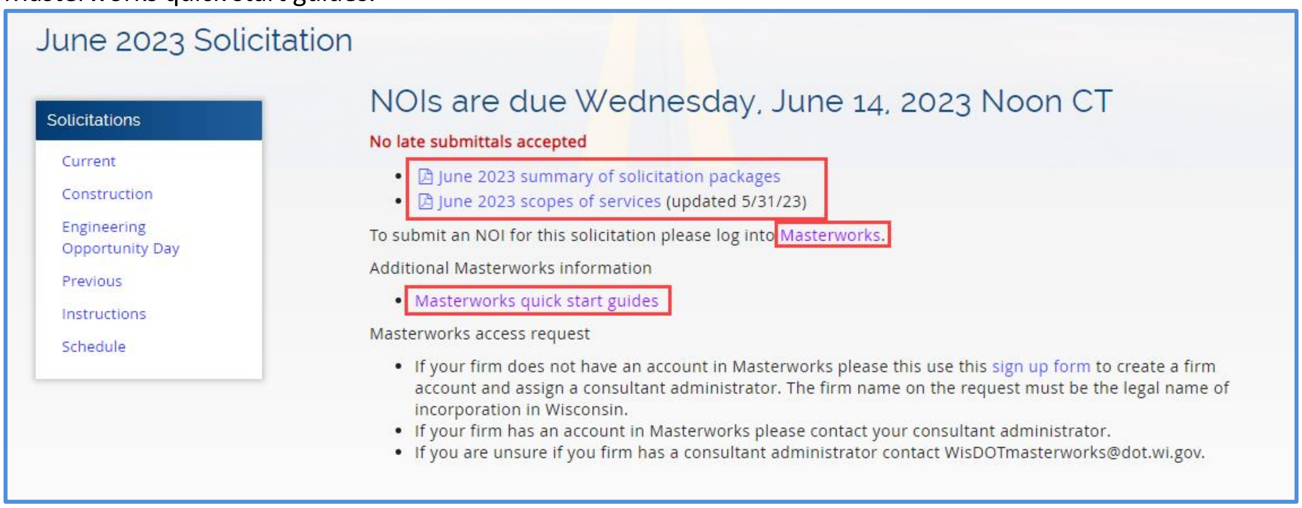
The Solicitations can be viewed in the application or on our website.

3.1 Viewing Solicitation Details on Public Portal

On the wisconsindot.gov website, you can view the current solicitations. You can also view the projects and tasks associated with each solicitation.

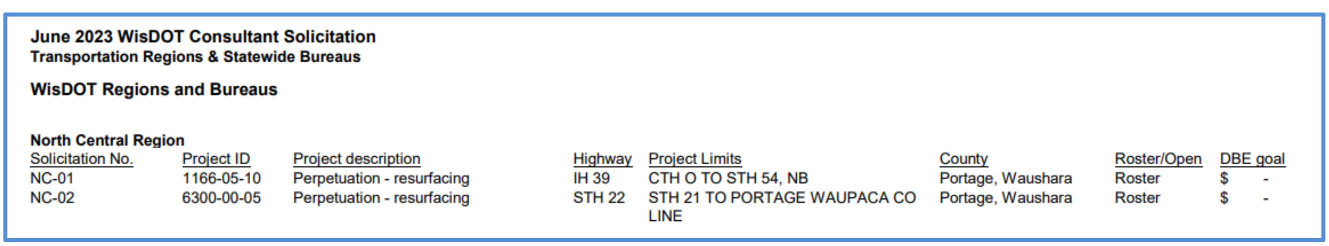
1. Go to the Solicitations page using the following link: https://wisconsindot.gov/Pages/doing-bus/eng-consultants/solicitations/default.aspx.

   The **WisDOT Solicitation - Current** page lists the current summary of solicitation packages, the current scopes of services, a link to Masterworks for those who want to submit an NOI for this solicitation, and a link to the Masterworks quick start guides.



On the left-hand side of the page, you will see links leading to different sections of this page: Construction, Engineering Opportunity Day, Previous, Instructions, and Schedule. Each of these pages will be elaborated on below.

- Click the summary of solicitation packages link to view the solicitations associated with that month.



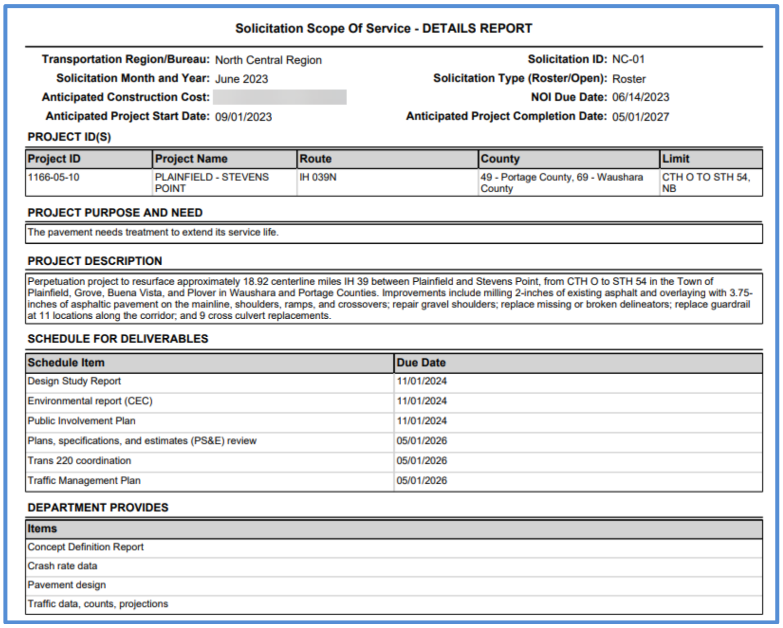
June 2023 WisDOT Consultant Solicitation
Transportation Regions & Statewide Bureaus

WisDOT Regions and Bureaus

North Central Region

Solicitation No.	Project ID	Project description	Highway	Project Limits	County	Roster/Open	DBE goal
NC-01	1166-05-10	Perpetuation - resurfacing	IH 39	CTH O TO STH 54, NB	Portage, Waushara	Roster	$ -
NC-02	6300-00-05	Perpetuation - resurfacing	STH 22	STH 21 TO PORTAGE WAUPACA CO LINE	Portage, Waushara	Roster	$ -

- Click the scopes of services link to view the details report for each solicitation.



Solicitation Scope Of Service - DETAILS REPORT

Transportation Region/Bureau: North Central Region
Solicitation ID: NC-01
Solicitation Month and Year: June 2023
Solicitation Type (Roster/Open): Roster
Anticipated Construction Cost:
NOI Due Date: 06/14/2023
Anticipated Project Start Date: 09/01/2023
Anticipated Project Completion Date: 05/01/2027

PROJECT ID(S)

Project ID	Project Name	Route	County	Limit
1166-05-10	PLAINFIELD - STEVENS POINT	IH 039N	49 - Portage County, 69 - Waushara County	CTH O TO STH 54, NB

PROJECT PURPOSE AND NEED

The pavement needs treatment to extend its service life.

PROJECT DESCRIPTION

Perpetuation project to resurface approximately 18.92 centerline miles IH 39 between Plainfield and Stevens Point, from CTH O to STH 54 in the Town of Plainfield, Grove, Buena Vista, and Plover in Waushara and Portage Counties. Improvements include milling 2-inches of existing asphalt and overlaying with 3.75-inches of asphaltic pavement on the mainline, shoulders, ramps, and crossovers; repair gravel shoulders; replace missing or broken delineators; replace guardrail at 11 locations along the corridor; and 9 cross culvert replacements.

SCHEDULE FOR DELIVERABLES

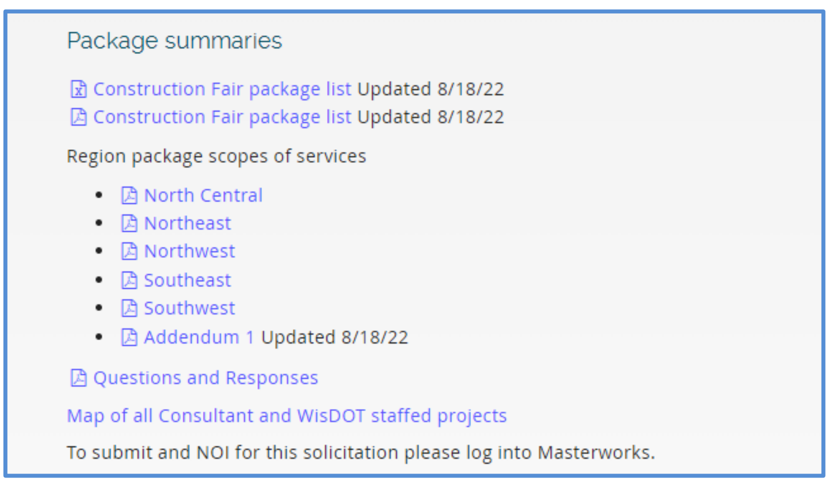
Schedule Item	Due Date
Design Study Report	11/01/2024
Environmental report (CEC)	11/01/2024
Public Involvement Plan	11/01/2024
Plans, specifications, and estimates (PS&E) review	05/01/2026
Trans 220 coordination	05/01/2026
Traffic Management Plan	05/01/2026

DEPARTMENT PROVIDES

Items
Concept Definition Report
Crash rate data
Pavement design
Traffic data, counts, projections

2. Click on the Construction link on the left-hand side of the page to navigate to the construction fair information page. This page contains construction fair interview information, package summaries, and important dates.
   - Interview information – The interview schedule and details about the interviews for this year.

   - Package summaries – The construction fair package list for this year, scopes of services packages by region, Q&A, and a map of all consultant and WisDOT staffed projects



- Important dates – Upcoming dates of important and relevant events

Important dates	
Notice of Interest (NOI) and solicitation packages published	August 10, 2022
Project questions due 8 a.m. CT	August 15, 2022
Questions and answers published	August 18, 2022
Updated WisDOT construction packages published	August 18, 2022
NOIs due noon CT	August 31, 2022
Interview schedule published	September 1, 2022
Construction fair interviews	September 13, 2022
Construction engineering services selections published	October 2022

3. Click on the Engineering Opportunity Day link on the left to view information on this year's Engineering Opportunity Day. Here you will find registration and interview information.

Engineering Opportunity Day 2023

Solicitations
- Current
- Construction
- Engineering Opportunity Day
- Previous
- Instructions
- Schedule

Interviews will be conducted Thursday, February 16, 2023

Registration Information

Firms on WisDOT's Roster of Eligible Engineering Consultants may register for Engineering Opportunity Day 2023 interviews by noon Friday, January 20, 2023. To register, please send a brief email with the firm's name, region preferences and contact information to Consultant.Services@dot.wi.gov. A return confirmation email is required to complete the registration.

No Full Service Engineering master contracts will be awarded in 2023.

Interviews will be conducted in person on Thursday, February 16, 2023 at the Madison Marriott West.

Madison Marriott West Conference Center
1313 John Q Hammons Drive
Middleton, Wisconsin 53562

Interview Information

- Please limit interview teams to six members.
- Consultants are required to bring their own projectors, a screen will be provided.
- Please list anticipated interview team members on the first slide of the presentation.
- Paper copies of the presentation or supplemental materials are not needed.
- Interview schedule

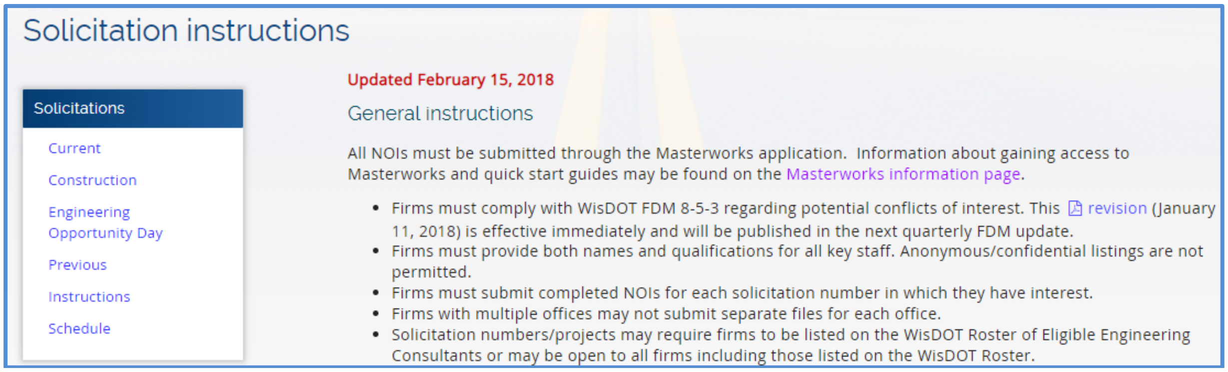
4. Click on the Previous link on the left-hand side to view solicitations for previous years dating back until 2021.

Consultant Solicitations

Solicitations
- Current
- Construction
- Engineering Opportunity Day
- Previous
- Instructions
- Schedule

State fiscal year 2023	
July	January
Construction Fair	Engineering Opportunity
August	February
September	March
October	April
November	May
December	June
State fiscal year 2022	
July	January

5. Click on the instructions link on the left-hand side to view instructions and commonly asked questions on how to submit an NOI.



6. Click on schedule on the left-hand side to view the solicitation publishing, questions, NOI return, and selection posting schedule.

Solicitation Name	Preview Published	Solicitation Date	Questions Due	NOI Return	Selections Posted
November 2022	October 12, 2022	October 26, 2022	October 31, 2022	November 9, 2022	November 28, 2022
December 2022	M November 7, 2022	M November 21, 2022	November 28, 2022	M December 5, 2022	December 14, 2022
January 2023	December 14, 2022	January 4, 2023	January 9, 2023	January 18, 2023	February 6, 2023
February 2023	January 18, 2023	February 1, 2023	February 6, 2023	February 15, 2023	March 6, 2023

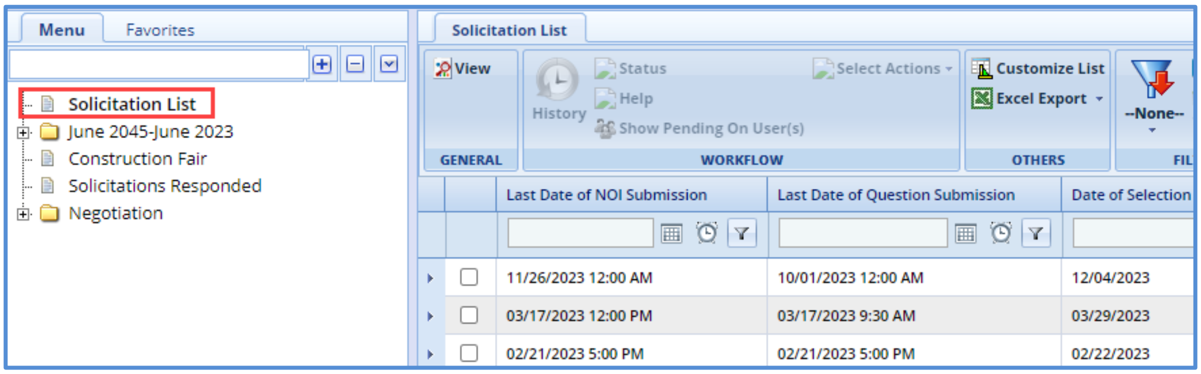
3.2 Questions and Responses

The system allows you to submit questions against the solicitation. The questions are submitted before the expiry of the last date of question submission, which is defined in Solicitation Details page. WisDOT will publish relevant answers to the questions submitted.

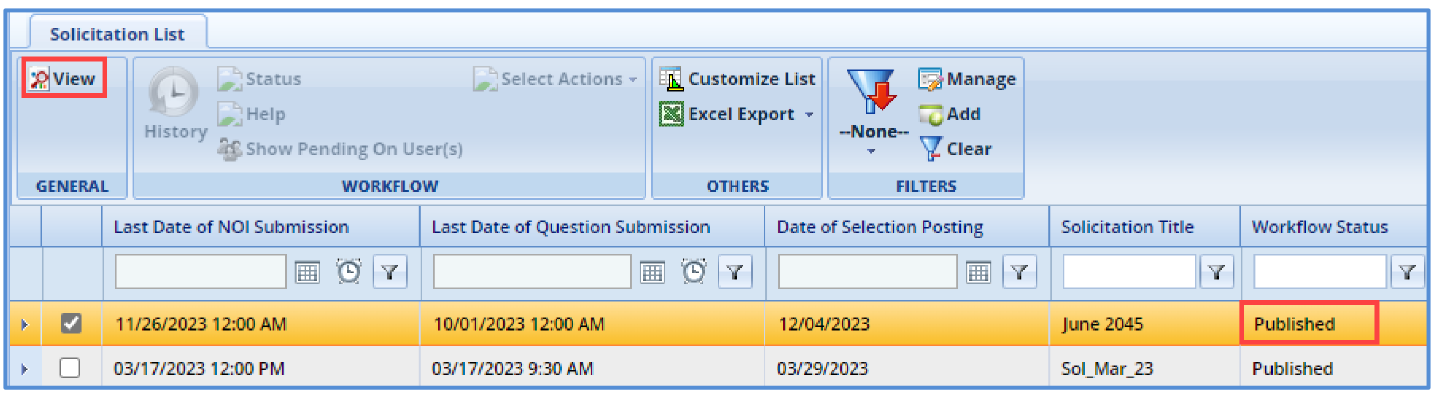
To raise questions regarding the Solicitation, perform the following steps:

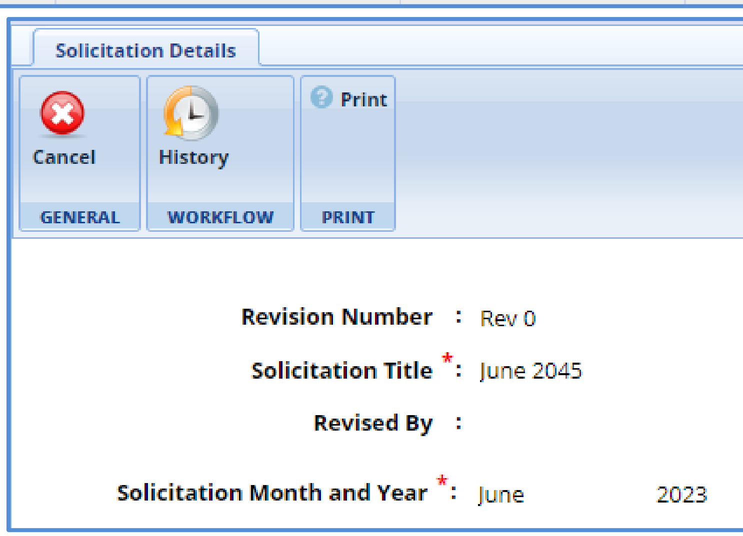
Prerequisite: The last date of question submission has not expired.

1. In the module menu, click **Solicitation**.
   Click **Solicitation List.**

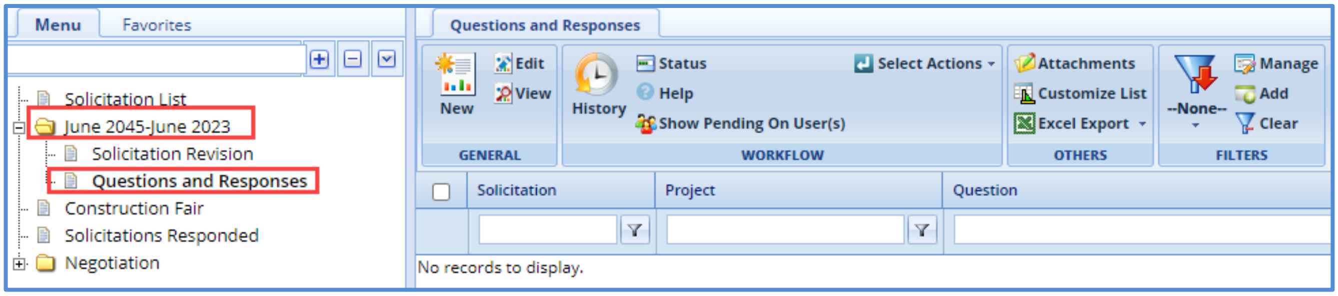


2. Select the **Solicitation** record, which is in 'Published' status, and then click **View**. The **Solicitation Details** page is displayed.

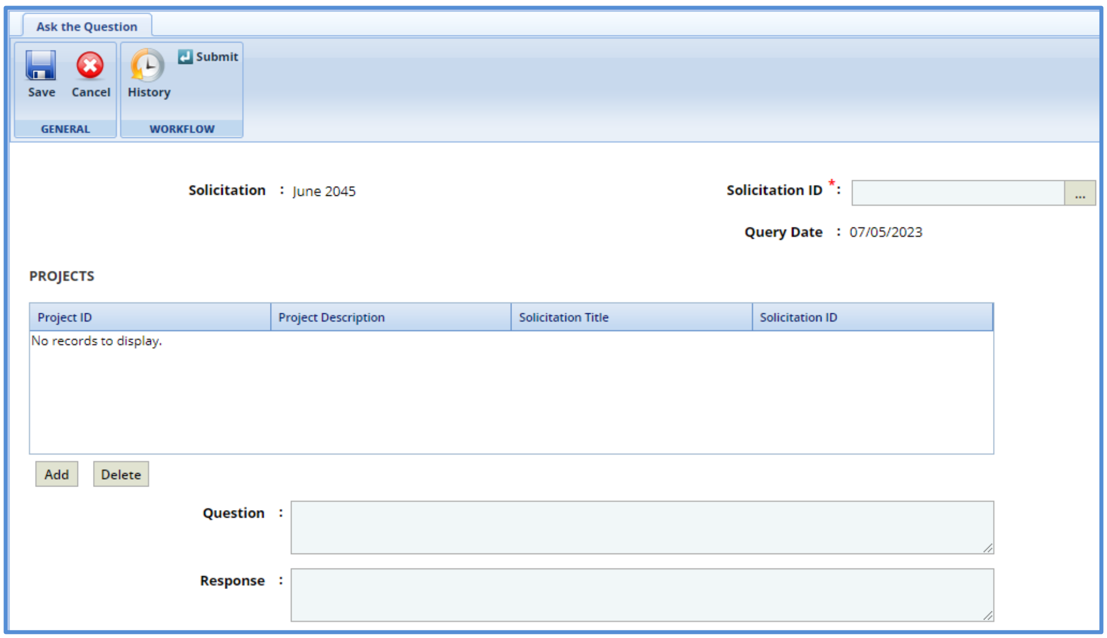




3. In the navigation pane, expand the selected **Solicitation** record, and then click **Questions and Responses**.



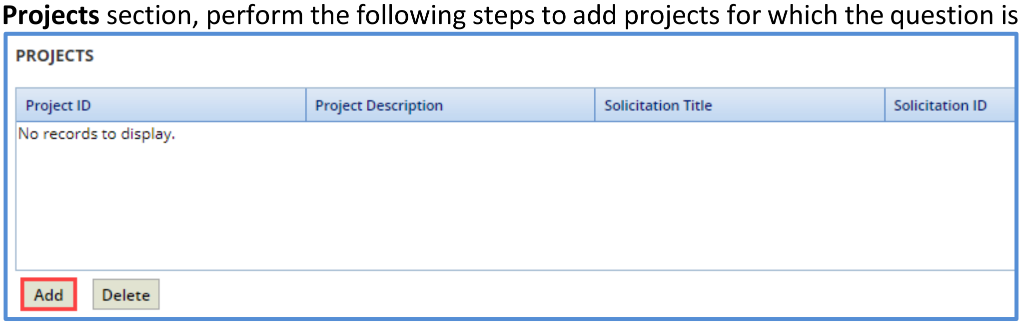
4. Click **New**.
   The **Ask the Question** page is displayed.



The values in the **Solicitation** and **Query Date** fields are auto-populated.

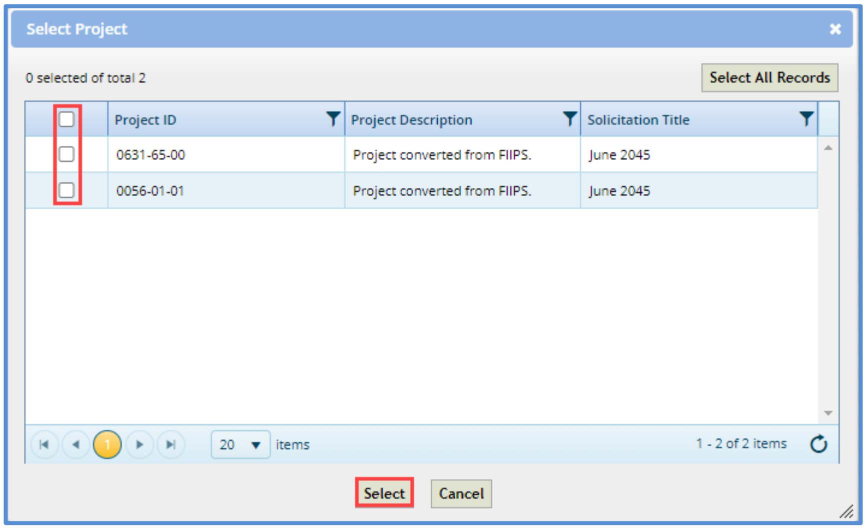
5. In the **Solicitation ID** field, perform the following steps to select solicitations for which the question is raised:
   a. Click .
      The **Select Solicitation** dialog box is displayed listing the solicitations that are associated with the Solicitation.
   b. Select the solicitations for which the question is raised and then click **Select**.

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



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

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



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

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

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

Field	Description
Question	Enter the question.
Response	The response for the question is populated in this field when it is published by WisDOT.

8. For the **Attachments** section: unless specifically mentioned in the NOI instructions, please do **not** attach additional files (e.g. resumes, project descriptions, letters). These materials have not been requested and will not be reviewed.
9. Click **Save**. The **Questions and Responses** record is in the **Draft** workflow status.
10. Select the **Questions and Responses** record and in the **Workflow** group, click **Select Actions**.
11. Click **Submit**. The **WisDOT Masterworks** dialog box is displayed. Enter required information and then click **OK**. The question is submitted to WisDOT.

    Optionally, in the **Workflow** group click **Re-Draft** and enter required information in the dialog box that is displayed, and then click **OK** to redraft the record.

4 Notice of Interest (NOI)

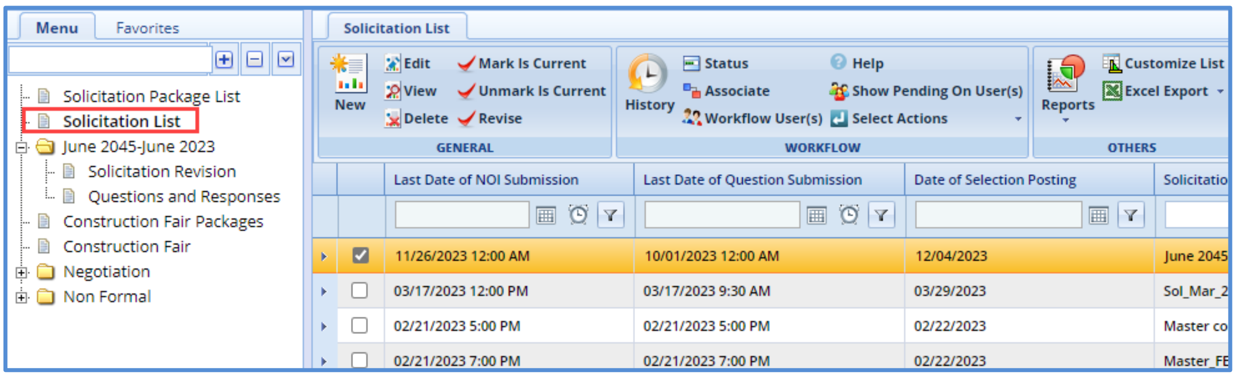
The system allows you to view the solicitation details and express your interest in the solicitation by submitting the duly filled-in NOI to WisDOT.

4.1 Viewing the Solicitation Details

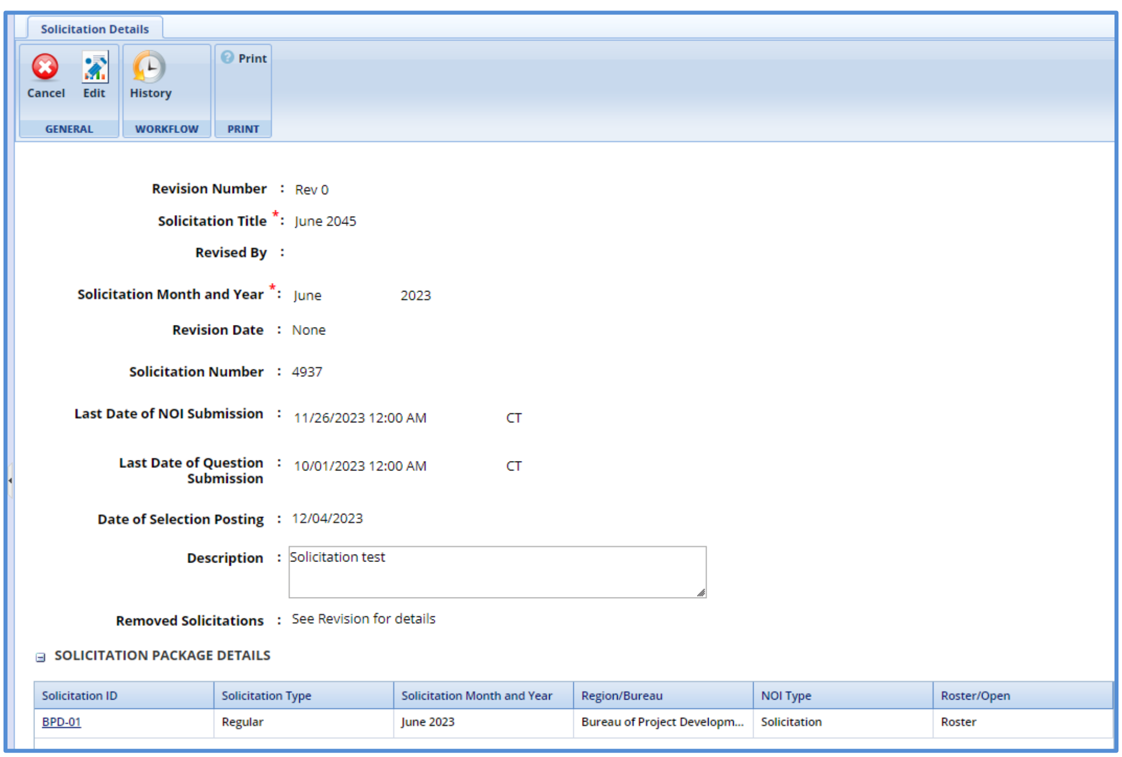
The system allows you to view the solicitation details such as projects associated with the solicitation, scope of service, and tasks associated with the solicitation.

The procedure to view the solicitation details is described.

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



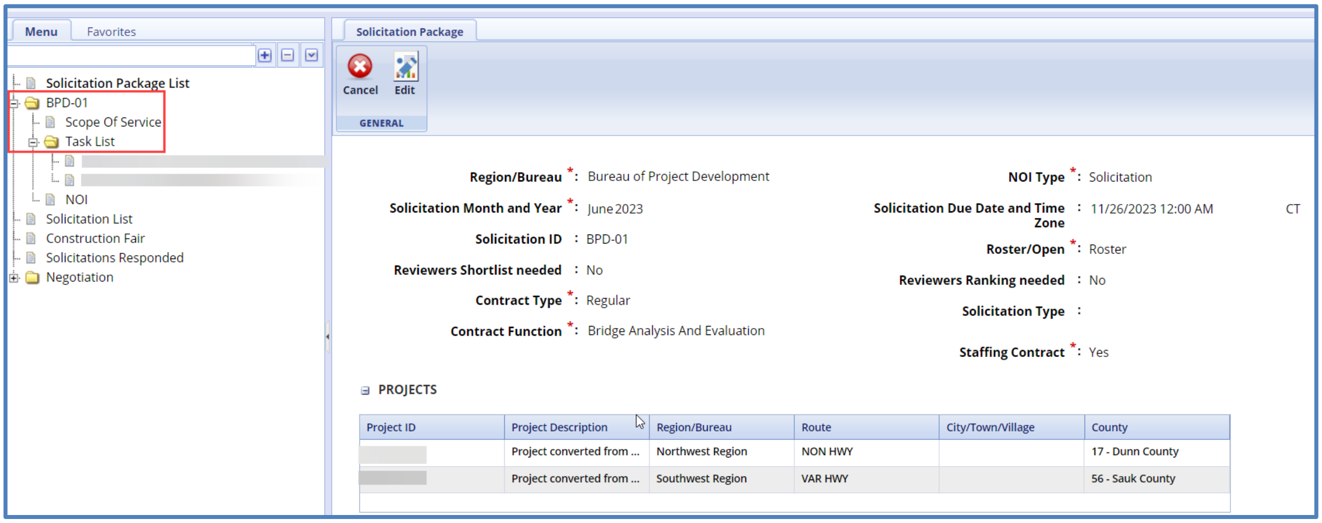
3. Select the required Solicitation record, and then click **View**. The selected **Solicitation Details** page is displayed.



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

   The **Solicitation Package** page is displayed.

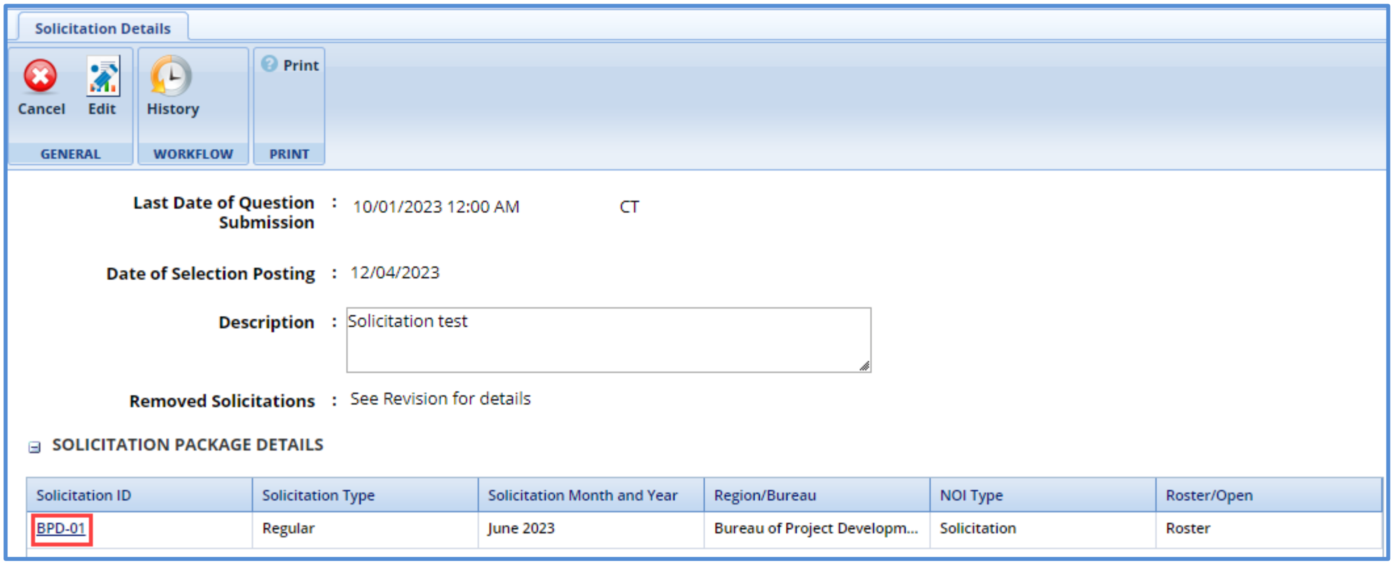
5. In the navigation pane, expand the solicitation folder, and click **Scope of Service** to view the solicitation scope of service or expand the **Task List** folder to view the solicitation task details.



4.2 Submitting the Notice of Interest

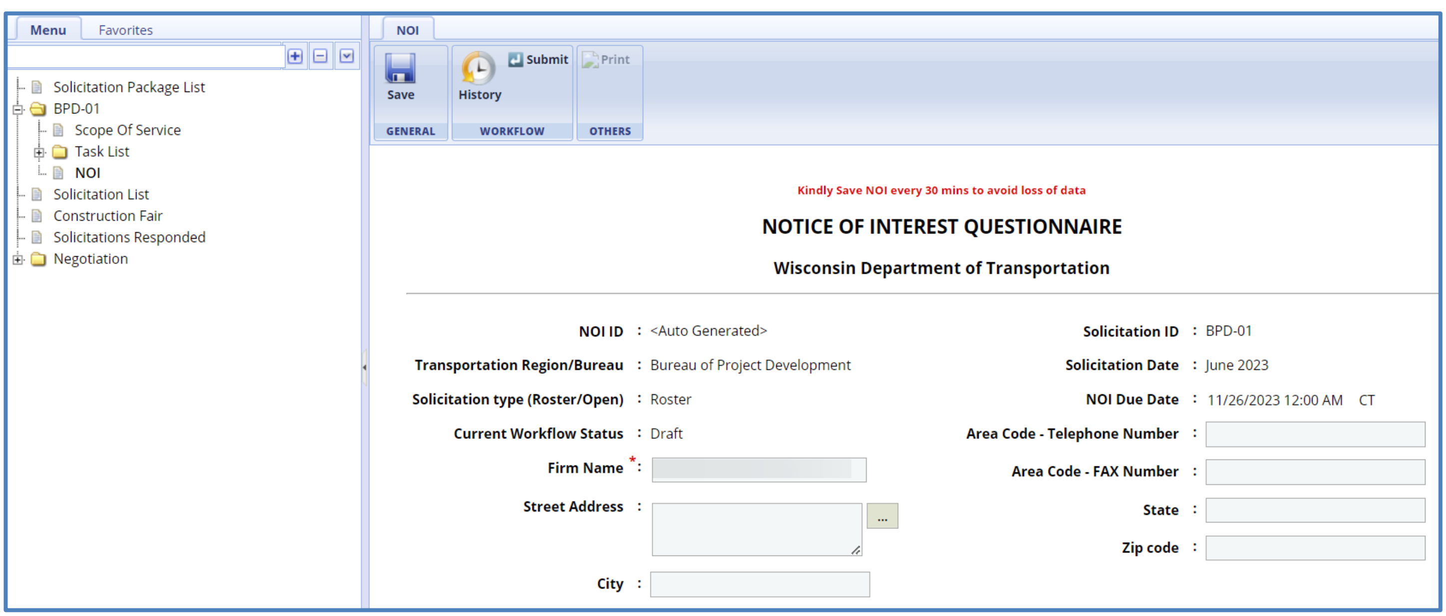
The system allows you to duly fill in the NOI and submit to WisDOT.

1. In the module menu, click **Solicitation**. Click **Solicitation List**.
2. Select the required **Solicitation** record, which is in Marked as "Is Current", and then click **View**. The selected **Solicitation Details** page is displayed.



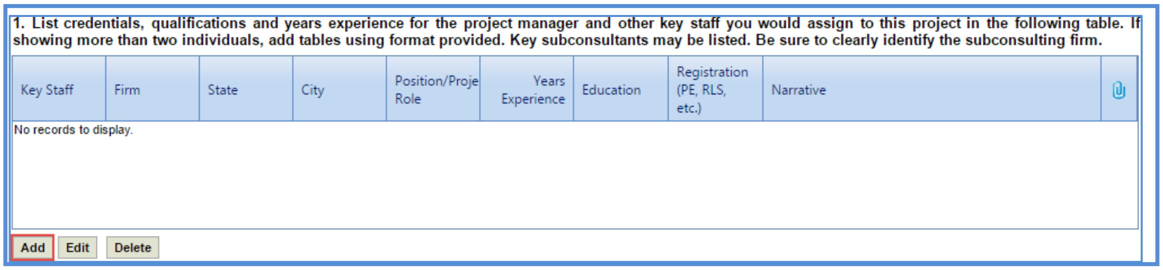
3. In the **Solicitation Package Details** section, click the **Solicitation ID** link for which you want to submit the NOI. The **Solicitation Package** details page is displayed.
4. In the navigation pane, expand the solicitation folder, and click **NOI**. The **NOI** page is displayed.

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



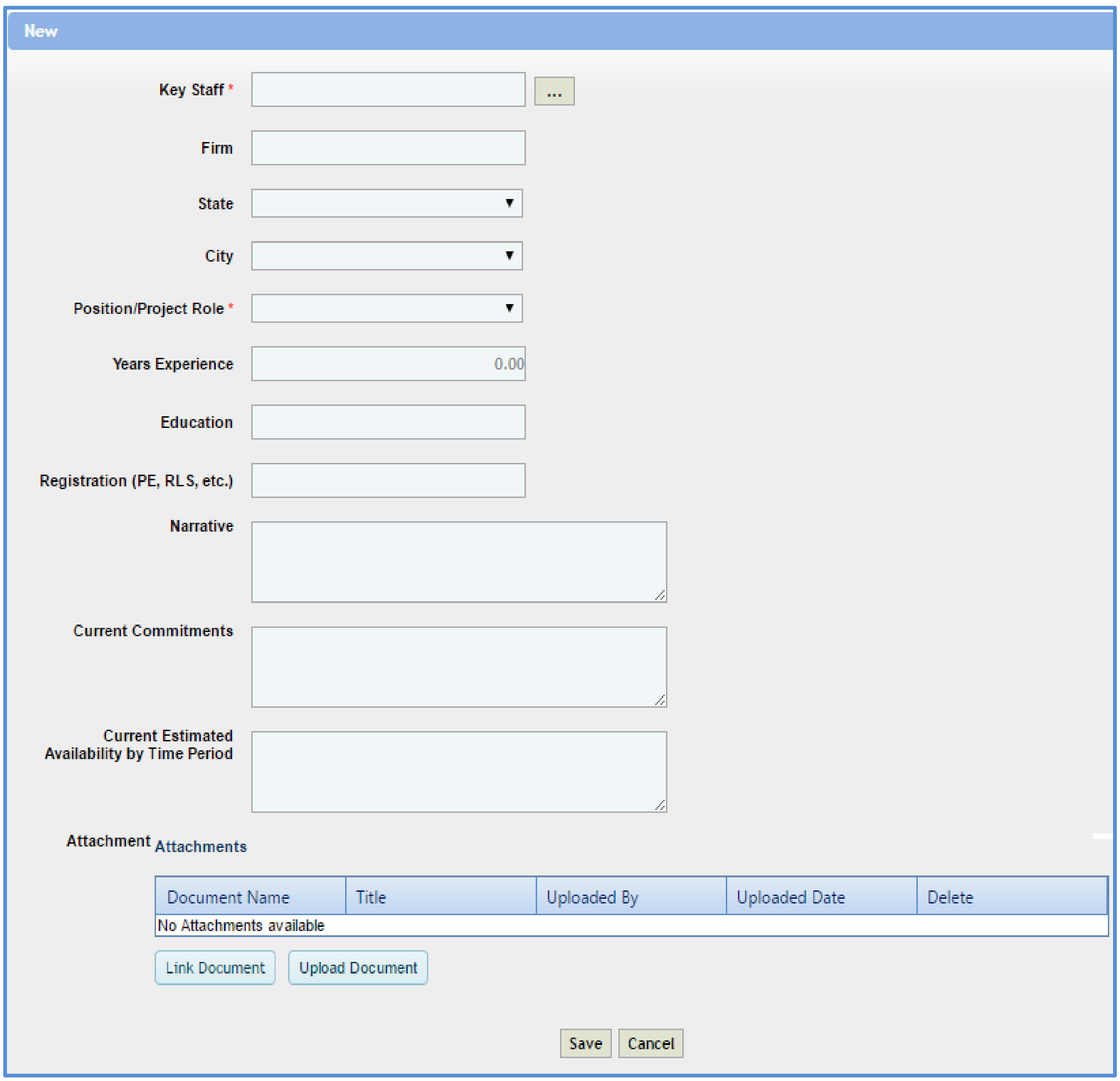
5. For factor 1, perform the following steps to add key staff details:

   a. Click **Add**.



   The **New** dialog box is displayed.

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

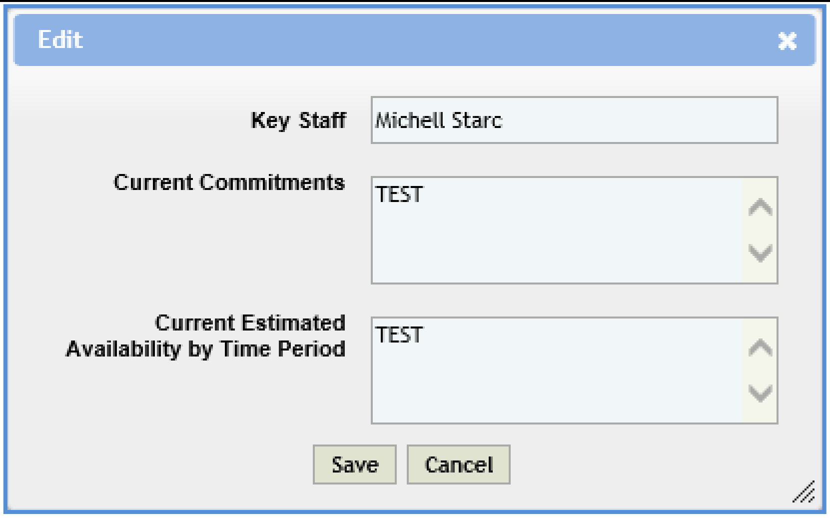


Field	Mandatory / Non-mandatory	Description
Key Staff	Mandatory	To select key staff: a. Click ... . The **Select Key Staff** dialog box is displayed listing all the key staffs of the consultant firm. b. Select the required key staff, and then click **Select**. The values in the **Firm**, **Years Experience**,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

a. In the **Attachments** section, upload relevant images and files.

b. Click **Save.**

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



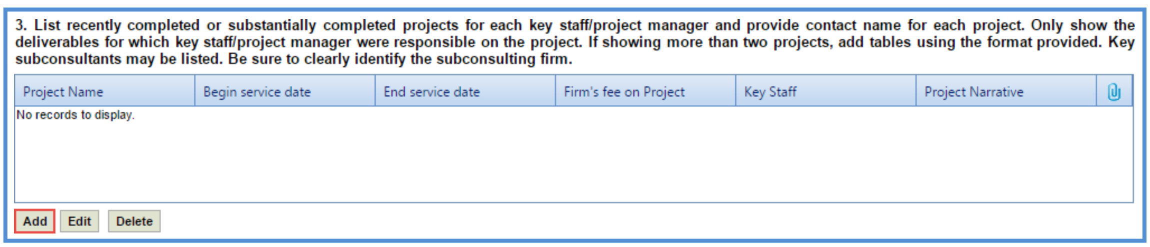
***Note**: The value in the **Key Staff, Current Commitments,** and* **Current Estimated Availability by Time Period** *field is auto-populated.*

b. If required edit information in the **Current Commitments** and **Current Estimated Availability by Time Period** fields.

c. Click **Save**.

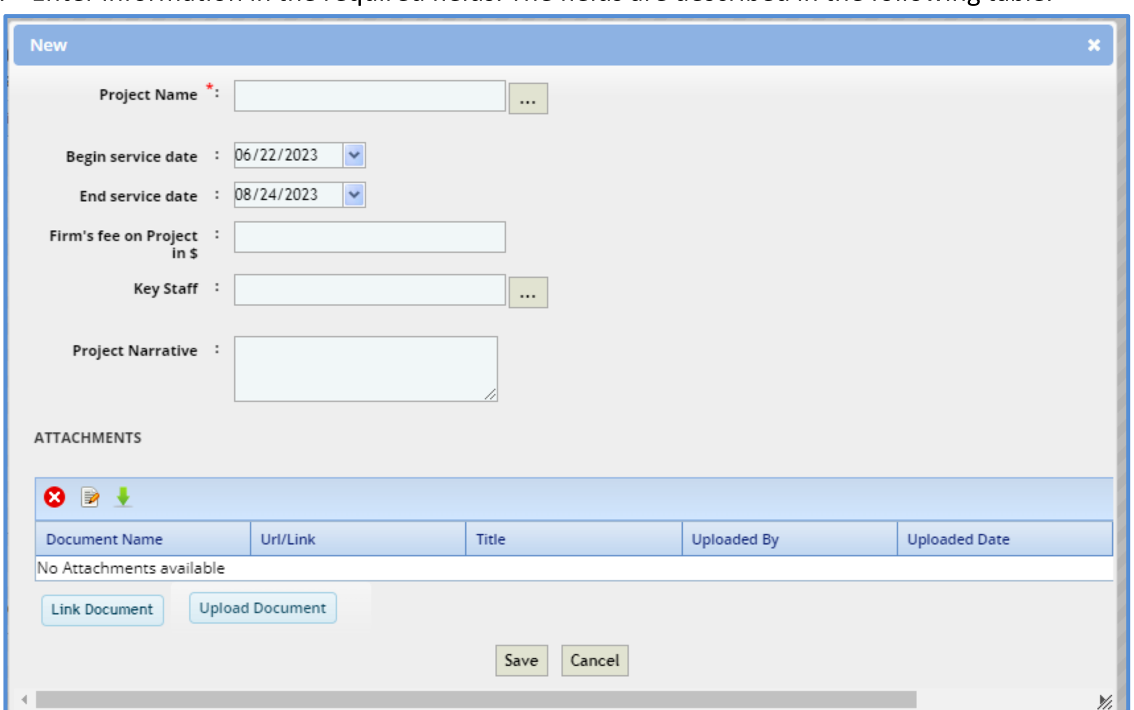
8. For factor 3, perform the following steps to add the past project details of the key staff:

   a. Click **Add**.



The **New** dialog box is displayed.

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

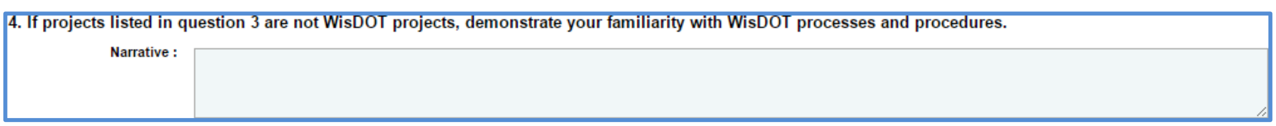


Field	Mandatory / Non-Mandatory	Description
Project Name	Mandatory	To select a project: a. Click ... . The **Select Project** dialog box is displayed listing all the past projects of the consultant firm. b. Click the required project, and then click **Select**.
Key Staff	-	To select key staff: a. Click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

c. For the **Attachments** section: unless specifically mentioned in the NOI instructions, please do **not** attach additional files (e.g. resumes, project descriptions, letters). These materials have not been requested and will not be reviewed.

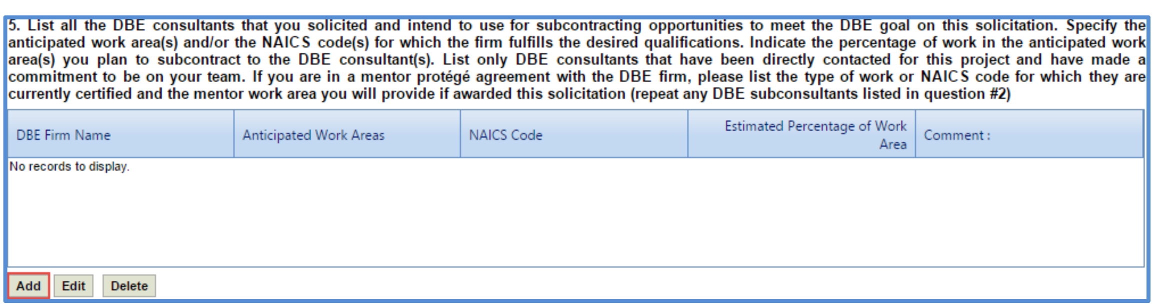
d. Click **Save**.

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



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

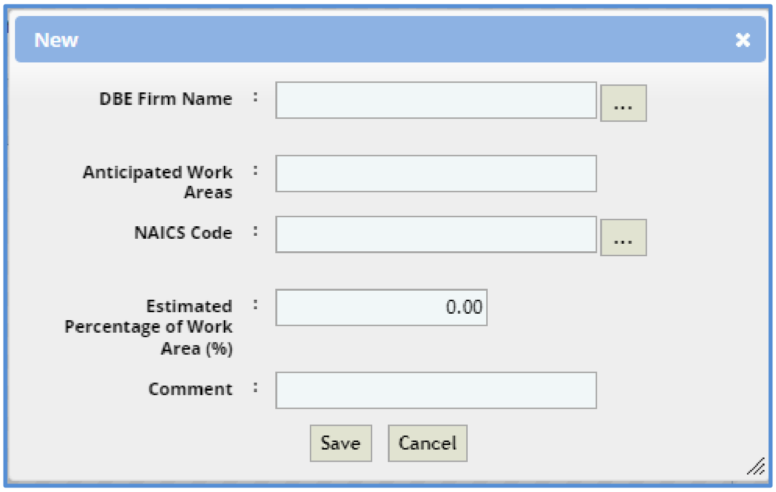
a. Click **Add**.



The **New** dialog box is displayed.

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

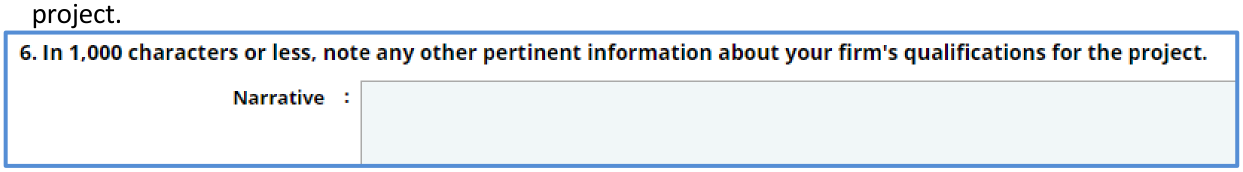
***Note**: All the fields described in the below table are non-mandatory fields.*



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

c. Click **Save**.

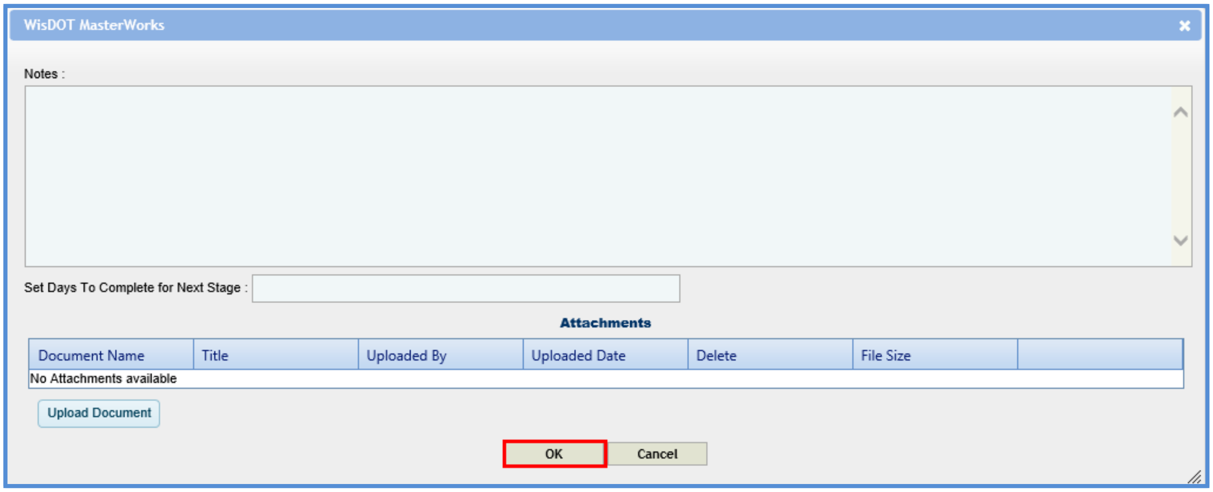
11. For factor 6, in the **Narrative** box, enter other related information about the firm's qualifications for the project.



d. Click **Save** at the top of the page.

e. In the **Workflow** group, click **Submit**.

The **WisDOT Masterworks** dialog box is displayed.



f. Enter required information and then click **OK**.
   The **NOI** is submitted to WisDOT.

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

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

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

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

5 Construction Fair

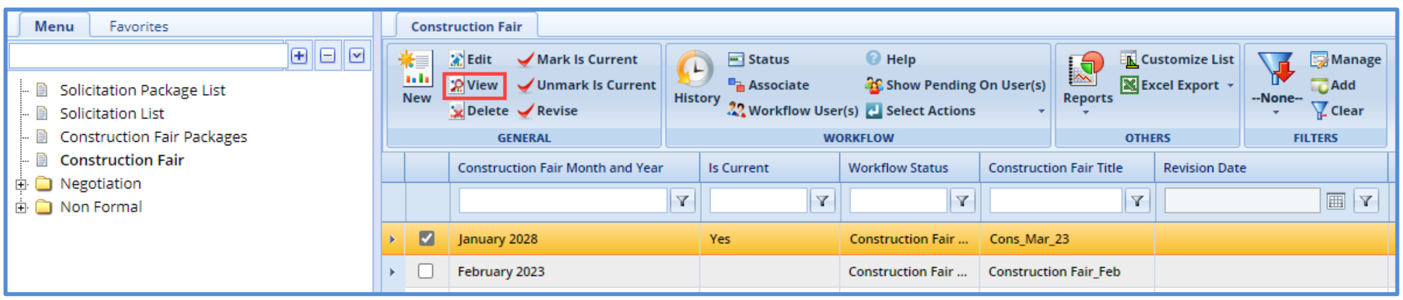
The system allows you to express your interest in a construction fair by submitting the Notice of Interest (NOI) for the current construction fair. Prior to submitting NOI, you can also raise queries regarding the construction fair and receive appropriate answers.

5.1 Viewing Construction Fair Details

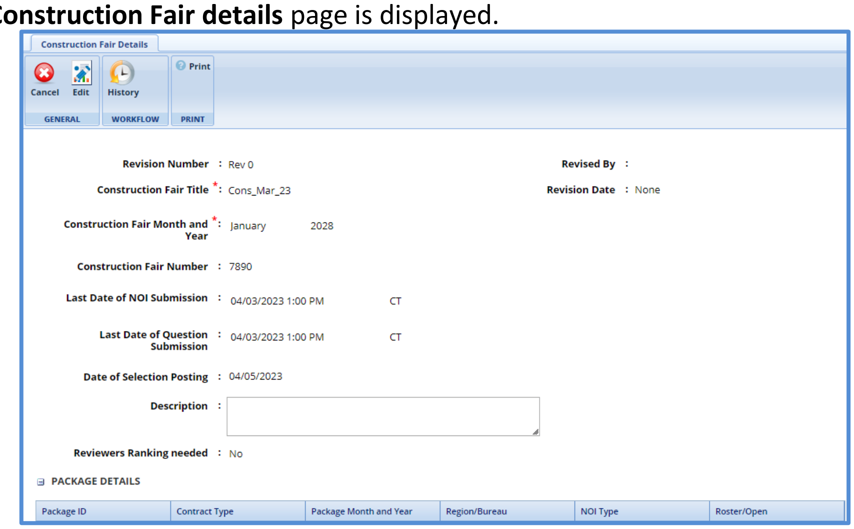
The system allows you to view the construction fair details including construction fair packages associated with the construction fair.

The procedure to view the construction fair details is described.

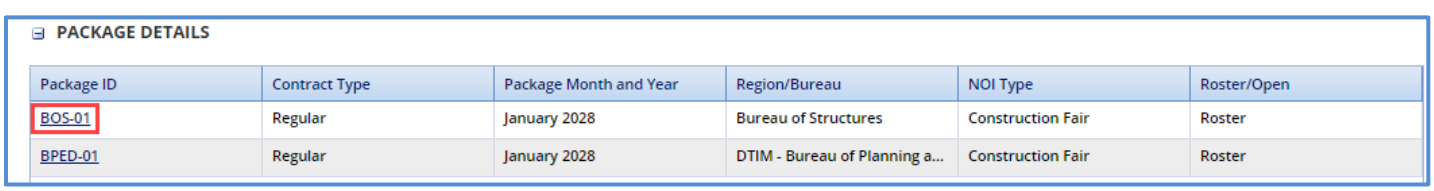
1. In the module menu, click **Solicitation**.
2. In the navigation pane, click **Construction Fair**.
   The **Construction Fair** list page is displayed.



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



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



5.2 Questions and Responses

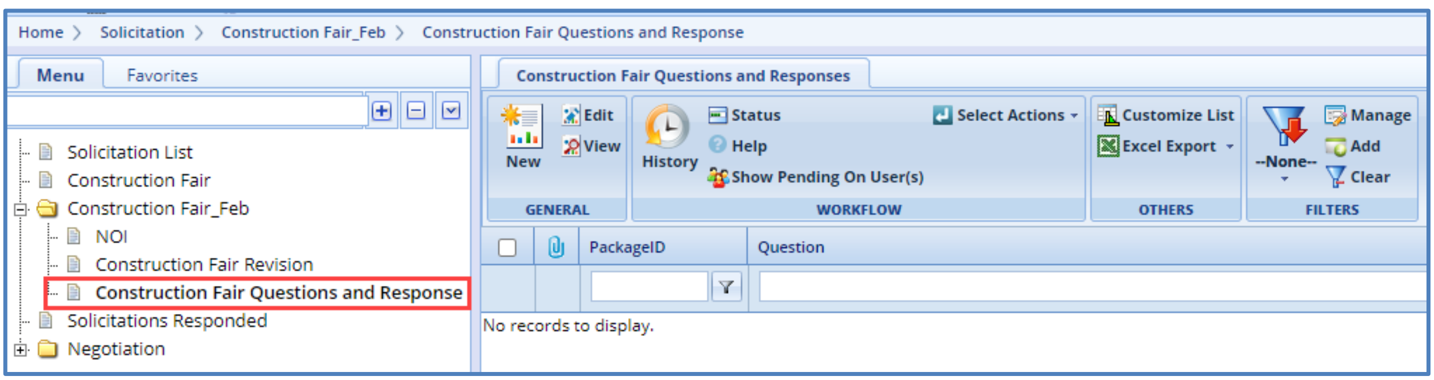
The system allows you to submit questions regarding the construction fair. The questions must be submitted before the expiry of the last date of question submission, which is defined on the **Construction Fair details** page. WisDOT will publish relevant answers to the questions submitted.

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

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

Note: *The window for submitting questions typically falls at 8 AM, please ensure your questions are submitted before this time.*

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



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

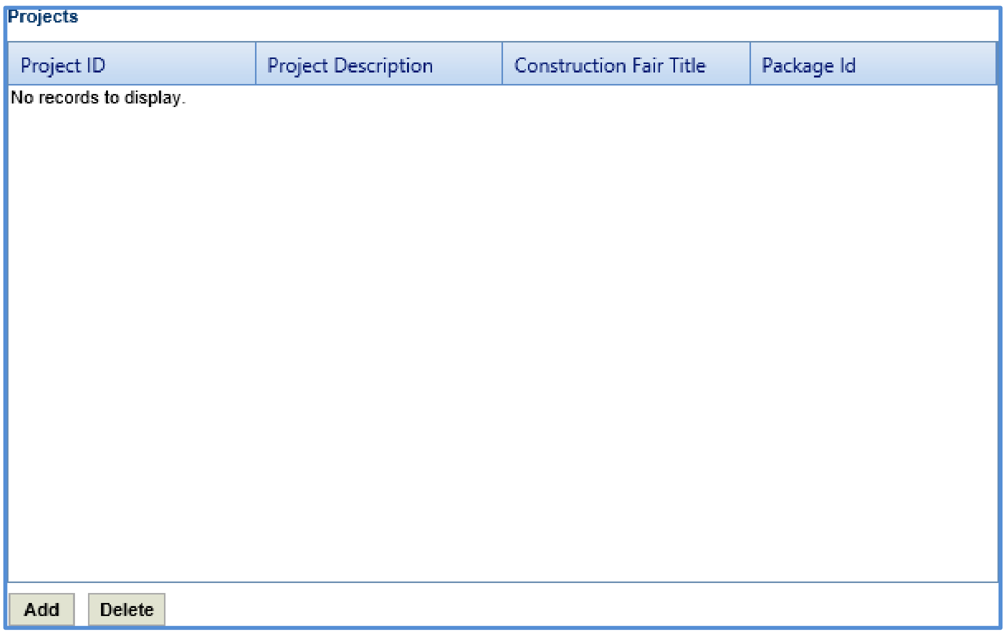
The values in the **Construction Fair Title**, **Query By**, **Consultant**, **Query Date** fields are auto-populated.

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

    a. Click .
    The **Select Package** dialog box is displayed listing all the construction packages that are associated with the construction fair.

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

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



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

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

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

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

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

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

9. For the **Attachments** section: unless specifically mentioned in the NOI instructions, please do not attach additional files (e.g. resumes, project descriptions, letters). These materials have not been requested and will not be reviewed.
10. Click **Save**. The **Construction Fair Questions and Responses** record is in the **Draft** workflow status.
11. Select the **Construction Fair Questions and Responses** record and in the **Workflow** group, click **Select Actions**.
12. Click **Submit**. The **WisDOT Masterworks** dialog box is displayed.
13. Enter required information and then click **OK**. The question is submitted to WisDOT.

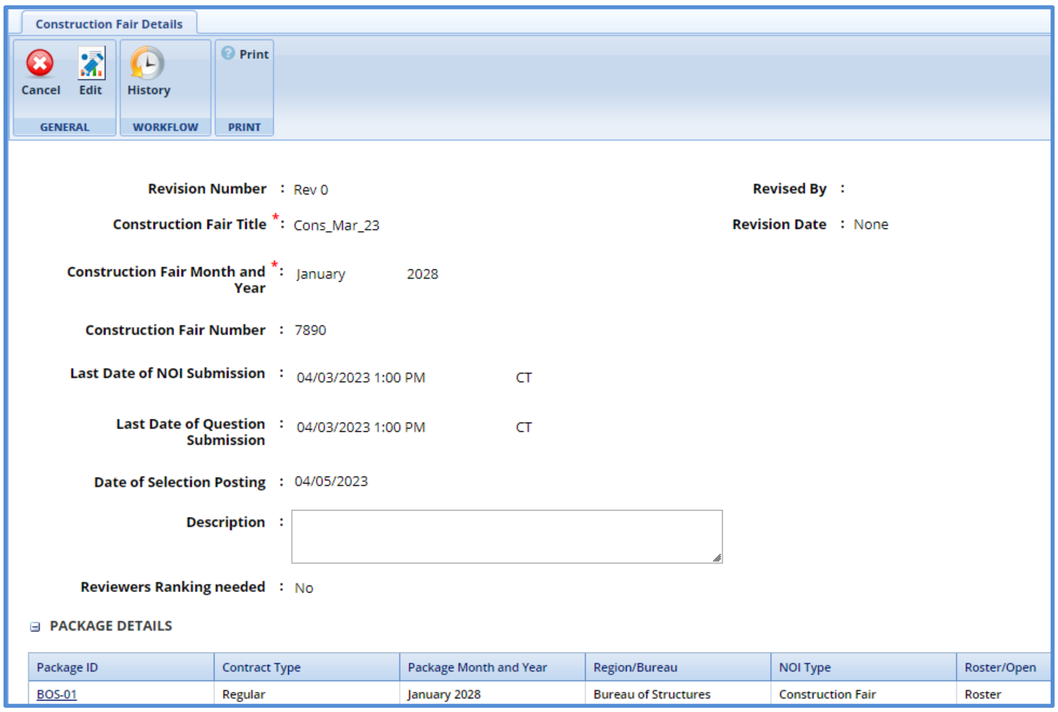
6 Construction Fair Notice of Interest (NOI)

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

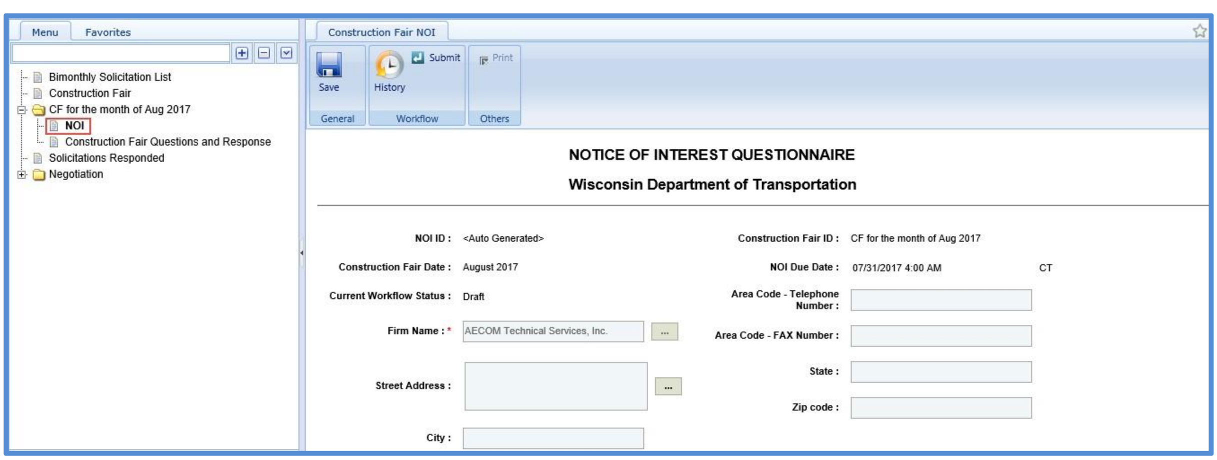
6.1 Submitting Construction Fair Notice of Interest

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

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



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



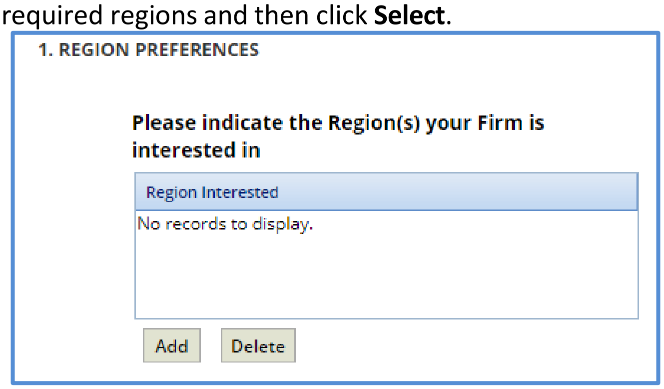
Note**: The values in the **NOI ID, Construction Fair ID, Construction Fair Date, NOI Due Date, and ***Current Workflow Status,** are auto-populated.*

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

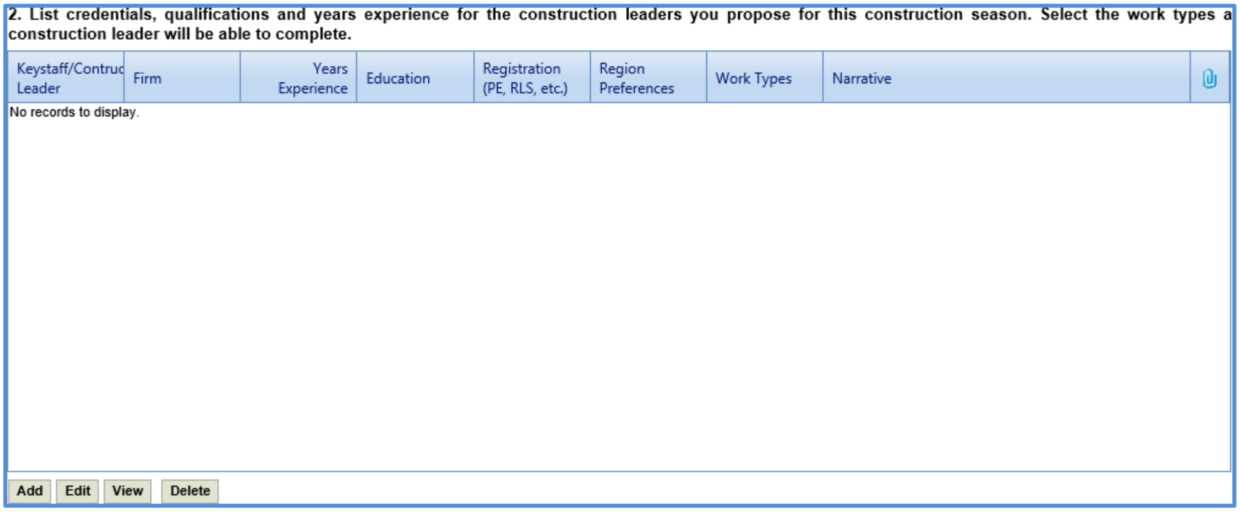
   ***Note**: All the fields described in the below table are non-mandatory fields.*

Field	Description
Firm Name	To select the appropriate firm: 1. Click ... . The **Firm Name** dialog box is displayed listing all firms. Select the required firm, then click **Select**.
Street Address	To select the firm address: 1. Click ... . 2. The **Street Address** dialog box is displayed listing addresses. Select the appropriate address, then click **Select**.
City	Enter the city of the consultant firm.
Area Code - Telephone Number	Enter the telephone number with the area code of the consultant firm.
Area Code - FAX Number	Enter the fax number with the area code of the consultant firm.
State	Enter the name of the state where the consultant firm is located.
Zip code	Enter the zip code of the consultant firm location.
Contact Name	To select the contact: 1. Click ... . 2. The **Contact Name** dialog box is displayed listing firm contacts. Select the appropriate contact, then click **Select**.
Contact Email	Enter the email of the consultant contact.
Phone Number	Enter the phone number of the consultant contact.

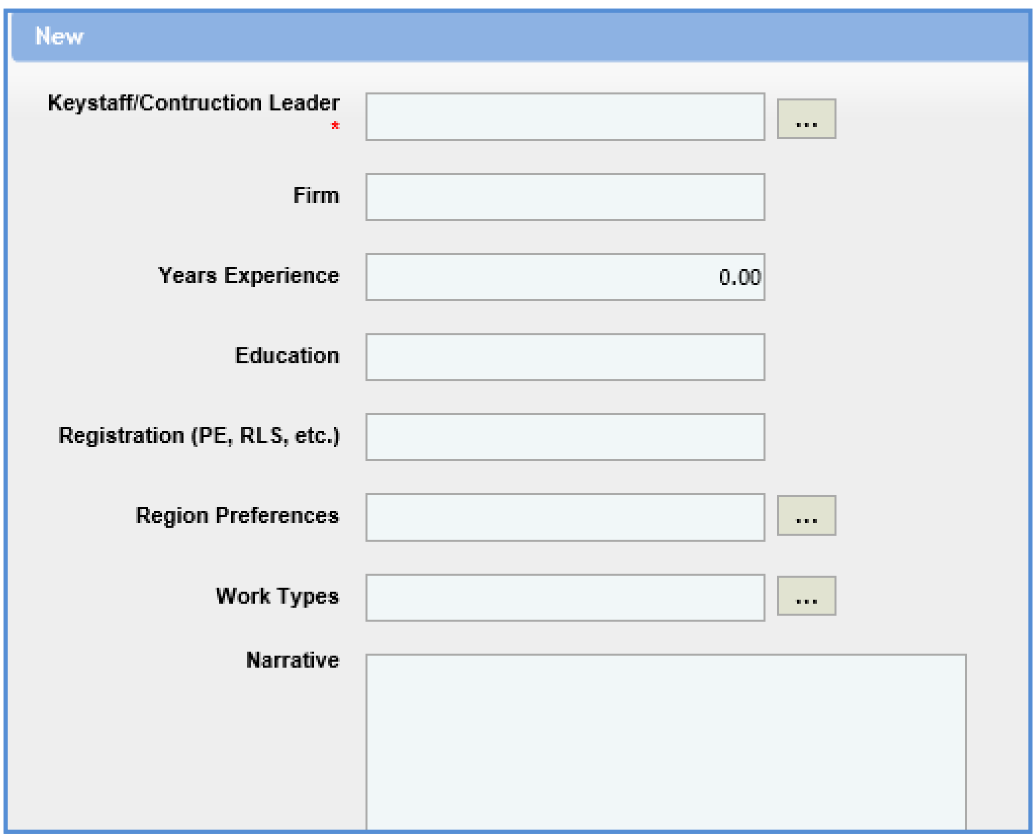
6. For factor 1, perform the following steps to add region of interest.
   a. Click **Add**. The **Region/Bureau** dialog box is displayed listing the regions.
   b. Select the required regions and then click **Select**.



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



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



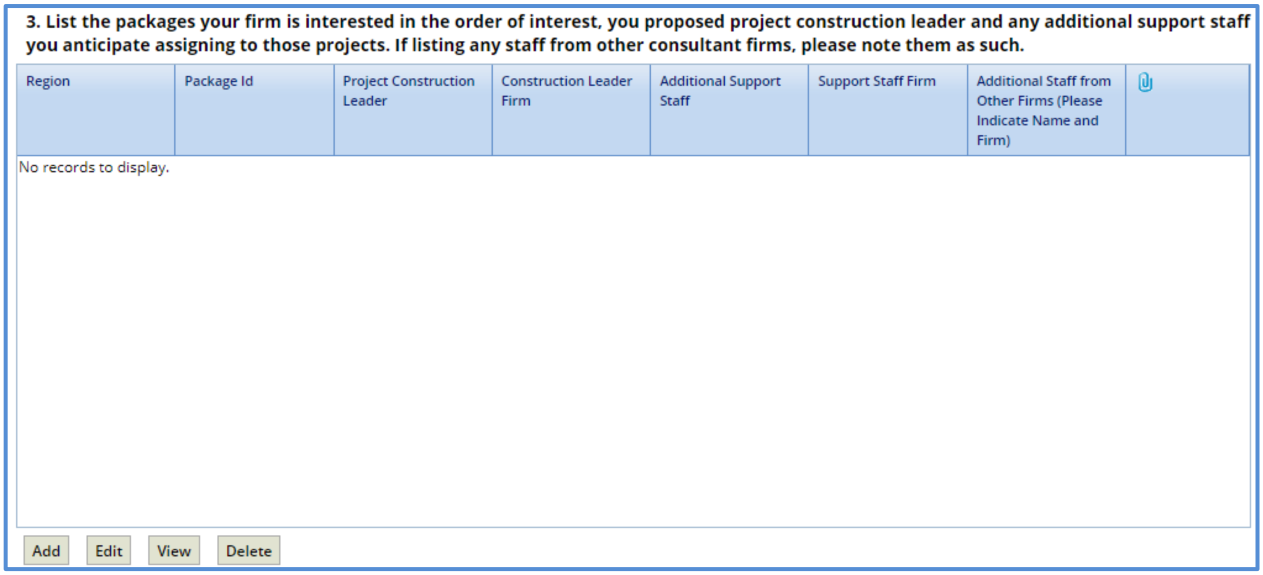
b. Enter information in the required fields. The fields are described in the following table.

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

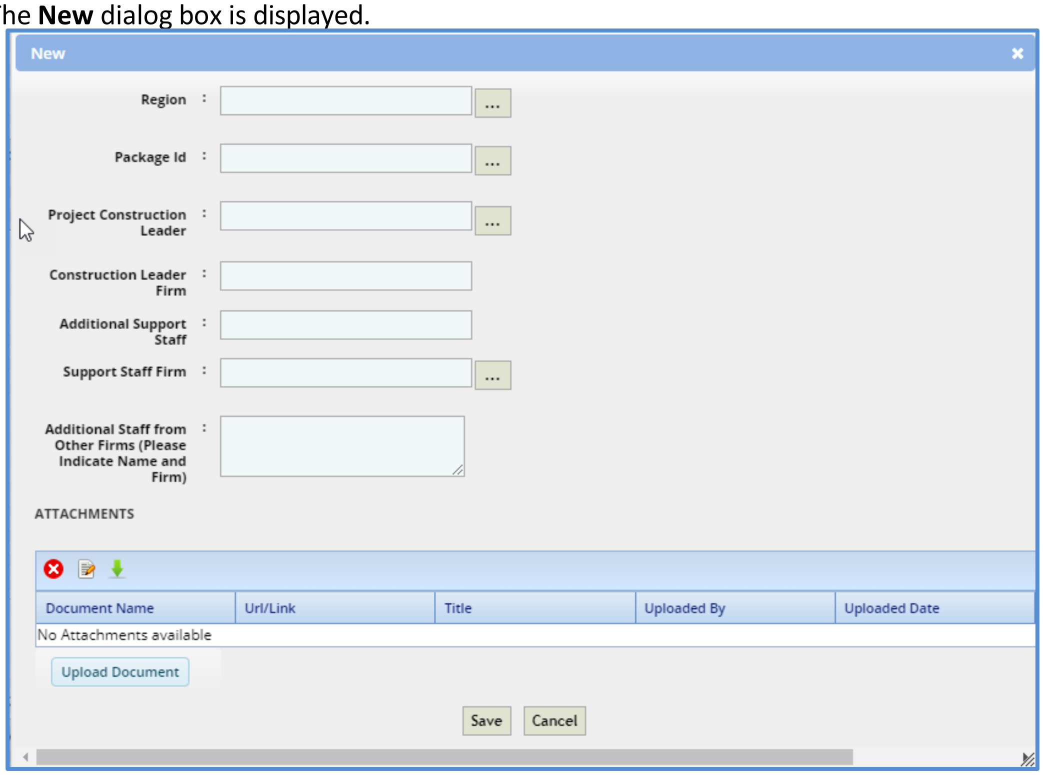
c. In the **Attachments** section, upload relevant images and files.

d. Click **Save**.

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



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



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

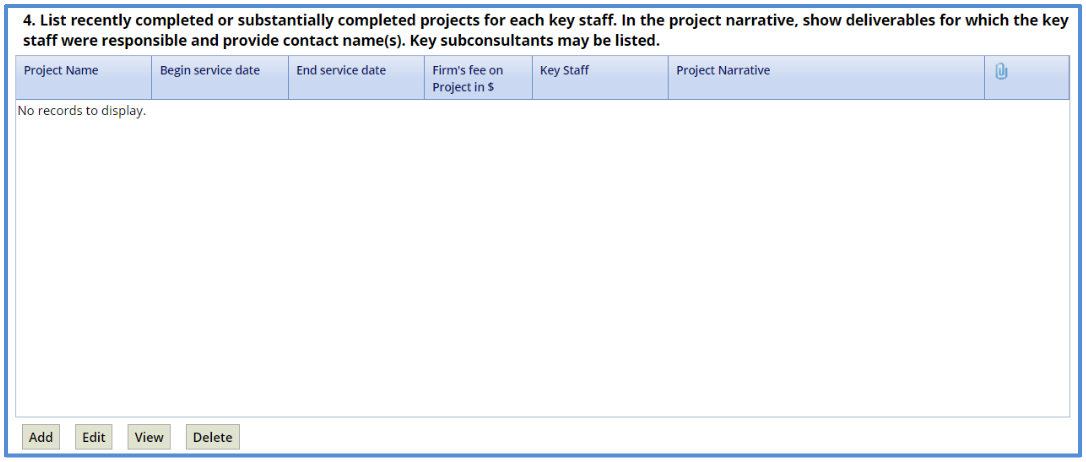
***Note**: All fields described in the below table are non-mandatory fields.*

Field	Description
Region	To select region: a. Click [...]. The **Region/Bureau** dialog box is displayed listing all the regions selected in Factor 1. b. Select the required key staff/construction leader, and then click **Select**.
	The values in the **Firm**, **Years Experience**, and **Education** fields auto-populated.
Package Id	To select interested construction fair package ID: a. Click [...]. The **Select Package** dialog box is displayed listing all the construction packages associated with the construction fair is displayed. b. Select the required package, and then click **Select**.
Project Construction Leader	To select the project construction leader for the construction fair: a. Click [...]. The **Select Key Staff** dialog box is displayed listing the construction leaders added in Factor 2. b. Select the required person as the project construction leader and then click **Select**.
Construction Leader Firm	The value in this field is auto-populated when the project construction leader is selected.
Additional Support Staff	To select additional support staff for the construction fair: a. Click [...]. The **Select Key Staff** dialog box is displayed listing all the key staff. b. Select the required person as additional support staff and then click **Select**.
Support Staff Firm	The value in this field is auto-populated when the additional support staff is selected.

c. In the **Attachments** section, upload relevant images and files.

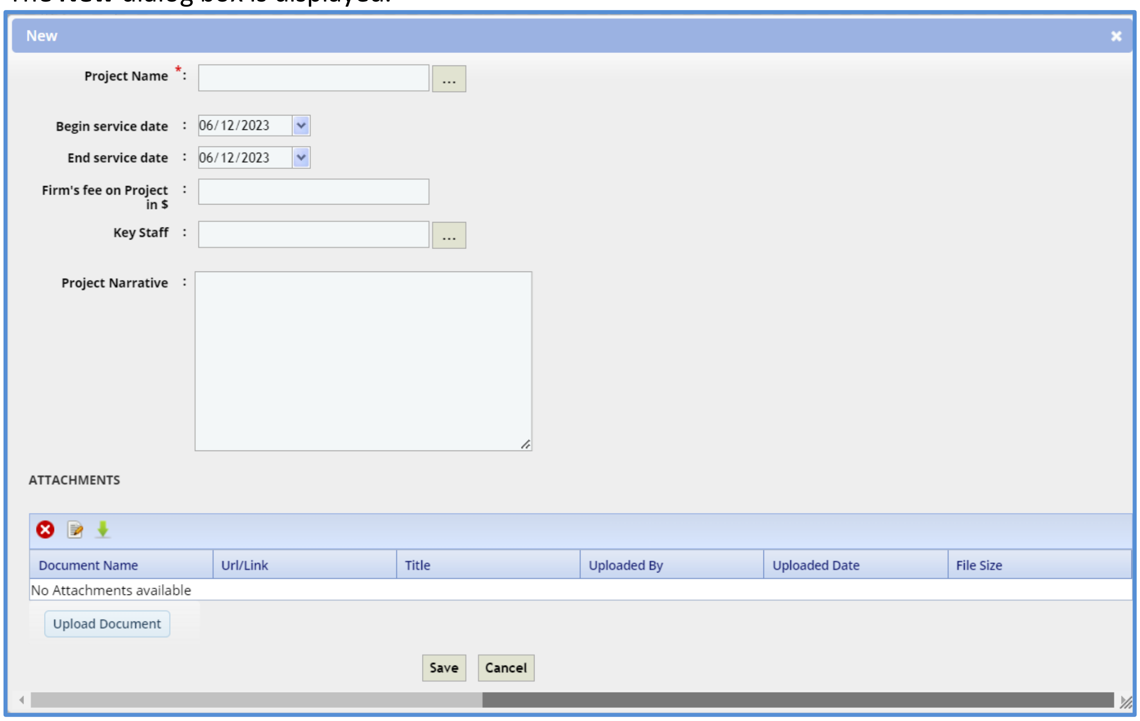
d. Click **Save**.

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



a. Click **Add**.

The **New** dialog box is displayed.



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

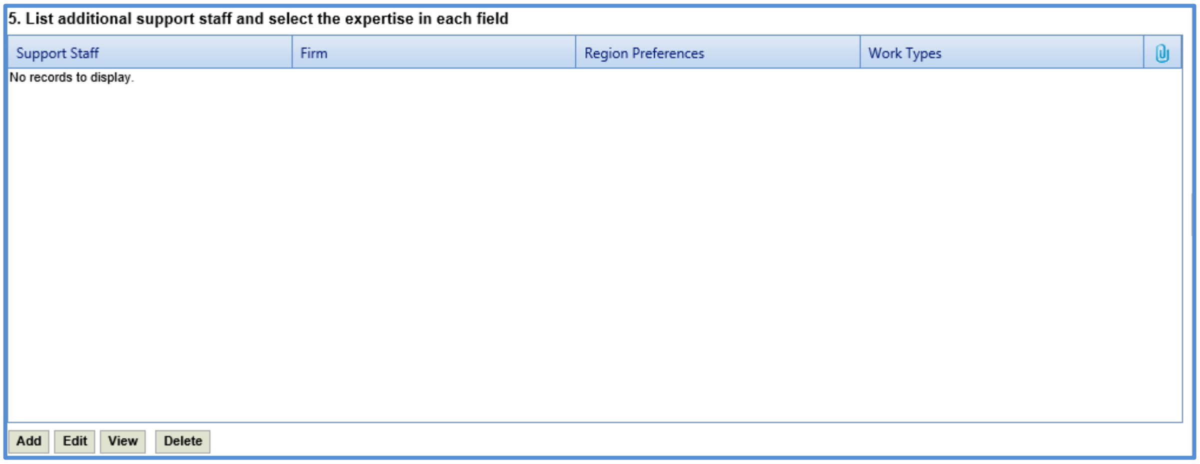
Field	Mandatory / Non-Mandatory	Description
Project Name	Mandatory	To select a project: a. Click ... . The **Select Project** dialog box is displayed listing all the past projects of the consultant firm. b. Click the required project, and then click **Select**.
Begin service date	Non-mandatory	Select the date the project began.

End service date		
Project Narrative	Non-mandatory	The project narration is auto-populated when a project is selected. You can edit the existing narration or enter a new narration about the project.

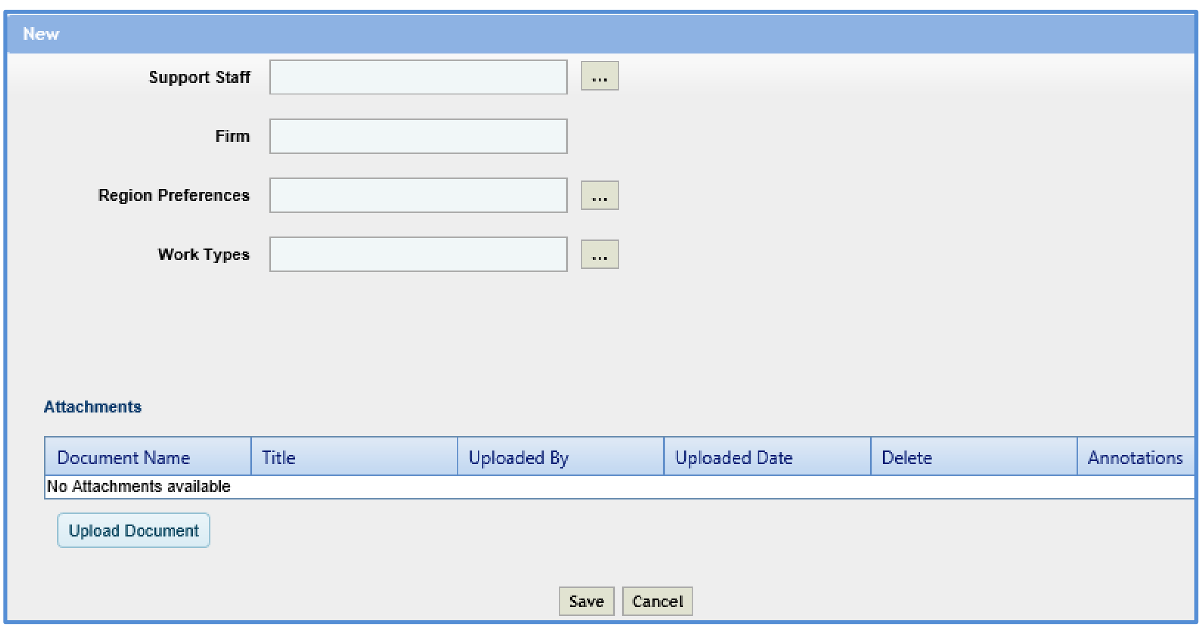
c. In the **Attachments** section, upload relevant images and files.

d. Click **Save**.

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



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



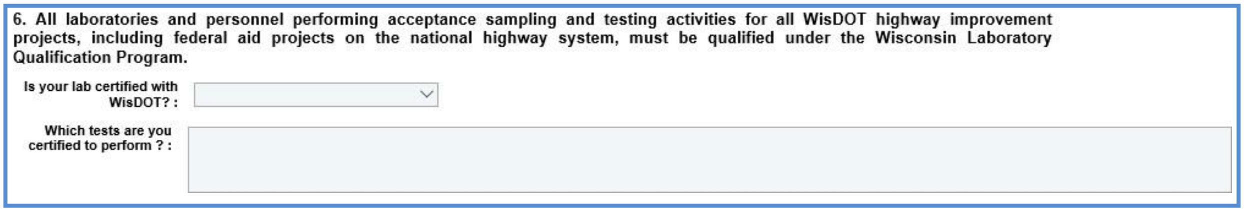
b. Enter information in the required fields. The fields are described in the following table.
***Note**: All fields in the below table are non-mandatory fields.*

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

c. In the **Attachments** section, upload relevant images and files.

d. Click **Save**.

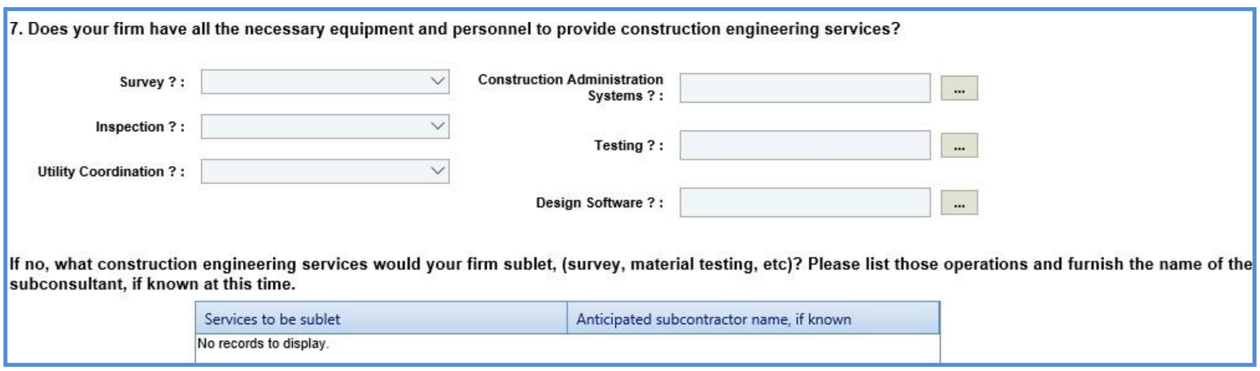
11. For factor 6, perform the following steps to record laboratory certification and testing activities related details:



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

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

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



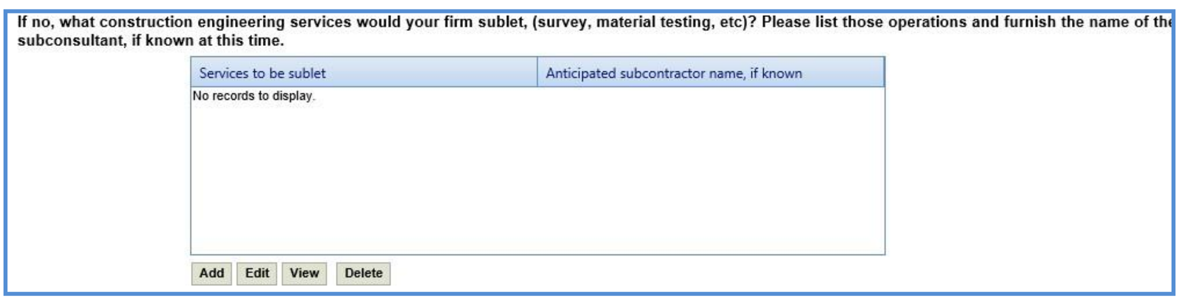
   a. Enter information in the required fields. The fields are described in the following table.

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

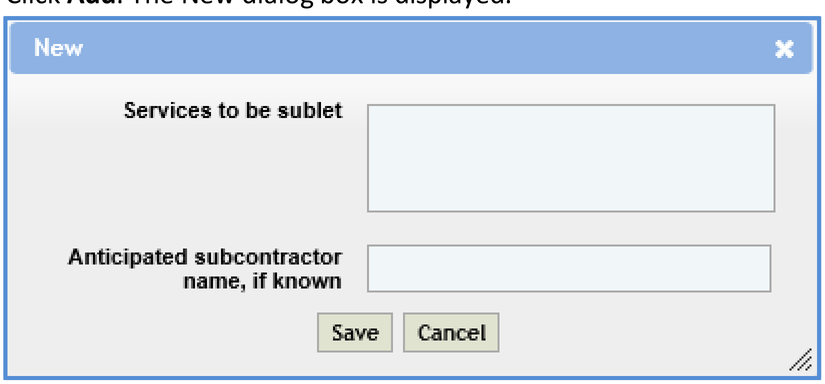
Field	Description
Survey ?	From the drop-down list, select **Yes** if all the equipment and personnel required for the survey of construction fair are available or select **No** if all the equipment and personnel required for the survey of construction fair are not available.
Construction Administration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

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

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



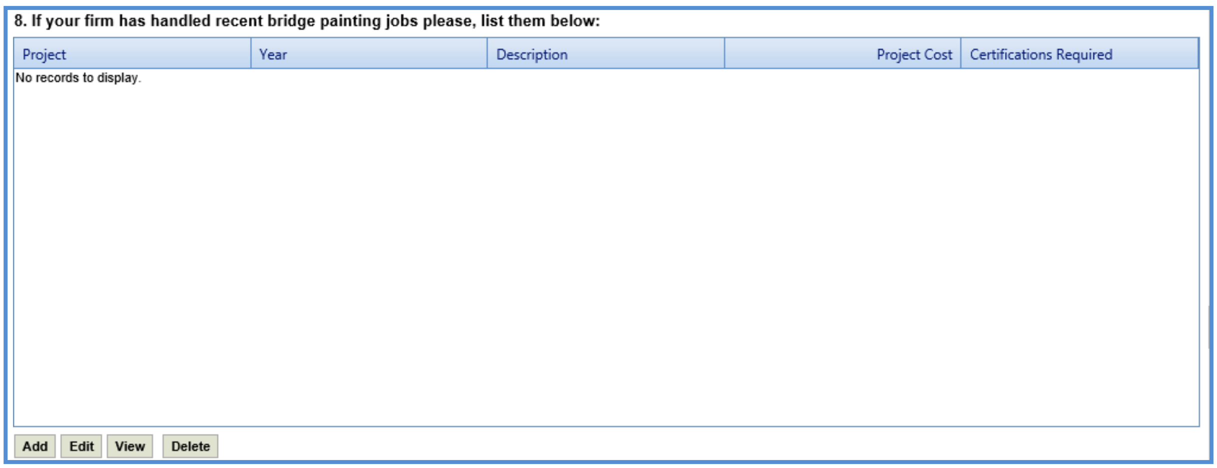
i. Click **Add**. The New dialog box is displayed.



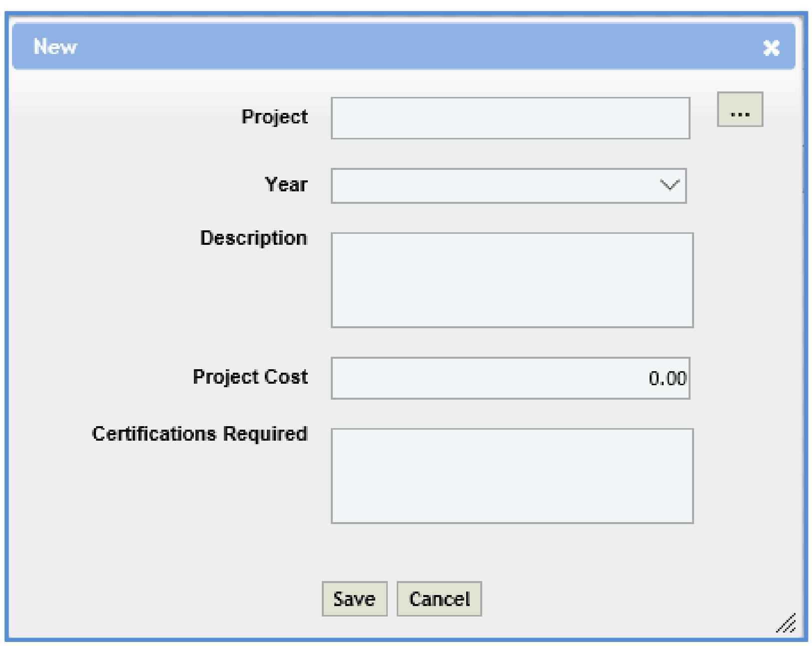
ii. Enter information in the required fields. The fields are described in the following table.
__Note__: The fields described in the below table are non-mandatory fields.

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

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



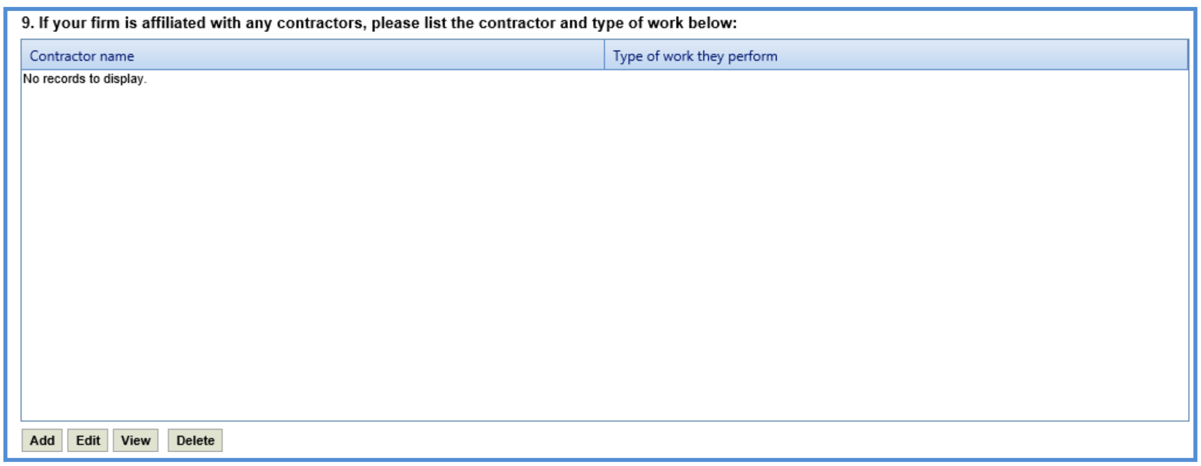
a. Click **Add**. The **New** dialog box is displayed.



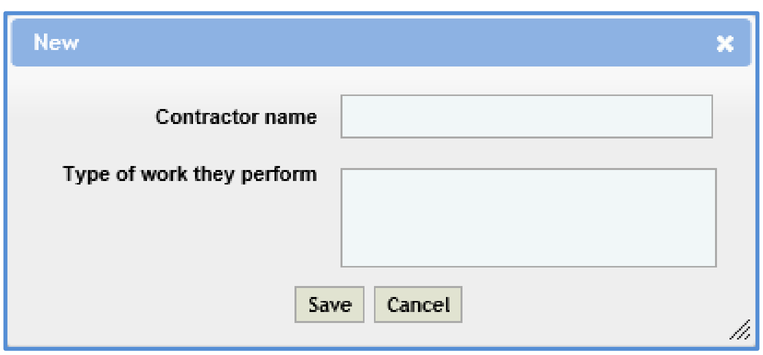
b. Enter information in the required fields. The fields are described in the following table.

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

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



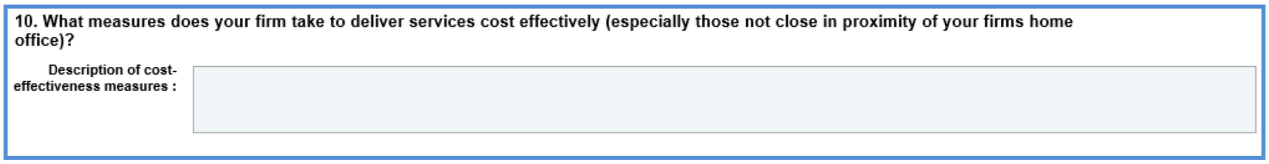
a. Click **Add**. The **New** dialog box is displayed.



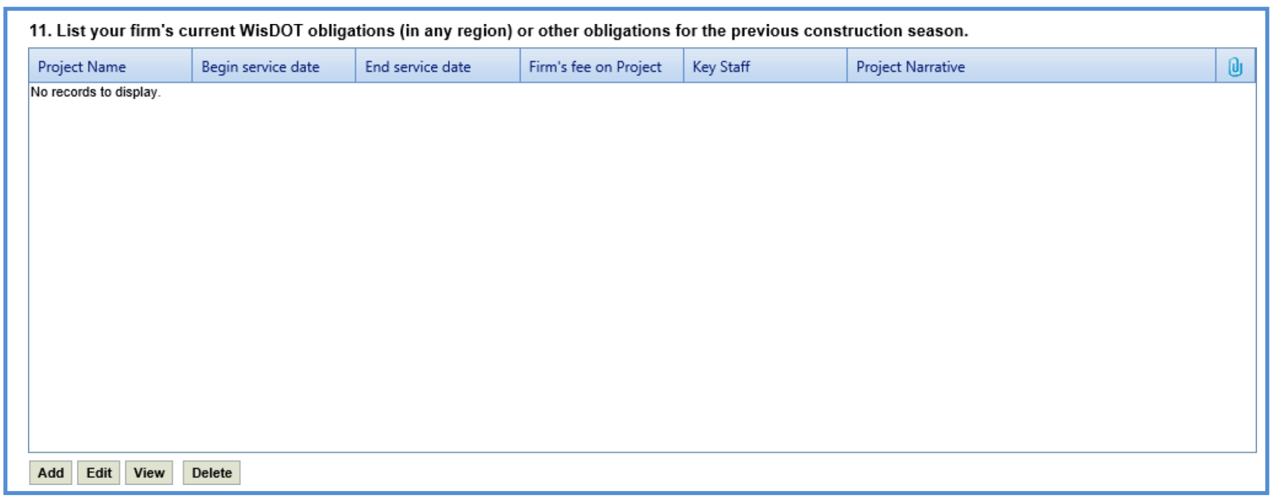
Note*: The fields described in the below table are non-mandatory fields.*

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

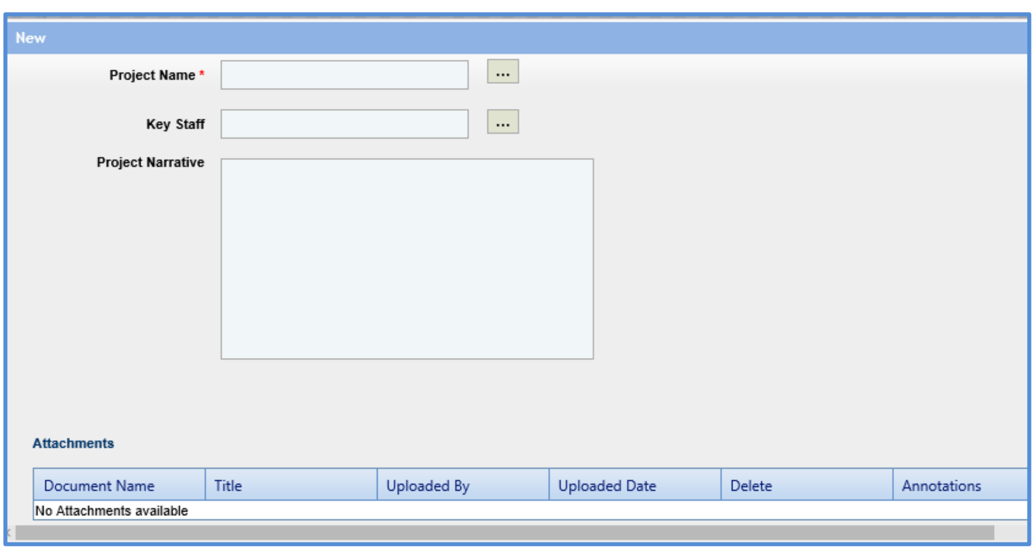
6. For factor 10, in the **Description of cost-effectiveness measures** field, enter details about the cost effective measures that will be executed by the firm for the construction fair.



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



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



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

c. In the **Attachments** section, upload relevant images and files.

d. Click **Save**.

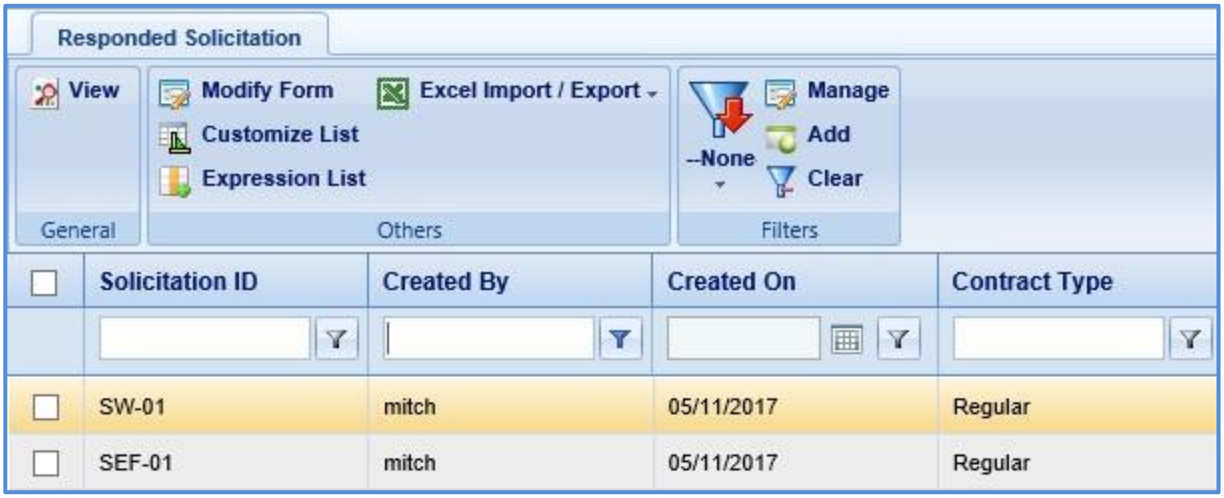
8. In the **Workflow** group, click **Submit**.
   The **WisDOT Masterworks** dialog box is displayed.
9. Enter required information and then click **OK**.
10. Optionally, if changes must be made to the submitted construction fair NOI, perform the following steps:
    Prerequisite: You can make changes to a submitted construction fair NOI only when the due date of the construction fair NOI has not expired.
    a. In the **Workflow** group, click **ReDraft**.
       The **WisDOT Masterworks** dialog box is displayed.
    b. Enter the required information and then click **OK**.
    c. Make the required changes and click **Save**.
    d. In the **Workflow** group, click **Submit**.
       The **WisDOT Masterworks** dialog box is displayed.
    e. Enter the required information and then click **OK**.
       The construction fair NOI is resubmitted to WisDOT.

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

7 Viewing Responded Solicitations

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

1. In the module menu, click **Solicitation**.
2. In the navigation pane, click **Solicitations Responded**.
   The **Responded Solicitation** list page is displayed listing all the solicitations for which the NOI is saved.



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

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

8 Negotiation

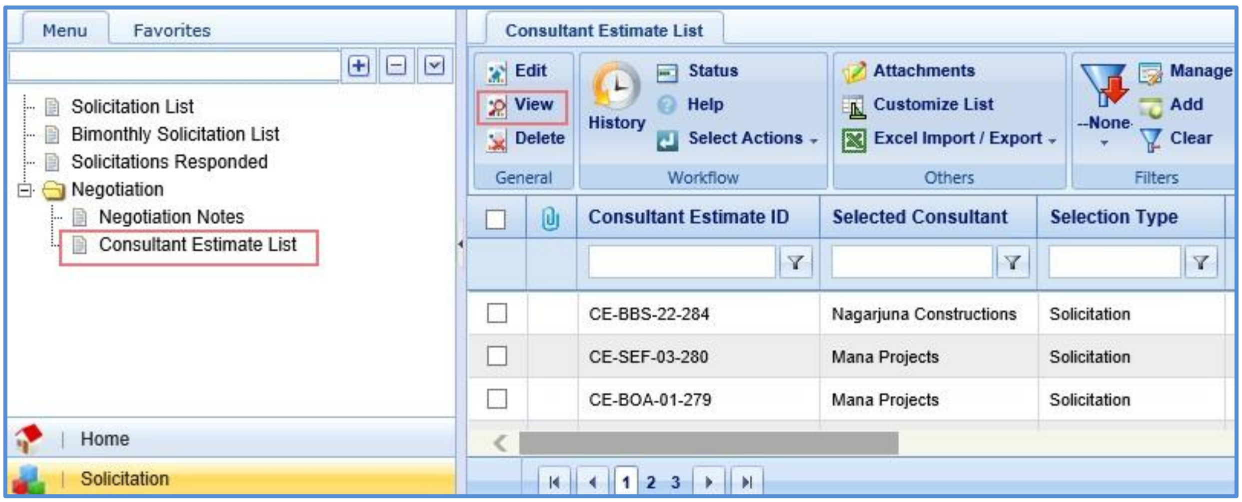
The system allows prime consultants to provide an estimate for the tasks assigned to them for negotiation purposes. If required, the prime consultants can sublet these tasks to other consultant firms and receive their estimation. Similarly, the sublet firms can further sublet the tasks to other consultant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

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

8.1 Viewing Consultant Estimate Scope

The system allows you to view the scope of tasks for which the consultant has to provide estimate.

1. In the module menu, click **Solicitation**.
2. In the navigation pane, in the **Negotiation** folder, click **Consultant Estimate List**. The **Consultant Estimate List** page is displayed.



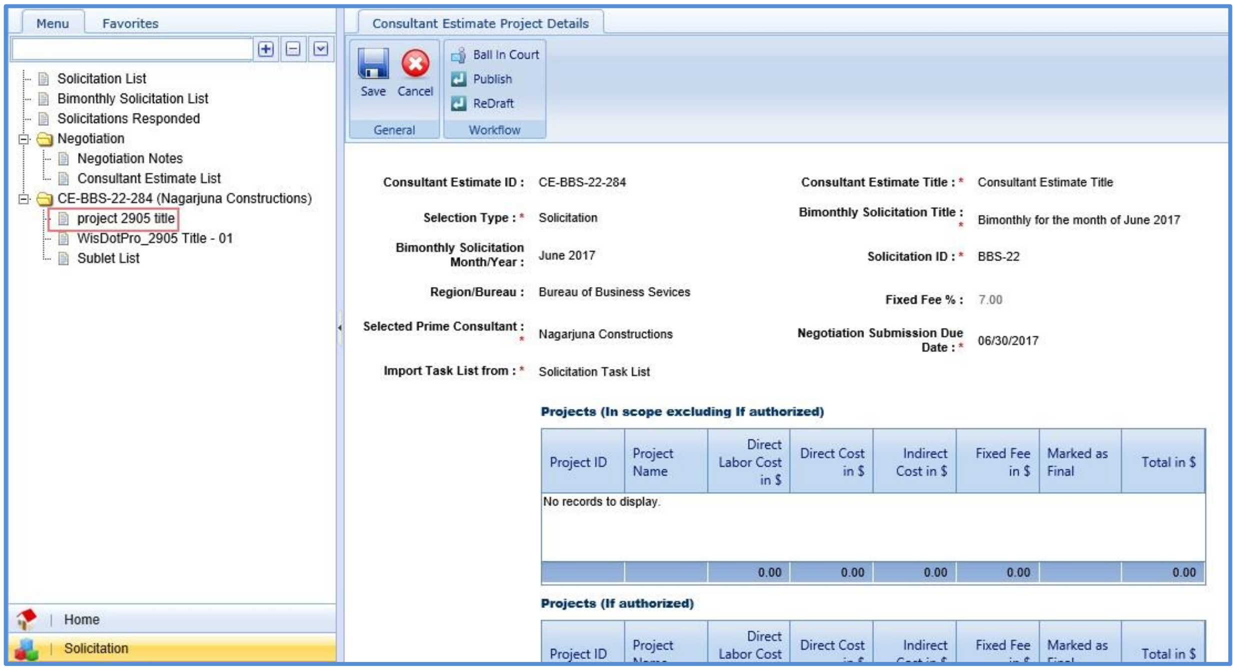
3. Select a consultant estimate record and click **View**. The **Consultant Estimate Project Details** page is displayed.

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

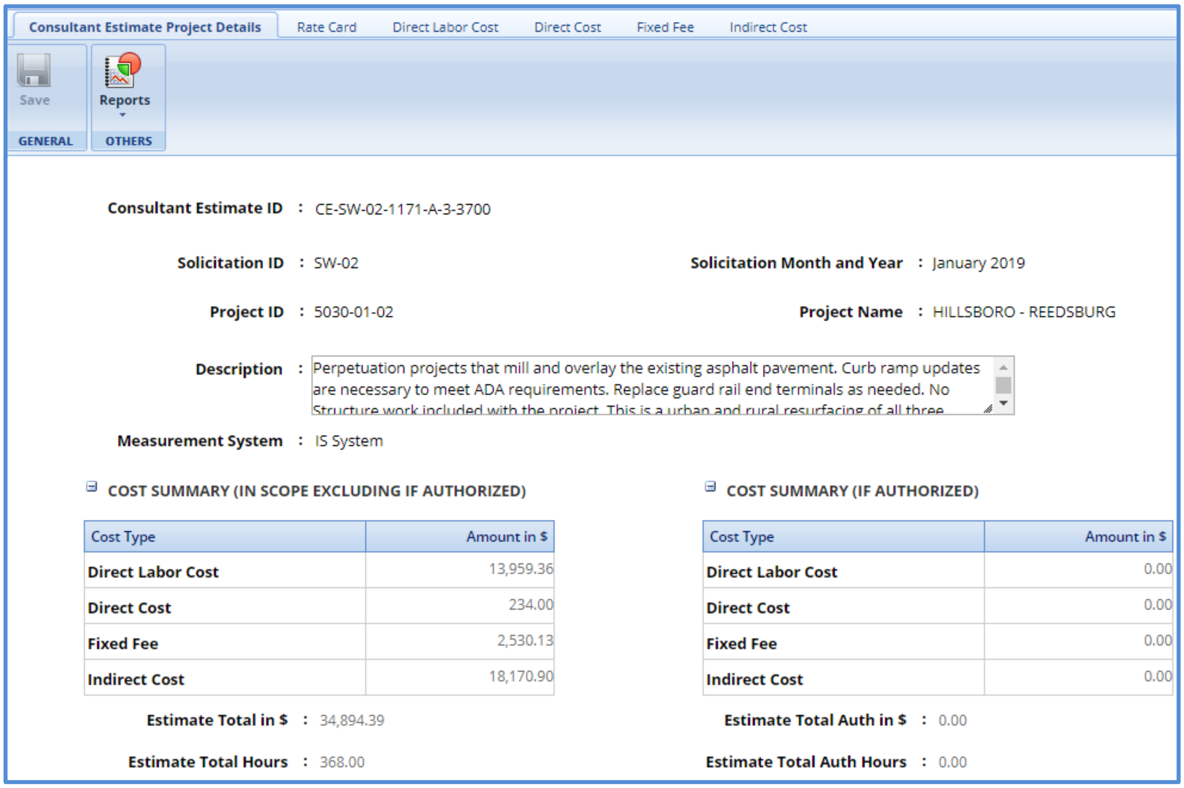
8.2 Adding Consultant Estimate

The procedure to add consultant estimate details are described.

1. In the module menu, click **Solicitation**.
2. In the navigation pane, in the **Negotiation** folder, click **Consultant Estimate List**. The **Consultant Estimate List** page is displayed.
3. Select a consultant estimate record and then click **Edit**. The **Consultant Estimate Project Details** page is displayed.



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

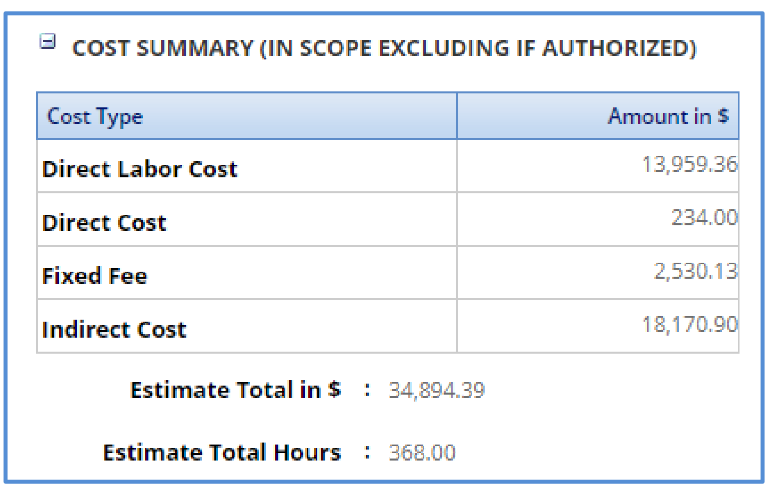


***Note**: The values in the **Consultant Estimate ID, Solicitation ID, Solicitation Month and Year, Project ID, Project Name,** and **Region/Bureau** fields are auto-populated.*

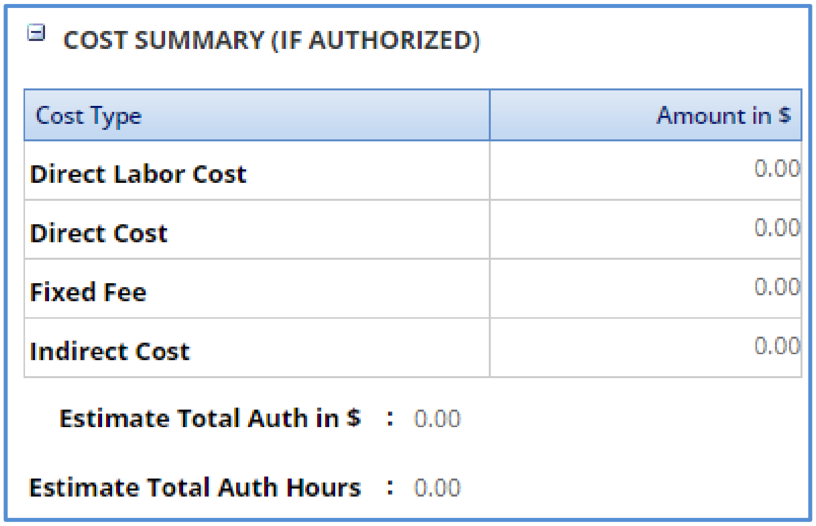
5. In the **Description** field, enter description about the consultant estimate for negotiation.

***Note**:*

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



- *The **Cost Summary (If Authorized)** section is rarely utilized by WisDOT. Please reach out to Central Office or Consultant Services if you feel that this section will be necessary.*

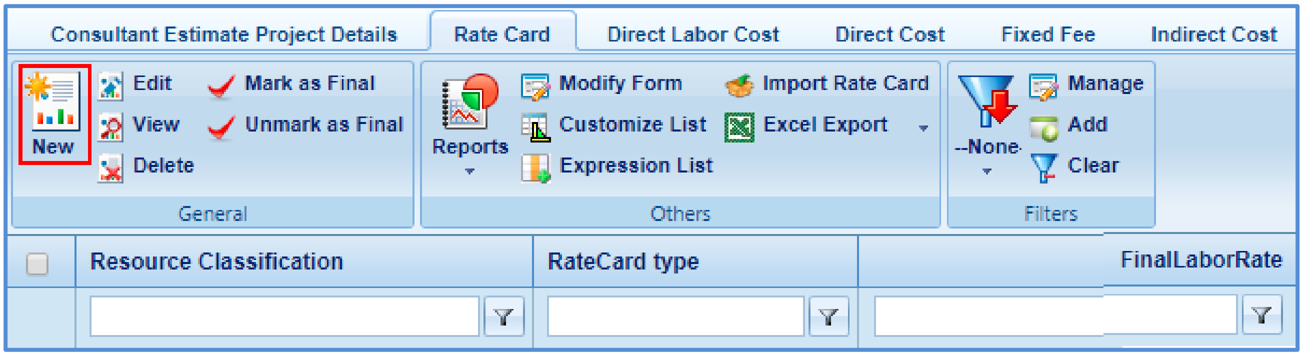


6. In the **Attachments** section, upload images and files relevant to the consultant estimate.
7. Click **Save.**

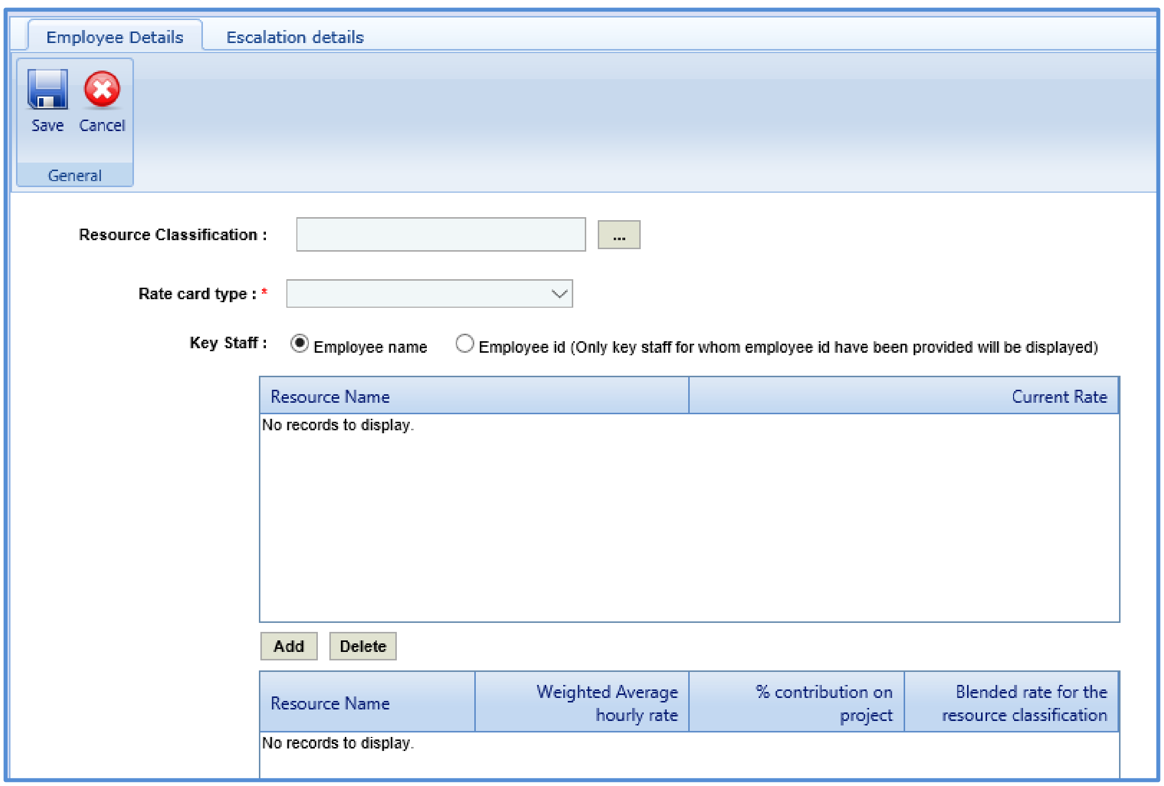
8.3 Creating a Rate Card

You can either create a new rate card or import an existing rate card. Steps to create a rate card is described below. For information on importing a rate card, refer *Importing Rate Card*. For documentation on how to do the global escalation, refer WisDOT Masterworks Rate Card Guide.

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



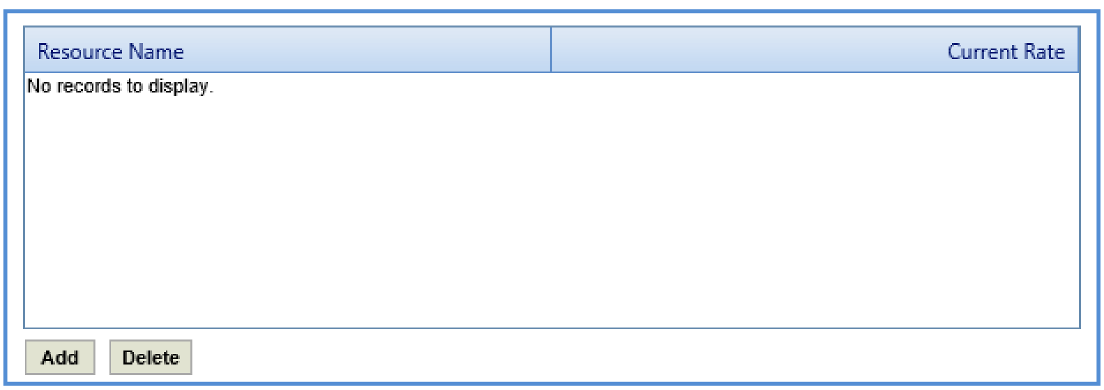
   a. Click **New**. The **Employee Details** page is displayed.



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

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

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



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

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

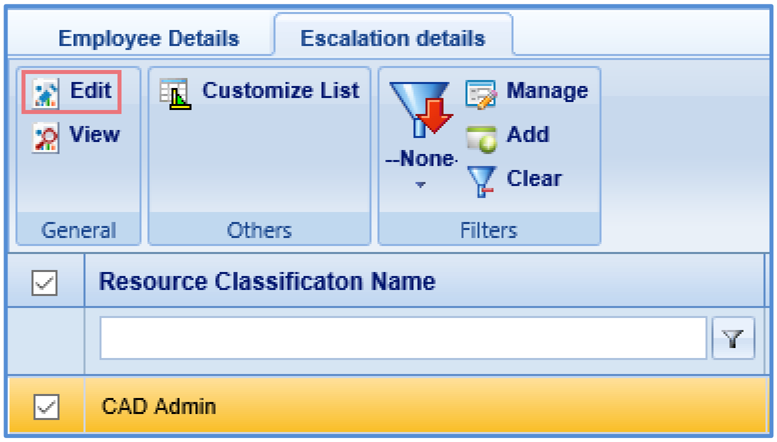
iii. Corresponding to a key staff record, click in the Current Rate column and enter the current rate of the resource.

1. *Adding Escalation Details*

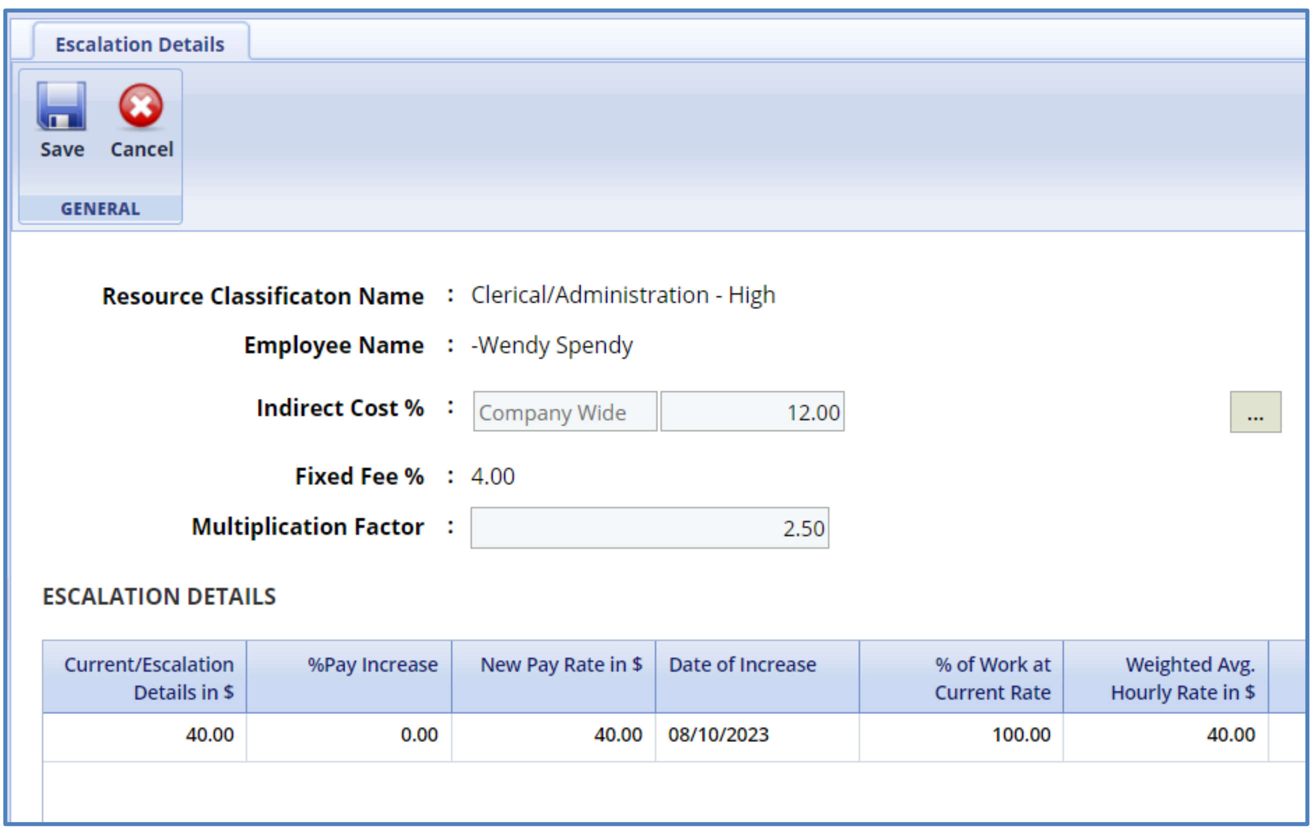
You can add escalation details for a key staff record.

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

1. Click the **Escalation details** tab. The list of key staff records added in the **Employee Details** tab is displayed.



2. Select a record and click **Edit**. The Select a key staff record for which you want to add the escalation details and click **Edit**. The **Escalation Details** page is displayed.

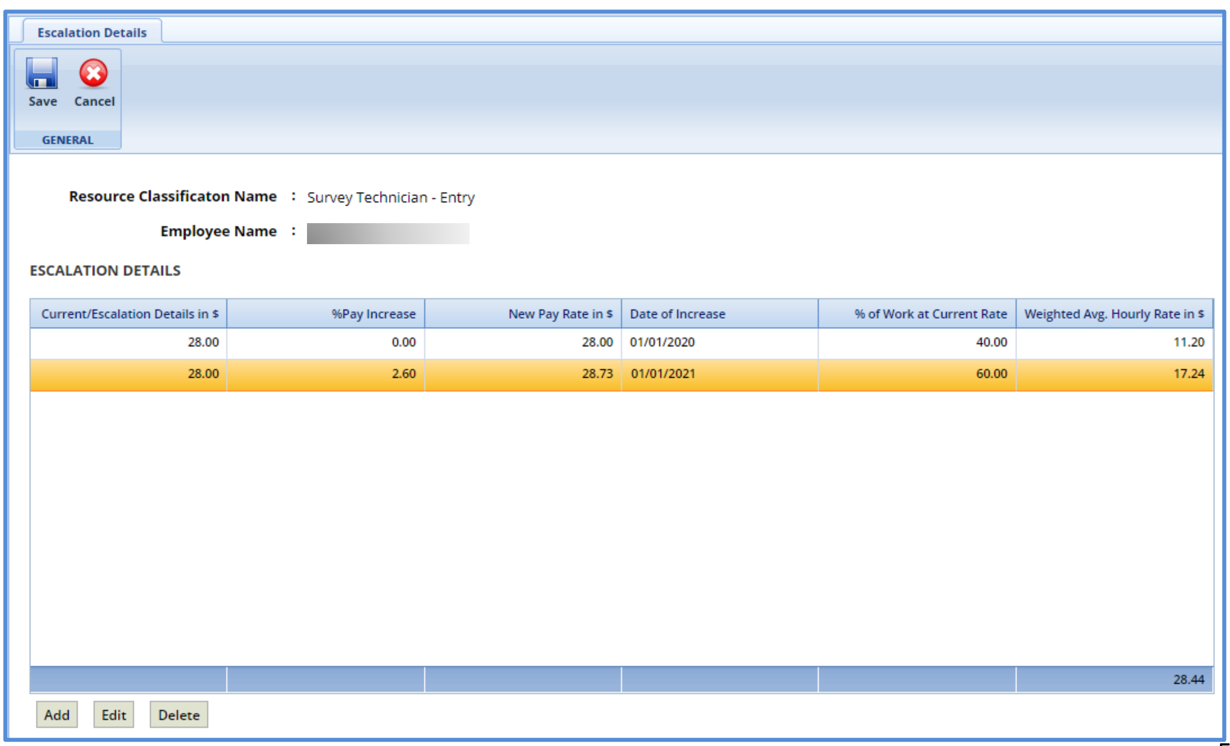


3. Enter information in the required fields. The fields are described in the following table.

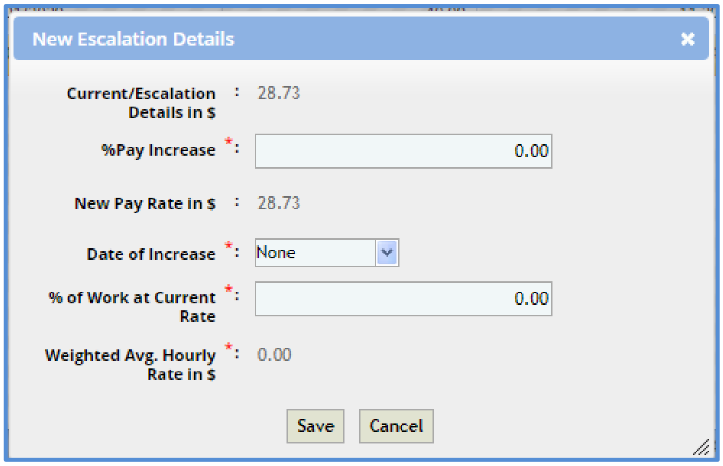
   ***Note**: All the fields described in the below table are non-mandatory fields.*

Field	Description
Resource Classification Name	Indicates the name of the resource classification of the key staff.
Employee Name	Indicates the name and employee ID of the key staff.
Indirect cost %	The field is displayed only when the **Rate Card type** is **Specific**. To select indirect cost percentage: 1. Click ... . The **Indirect Cost** dialog box is displayed listing all the indirect cost types associated with the consultant and are marked as current. 2. Select the required indirect cost and click **Select**. The percentage of the selected indirect cost is displayed in the corresponding box. **Note:** *Users can manually update the indirect cost rate if a change has recently been made – a note will appear indicating that.*
Fixed fee %	The field is displayed only when the **Rate Card type** is **Specific**. The percentage of fixed fee associated with the consultant on the Solicitation Scope of Service is auto-populated.

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



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



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

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

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

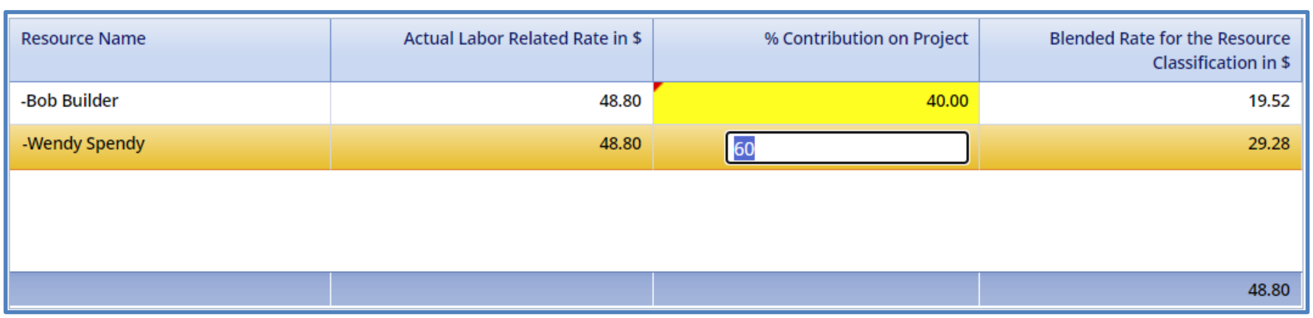
c. Click **Save**. The details are displayed in the **Escalation details** table.

Note*: Ensure that the sum of the* ***% of work at current rate*** *field for all the records together must be equal to 100%.*

5. On the **Escalation Details** page, click **Save.** The defined escalation details are displayed on the **Employee Details** tab.
6. Click the **Employee Details** tab, in the second table, the key staff record with the actual labor related rate is displayed.
7. Perform the following steps to define percentage of contribution on project and blended rate for the resource classification.

   Pre-requisite: The escalation details must be defined for the key staff record.

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



Resource Name	Actual Labor Related Rate in $	% Contribution on Project	Blended Rate for the Resource Classification in $
-Bob Builder	48.80	40.00	19.52
-Wendy Spendy	48.80	60	29.28
			48.80

   b. To edit percent contribution, which will automatically calculate the blended rate, double click the cell record you wish to edit.

   c. Alternatively, click **Edit**. The **Edit** dialog box is displayed.

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

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

Field	Description
Resource Name	The name of the resource is auto-populated.
Weighted Average Hourly Rate in $	The weighted average hourly rate is auto-populated.
% Contribution on project	Enter the percentage of contribution towards project by the selected key staff.
Blended Rate for the Resource Classification	The blended rate for resource classification is auto-calculated and displayed. The auto-calculation is based on the values defined in the **Actual labor related rate** and **% contribution on project** fields.

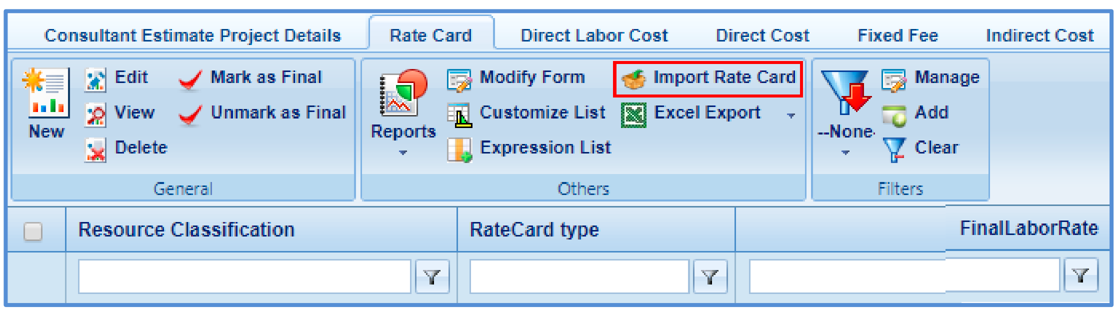
e. Click **Save**.

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

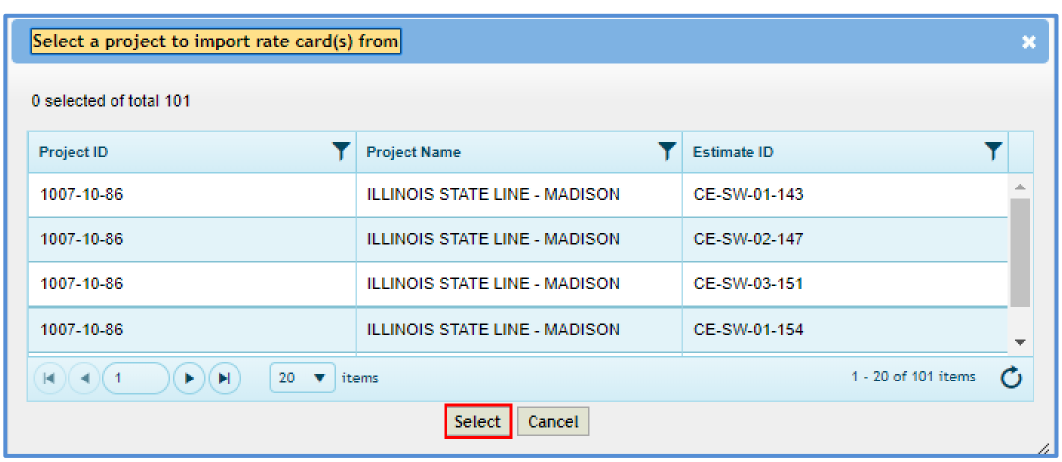
8. On the **Employee Details** tab, click **Save**.

2. *Importing Rate Card*

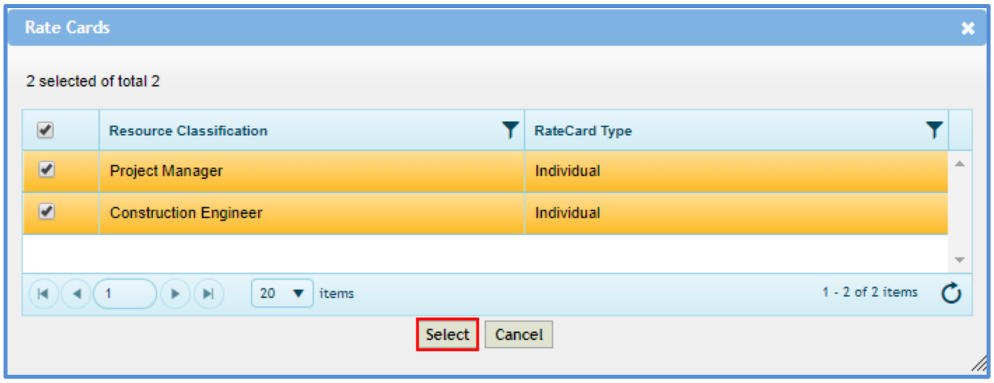
1. On the **Rate Card** page, in the **Others** group, click **Import Rate Card**.



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



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



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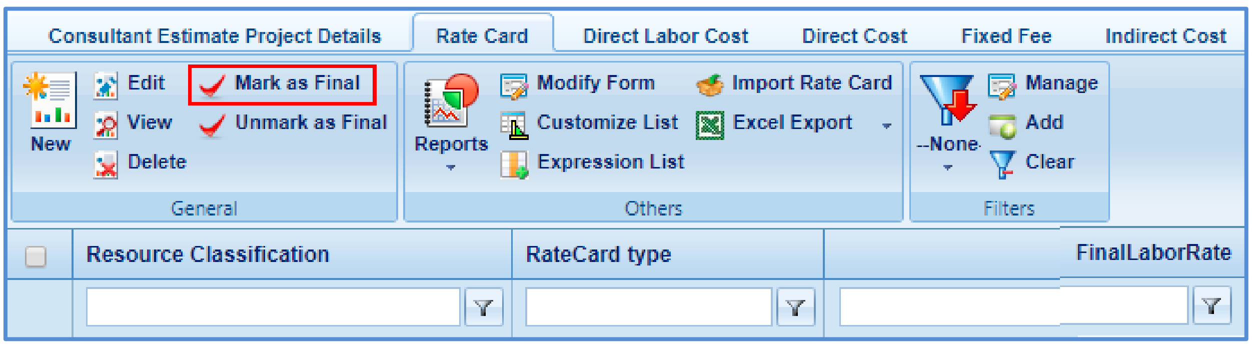
3. *Mark as Final*

1. To mark a rate card as final, on the **Rate Card** page, select an appropriate rate card record and click **Mark as Final**. A message to confirm the marking is displayed.



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

Note:

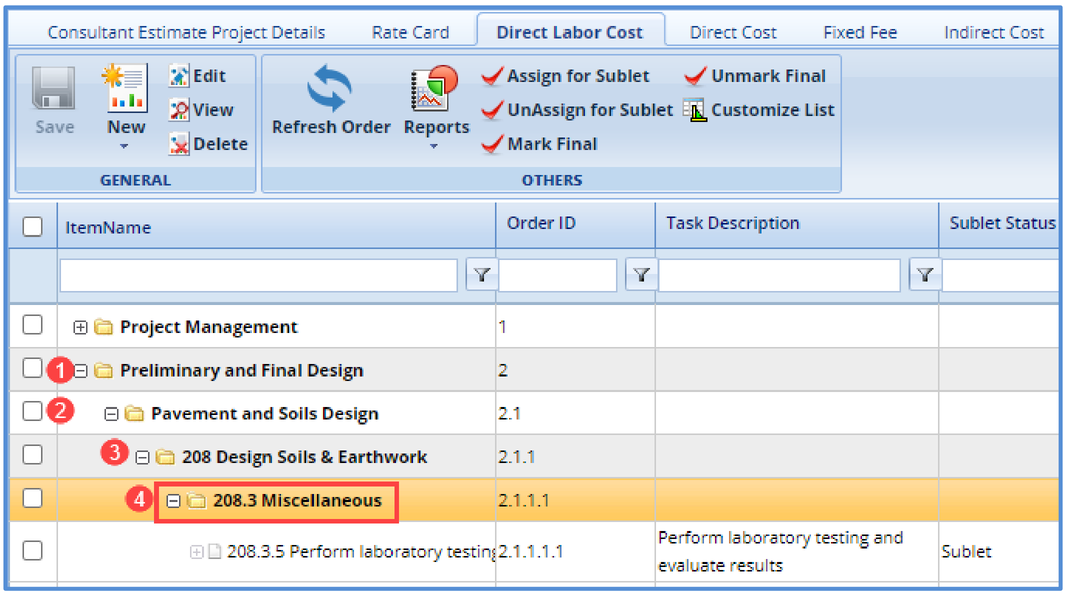
- *Multiple rate card records can be marked as final.*
- *To unmark a marked final record, click the rate card record marked as final.*

8.4 Adding Direct Labor Cost Task

1. Click the **Direct Labor Cost** tab**.** The tasks that are associated with the solicitation and marked **In Scope** as **Yes** are displayed. In this tab, you can perform the following:

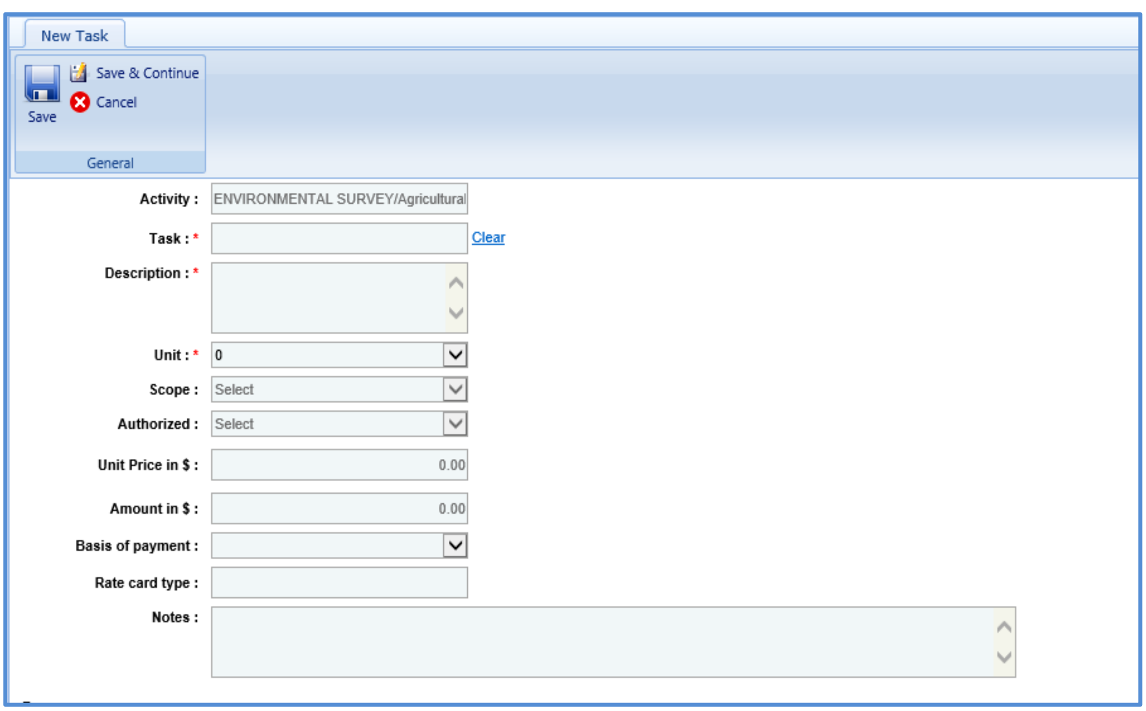
   - Define basis of payment, rate card type, and add resources for the existing tasks that are displayed. For more information to define the basis of payment, rate card type, and add resources for existing tasks.
   - If required, additional direct labor cost tasks and additional activity folders can be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

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



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

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

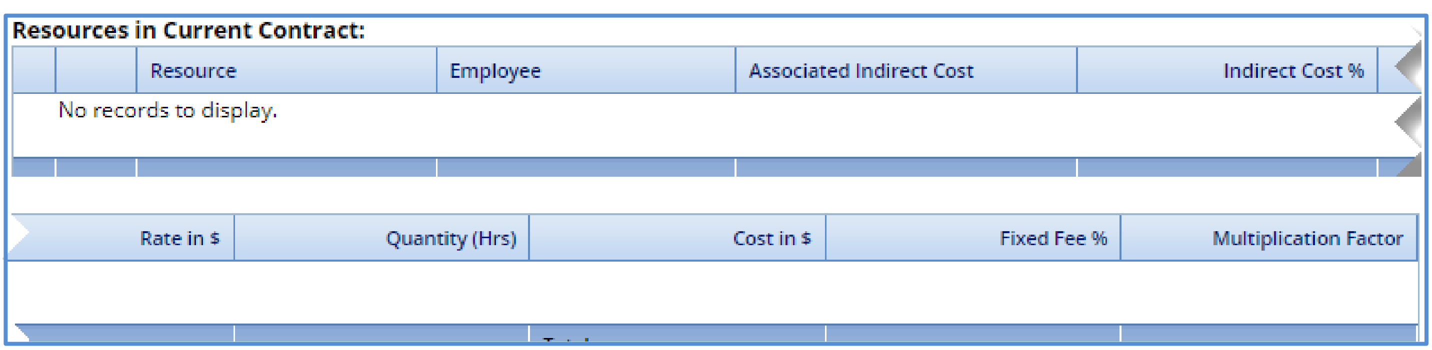


b. Provide information in the required fields. The fields in the section are described in the following table:

Field	Mandatory / Non-mandatory	Description
Task	Mandatory	Enter a name for the task.
Activity	-	The name of the selected activity folder in which the task is being added is auto-populated.
Description	Mandatory	Enter description about the task.
Unit	Mandatory	From the drop-down list, select the unit of measurement for the task.
Scope	-	This is auto-populated based on the root folder to which the task is added. It indicates whether the task is marked as in scope or not.
Unit Price in $	-	The value in this field is auto-calculated and displayed from the **Resources** section.
Amount in $	-	The value in this field is auto-calculated and displayed from the **Resources** section.
Basis of Payment	Mandatory	From the drop-down list, select the required basis of payment. The drop-down lists all the basis of payment associated with the solicitation.
Rate Card Type	-	The rate card type is auto-populated based on the selected basis of payment.
Notes	Non-mandatory	Enter notes about the task.

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

Pre-requisite: A rate card with all the relevant details and key staff associated must be marked final.



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

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

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

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

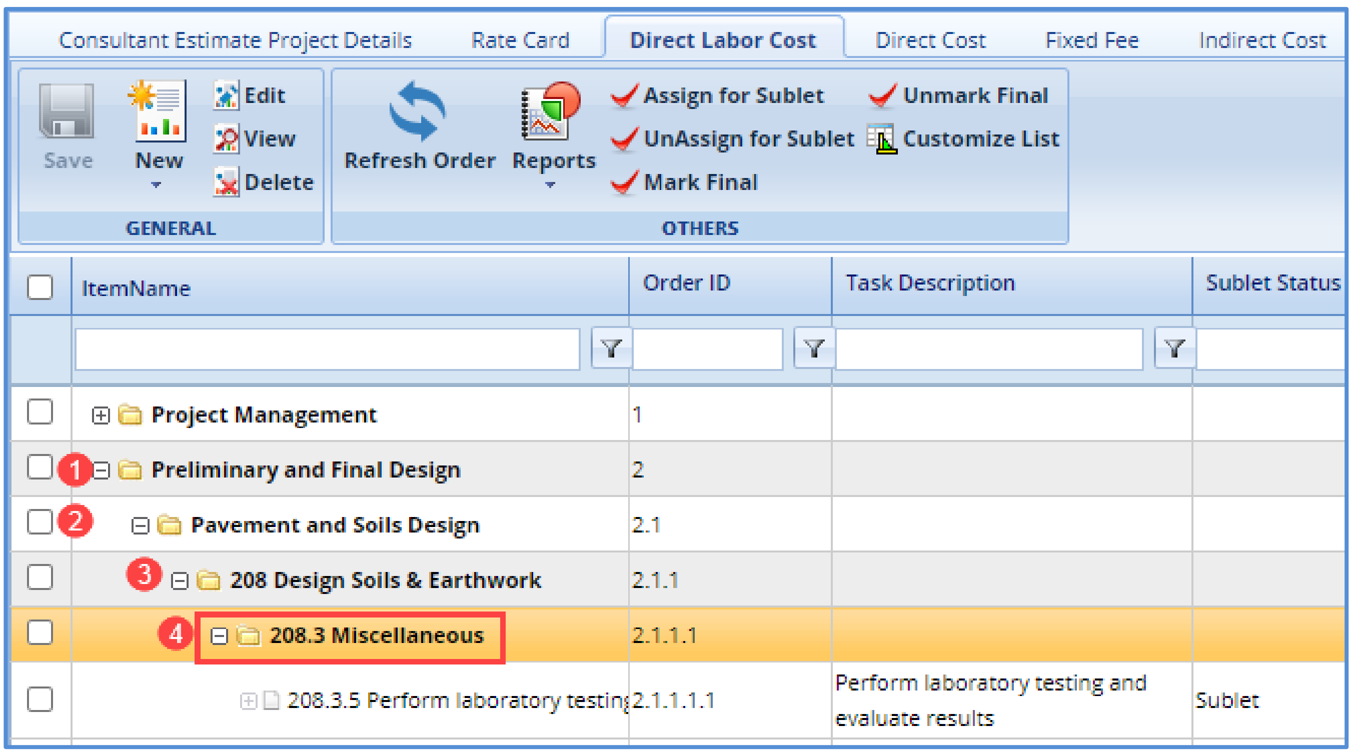
v. Click in the **Quantity** column to enter the number of hours required by the resource to complete the task. The total quantity of all the resources is auto-calculated and displayed in the column. ***Note:*** *The* ***Cost in $*** *for each resource is auto-calculated and displayed in the* ***Cost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

d. In the next section, upload images and files relevant to the task.

e. Click **Save**.

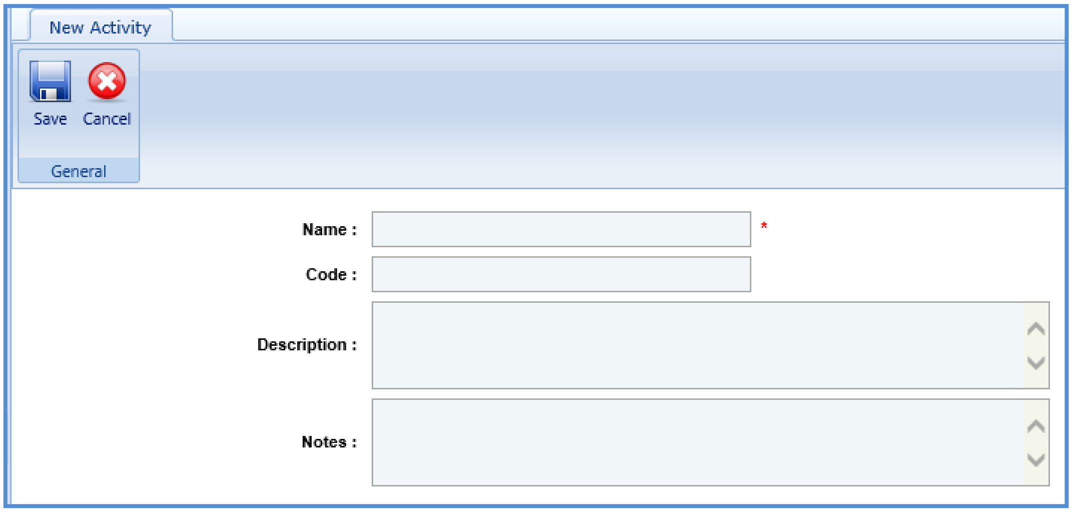
1. Adding an Activity

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



a. Click 

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



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

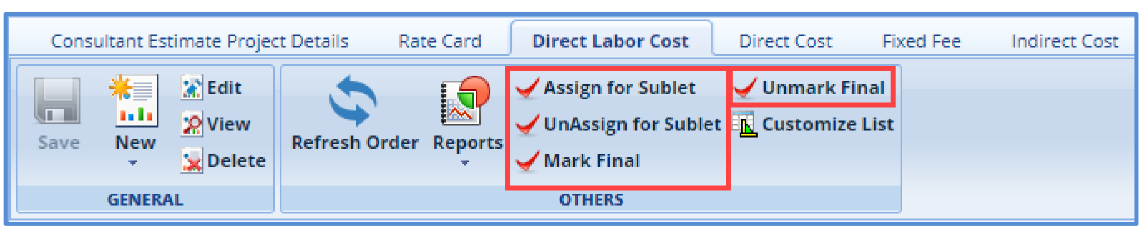
Field	Mandatory / Non-mandatory	Description
Name	Mandatory	Enter a name for the activity.
Code	Non-mandatory	Enter the activity code.
Description	Non-mandatory	Enter description about the activity.
Notes	Non-mandatory	Enter notes about the activity.

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

2. Assigning for Sublet

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

1. To mark tasks for subletting, perform the following steps:



a. Select the tasks that must be sublet.

b. Click **Assign for Sublet**. If rate card details are entered for a task, then a message to confirm that the rate card details will be deleted and then assigned for subletting appears. Click **OK**.

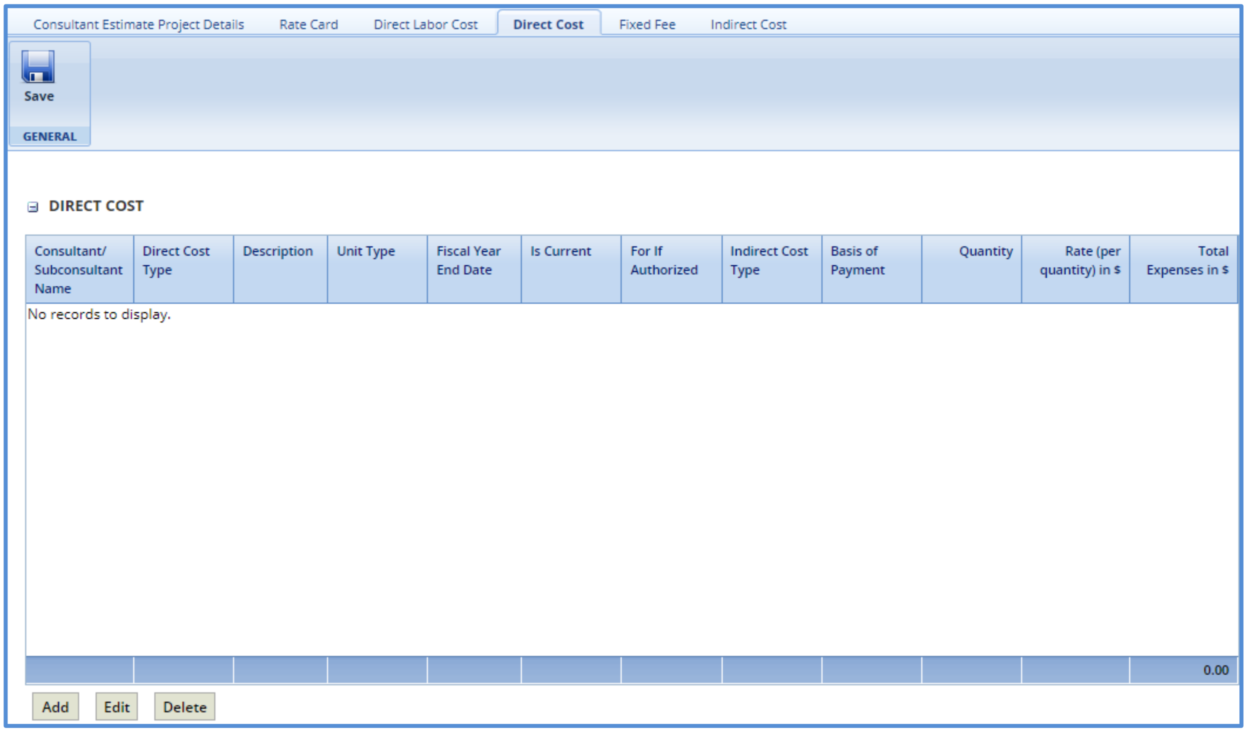
Note: *You can unmark a task that is assigned for subletting. Select a record marked as Assign for Sublet and click **UnAssign for Sublet**.*

c. Click **Mark as Final for Sublet.** The tasks are available for the associating with the sublet consultant firms.

__Note__: You can unmark a task that is marked as final for subletting. Select a record marked as final for Sublet and click __Unmark final for Sublet__.

8.5 Adding Direct Cost details

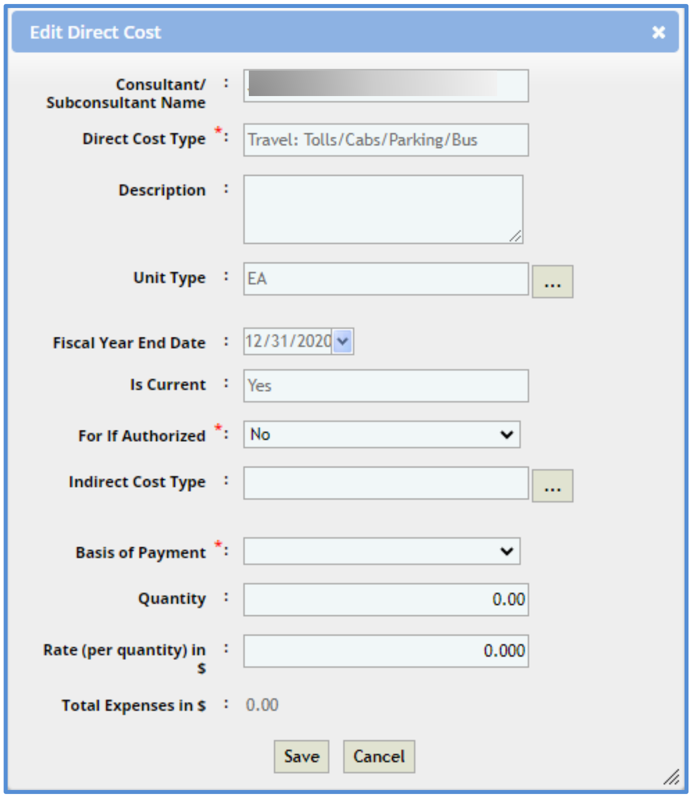
1. Click the **Direct Cost** tab to add direct costs and perform the following steps:



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

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

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



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

Field	Mandatory / Non-Mandatory	Description
Consultant/Subconsultant Name	-	The name of the consultant or sub-consultant firm is auto-populated.
Direct Cost Type	-	The name of the selected direct cost type is auto-populated.
Description	-	Enter in a description of the direct cost including a description of specific goods or services.
Unit Type	-	The unit type of the selected direct cost is auto-populated.
Fiscal Year End Date	-	The fiscal year end date of the direct cost is auto-populated.
Is Current	-	Indicates whether the selected direct cost is current or not. This is auto-populated.

For If Authorized	**Mandatory**	From the drop-down list, select **Yes** or **No** to indicate if the direct cost is authorized or not. If the selected option is **Yes**, then the cost details are available for future implementation.
Basis of Payment	**Mandatory**	From the drop-down list, select the required type of basis of payment. The drop-down list lists the basis of payment types that are associated with the solicitation.
Quantity	**Non-mandatory**	Enter quantity for the direct cost.
Rate (per quantity)	**Non-mandatory**	Enter the rate for one quantity of the direct cost.
Total Expenses	**-**	The total direct cost expenses based on the entered quantity and rate is auto-calculated and displayed.

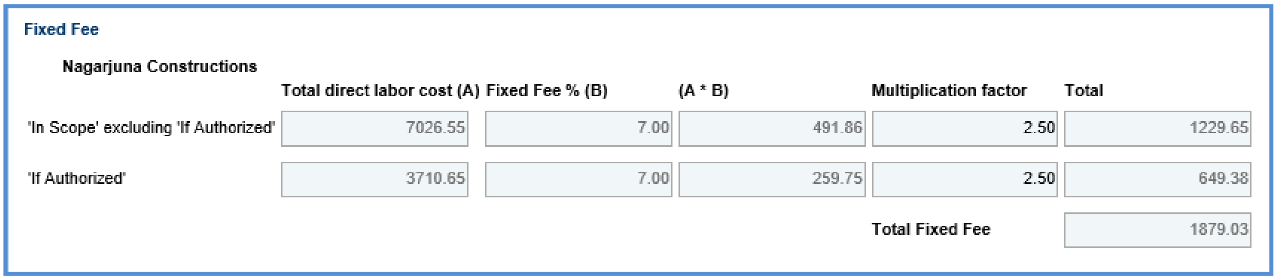
e. Click **Save**.

2. In the **Direct Cost** page, click **Save**. The total of direct costs are displayed based on whether the direct costs are marked as **Yes** in the **In Scope** and **If authorized** fields.

8.6 Viewing Fixed Fee

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

Click the **Fixed Fee** tab to view the fixed fee details of the consultant estimate. The details that are displayed are described in the following table.



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

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

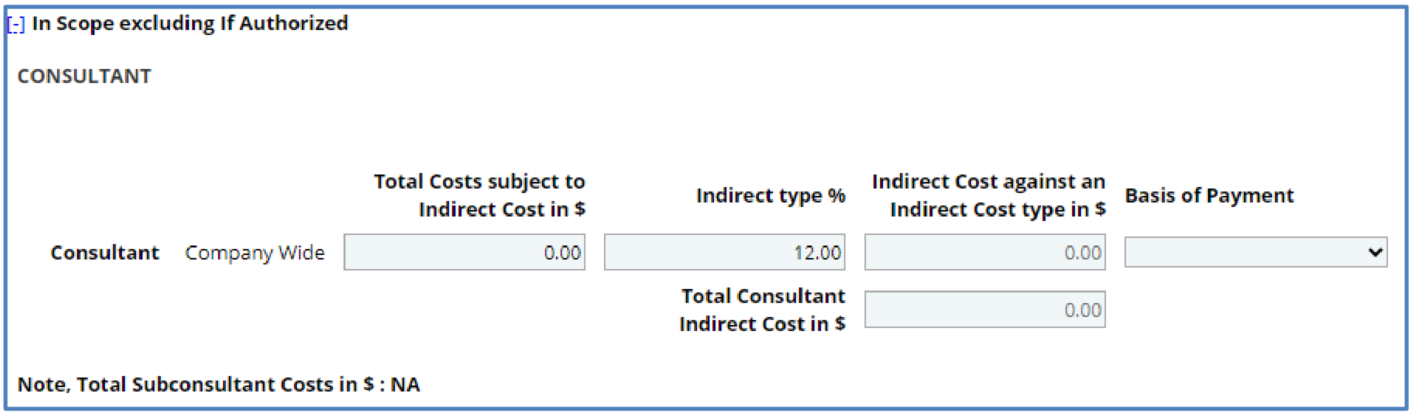
The total fixed fees is displayed in the **Cost Summary** section of the **Consultant Estimate Details** tab.

8.7 Viewing Indirect Cost

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

   Note:

   - *Based on whether the indirect costs are marked as **Yes** for **In Scope** and **If Authorized,** the details are displayed in appropriate sections.*
   - *If the consultant is marked as **Yes** in **Is G&A** on the **Consultant\Contractor** page, then **G&A** sub-section with appropriate indirect cost details is displayed in the **In Scope excluding If Authorized** section and **If Authorized** sections.*
   - *If the direct labor cost tasks are sublet, then **Sub Consultant Handling Fee** section with appropriate cost details is displayed.*



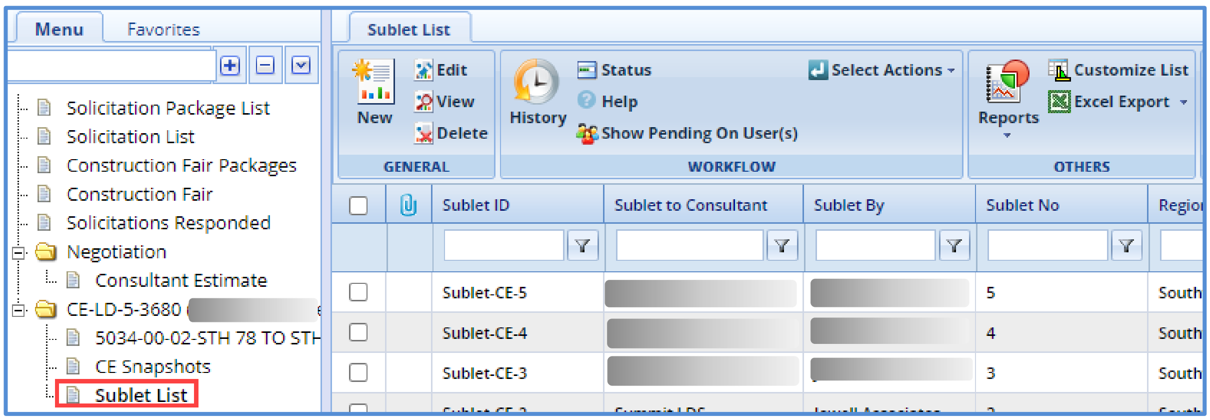
Field	Description
Total Costs subject to Indirect Cost in $	The total cost subject to an indirect cost for the consultant is auto-populated.
Indirect type %	Indicates the percentage of indirect cost defined for the consultant. This is auto-populated.
Indirect Cost against an Indirect Cost type in $	Indicates the indirect cost amount of each indirect cost type, which is auto-calculated based on the total direct labor cost and indirect type %. This is auto-populated.
Total Consultant Indirect Cost in $	The total of consultant indirect cost is auto-calculated and displayed.
Basis of Payment	The basis of payment determines how the estimate is being created and subsequently invoiced. Click the drop down menu and select one of these options: actual cost, cost per unit, lump sum or specific rate.
Note, Total Subconsultant Costs in $	The total subconsultant cost is auto-populated.

9 Finalizing Scope for Subletting

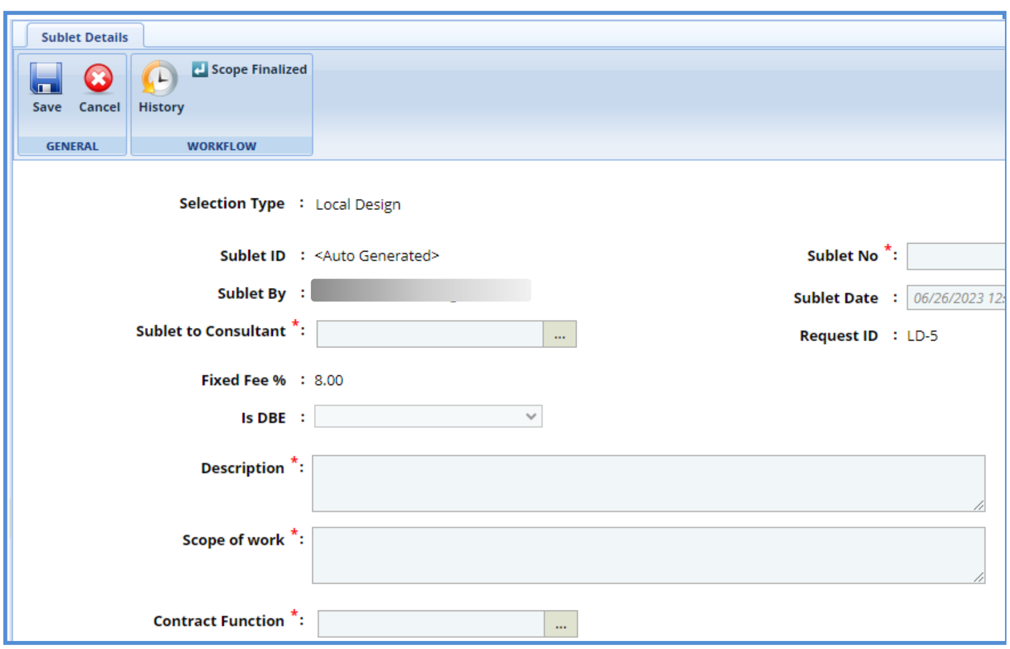
A prime consultant can sublet tasks to other consultant firms. The subconsultant can add their estimate details and publish to the prime consultant for negotiation purposes. The subconsultant can further sublet the tasks to other consultant firms.

The procedure to add and finalize the scope for subletting is described:

1. In the module menu, click **Solicitation**.
2. In the navigation pane, in the **Negotiation** folder, click **Consultant Estimate**. The **Consultant Estimate List** page is displayed.
3. Select a consultant estimate and click **View**. The **Consultant Estimate Project Details** page is displayed.
4. In the navigation pane, in the consultant estimate of the primary consultant folder, click **Sublet List.** The **Sublet List** page is displayed.



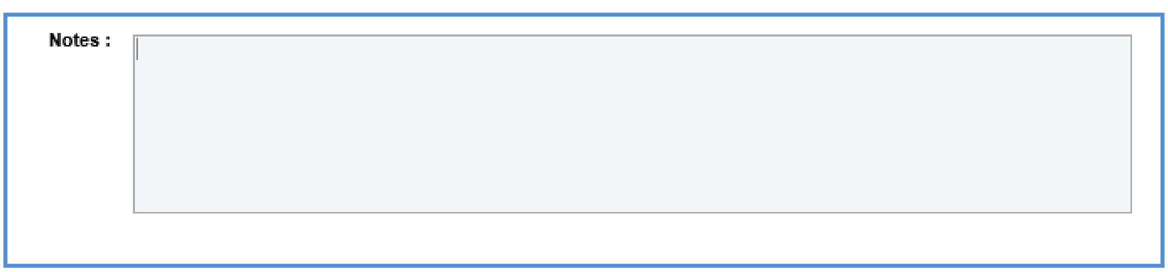
5. Click **New**. The **Sublet Details** page is displayed.



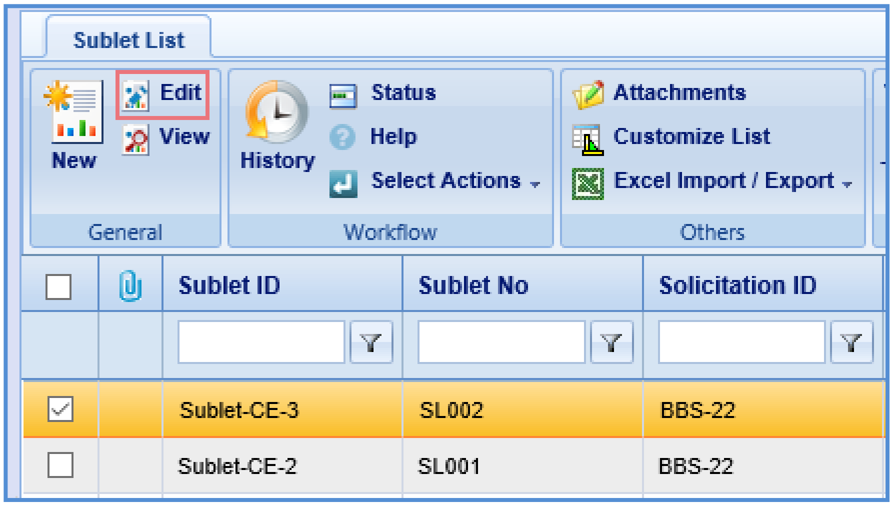
6. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory/Non-mandatory	Description
Sublet ID	-	The Sublet ID is auto-generated.
Sublet No	Mandatory	Enter a number for the sublet.
Sublet By	-	The name of the consultant firm who is subletting is auto-populated.
Sublet Date	Non-mandatory	Click the Calendar icon to select the date of sublet and click the Time Picker icon to select the time of sublet.
Sublet to Consultant	Mandatory	To select subconsultant for whom the task has to be sublet: 1. Click ... . The **Consultant Name** dialog box is displayed listing names of the consultant firms. 2. Select the required consultant firm name and click **Select.**
Request ID	-	The Request ID is auto-populated.
Fixed Fee %	-	The fixed fee percentage of the consultant is auto-populated.
Is DBE	Non-mandatory	If DBE, click drop down and select yes.
Description	Mandatory	Enter overall description of work for the sublet firm.
Scope of Work	Mandatory	Enter specific scope of work details being done by the sublet firm.
Contract Function	Mandatory	To select contract function: 1. Click ... . The **Contract Function** dialog box is displayed listing contract functions. 2. Select contract function of work being performed by sublet firm and click **Select.**

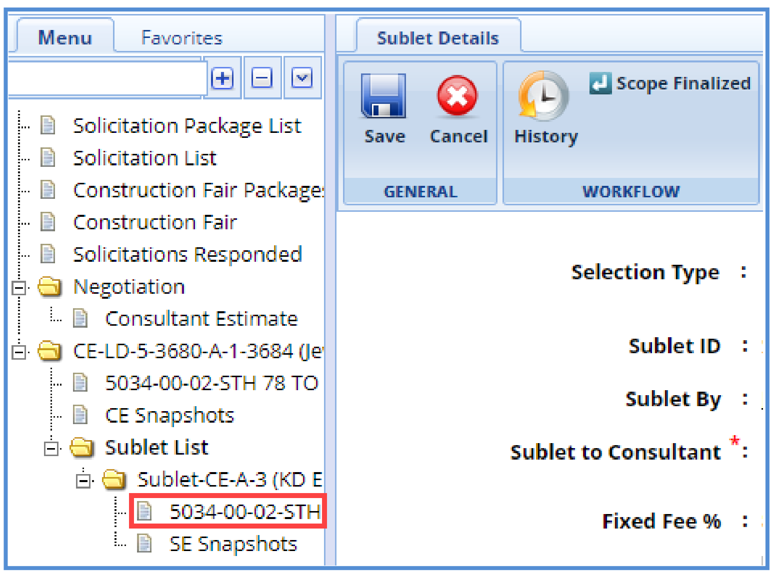
7. In the **Notes** field, enter notes about subletting of tasks.



8. In the **Attachments** section, upload images and files relevant to subletting.
9. Click **Save**. The sublet record is listed in the **Sublet List** page.



10. Select the required sublet record and click **Edit**. The **Sublet Details** page is displayed.
11. In the navigation pane, expand the sublet record folder and click the project for which the task must be associated. The **Sublet Estimate Details** page is displayed.

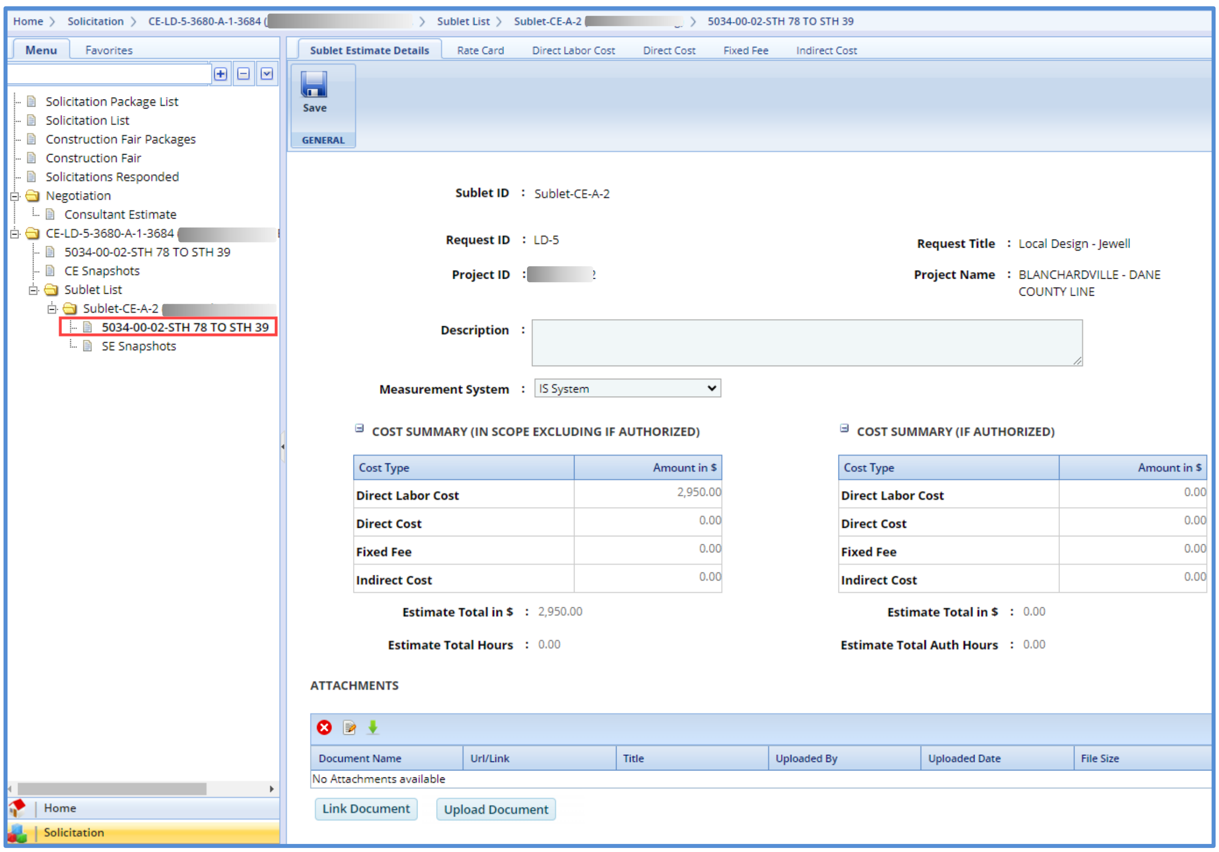


12. Click the **Direct Labor cost** tab and then click **Add Task**. The **Select Task** dialog box is displayed. The dialog box displays all the tasks of the selected project that are marked as final for sublet.
13. Select the required tasks that are to be sublet and then click **Select**.
14. In the navigation pane, click **Sublet List.** The **Sublet List** page is displayed.
15. Select the record, in the **Workflow** group, click **Select Actions,** and then click **Scope Finalized**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The scope of work is published to subconsultants.
16. In the **Workflow** group, after clicking **Scope** Finalized in **Select Actions**, you can click **Publish** or **ReDraft**, enter required information in the dialog box that is displayed, and then click **OK** to publish or redraft the record.

9.1 Adding and Publishing Sublet Estimate

The subconsultant can provide the estimation for the tasks assigned to them.

1. In the module menu, click **Solicitation**.
2. In the navigation pane, in the **Negotiation** folder, click **Consultant Estimate List**. The **Consultant Estimate List** page is displayed.
3. Select a consultant estimate and click **Edit**. The **Consultant Estimate Project Details** page is displayed.
4. In the navigation pane, in the consultant estimate folder, click **Sublet List.** The **Sublet List** page is displayed.
5. Select the record for which you want to provide estimation and click **Edit**.
6. In the navigation pane, in the sublet estimation folder, click the project for which the estimation must be provided. The **Sublet Estimate Details** page is displayed.



Note: *The values in the **Sublet ID, Request ID, Request Title, Project ID,** and **Project Name** fields are auto-populated.*

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

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

⊟ COST SUMMARY (IN SCOPE EXCLUDING IF AUTHORIZED)

Cost Type	Amount in $
Direct Labor Cost	1,012.52
Direct Cost	457.00
Fixed Fee	183.53
Indirect Cost	1,362.45

Estimate Total in $: 3,015.50

Estimate Total Hours : 40.00

⊟ COST SUMMARY (IF AUTHORIZED)

Cost Type	Amount in $
Direct Labor Cost	0.00
Direct Cost	0.00
Fixed Fee	0.00
Indirect Cost	0.00

Estimate Total Auth in $: 0.00

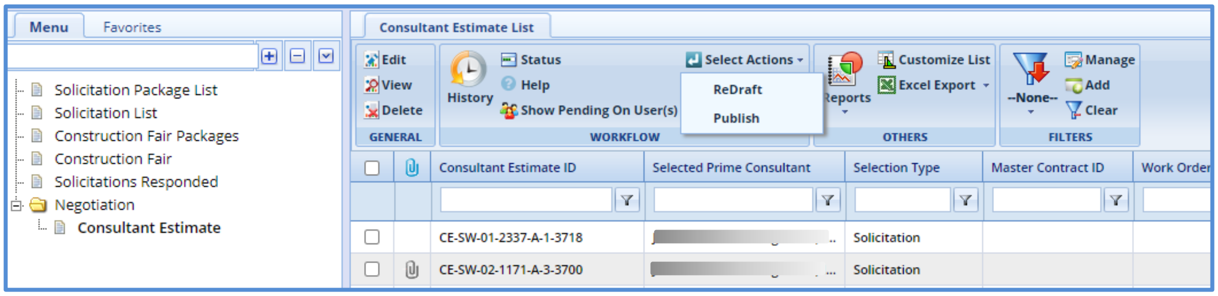
Estimate Total Auth Hours : 0.00

8. In the **Attachments** section, upload images and files relevant to the sublet estimate.
9. Click **Save.**
10. Click the **Rate Card** to enter employee rate details and finalize the rate card for the estimate. For more information on the procedure to add rate card details, refer to the adding rate card details.
11. Click **Direct Labor Cost tab.** The tasks that are assigned to you by the Prime Consultant are displayed. If required, additional direct labor cost tasks and activity folders can be added. You can further sublet the tasks to other consultant firms. For more information on adding direct labor cost details, refer to the adding direct labor cost details step in the Adding Consultant Estimation Details topic.
12. Click the **Direct Cost** tab to add direct costs. For more information on adding direct cost details, refer to the adding direct cost details step in the Adding Consultant Estimation Details topic.
13. Click the **Fixed Fee** tab to view the fixed fee details of the sublet estimate. For more information on viewing fixed fee details, refer to the viewing fixed fee details step in the Adding Consultant Estimation Details topic.
14. Click the **Indirect Cost** tab to view the indirect cost details. For more information on viewing the indirect cost details, refer to viewing indirect cost details step in the Adding Consultant Estimation Details topic.
15. Click **Save**.
16. In the navigation pane, click **Sublet List.** The **Sublet List** page is displayed.
17. Select the record, in the **Workflow** group, click **Select Actions,** and then click **Publish**. A message to confirm publishing of the estimate appears. Click **OK**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The estimate is published to the prime consultant.
18. Optionally, in the **Workflow** group, in **Select Actions**, you can click **ReDraft**, enter required information in the dialog box that is displayed, and then click **OK** to redraft the record.

9.2 Publishing a Consultant Estimate

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

1. In the module menu, click **Solicitation**.
2. In the navigation pane, in the **Negotiation** folder, click **Consultant Estimate List**. The **Consultant Estimate List** page is displayed.
3. Select the record that has to be published.



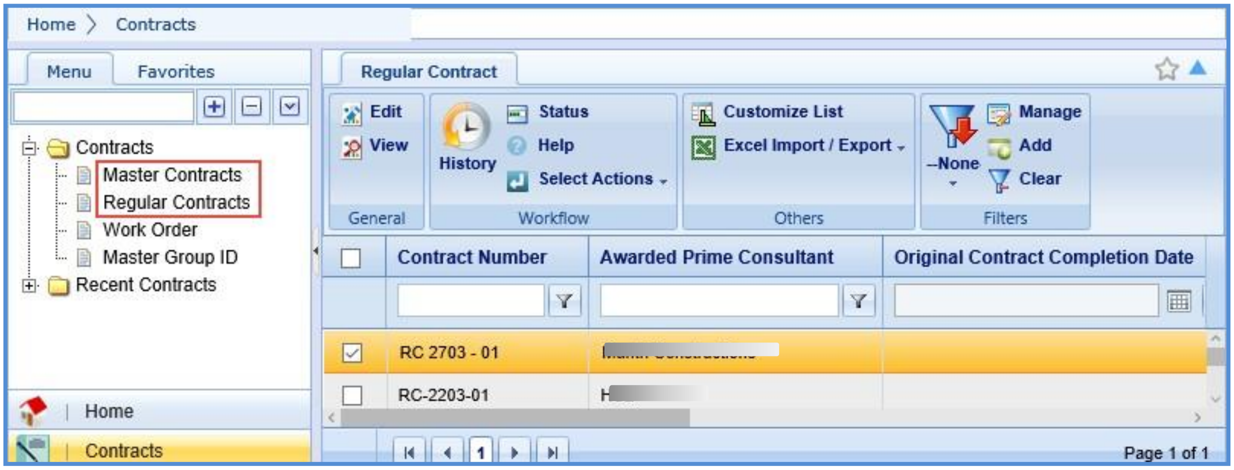
4. In the **Workflow** group, click **Select Actions**, and then click **Publish**. A message to confirm publishing of the estimate appears. Click **OK**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The estimate is published to WisDOT.

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

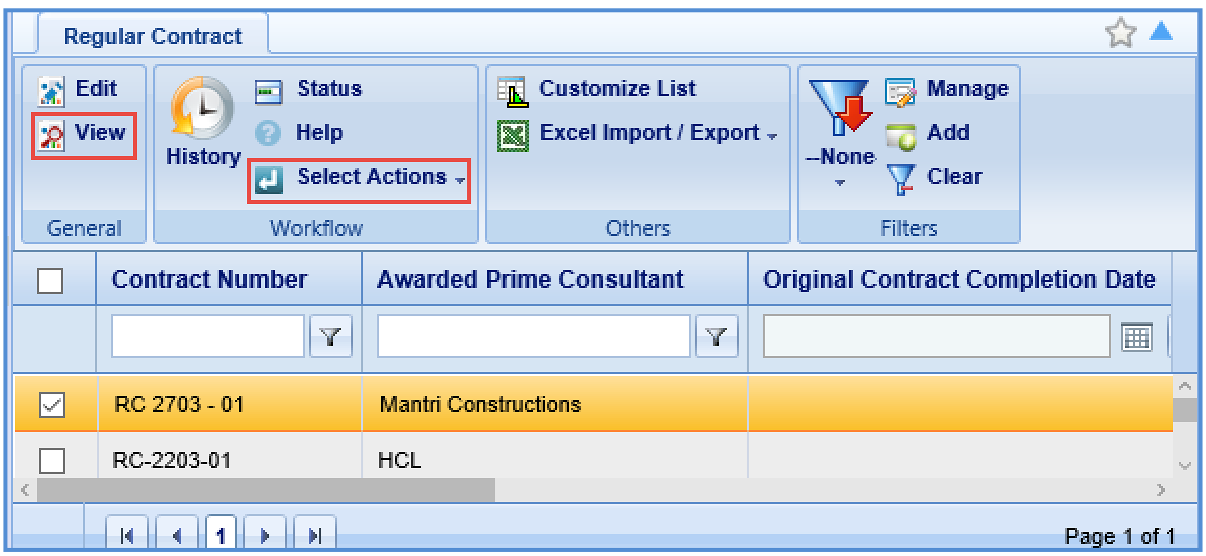
10 Reviewing Contracts

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

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



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



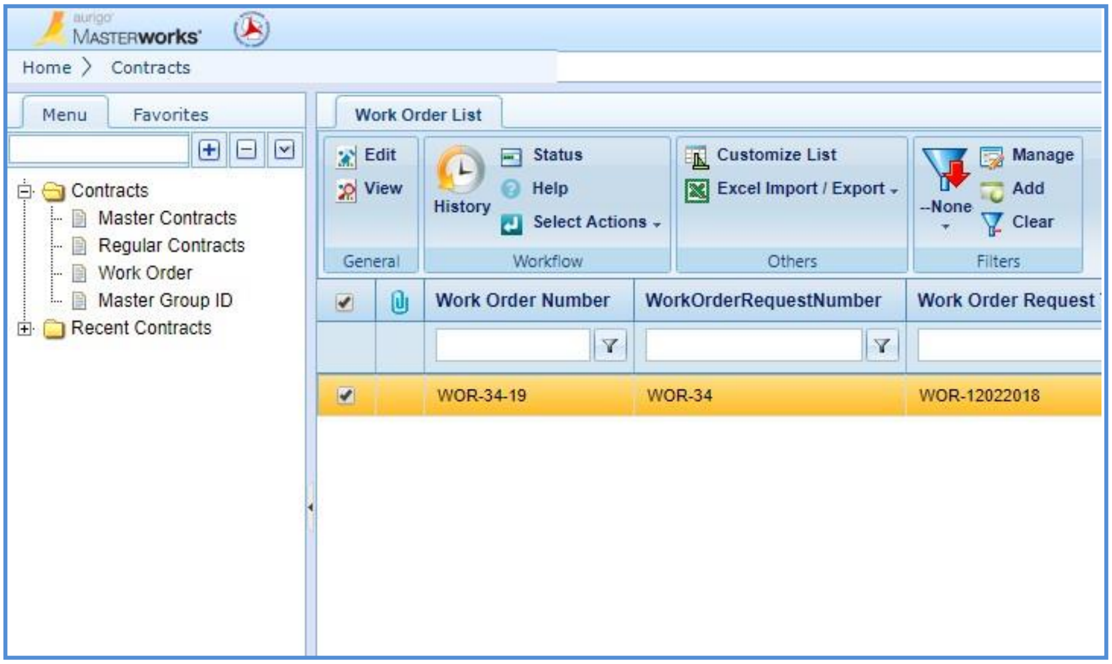
3. Select the contract that is reviewed and click **View** to view the contract details.
4. In the **Workflow** group, click **Select Actions**, and then click **Reviewed**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The contract is reviewed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

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

11 Reviewing Work Order Contracts

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

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



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

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

12 Contract Amendments

If there are any changes in approved regular contracts, master contracts, and work orders, the changes can be made by amending the contracts. There can be multiple amendment negotiations in progress, but only one amendment contract can be going through the final approval workflows at a time.

The steps to amending a contract is dependent upon the type 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 11.1 to review and update an amendment estimate. If the type of amendment is **Update Contract Completion Date** or **Cancel Contract**, an estimate for the amendment is not needed. Jump to section 11.2 and follow the steps to **Review an Amendment Contract**.

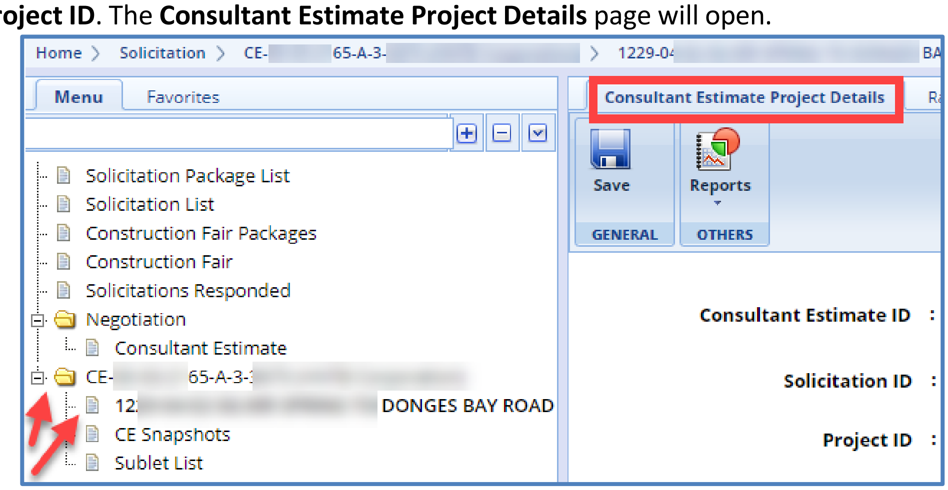
12.1 Reviewing and Updating an Amendment Estimate

Steps:

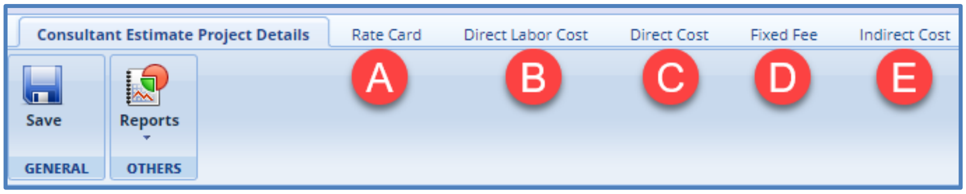
1. In the module menu, click **Solicitation**.
2. In the navigation pane, open the **Negotiation** folder by clicking the plus button and select the **Consultant Estimate** file. The **Consultant Estimate List** page will open.
3. Select the estimate that is being amended then click **Edit**.
4. In the Navigation pane, expand the estimate folder by clicking the plus button next to the estimate file. Click **Edit** in the tool bar at the top of the page.

Note: *The contract amendment estimate is differentiated from the original contract estimate by the "-A" at the end of the title. If there is more than one amendment estimate for the same contract, each will have the associated number after it. For example: CE-WOR-999-9999-**A-3**-8888.*

5. In the navigation pane, the **CE Amendment Estimate** folder will appear. Open the folder by clicking the plus button next to it.
6. Click the **Project ID**. The **Consultant Estimate Project Details** page will open.

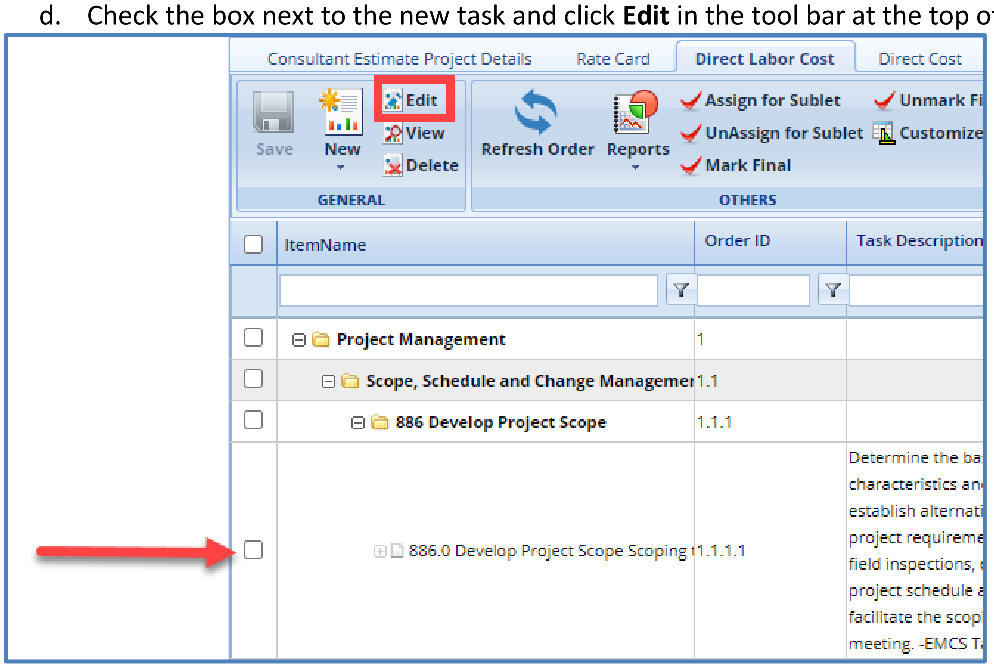


7. Review and update each tab at the top of the page



A. Review and update the **Rate Card** tab.
   - If a resource is new to the contract or if an existing resource has a new rate, follow the steps on page 75 of this manual.
   - If the resources on the current contract will be using rates established from previous approved negotiations, this step can be skipped.

B. Review and update the **Direct Labor Cost** tab. The direct labor cost tasks will be prepopulated with tasks entered by WisDOT. However, use the following steps to adjust tasks as necessary.
   - Modifying resources on an existing task on the current contract (This is the most common)
     1. If the task is already listed in the **Direct Labor Cost** list use the following steps.
        a. Right click on a task folder and select **Expand All** or check the box at the top of the list to do the same.
        b. Select the fourth line item of the task, then click **Edit** in the tool bar at the top of the page.
        c. Proceed to step 4.
     2. If the task is not listed on the **Direct Labor Cost** list but is on the current contract use the following steps.
        a. From the **Direct Labor Cost** tab, select the **New** button, then **Modify Current** from the drop down.
        b. The **Select Tasks** dialog box will open. Check the box next to the task that needs to be modified and click the **Select** button.
        c. The new task will now appear on the **Direct Labor Cost** page.
        d. Check the box next to the new task and click **Edit** in the tool bar at the top of the page.



        e. Proceed to step 4

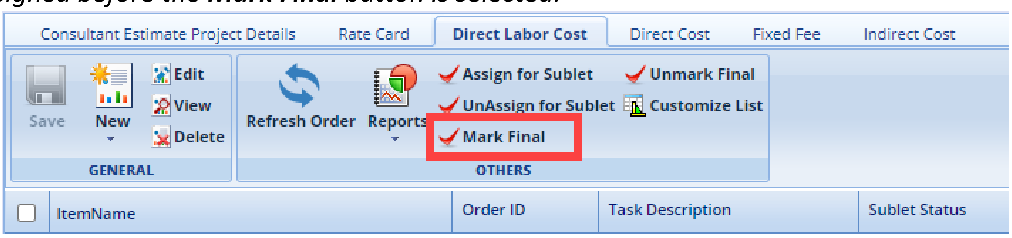
     3. Adding a task that is not on the current contract
        a. From the **Direct Labor Cost** tab, select the **New** button, then **Add Multiple** from the drop down. The **Add Standard Tasks** page will be displayed.

   b. In the tool bar at the top of the screen select the **Add** button. The **Standard Items** dialog box is displayed.
   c. Use the filters to search for the task to be added. Once located, select the task by clicking the check box next to the line item. Click **Select**.
   d. Once all the tasks have been added that need to be adjusted, select **Save** in the tool bar at the top of the page.
   e. Proceed to step 4.

4. On the **Edit Task** page, click **Modify Current Resource** or **Add** under the **Resources in Amendment** table for each of the below situations**.**
   a. To edit the hours for a current resource
      i. Click **Modify Current Resource**. The **Resource** dialog window will open.
      ii. Select the resource to be added from the list and click **Select**. The resource will appear in the **Resources in Amendment** table.
      iii. Click into the table to edit each field highlighted in yellow.

   b. To add a new resource to a task or a current resource with a new rate
      a. Click **Add**. The Resource dialog window will open.
      b. Select the new resource to be added from the list. This will be from the rate card created in this amendment negotiation. Click **Select**. The resource will appear in the **Resources in Amendment** table.
      c. 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.
6. Once all the direct labor cost tasks have been reviewed and updated, select **Mark Final** at the top of the page. This will save the tasks and populate the information on the **Consultant Estimate Project Details** page.

Note: *If a Prime has a sublet involved in the amendment, refer to section 11.1.1 of this manual before selecting the **Mark Final** button. The **Mark Final** button is the last step in saving the **Direct Labor Cost** tab. This means that tasks for a sublet need to be assigned before the **Mark Final** button is selected.*



Note: *If a new resource is added to the estimate but there is no change to their hours (IE. the name is being added for billing purposes) the **Direct Labor Cost** page will still need to be **Marked Final** for the estimate to be published.*

C. Review and update the **Direct Cost** tab.
   - To add a new direct cost that is not on the current contract for either the prime or the sub, follow the steps on page 88 of this manual.
   - To edit an existing direct cost
     a. Select the **Modify Current Direct Cost** button in the tool bar at the top of the page. The **Select Existing Direct Cost** dialog box will display.
     b. Check the box next to the direct cost that needs to be modified and click the **Select** button.
     c. In the **Direct Costs in Amendment** table, select the direct cost line item that needs to be modified. Then click the **Edit** button under the table. The **Edit Direct Cos**t dialog box will display
     d. Adjust the fields in this dialog box to reflect the desired modifications. Click **Save**.
     e. Select **Save** in the tool bar at the top of the page.

D. Review the **Fixed Fee** tab. Follow the steps on page 90 of this manual for further steps. If adjustments are needed contact Consultant Services at wisdotmasterworks@dot.wi.gov.

E. Review the **Indirect Cost** tab. Follow the steps on page 91 of this manual for further steps. If adjustments are needed contact Consultant Services at wisdotmasterworks@dot.wi.gov.

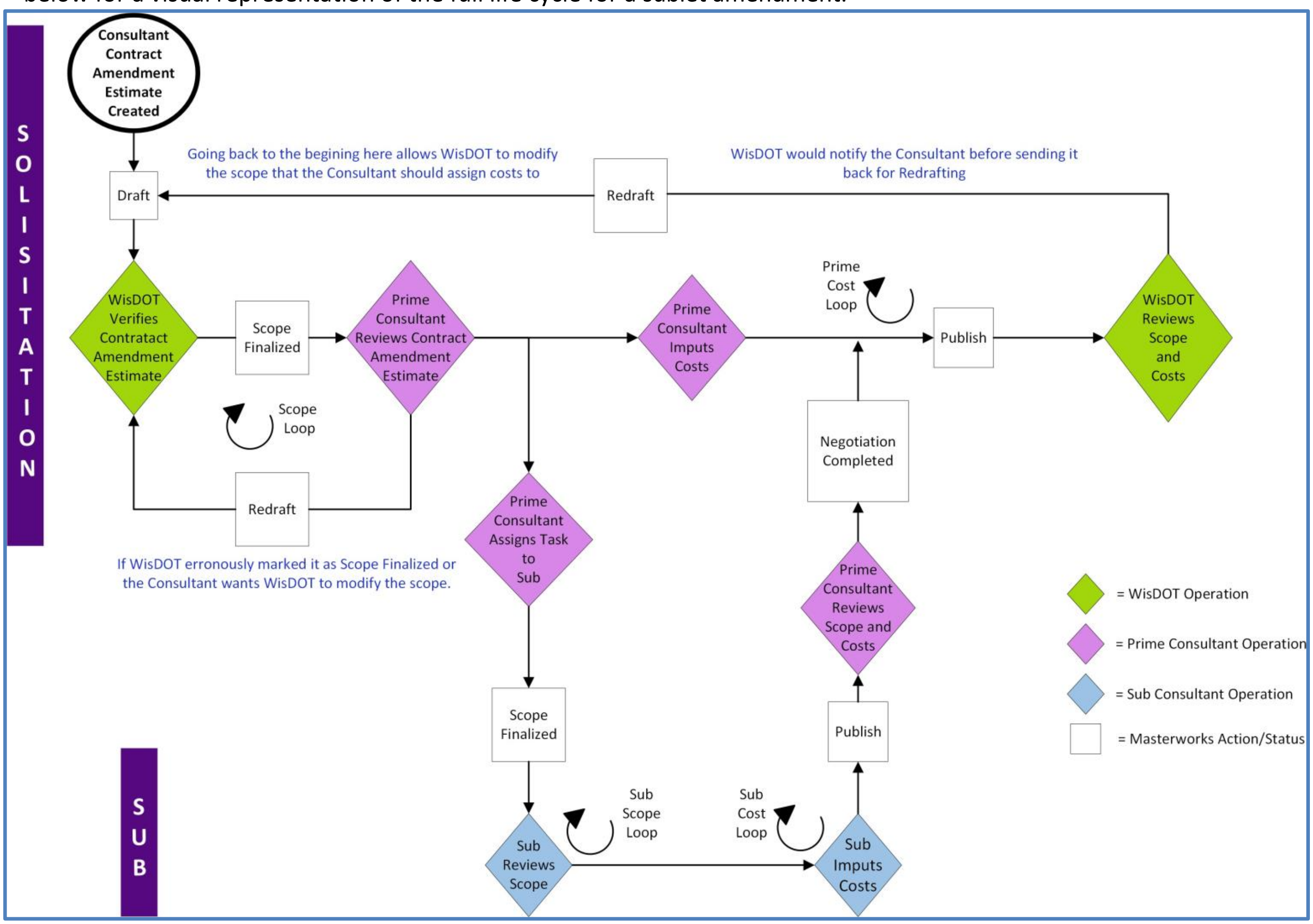
8. Return to the **Consultant Estimate Project Details** tab. Review and upload any needed documents using the **Link document** and **Upload Document** buttons.
9. Select the **Save** button in the tool bar at the top of the page.
10. Select the **Consultant Estimate** file under the **Negotiation** folder in the navigation pane.
11. From the list find and select the amendment estimate. Click the **Select Actions** button in the tool bar at the top of the page. From the drop down select **Publish** and then **Ok**.
12. WisDOT Staff will receive an email notifying them that the estimate has been **Published**.

12.2 Contract Amendments Estimates for Sublets

Prime consultants will assign tasks in the amendment estimate to send to the sublet firms as applicable. The sublet firms must then add their details to the amendment estimate. These steps start at 11.1, step 6. Similarly, if the sublet firms have a sublet firm of their own, the second tiered sublets must follow the steps.

The prime consultant firm publishes the amended consultant estimate to WisDOT for negotiation purposes. If a prime consultant has sublet the tasks, then the amended consultant estimate can be published to WisDOT only after all the sublet firms have published their amended estimates back to the prime consultant. The prime will then mark the estimates as **Negotiation Completed**.

Follow the steps on page 96 of this manual to add or edit a sublet for an amendment estimate. See the flow chart below for a visual representation of the full life cycle for a sublet amendment.



Steps:

a. In the module menu, click **Delivery Contracts**.
b. 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.
c. Find the contract in the list, using the filters as needed. Select the contract needing to be amended and then click **View**.
d. In the navigation pane, select the plus sign next to the **Contract Number** to expand the folder. Select the **Contract Amendment** file. This will open a new page titled **Contract Amendment Request.**
e. Click the **Edit** button in the tool bar at the top of the page. Review the contract amendment. When completed, select the **Reviewed** button in the tool bar at the top of the page.
f. A new window will open. Select **Ok**. WisDOT staff will receive an email notification that the contract amendment has been reviewed. WisDOT will make one last review and then approve and finalize the contract amendment. Email notifications will be sent to both WisDOT staff, and the consultant contact once the contract amendment is in the **Approved** status.