

aurigo[®]



MASTERWORKS

CLOUD

Consultant Guide

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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**

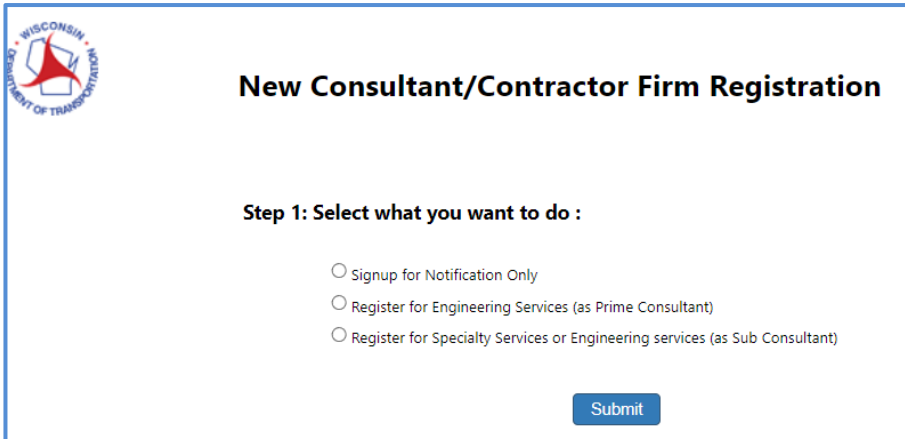
Note: *The password is case sensitive.*

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**.



New Consultant/Contractor Firm Registration

Step 1: Select what you want to do :

- Signup for Notification Only
- Register for Engineering Services (as Prime Consultant)
- Register for Specialty Services or Engineering services (as Sub Consultant)

Submit

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**

Step 2 : Fill below information to receive notification :

Firm Name :

Title	First Name	Last Name	Telephone	Email
No records to display.				

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

Title

First Name

Last Name

Telephone

Email

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 :	<input type="text"/>	*
Firm Name(Doing Business As) :	<input type="text"/>	*
Joint Venture? :	<input type="text" value="No"/>	*
Title :	<input type="text"/>	*
First Name :	<input type="text"/>	*
Last Name :	<input type="text"/>	*
Telephone :	<input type="text"/>	*
Email:	<input type="text"/>	*
Firm Federal Identification Number :	<input type="text"/>	*
Create your Masterworks User ID :	<input type="text"/>	*

- Enter the information in the fields provided. All fields are required.
- Click **Save**.

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

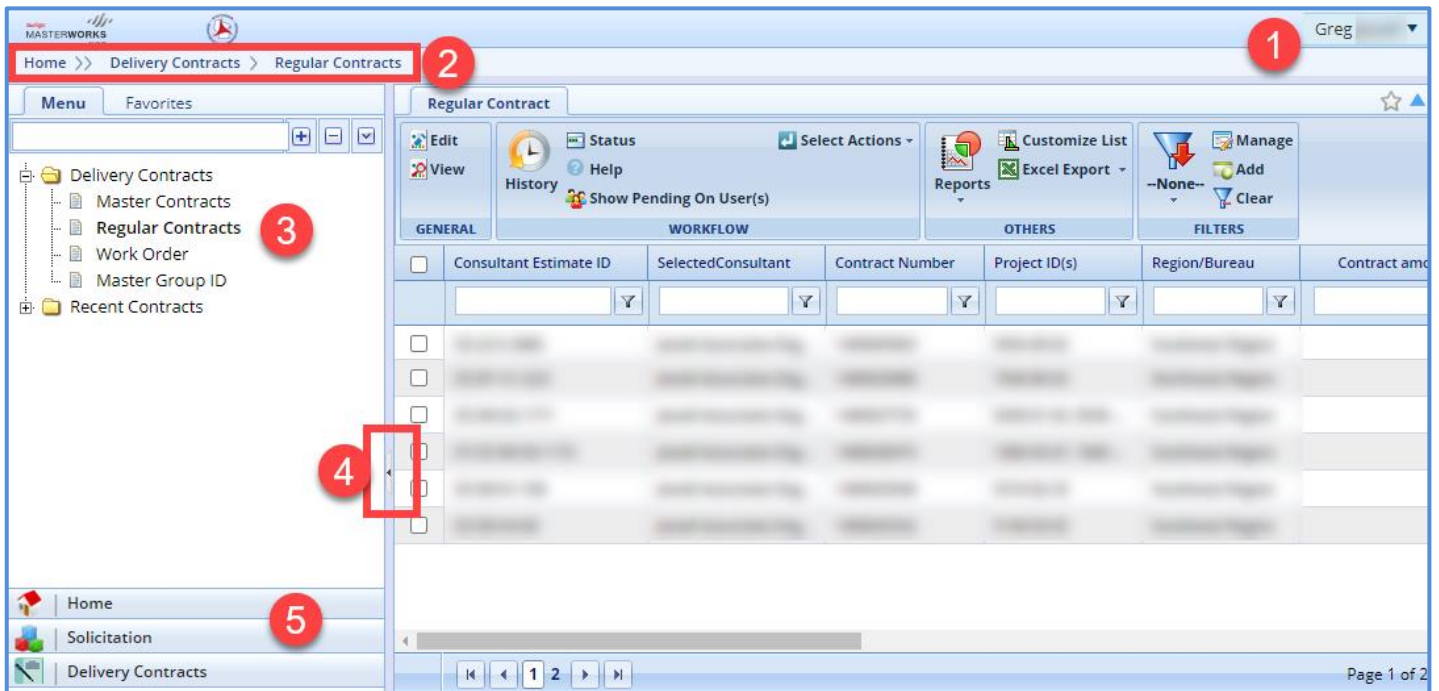
Step 2 : Fill below information to register for Specialty Services or Engineering services (as Sub Consultant) :

Legal Name :	<input type="text"/>	*
Firm Name(Doing Business As) :	<input type="text"/>	*
Title :	<input type="text"/>	*
First Name :	<input type="text"/>	*
Last Name :	<input type="text"/>	*
Telephone :	<input type="text"/>	*
Email:	<input type="text"/>	*
Firm Federal Identification Number :	<input type="text"/>	*
Create your Masterworks User ID :	<input type="text"/>	*
CFR to be submitted by your Firm? :	<input type="text" value="v"/>	*

- Enter the information in the fields provided. All fields are required.
- Click **Save**.
- Click **Submit**.

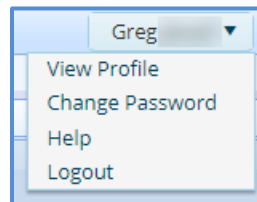
1.3 Understanding the User Interface

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

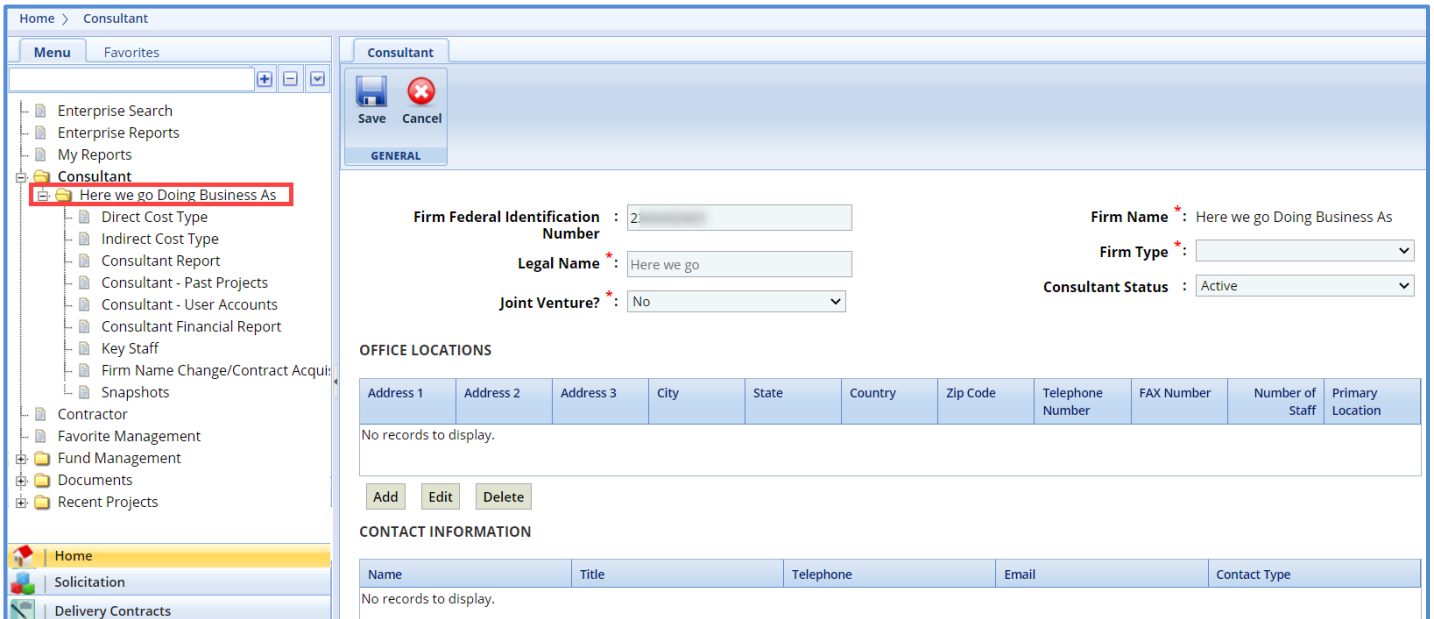


2. Breadcrumbs: Displays the navigation path to current page. Each breadcrumb is an active link to the specific page.
3. Navigation Pane: Displays the pages available to view. This is set up like a filing cabinet, folders, and files.
4. Toggle button: This button allows for the navigation pane to be 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:

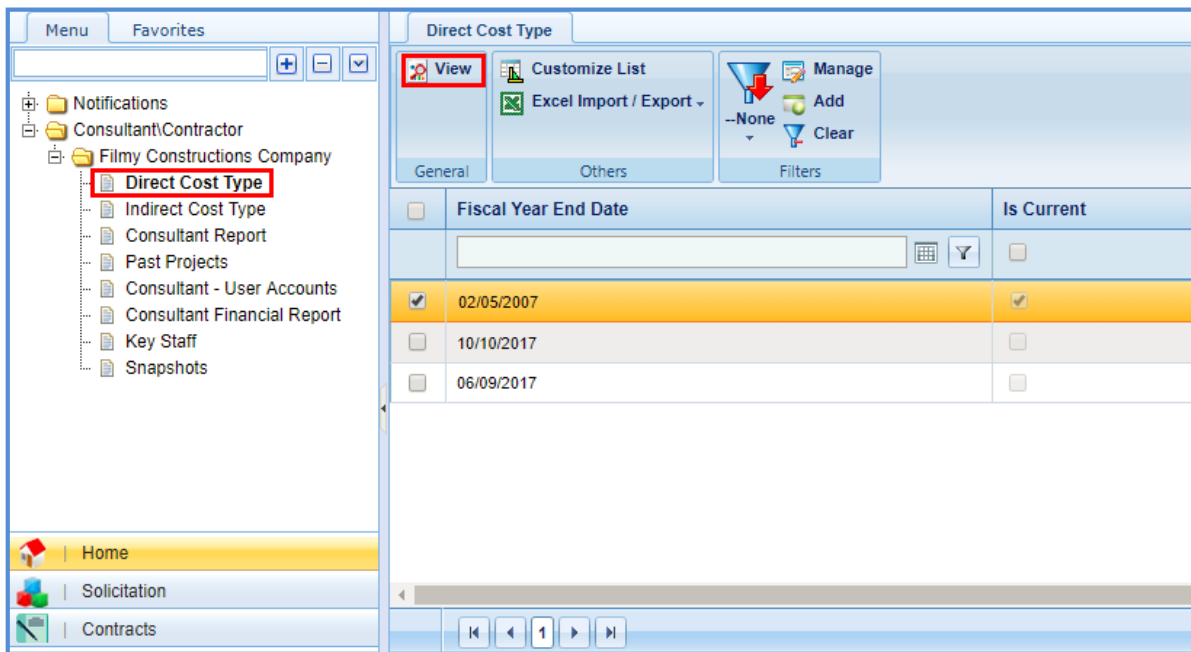
1. In the **Home** module, click **Consultant**. The Consultant page displays the consultant details of the logged in user.
2. Select the firm and click **View**. The consultant details are displayed.
3. In the navigation pane, expand the consultant folder. The list of consultant library forms is displayed.



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



Cancel

General

Fiscal Year End Date : * 02/05/2007

Direct Cost Types :

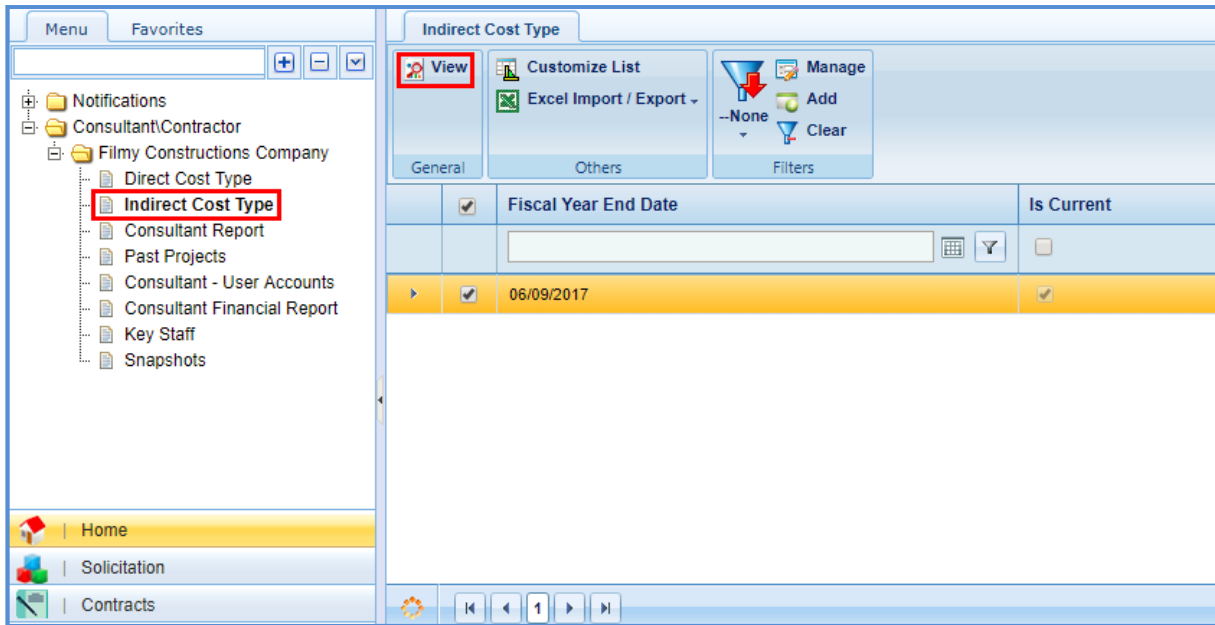
Direct Cost Type	Notes	Unit	Internal Allocation	Outside Cost
Aerial Mapping Service		EA		
Airfare/Railway Fare		EA		
ATV	Desc	EA		
ATV Geotech Drill Rig		EA		
Bluelines/Blueprints	test	EA		
CADD		EA		
Concrete Testing/Equip		EA		
Employee Vehicle Allow		EA		
Fees/Permits/License/		EA		
Vehicle Rental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

Delete

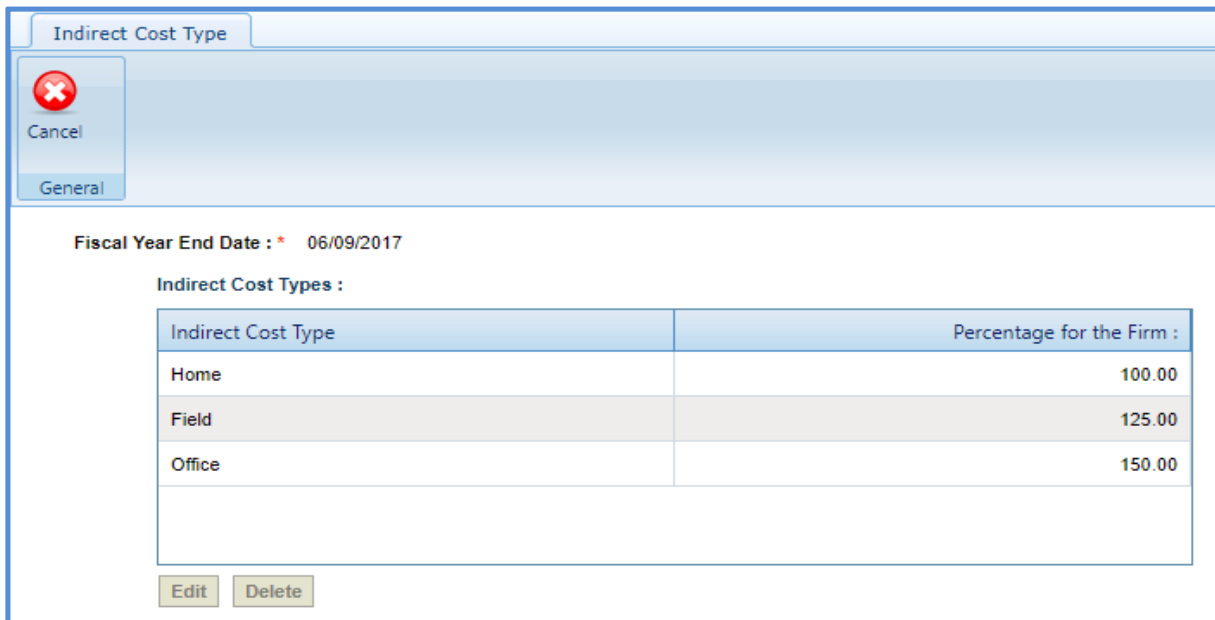
2.2 Viewing Indirect Cost Type

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-rsrcs/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 wisconsin.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://wisconsin.gov/Pages/doing-business/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.

June 2023 Solicitation

Solicitations

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

NOIs are due Wednesday, June 14, 2023 Noon CT

No late submittals accepted

- [June 2023 summary of solicitation packages](#)
- [June 2023 scopes of services \(updated 5/31/23\)](#)

To submit an NOI for this solicitation please log into [Masterworks](#).

Additional Masterworks information

- [Masterworks quick start guides](#)

Masterworks access request

- If your firm does not have an account in Masterworks please use this [sign up form](#) to create a firm account and assign a consultant administrator. The firm name on the request must be the legal name of incorporation in Wisconsin.
- If your firm has an account in Masterworks please contact your consultant administrator.
- If you are unsure if your firm has a consultant administrator contact WisDOTmasterworks@dot.wi.gov.

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 0 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				

- 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.

Construction Fair 2022

Solicitations

- Current
- Construction**
- Engineering Opportunity Day
- Previous
- Instructions

NOIs are due Wednesday, August 31, 2022

No late submittals accepted

Interview information

Interviews will be held Tuesday, September 13, 2022

- [Construction Fair 2022 interview schedule](#)
- All interviews will take place via Microsoft Teams videoconference
- By noon Thursday, September 8, email PDF of presentation/other materials to Consultant.Services@dot.wi.gov

- 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

Package summaries

- [Construction Fair package list](#) Updated 8/18/22
- [Construction Fair package list](#) Updated 8/18/22

Region package scopes of services

- [North Central](#)
- [Northeast](#)
- [Northwest](#)
- [Southeast](#)
- [Southwest](#)
- [Addendum 1](#) Updated 8/18/22

[Questions and Responses](#)

[Map of all Consultant and WisDOT staffed projects](#)

To submit and NOI for this solicitation please log into Masterworks.

- 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

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

Solicitation instructions

Solicitations

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

Updated February 15, 2018

General instructions

All NOIs must be submitted through the Masterworks application. Information about gaining access to Masterworks and quick start guides may be found on the [Masterworks information page](#).

- Firms must comply with WisDOT FDM 8-5-3 regarding potential conflicts of interest. This [revision](#) (January 11, 2018) is effective immediately and will be published in the next quarterly FDM update.
- Firms must provide both names and qualifications for all key staff. Anonymous/confidential listings are not permitted.
- Firms must submit completed NOIs for each solicitation number in which they have interest.
- Firms with multiple offices may not submit separate files for each office.
- Solicitation numbers/projects may require firms to be listed on the WisDOT Roster of Eligible Engineering Consultants or may be open to all firms including those listed on the WisDOT Roster.

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

Solicitation Schedule

Solicitations

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

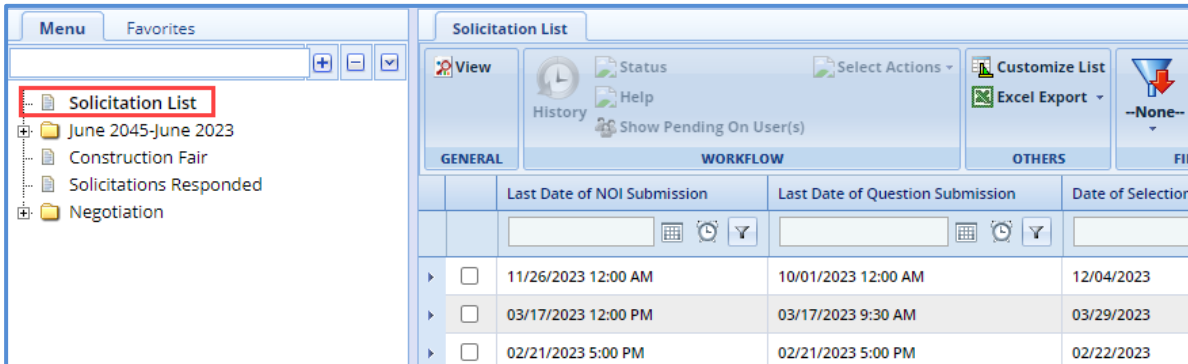
3.2 Questions and Responses

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.

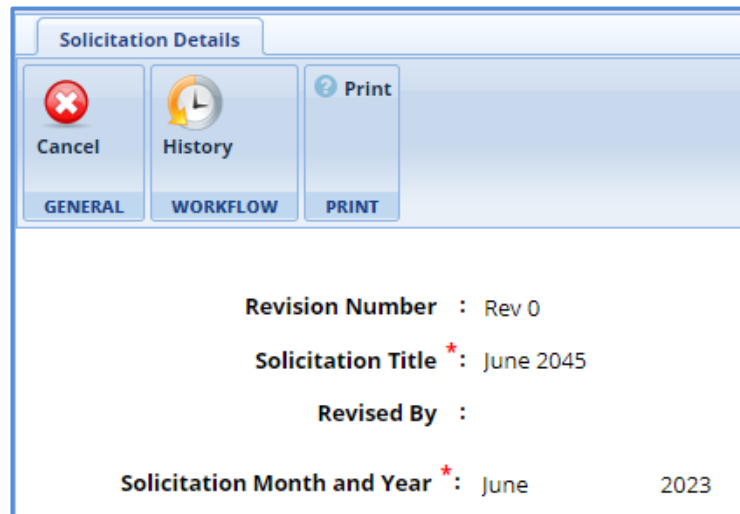
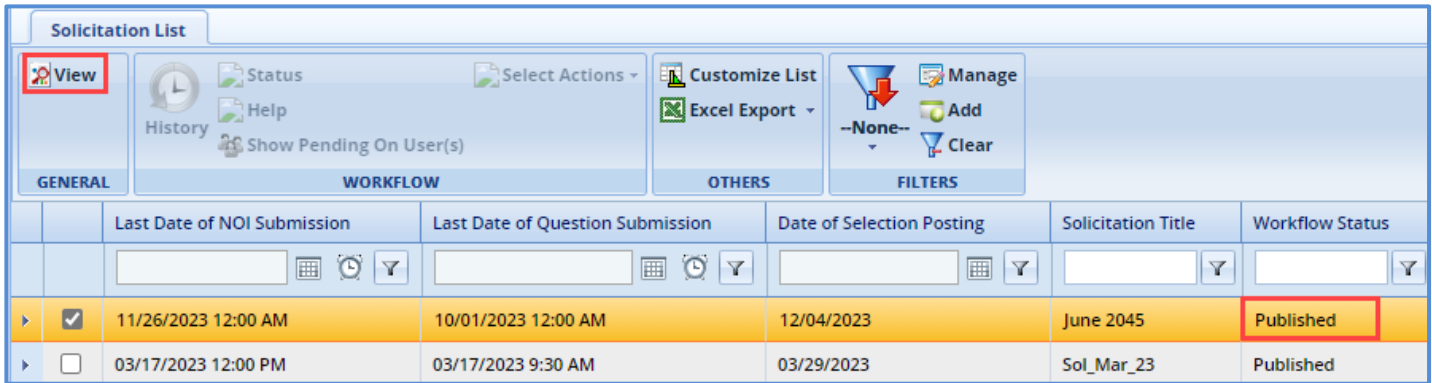
To raise questions regarding the Solicitation, perform the following steps:

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

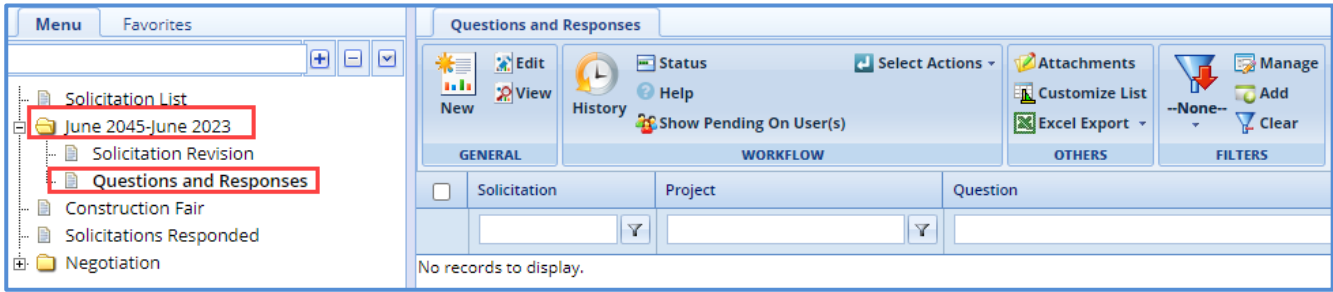
1. In the module menu, click **Solicitation**.
Click **Solicitation List**.



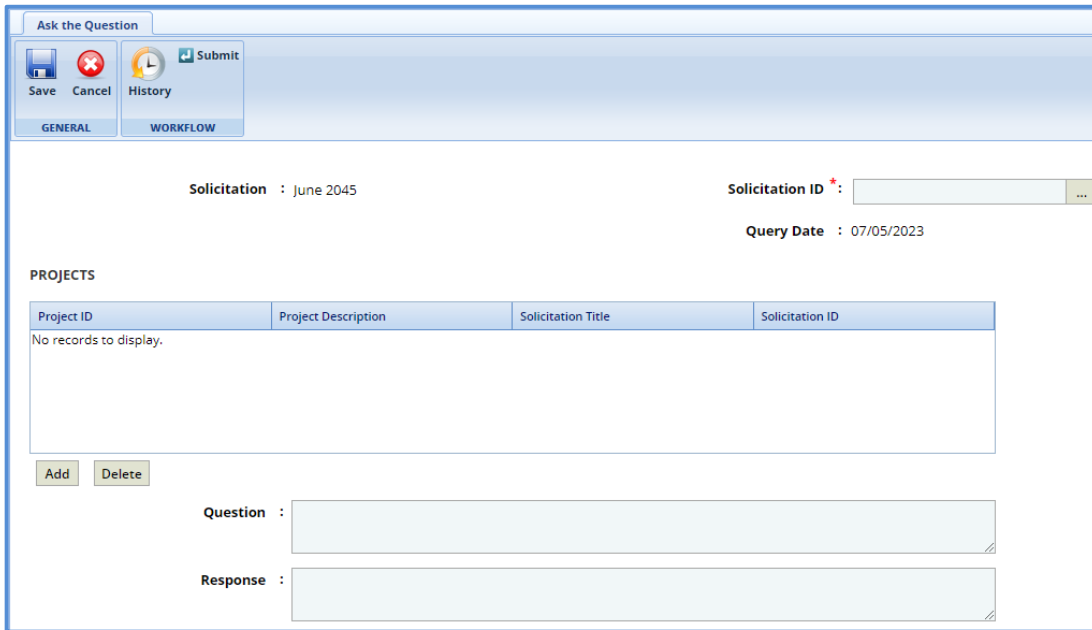
2. Select the **Solicitation** record, which is in 'Published' status, and then click **View**. The **Solicitation Details** page is displayed.



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

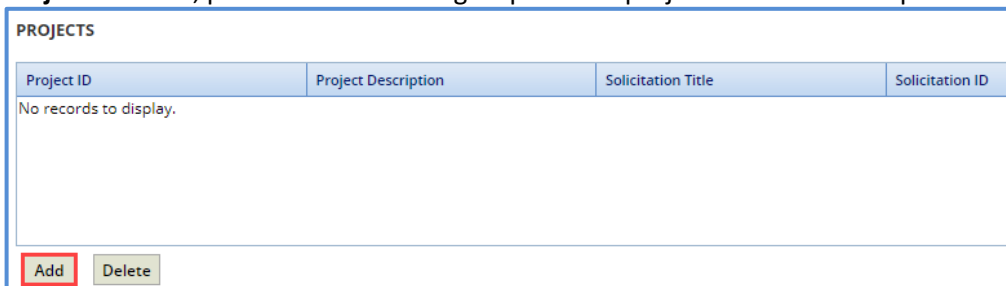


- Click **New**.
The **Ask the Question** page is displayed.

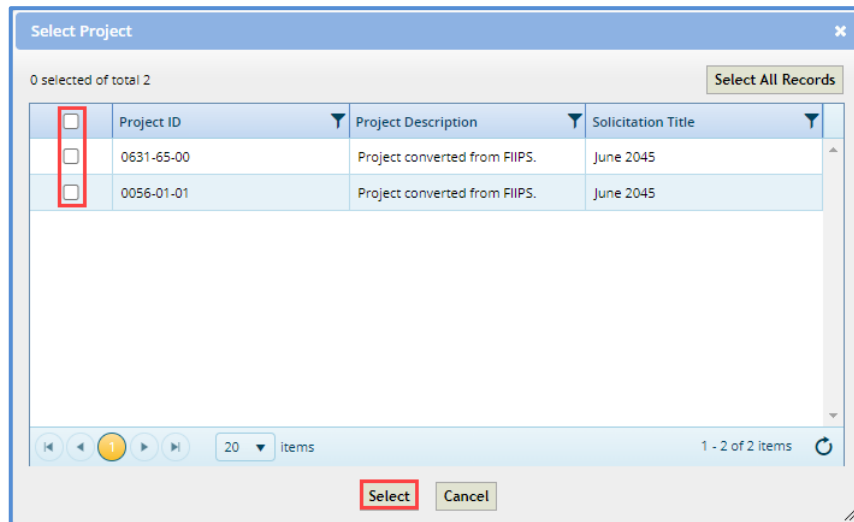


The values in the **Solicitation** and **Query Date** fields are auto-populated.

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

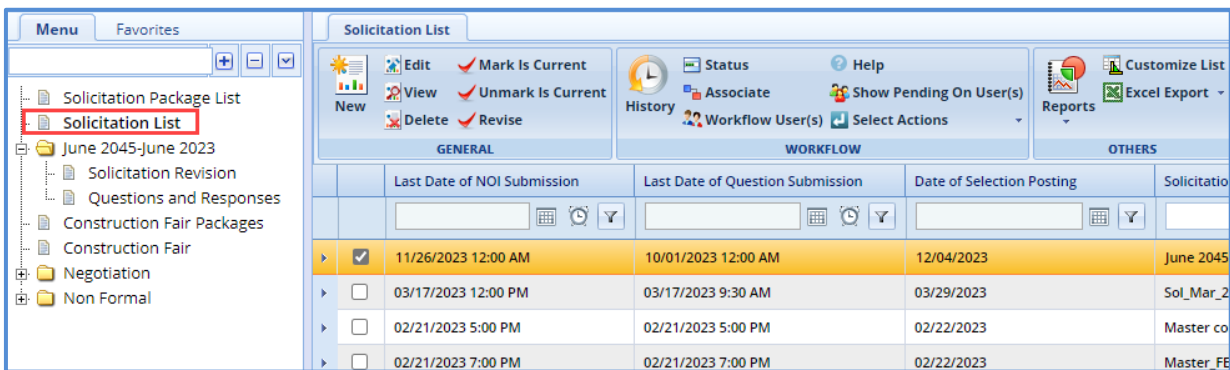
The system allows you to view the solicitation details and express your interest in the solicitation by submitting the duly filled-in NOI to WisDOT.

4.1 Viewing the Solicitation Details

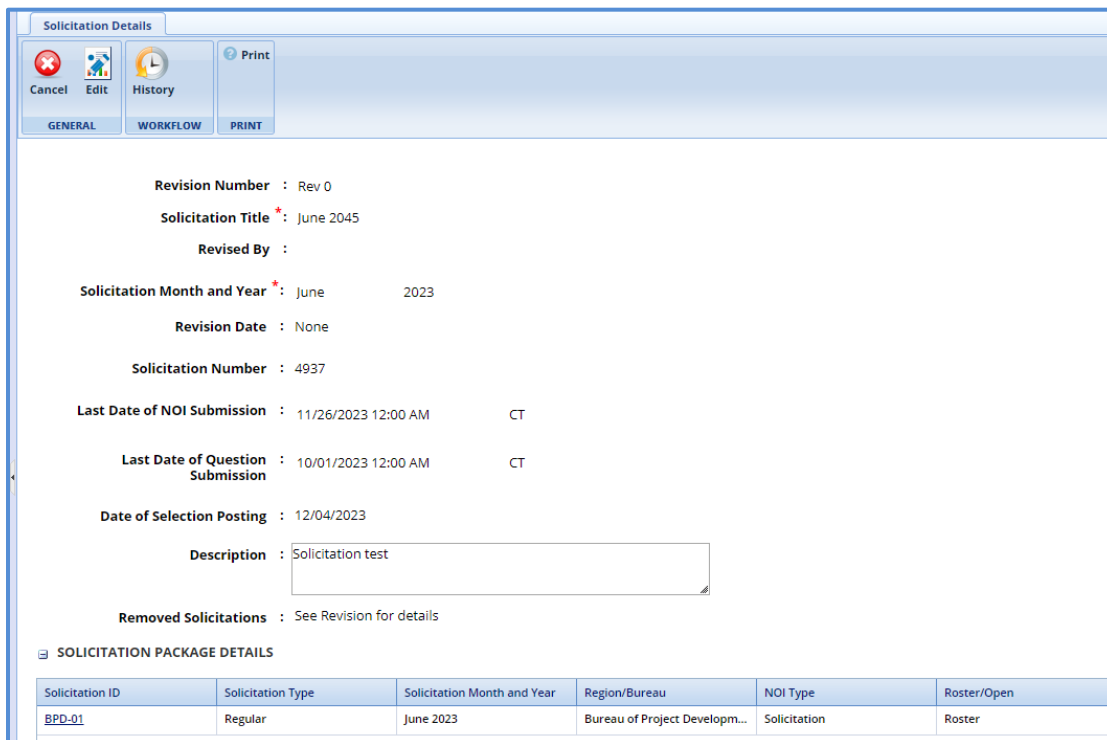
The system allows you to view the solicitation details such as projects associated with the solicitation, scope of service, and tasks associated with the solicitation.

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.



- 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.

- 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.

Solicitation Package

Cancel Edit

GENERAL

Region/Bureau *: Bureau of Project Development

NOI Type *: Solicitation

Solicitation Month and Year *: June 2023

Solicitation Due Date and Time Zone: 11/26/2023 12:00 AM CT

Solicitation ID: BPD-01

Reviewers Shortlist needed: No

Roster/Open *: Roster

Contract Type *: Regular

Reviewers Ranking needed: No

Contract Function *: Bridge Analysis And Evaluation

Solicitation Type:

Staffing Contract *: Yes

PROJECTS

Project ID	Project Description	Region/Bureau	Route	City/Town/Village	County
	Project converted from ...	Northwest Region	NON HWY		17 - Dunn County
	Project converted from ...	Southwest Region	VAR HWY		56 - Sauk County

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.

Solicitation ID	Solicitation Type	Solicitation Month and Year	Region/Bureau	NOI Type	Roster/Open
BPD-01	Regular	June 2023	Bureau of Project Developm...	Solicitation	Roster

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.

Kindly Save NOI every 30 mins to avoid loss of data

NOTICE OF INTEREST QUESTIONNAIRE

Wisconsin Department of Transportation

NOI ID : <Auto Generated> Solicitation ID : BPD-01

Transportation Region/Bureau : Bureau of Project Development Solicitation Date : June 2023

Solicitation type (Roster/Open) : Roster NOI Due Date : 11/26/2023 12:00 AM CT

Current Workflow Status : Draft Area Code - Telephone Number :

Firm Name * : Area Code - FAX Number :

Street Address : State :

City : Zip code :

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

a. Click **Add**.

1. List credentials, qualifications and years experience for the project manager and other key staff you would assign to this project in the following table. If showing more than two individuals, add tables using format provided. Key subconsultants may be listed. Be sure to clearly identify the subconsulting firm.

Key Staff	Firm	State	City	Position/Proje Role	Years Experience	Education	Registration (PE, RLS, etc.)	Narrative	
No records to display.									
<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/>									

The **New** dialog box is displayed.

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

New

Key Staff *

Firm

State

City

Position/Project Role *

Years Experience

Education

Registration (PE, RLS, etc.)


Narrative

Current Commitments

Current Estimated Availability by Time Period

Attachment Attachments

Document Name	Title	Uploaded By	Uploaded Date	Delete
No Attachments available				

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**.



3. List recently completed or substantially completed projects for each key staff/project manager and provide contact name for each project. Only show the deliverables for which key staff/project manager were responsible on the project. If showing more than two projects, add tables using the format provided. Key subconsultants may be listed. Be sure to clearly identify the subconsulting firm.

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

Add **Edit** **Delete**

The **New** dialog box is displayed.

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

Field	Mandatory / Non-Mandatory	Description
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.

4. If projects listed in question 3 are not WisDOT projects, demonstrate your familiarity with WisDOT processes and procedures.

Narrative :

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

a. Click **Add**.

5. List all the DBE consultants that you solicited and intend to use for subcontracting opportunities to meet the DBE goal on this solicitation. Specify the anticipated work area(s) and/or the NAICS code(s) for which the firm fulfills the desired qualifications. Indicate the percentage of work in the anticipated work area(s) you plan to subcontract to the DBE consultant(s). List only DBE consultants that have been directly contacted for this project and have made a commitment to be on your team. If you are in a mentor protégé agreement with the DBE firm, please list the type of work or NAICS code for which they are currently certified and the mentor work area you will provide if awarded this solicitation (repeat any DBE subcontractors listed in question #2)

DBE Firm Name	Anticipated Work Areas	NAICS Code	Estimated Percentage of Work Area	Comment :
No records to display.				



The **New** dialog box is displayed.

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

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

The screenshot shows a 'New' dialog box with the following fields and controls:

- DBE Firm Name :** A text input field followed by a selection button (three dots).
- Anticipated Work Areas :** A text input field.
- NAICS Code :** A text input field followed by a selection button (three dots).
- Estimated Percentage of Work Area (%) :** A text input field containing the value '0.00'.
- Comment :** A text input field.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

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.

6. In 1,000 characters or less, note any other pertinent information about your firm's qualifications for the project.

Narrative :

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

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

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

WisDOT MasterWorks

Notes :

Set Days To Complete for Next Stage :

Attachments

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

Upload Document

OK Cancel

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

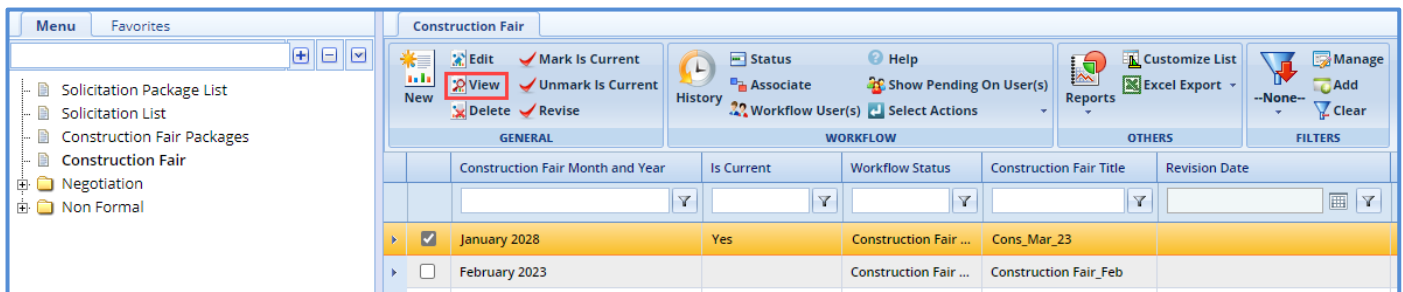
The system allows you to express your interest in a construction fair by submitting the Notice of Interest (NOI) for the current construction fair. Prior to submitting NOI, you can also raise queries regarding the construction fair and receive appropriate answers.

5.1 Viewing Construction Fair Details

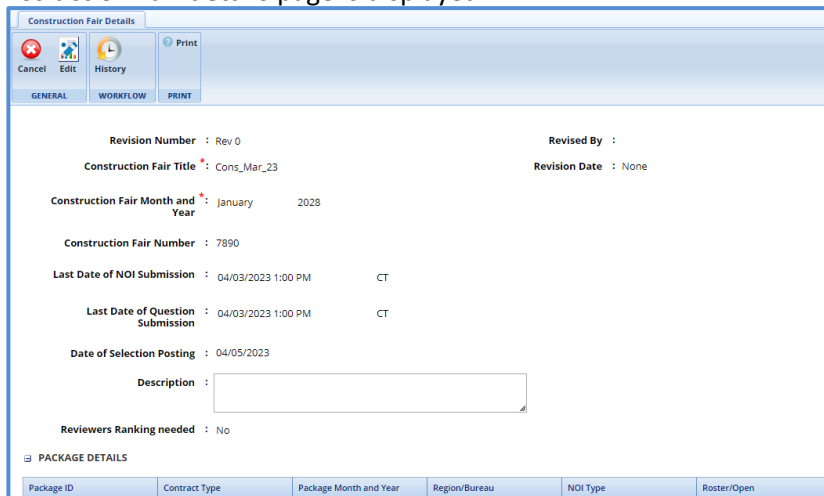
The system allows you to view the construction fair details including construction fair packages associated with the construction fair.

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.

Package ID	Contract Type	Package Month and Year	Region/Bureau	NOI Type	Roster/Open
BOS-01	Regular	January 2028	Bureau of Structures	Construction Fair	Roster
BPED-01	Regular	January 2028	DTIM - Bureau of Planning a...	Construction Fair	Roster

5.2 Questions and Responses

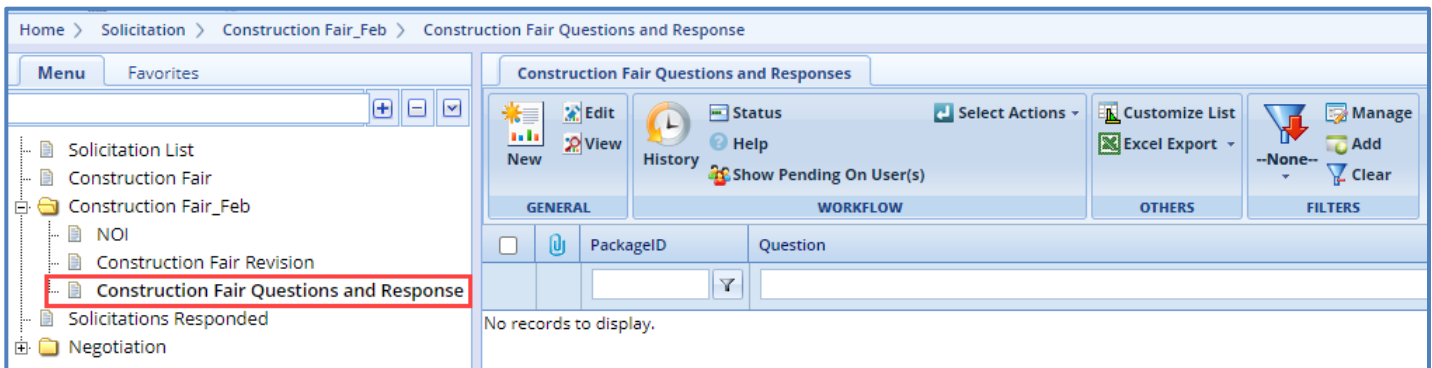
The system allows you to submit questions regarding the construction fair. The questions must be submitted before the expiry of the last date of question submission, which is defined on the **Construction Fair details** page. WisDOT will publish relevant answers to the questions submitted.

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:

Projects			
Project ID	Project Description	Construction Fair Title	Package Id
No records to display.			
<div style="display: flex; justify-content: space-between; align-items: center;"> Add Delete </div>			

- 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.




Package ID	Contract Type	Package Month and Year	Region/Bureau	NOI Type	Roster/Open
BOS-01	Regular	January 2028	Bureau of Structures	Construction Fair	Roster

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: <ol style="list-style-type: none"> 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: <ol style="list-style-type: none"> Click . 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: <ol style="list-style-type: none"> Click . 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.
- Click **Add**. The **Region/Bureau** dialog box is displayed listing the regions.
 - Select the required regions and then click **Select**.

1. REGION PREFERENCES

Please indicate the Region(s) your Firm is interested in

Region Interested

No records to display.

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

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

Keystaff/Construc Leader	Firm	Years Experience	Education	Registration (PE, RLS, etc.)	Region Preferences	Work Types	Narrative	
No records to display.								
<div style="display: flex; justify-content: space-between; padding: 5px;"> Add Edit View Delete </div>								

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

New

**Keystaff/Construc
Leader** * ...

Firm

Years Experience 0.00

Education




Registration (PE, RLS, etc.)

Region Preferences ...

Work Types ...

Narrative

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

Field	Mandatory / Non-mandatory	Description
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:

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

Region	Package Id	Project Construction Leader	Construction Leader Firm	Additional Support Staff	Support Staff Firm	Additional Staff from Other Firms (Please Indicate Name and Firm)	
No records to display.							

Add Edit View Delete

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

New
✕

Region : ...

Package Id : ...

Project Construction Leader : ...

Construction Leader Firm :

Additional Support Staff :

Support Staff Firm : ...

Additional Staff from Other Firms (Please Indicate Name and Firm) :

ATTACHMENTS





✕

↓

Document Name	Url/Link	Title	Uploaded By	Uploaded Date
No Attachments available				

- 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	<p>To select region:</p> <ol style="list-style-type: none"> Click . The Region/Bureau dialog box is displayed listing all the regions selected in Factor 1. Select the required key staff/construction leader, and then click Select. <p>The values in the Firm, Years Experience, and Education fields auto-populated.</p>
Package Id	<p>To select interested construction fair package ID:</p> <ol style="list-style-type: none"> Click . The Select Package dialog box is displayed listing all the construction packages associated with the construction fair is displayed. Select the required package, and then click Select.
Project Construction Leader	<p>To select the project construction leader for the construction fair:</p> <ol style="list-style-type: none"> Click . The Select Key Staff dialog box is displayed listing the construction leaders added in Factor 2. 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	<p>To select additional support staff for the construction fair:</p> <ol style="list-style-type: none"> Click . The Select Key Staff dialog box is displayed listing all the key staff. 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.

- In the **Attachments** section, upload relevant images and files.
- Click **Save**.

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

4. List recently completed or substantially completed projects for each key staff. In the project narrative, show deliverables for which the key staff were responsible and provide contact name(s). Key subconsultants may be listed.

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

Add Edit View Delete

- a. Click **Add**.

The **New** dialog box is displayed.

New

Project Name * : ...

Begin service date : 06/12/2023

End service date : 06/12/2023

Firm's fee on Project in \$:

Key Staff : ...

Project Narrative :


ATTACHMENTS

Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size
No Attachments available					

Upload Document

Save Cancel

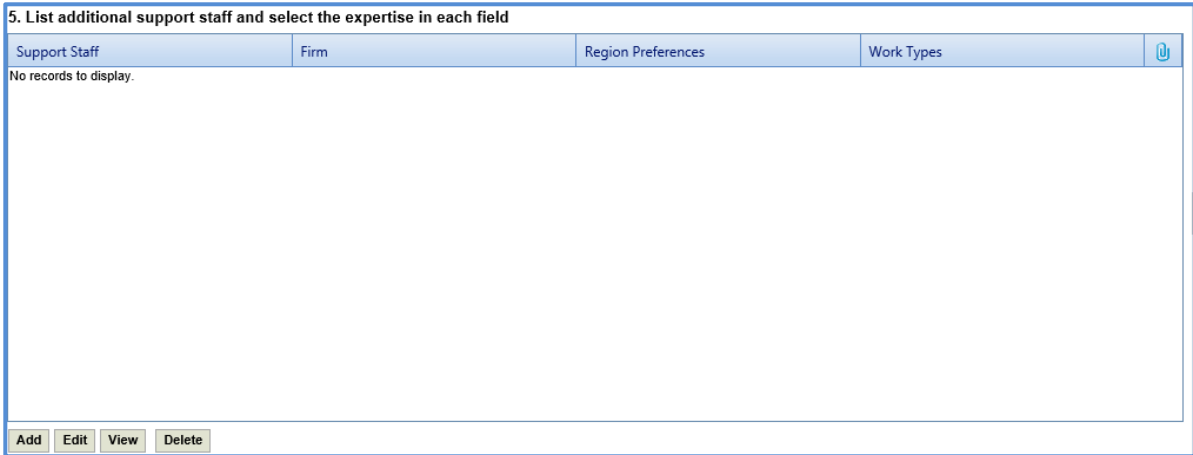
- b. Enter information in the required fields. The fields are described in the following table.

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.

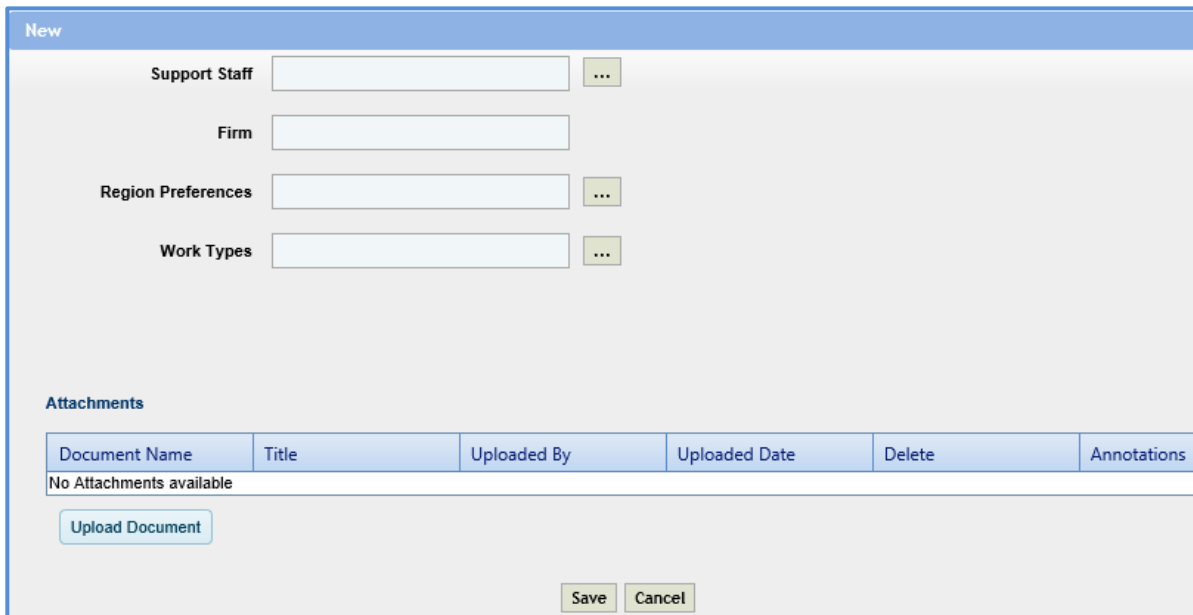
End service date		
Project Narrative	Non-mandatory	The project narration is auto-populated when a project is selected. You can edit the existing narration or enter a new narration about the project.

- 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:

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

Is your lab certified with WisDOT? :

Which tests are you certified to perform? :

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

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

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

Survey ? : Construction Administration Systems ? : ...

Inspection ? : Testing ? : ...


Utility Coordination ? : Design Software ? : ...



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

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

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

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

Field	Description
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:

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

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

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

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

New ✕

Services to be sublet

Anticipated subcontractor name, if known

Save **Cancel**

- 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.

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

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

Add Edit View Delete

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

New [Close]

Project ...

Year ▾


Description

Project Cost

Certifications Required

Save Cancel

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.

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

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

Add Edit View Delete

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

New ✕

Contractor name

Type of work they perform

Save Cancel

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.

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

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

Description of cost-effectiveness measures :

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

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

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

Add Edit View Delete

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

New



Project Name ...

Key Staff ...

Project Narrative

Attachments

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

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.

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

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

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

8 Negotiation

The system allows 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.

	Consultant Estimate ID	Selected Consultant	Selection Type
<input type="checkbox"/>	CE-BBS-22-284	Nagarjuna Constructions	Solicitation
<input type="checkbox"/>	CE-SEF-03-280	Mana Projects	Solicitation
<input type="checkbox"/>	CE-BOA-01-279	Mana Projects	Solicitation

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

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

8.2 Adding Consultant 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.

Consultant Estimate Project Details

Save Cancel Ball In Court Publish ReDraft

General Workflow

Consultant Estimate ID : CE-BBS-22-284 Consultant Estimate Title : * Consultant Estimate Title

Selection Type : * Solicitation Bimonthly Solicitation Title : * Bimonthly for the month of June 2017

Bimonthly Solicitation Month/Year : June 2017 Solicitation ID : * BBS-22

Region/Bureau : Bureau of Business Services Fixed Fee % : 7.00

Selected Prime Consultant : * Nagarjuna Constructions Negotiation Submission Due Date : * 06/30/2017

Import Task List from : * Solicitation Task List

Projects (In scope excluding If authorized)

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

Projects (If authorized)

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

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

Consultant Estimate Project Details | Rate Card | Direct Labor Cost | Direct Cost | Fixed Fee | Indirect Cost

Save | Reports

GENERAL | OTHERS

Consultant Estimate ID : CE-SW-02-1171-A-3-3700

Solicitation ID : SW-02 | Solicitation Month and Year : January 2019

Project ID : 5030-01-02 | Project Name : HILLSBORO - REEDSBURG

Description : Perpetuation projects that mill and overlay the existing asphalt pavement. Curb ramp updates are necessary to meet ADA requirements. Replace guard rail end terminals as needed. No Structure work included with the project. This is a urban and rural resurfacing of all three

Measurement System : IS System

COST SUMMARY (IN SCOPE EXCLUDING IF AUTHORIZED)

Cost Type	Amount in \$
Direct Labor Cost	13,959.36
Direct Cost	234.00
Fixed Fee	2,530.13
Indirect Cost	18,170.90
Estimate Total in \$: 34,894.39	
Estimate Total Hours : 368.00	

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	

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.

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

Note:

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

COST SUMMARY (IN SCOPE EXCLUDING IF AUTHORIZED)

Cost Type	Amount in \$
Direct Labor Cost	13,959.36
Direct Cost	234.00
Fixed Fee	2,530.13
Indirect Cost	18,170.90
Estimate Total in \$: 34,894.39	
Estimate Total Hours : 368.00	

- 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.

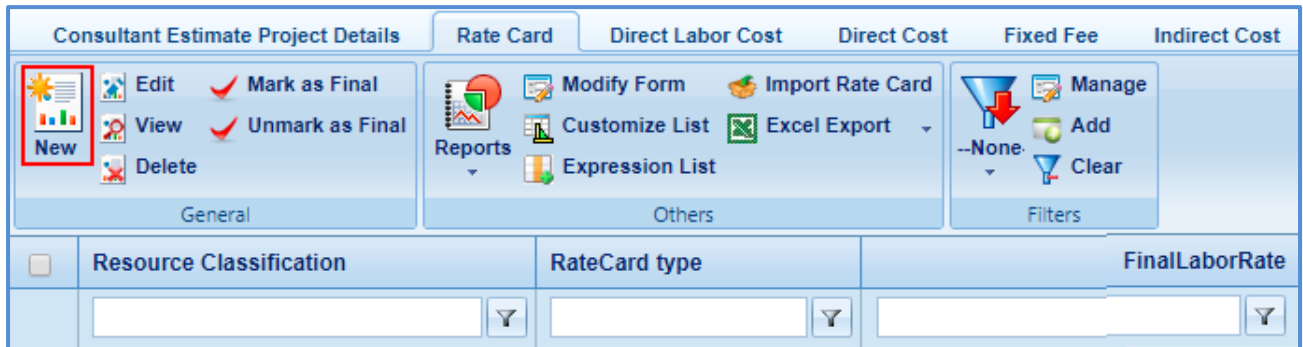
COST SUMMARY (IF AUTHORIZED)	
Cost Type	Amount in \$
Direct Labor Cost	0.00
Direct Cost	0.00
Fixed Fee	0.00
Indirect Cost	0.00
Estimate Total Auth in \$: 0.00	
Estimate Total Auth Hours : 0.00	

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

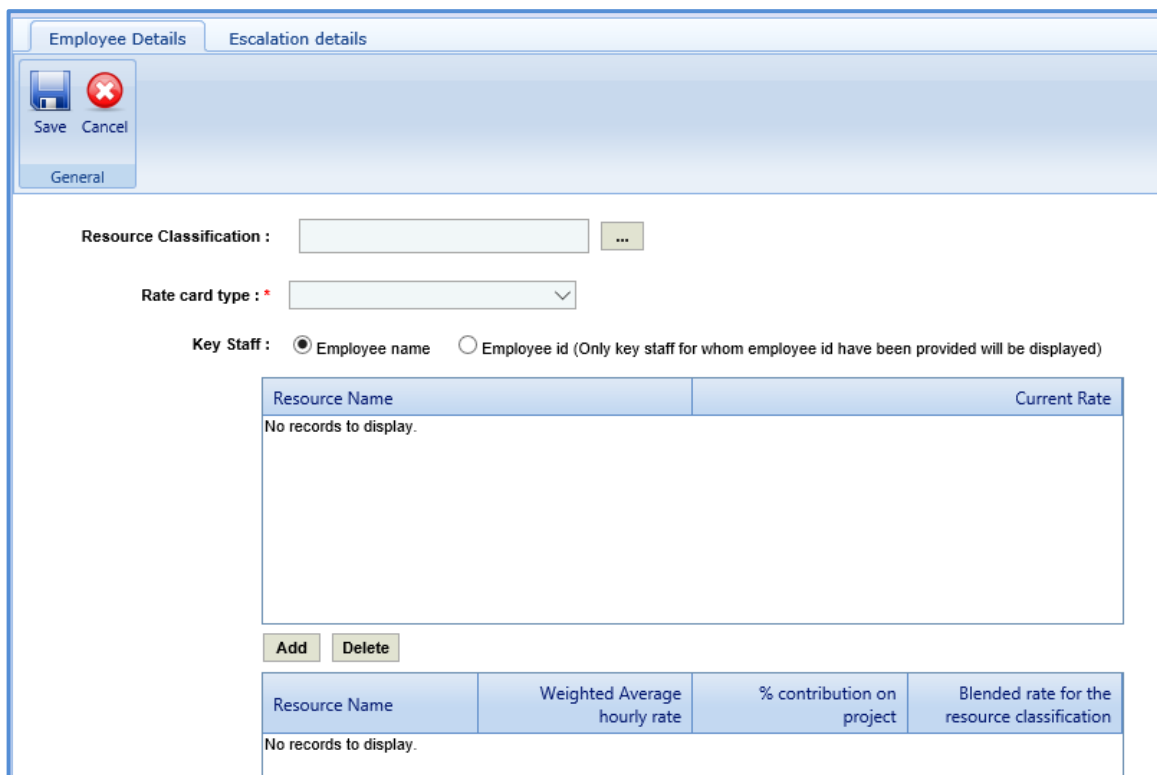
8.3 Creating a Rate Card

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: <ol style="list-style-type: none"> 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: <ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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:

Resource Name	Current Rate
No records to display.	
<div style="display: flex; justify-content: space-between; margin-top: 10px;"> Add Delete </div>	

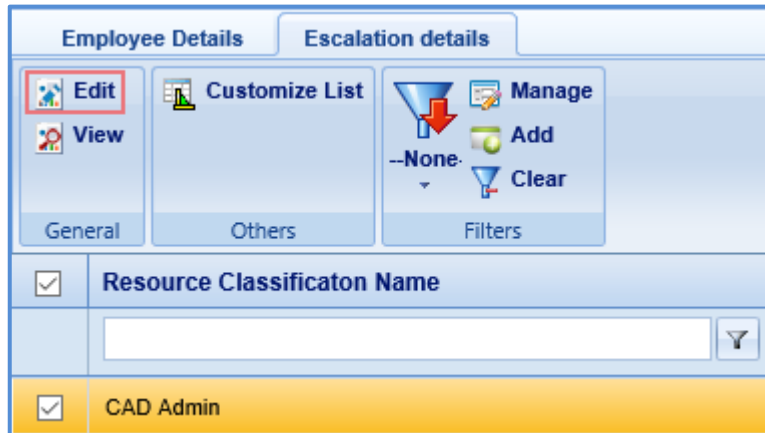
- Click **Add**. The **Key Staff** dialog box is displayed. The dialog box lists the names or employee IDs of the key staff based on the option selected in the **Key Staff** field.
- Select the required key staff record and click **Select**. The record is displayed in the table.
- Corresponding to a 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.

Escalation Details

Save

Cancel

GENERAL

Resource Classification Name : Clerical/Administration - High

Employee Name : -Wendy Spendy

Indirect Cost % : Company Wide 12.00 ...

Fixed Fee % : 4.00


Multiplication Factor : 2.50

ESCALATION DETAILS

Current/Escalation Details in \$	%Pay Increase	New Pay Rate in \$	Date of Increase	% of Work at Current Rate	Weighted Avg. Hourly Rate in \$
40.00	0.00	40.00	08/10/2023	100.00	40.00

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 %	<p>The field is displayed only when the Rate Card type is Specific.</p> <p>To select indirect cost percentage:</p> <ol style="list-style-type: none"> 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. <p>Note: Users can manually update the indirect cost rate if a change has recently been made – a note will appear indicating that.</p>
Fixed fee %	<p>The field is displayed only when the Rate Card type is Specific.</p> <p>The percentage of fixed fee associated with the consultant on the Solicitation Scope of Service is auto-populated.</p>

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

Escalation Details

Save Cancel

GENERAL

Resource Classification Name : Survey Technician - Entry

Employee Name :

ESCALATION DETAILS

Current/Escalation Details in \$	%Pay Increase	New Pay Rate in \$	Date of Increase	% of Work at Current Rate	Weighted Avg. Hourly Rate in \$
28.00	0.00	28.00	01/01/2020	40.00	11.20
28.00	2.60	28.73	01/01/2021	60.00	17.24

28.44

Add Edit Delete

- 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%.

- On the **Escalation Details** page, click **Save**. The defined escalation details are displayed on the **Employee Details** tab.
- Click the **Employee Details** tab, in the second table, the key staff record with the actual labor related rate is displayed.
- 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	<input type="text" value="60"/>	29.28
			48.80

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

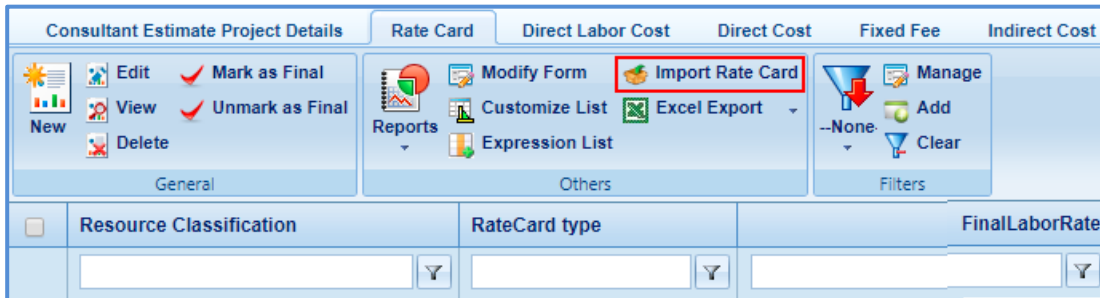
- e. Click **Save**.

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

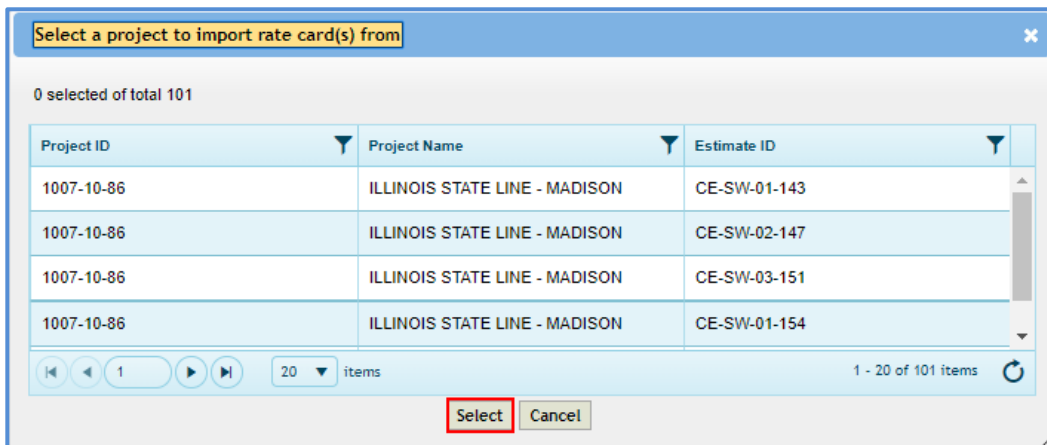
- 8. On the **Employee Details** tab, click **Save**.

2. Importing Rate Card

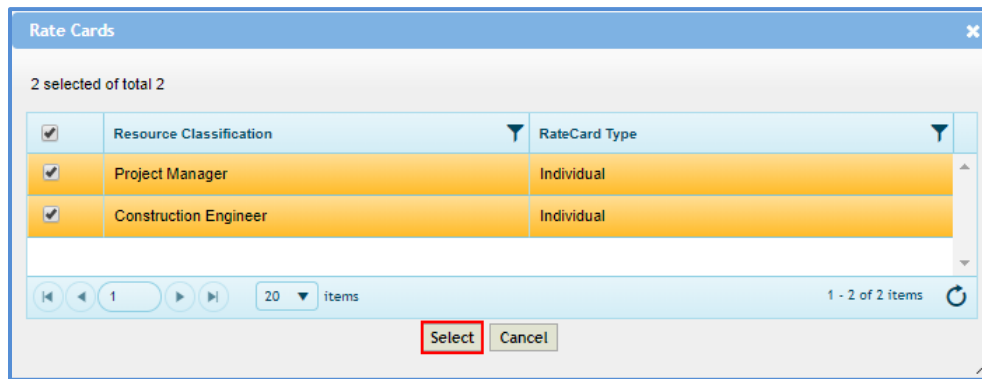
- 1. On the **Rate Card** page, in the **Others** group, click **Import Rate Card**.



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

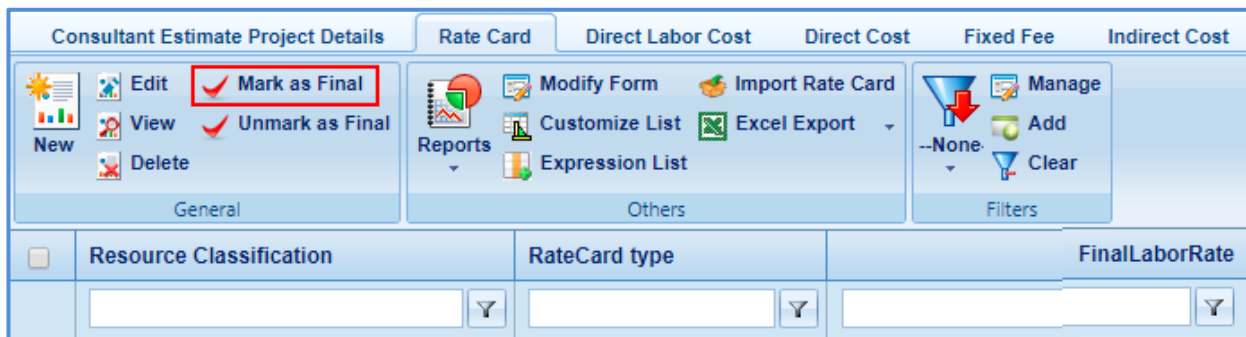


3. Select the rate card and click **Select**. The rate card details are added in Rate Card list page.



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.

ItemName	Order ID	Task Description	Sublet Status
Project Management	1		
Preliminary and Final Design	2		
Pavement and Soils Design	2.1		
208 Design Soils & Earthwork	2.1.1		
208.3 Miscellaneous	2.1.1.1		
208.3.5 Perform laboratory testing and evaluate results	2.1.1.1.1	Perform laboratory testing and evaluate results	Sublet

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.

New Task

Save & Continue

Save Cancel

General

Activity : ENVIRONMENTAL SURVEY/Agricultural

Task : * Clear

Description : *

Unit : * 0

Scope : Select

Authorized : Select

Unit Price in \$: 0.00

Amount in \$: 0.00

Basis of payment :

Rate card type :

Notes :

- 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.

Resources in Current Contract:				
Resource	Employee	Associated Indirect Cost	Indirect Cost %	
No records to display.				
Rate in \$	Quantity (Hrs)	Cost in \$	Fixed Fee %	Multiplication Factor

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

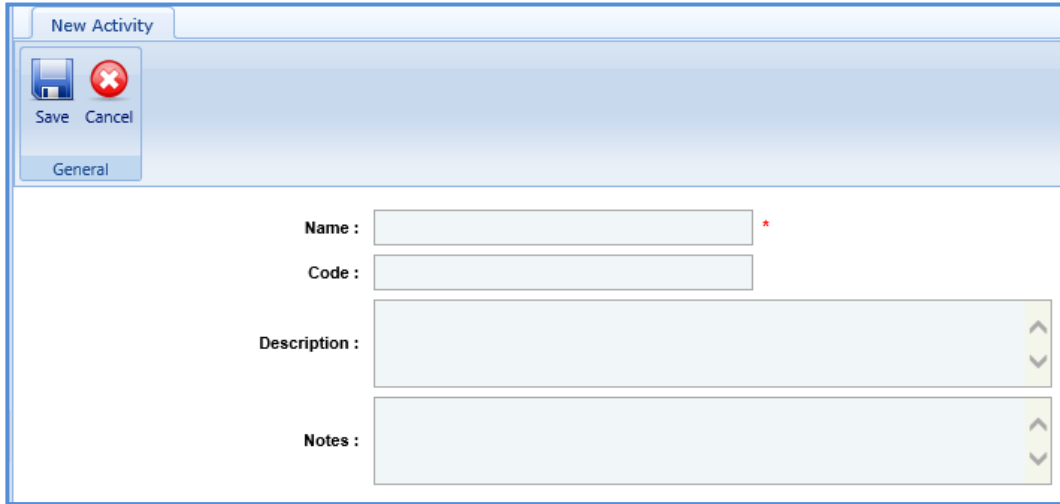
- ii. Select the required resources and then click **Select**. The selected resources are displayed in the **Resources** section.
- iii. Click in the **Associated Indirect Cost** column and from the drop-down list, select required type of indirect cost to associate with the resource.
- iv. Click in the **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.

Consultant Estimate Project Details					Rate Card	Direct Labor Cost	Direct Cost	Fixed Fee	Indirect Cost
Save New Edit View Delete		Refresh Order Reports Assign for Sublet UnAssign for Sublet Mark Final Unmark Final Customize List							
ItemName	Order ID	Task Description	Sublet Status						
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>						
<input type="checkbox"/>	1	Project Management							
<input type="checkbox"/>	2	Preliminary and Final Design							
<input type="checkbox"/>	2.1	Pavement and Soils Design							
<input type="checkbox"/>	2.1.1	208 Design Soils & Earthwork							
<input type="checkbox"/>	2.1.1.1	208.3 Miscellaneous							
<input type="checkbox"/>	2.1.1.1.1	208.3.5 Perform laboratory testing and evaluate results	Sublet						

- 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.

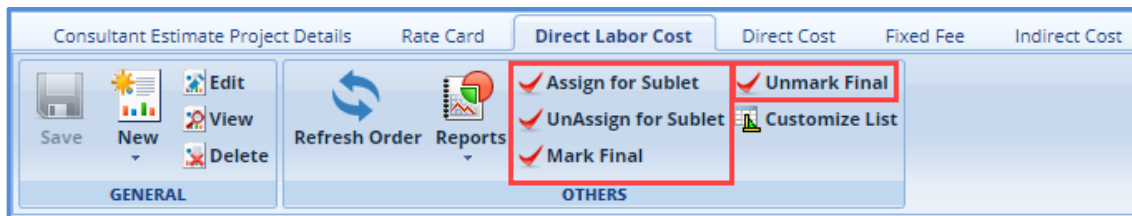
Field	Mandatory / Non-mandatory	Description
Name	Mandatory	Enter a name for the activity.
Code	Non-mandatory	Enter the activity code.
Description	Non-mandatory	Enter description about the activity.
Notes	Non-mandatory	Enter notes about the activity.

- 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:

Consultant Estimate Project Details Rate Card Direct Labor Cost **Direct Cost** Fixed Fee Indirect Cost

Save

GENERAL

☐ DIRECT COST

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

Add Edit Delete

- 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.

In Scope excluding if authorized:	3,500.00
If authorized:	2,250.00

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.

Fixed Fee					
Nagarjuna Constructions					
	Total direct labor cost (A)	Fixed Fee % (B)	(A * B)	Multiplication factor	Total
'In Scope' excluding 'If Authorized'	7026.55	7.00	491.86	2.50	1229.65
'If Authorized'	3710.65	7.00	259.75	2.50	649.38
				Total Fixed Fee	1879.03

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

Field	Description
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** subsection 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.

In Scope excluding If Authorized

CONSULTANT

		Total Costs subject to Indirect Cost in \$	Indirect type %	Indirect Cost against an Indirect Cost type in \$	Basis of Payment
Consultant	Company Wide	0.00	12.00	0.00	▼
		Total Consultant Indirect Cost in \$		0.00	

Note, Total Subconsultant Costs in \$: NA

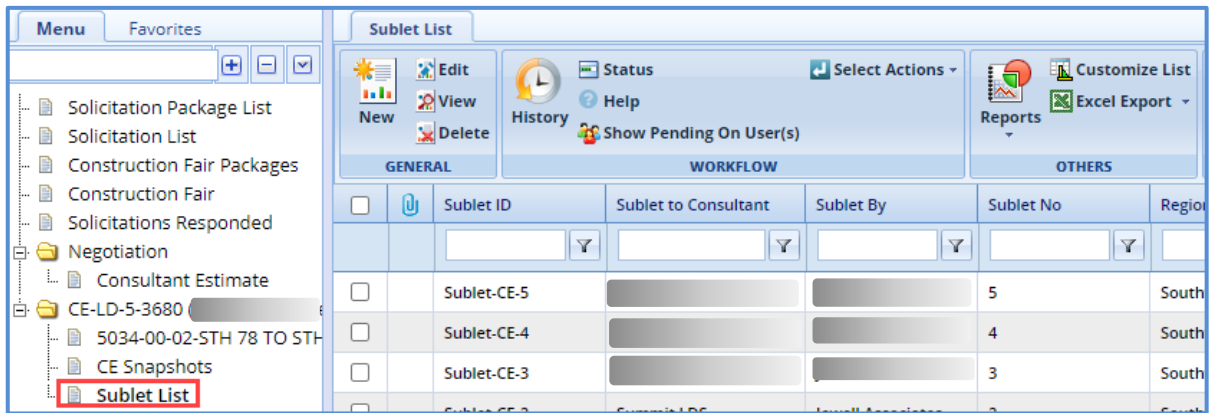
Field	Description
Total Costs subject to Indirect Cost in \$	The total cost subject to an indirect cost for the consultant is auto-populated.
Indirect type %	Indicates the percentage of indirect cost defined for the consultant. This is auto-populated.
Indirect Cost against an Indirect Cost type in \$	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

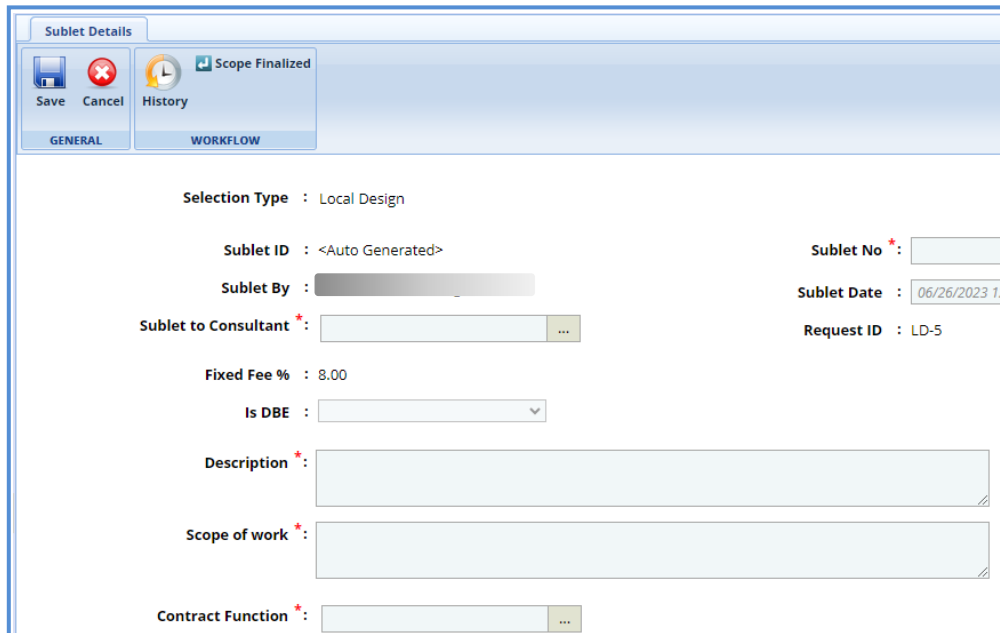
A prime consultant can sublet tasks to other consultant firms. The subconsultant can add their estimate details and publish to the prime consultant for negotiation purposes. The subconsultant can further sublet the tasks to other consultant firms.

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.



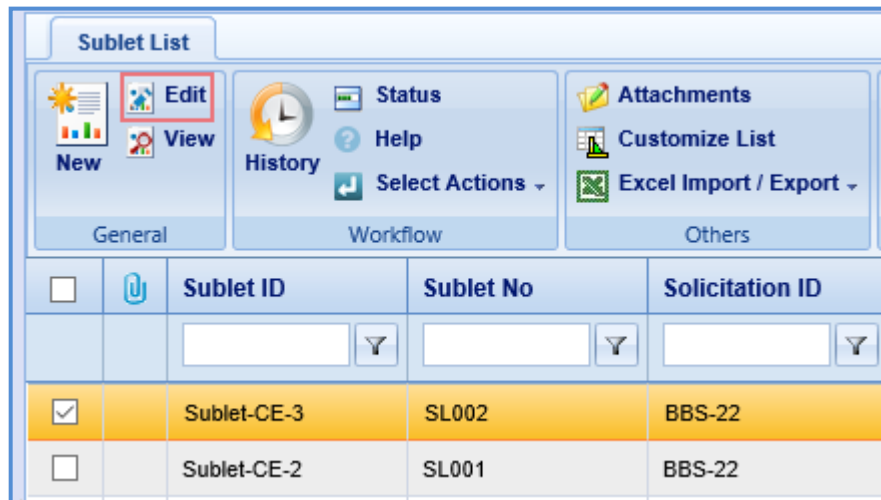
6. Enter information in the required fields. The fields are described in the following table.

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: <ol style="list-style-type: none"> 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: <ol style="list-style-type: none"> 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.

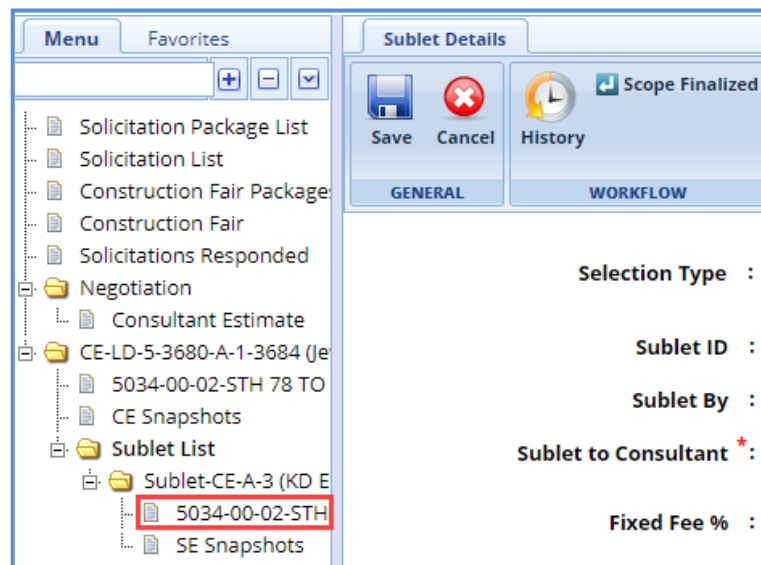
7. In the **Notes** field, enter notes about subletting of tasks.

Notes :

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.

The screenshot displays the 'Sublet Estimate Details' page. The left navigation pane shows a tree view with 'Sublet List' selected. The main content area includes the following fields and tables:

- Sublet ID :** Sublet-CE-A-2
- Request ID :** LD-5
- Project ID :** [Redacted]
- Request Title :** Local Design - Jewell
- Project Name :** BLANCHARDVILLE - DANE COUNTY LINE
- Description :** [Empty text box]
- Measurement System :** IS System

COST SUMMARY (IN SCOPE EXCLUDING IF AUTHORIZED)

Cost Type	Amount in \$
Direct Labor Cost	2,950.00
Direct Cost	0.00
Fixed Fee	0.00
Indirect Cost	0.00
Estimate Total in \$: 2,950.00	
Estimate Total Hours : 0.00	

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 in \$: 0.00	
Estimate Total Auth Hours : 0.00	

ATTACHMENTS

Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size
No Attachments available					

Buttons: Link Document, Upload Document

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	

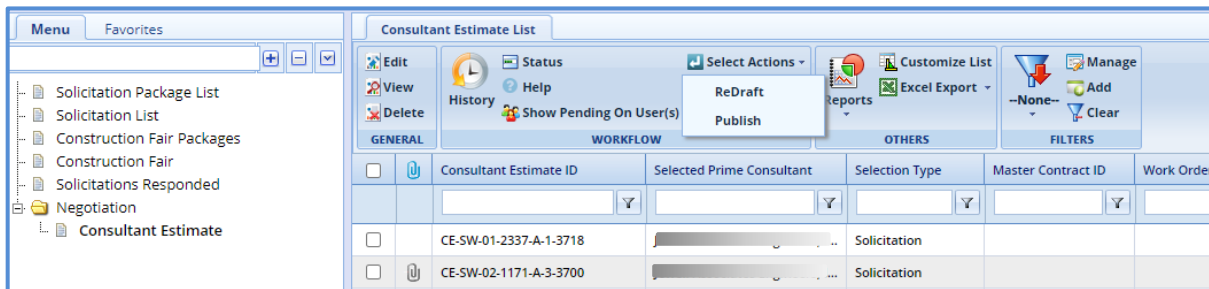
COST SUMMARY (IF AUTHORIZED)	
Cost Type	Amount in \$
Direct Labor Cost	0.00
Direct Cost	0.00
Fixed Fee	0.00
Indirect Cost	0.00
Estimate Total Auth in \$: 0.00	
Estimate Total Auth Hours : 0.00	

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.



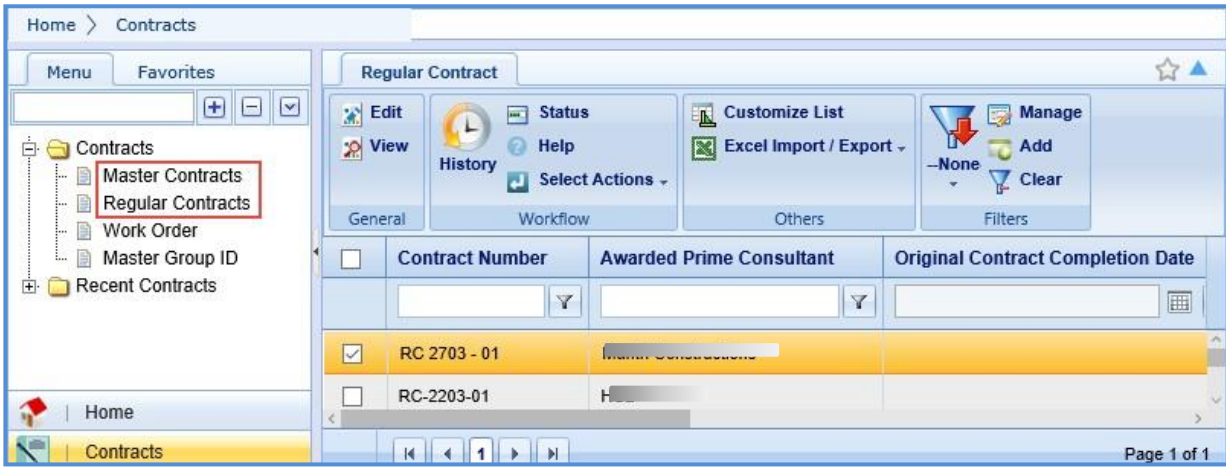
4. In the **Workflow** group, click **Select Actions**, and then click **Publish**. A message to confirm publishing of the estimate appears. Click **OK**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK**. The estimate is published to WisDOT.

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.

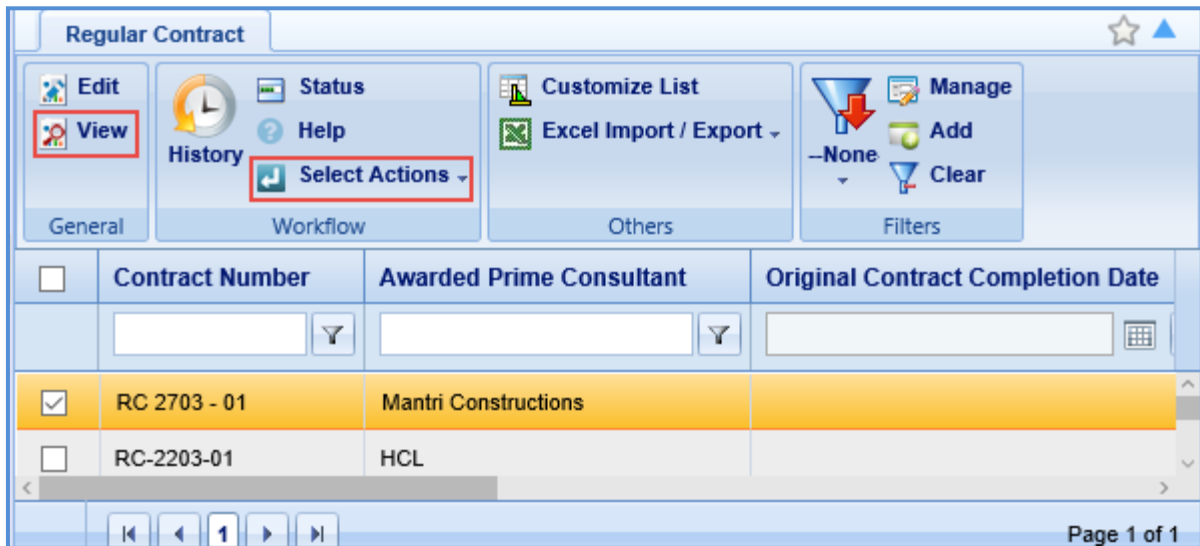
10 Reviewing Contracts

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.



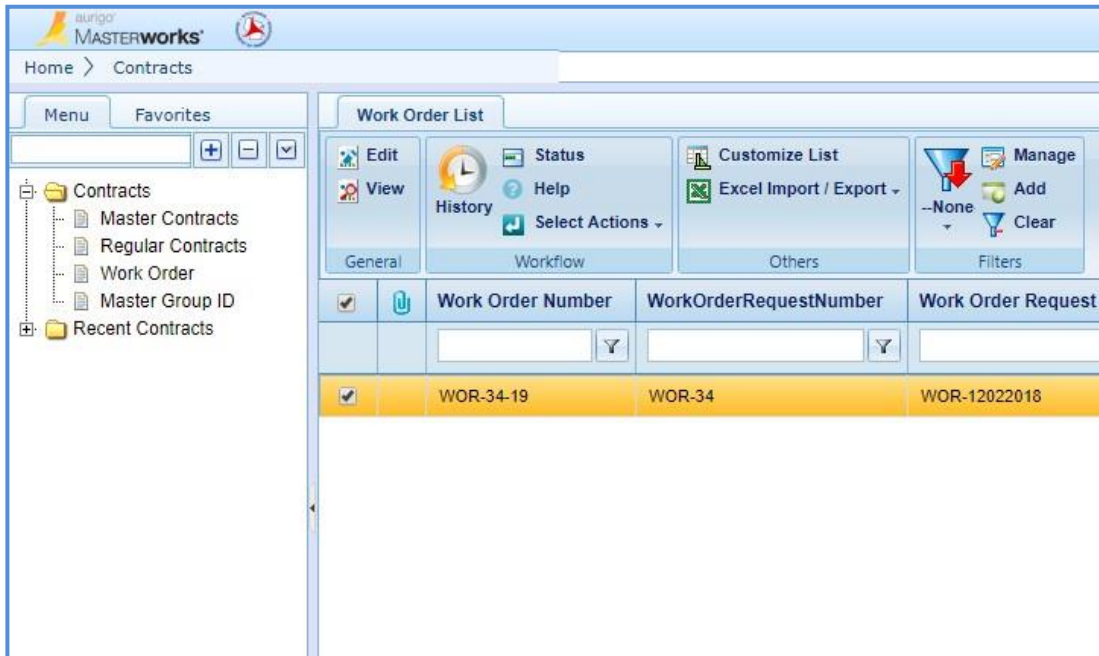
3. Select the contract that is reviewed and click **View** to view the contract details.
4. In the **Workflow** group, click **Select Actions**, and then click **Reviewed**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK**. The contract is reviewed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

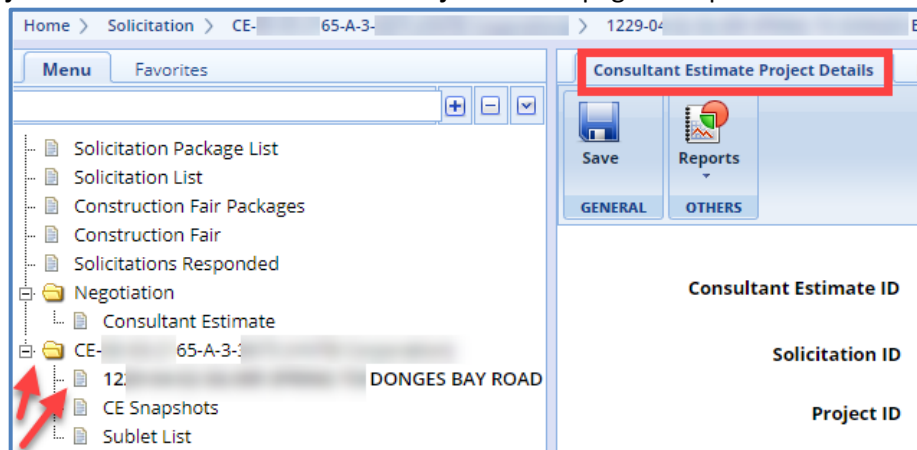
12.1 Reviewing and Updating an Amendment Estimate

Steps:

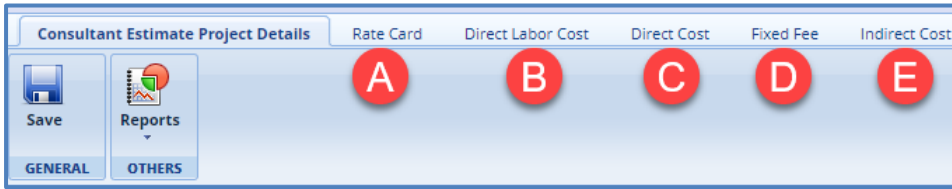
1. In the module menu, click **Solicitation**.
2. In the navigation pane, open the **Negotiation** folder by clicking the plus button and select the **Consultant Estimate** file. The **Consultant Estimate List** page will open.
3. Select the estimate that is being amended then click **Edit**.
4. In the 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.*

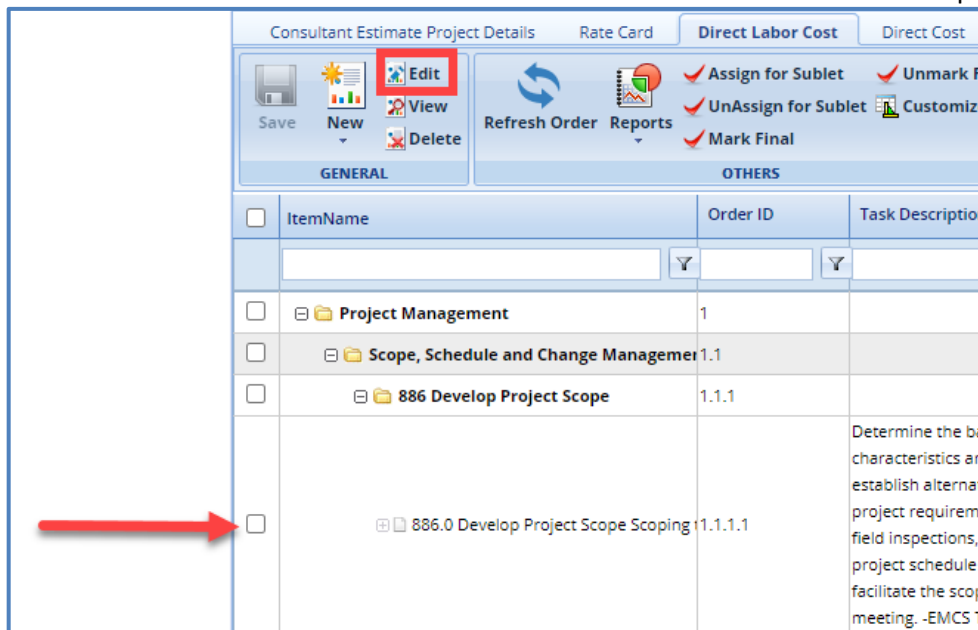
5. In the navigation pane, the **CE Amendment Estimate** folder will appear. Open the folder by clicking the plus button next to it.
6. Click the **Project ID**. The **Consultant Estimate Project Details** page will open.



7. Review and update each tab at [the top of the page](#)



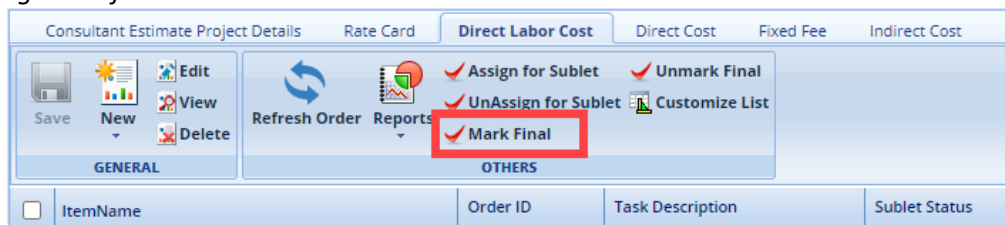
- A. Review and update the **Rate Card** tab.
 - If a resource is new to the contract or if an existing resource has a new rate, follow the steps on [page 75](#) of this manual.
 - If the resources on the current contract will be using rates established from previous approved negotiations, this step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

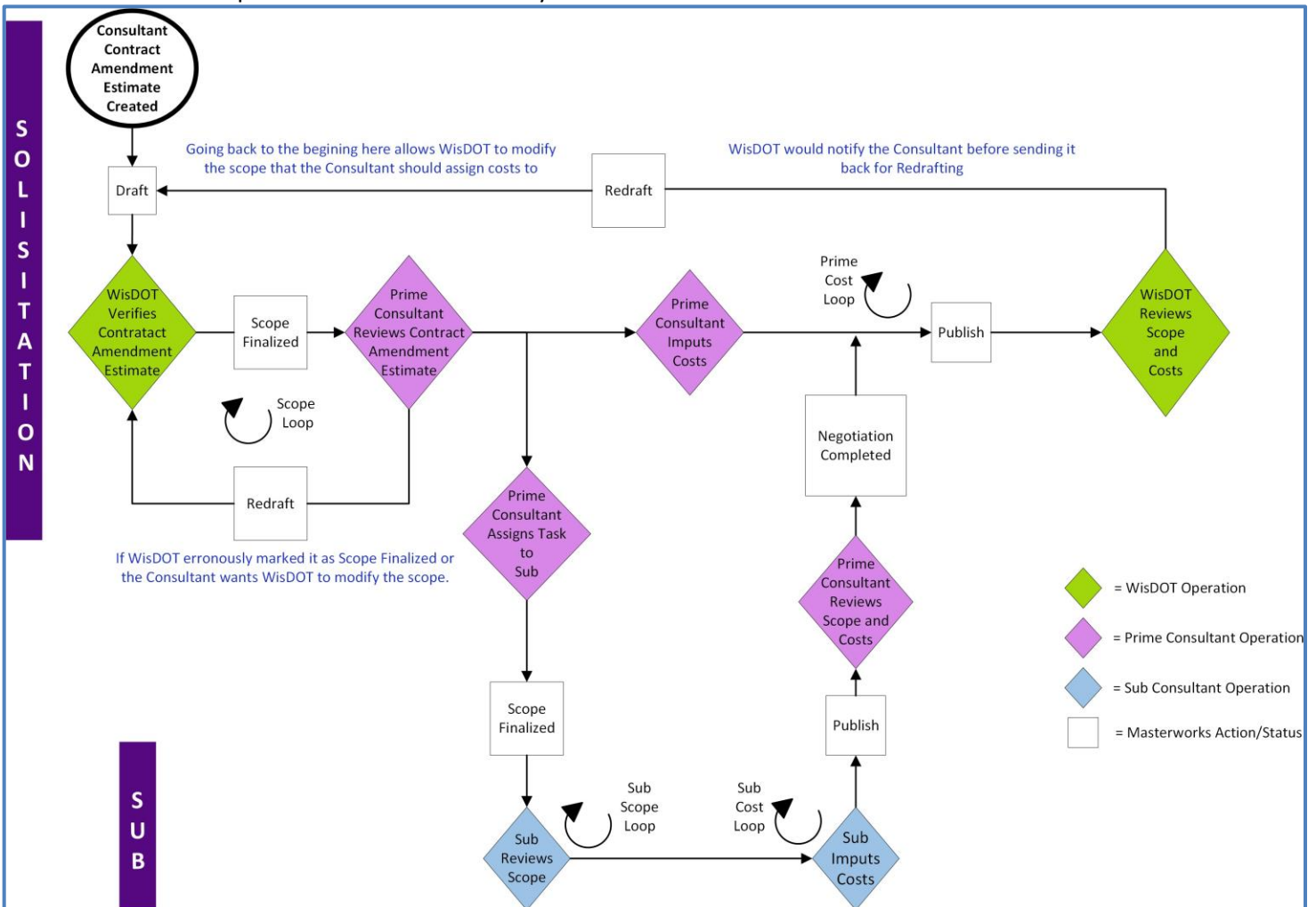
- E. Review the **Indirect Cost** tab. Follow the steps on [page 91](#) of this manual for further steps. If adjustments are needed contact Consultant Services at wisdotmasterworks@dot.wi.gov.
8. Return to the **Consultant Estimate Project Details** tab. Review and upload any needed documents using the **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.