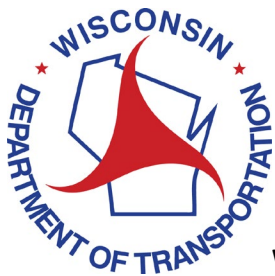


Complete a Consultant Report

2/1/2021



Wisconsin Department of Transportation

Version 1.0

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Version Notes

Version 1.0

- None

Complete a Consultant Report

1 Additional Information

See Guide *Navigate to Consultant Information* to find the Consultant Report.

The user must have the **Consultant – CR** role assigned to complete a consultant report.

Notifications are sent to consultant users with the following roles at the following changes in workflow status.

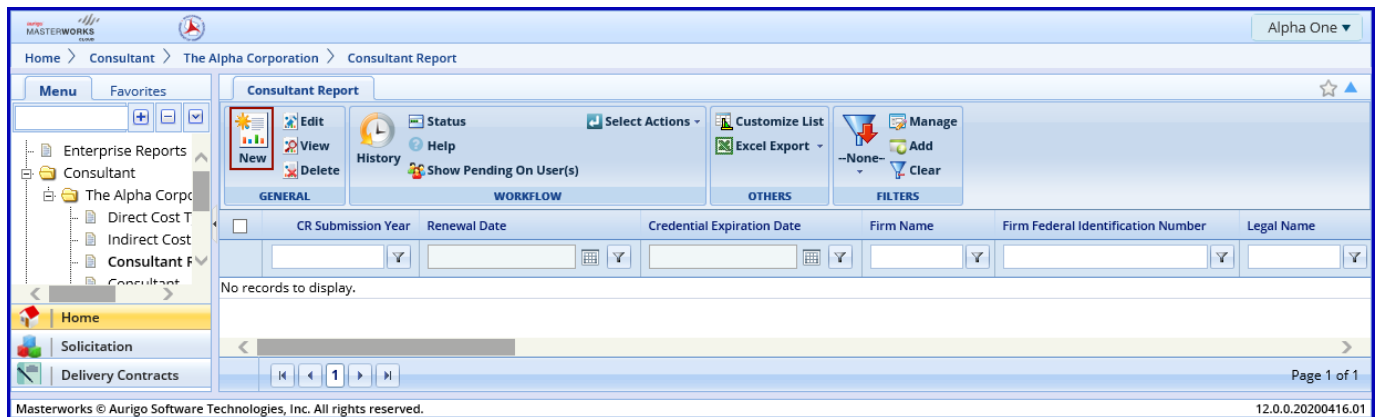
All users assigned the **Consultant – CR** role will receive a notification email from Masterworks when the CR has been Approved, Returned for more info or Rejected.

All users assigned the **Consultant – CR** role will be cc'd on the notification email sent to the Department when the CR has been Submitted, Resubmitted or Reopened.

All users assigned the **Consultant – CR** role will receive a notification email from Masterworks as a Renewal Reminder one month prior to the Renewal Date of the CR.

2 Create a Consultant Report

Click **New** to start a new Consultant Report.



Complete a Consultant Report

2.1 Add Firm Information

Beginning at the top of the form add:

1. **Legal Name:** the firm's legal name of incorporation
2. **Firm type:** Choose **Private Entity** from the dropdown menu
3. **Year Present Firm Established:** **Year** the current entity was incorporated
4. **Fiscal Year End Month and Date:** **Month** and **Day** the firm's fiscal year ends
5. **Name of Parent Company & Address:** If the firm is a subsidiary list the parent company; otherwise leave blank
6. **CR Submission Year:** Choose the current **Year** from the dropdown menu

The screenshot displays the 'Consultant Report' form in the Masterworks software. The form is titled 'Consultant Report' and is for 'The Alpha Corporation'. The form fields are as follows:

Field	Value
Firm Name	The Alpha Corporation
Legal Name	The Alpha Corporation
Year Present Firm Established	1986
Name of Parent Company & Address	Significant Consultants, LLC 4822 Madison Yards Way Madison, WI 53707
Firm Federal Identification Number	
Firm Type	Private Entity
Fiscal Year End Month and Date	December 31
CR Submission Year	2020

The form includes a navigation menu on the left with options like 'Enterprise Reports', 'Consultant', and 'Favorite Management'. The top right corner shows 'Alpha One'. The bottom of the window displays 'Masterworks © Aurigo Software Technologies, Inc. All rights reserved.' and the version number '12.0.0.20200416.01'.

Complete a Consultant Report

Continue to complete the form:

1. **Affiliated Consultants and Contractors:** All other consultants and contractors which the firm is associated
2. **Previous Firm Names:** Enter all other names the firm has done business under
3. **WI Architectural or Engineering Corp Certificate of Authorization Credential # Applicable?:** If choosing to pursue engineering services for WisDOT use the default Applicable option; otherwise choose Not Applicable from the dropdown menu
4. **WI Architectural or Engineering Corp Certificate of Authorization Credential #:** If box 3 is set to Applicable, enter the credential number; if box 3 is set to Not Applicable, box 4 will not be present
5. **Credential Expiration Date:** If box 3 is set to Applicable, enter the date the current credential expires; if box 3 is set to Not Applicable, box 5 will not be present
6. **Is DBE:** If the firm is an accepted DBE, choose Yes from the dropdown menu; otherwise choose No
7. **DBE Type of Ownership:** If the firm is a DBE, select the DBE type; if box 6 is set to No, box 7 will not be present

Alpha One

Home > Consultant > The Alpha Corporation > Consultant Report

Menu Favorites

Enterprise Reports
Consultant
The Alpha Corporation
Direct Cost T
Indirect Cost
Consultant F
Consultant -
Consultant F
Key Staff
Snapshots

Home
Solicitation
Delivery Contracts

Consultant Report

Save Cancel History Submit Instructions

GENERAL WORKFLOW OTHERS

1 Affiliated Consultants & Contractors : Thermal Testing, Inc.
The Difference Financial, LP

2 Previous Firm Names : Second to None Design, LLP

3 WI Architectural or Engineering Corp Certificate of Authorization Credential # Applicable?

4 WI Architectural or Engineering Corp Certificate of Authorization Credential # : 0000

5 Credential Expiration Date : 12/31/2020

6 Is DBE : Yes

7 DBE Type of Ownership : Other

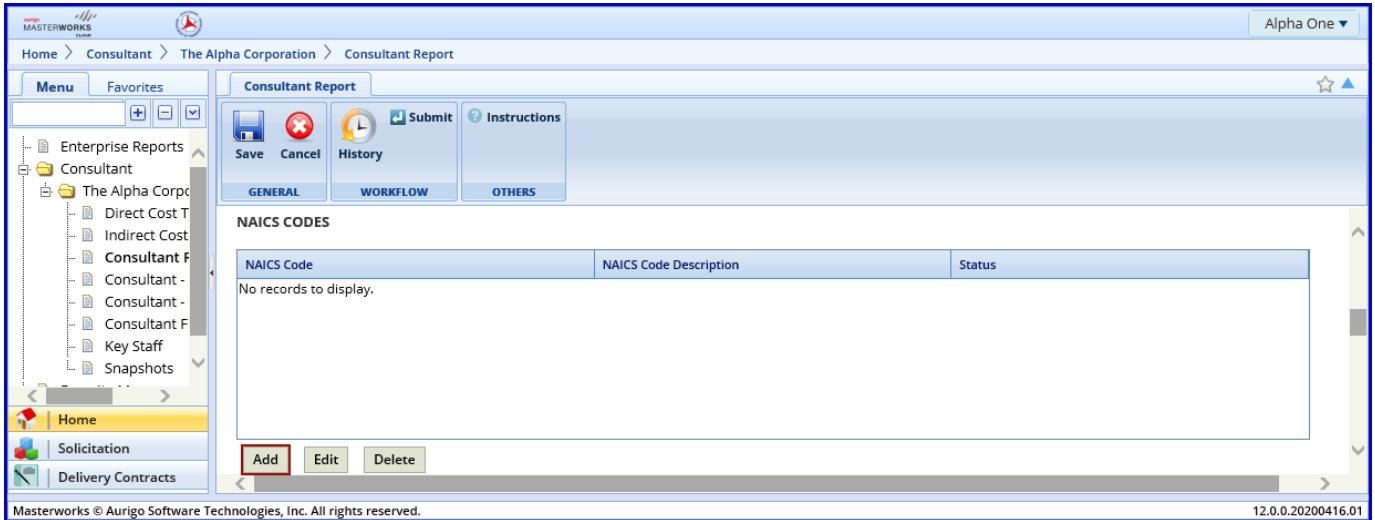
Masterworks © Aurigo Software Technologies, Inc. All rights reserved. 12.0.0.20200416.01

Complete a Consultant Report

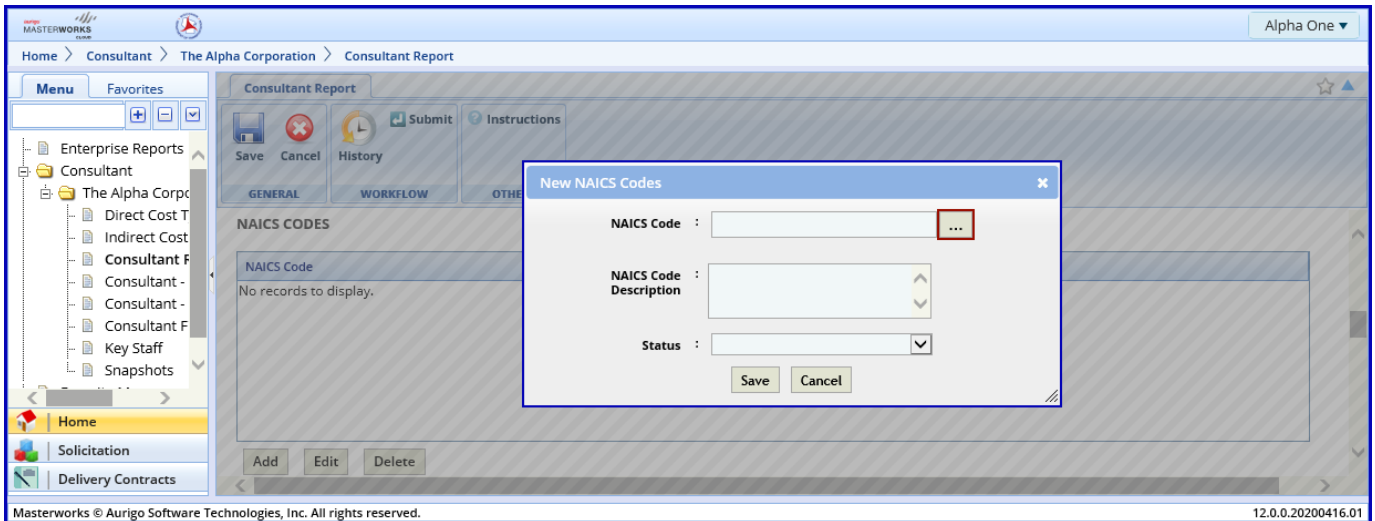
2.2 Add NAICS Codes

If the firm is a DBE, add applicable NAICS codes, otherwise move to the next section.

Click **Add** under the NAICS CODES table.

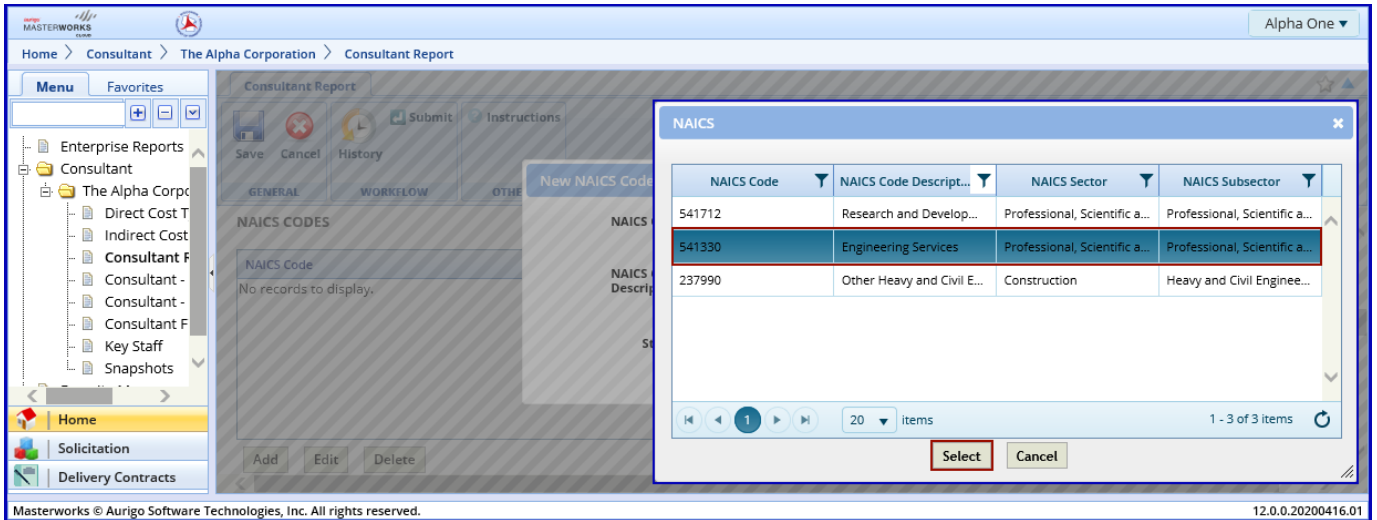


In the popup box that appears click on the **ellipses ...**



Complete a Consultant Report

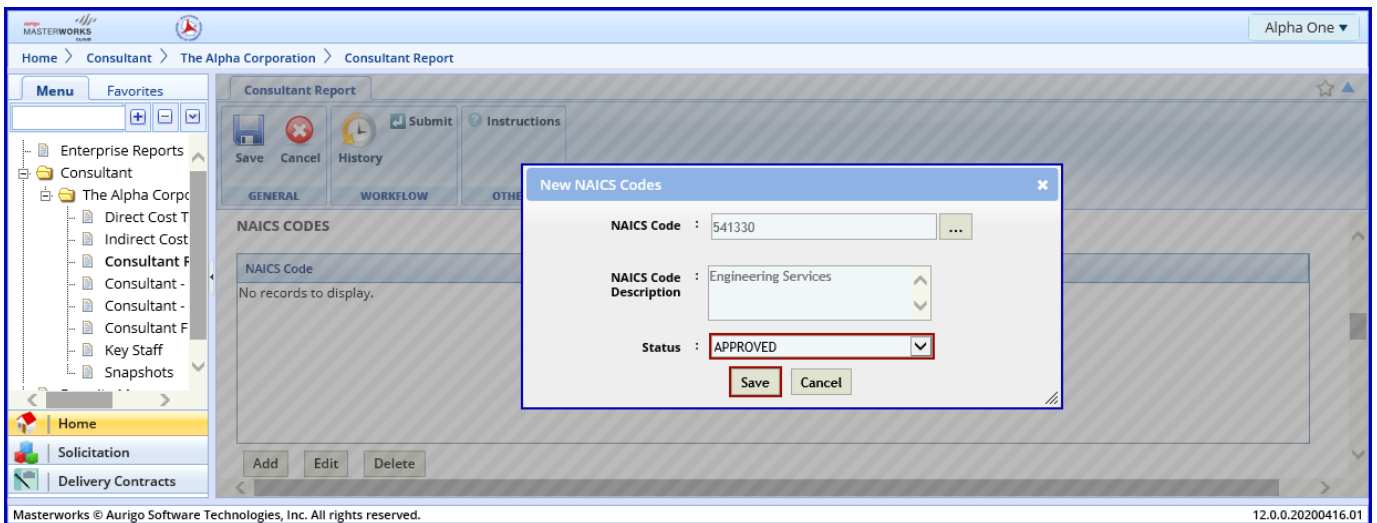
Select a **NAICS Code**, using the filters if necessary, and click **Select**.



The screenshot shows the Masterworks software interface. The main window is titled "Consultant Report" and displays a tree view on the left with "The Alpha Corporation" selected. A "New NAICS Codes" dialog box is open, showing a table of NAICS codes. The row for "541330 Engineering Services" is highlighted. The "Select" button is highlighted with a red box.

NAICS Code	NAICS Code Descript...	NAICS Sector	NAICS Subsector
541712	Research and Develop...	Professional, Scientific a...	Professional, Scientific a...
541330	Engineering Services	Professional, Scientific a...	Professional, Scientific a...
237990	Other Heavy and Civil E...	Construction	Heavy and Civil Enginee...

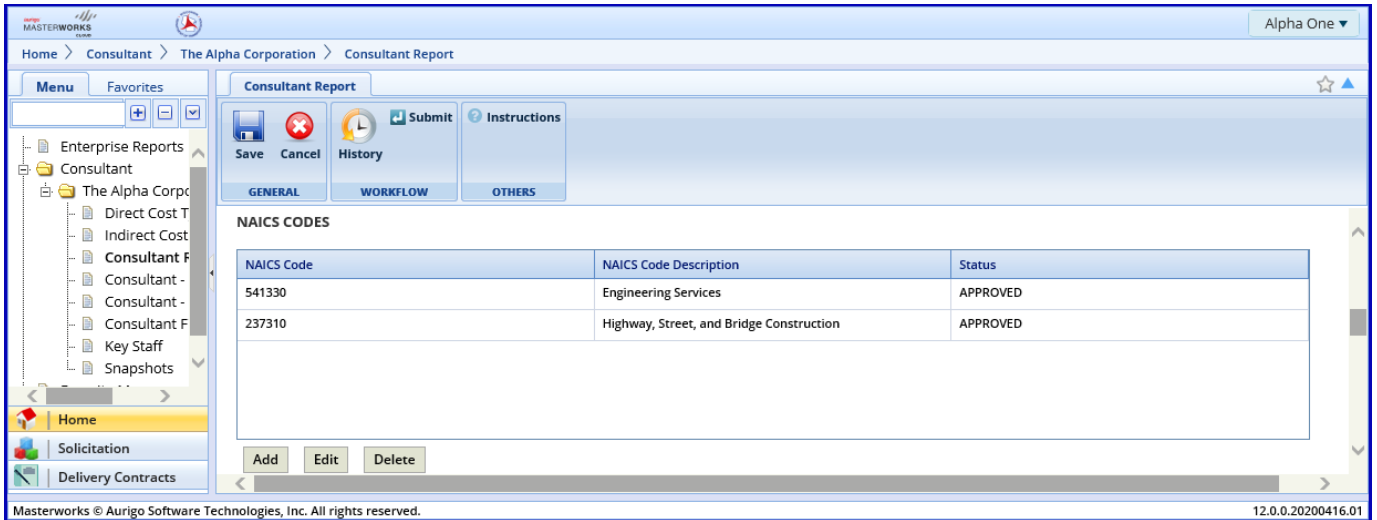
Set the **Status** to **APPROVED** using the dropdown menu. Pending codes should not be included. Click **Save**.



The screenshot shows the Masterworks software interface. The "New NAICS Codes" dialog box is open, showing the "NAICS Code" field set to "541330" and the "NAICS Code Description" field set to "Engineering Services". The "Status" dropdown menu is set to "APPROVED". The "Save" button is highlighted with a red box.

Complete a Consultant Report

Add additional NAICS codes as necessary.



The screenshot shows the Masterworks software interface for a Consultant Report. The breadcrumb navigation is Home > Consultant > The Alpha Corporation > Consultant Report. The left sidebar contains a tree view with 'Enterprise Reports' and 'Consultant' folders. Under 'Consultant', there are sub-items for 'The Alpha Corporation', 'Direct Cost T', 'Indirect Cost', 'Consultant F', 'Consultant -', 'Consultant F', 'Key Staff', and 'Snapshots'. The main content area has a 'Consultant Report' header with 'Save', 'Cancel', 'History', 'Submit', and 'Instructions' buttons. Below this are tabs for 'GENERAL', 'WORKFLOW', and 'OTHERS'. The 'GENERAL' tab is active, showing a table titled 'NAICS CODES' with the following data:

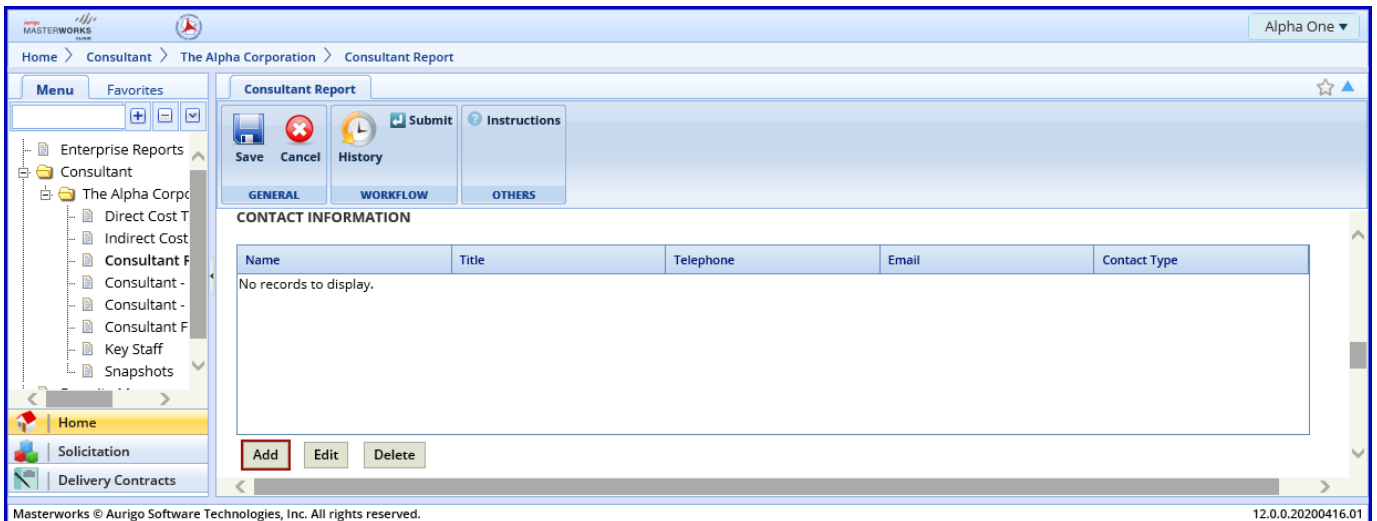
NAICS Code	NAICS Code Description	Status
541330	Engineering Services	APPROVED
237310	Highway, Street, and Bridge Construction	APPROVED

Below the table are 'Add', 'Edit', and 'Delete' buttons. The footer of the window reads 'Masterworks © Aurigo Software Technologies, Inc. All rights reserved.' and '12.0.0.20200416.01'.

2.3 Add Contact Information

Add the contact information of at least one senior manager.

Click **Add** under the CONTACT INFORMATION table.



The screenshot shows the Masterworks software interface for a Consultant Report, similar to the previous one. The breadcrumb navigation is Home > Consultant > The Alpha Corporation > Consultant Report. The left sidebar is the same. The main content area has the same header and tabs. The 'GENERAL' tab is active, showing a table titled 'CONTACT INFORMATION' with the following columns: Name, Title, Telephone, Email, and Contact Type. The table is currently empty, displaying 'No records to display.' Below the table are 'Add', 'Edit', and 'Delete' buttons. The 'Add' button is highlighted with a red box. The footer of the window reads 'Masterworks © Aurigo Software Technologies, Inc. All rights reserved.' and '12.0.0.20200416.01'.

Complete a Consultant Report

Complete the field for **Name, Title, Telephone, Email** and **Contact Type**. Click **Save**.

There are two Contact Types, "Primary" and "Secondary". Up to two contacts may be identified as Primary. Primary contacts will receive notification emails from WisDOT, in addition to Masterworks users with a solicitation role. Secondary contacts may be contacted by WisDOT to resolve other questions.

The screenshot shows the Masterworks software interface. A 'New Contact Information' dialog box is open, allowing the user to add a new contact. The fields are filled with the following information:

Name	Alpha One
Title	CEO
Telephone	(555)555-5555
Email	AlphaOne@alpha.com
Contact Type	Primary

The 'Save' button is highlighted in red. The background shows the 'Consultant Report' page with a table for 'CONTACT INFORMATION' that currently has no records.

Add additional contacts as necessary.

The screenshot shows the Masterworks software interface with the 'Consultant Report' page. The 'CONTACT INFORMATION' table is displayed, listing four contacts:

Name	Title	Telephone	Email	Contact Type
Alpha One	CEO	(555)555-5555	AlphaOne@alpha.com	Primary
Alpha Two	COO	(555)555-5556	AlphaTwo@alpha.com	Primary
Alpha Three	CFO	(555)555-5557	AlphaThree@alpha.com	Secondary
Alpha Four	Roadway President	(555)555-5558	AlphaFour@alpha.com	Secondary

The 'Add', 'Edit', and 'Delete' buttons are visible at the bottom of the table.

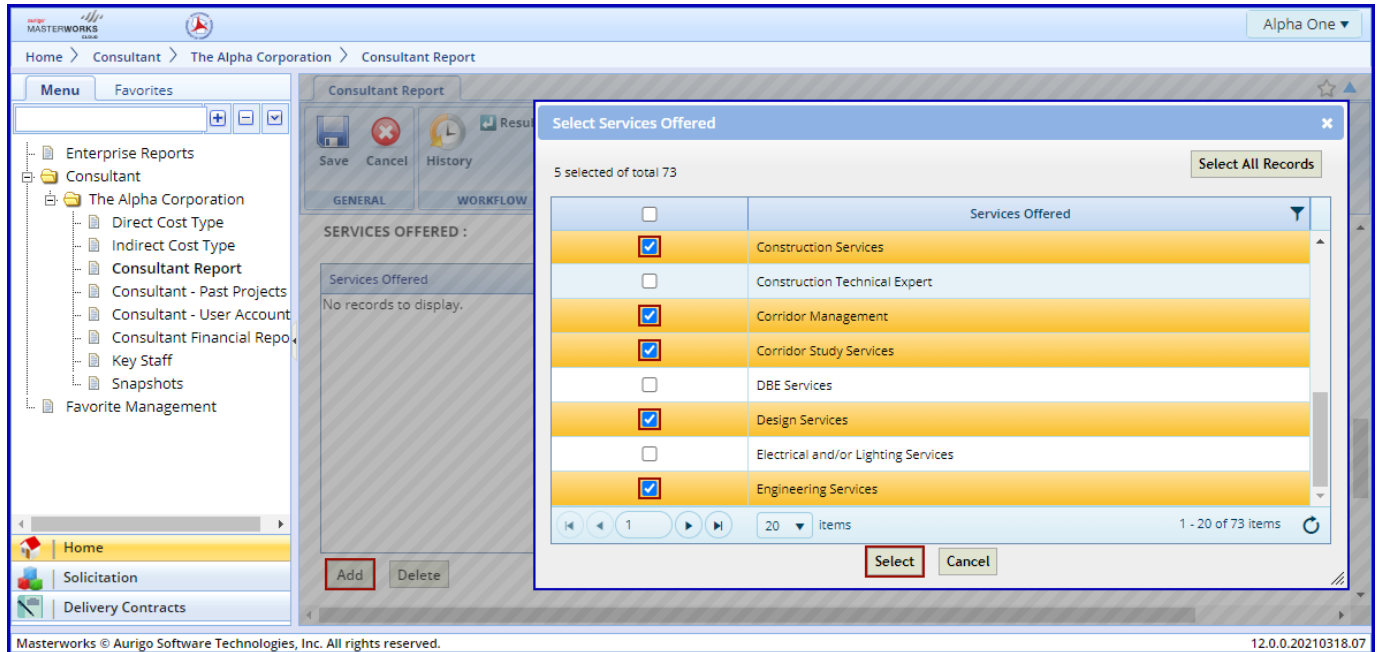
Complete a Consultant Report

2.4 Add Services Offered

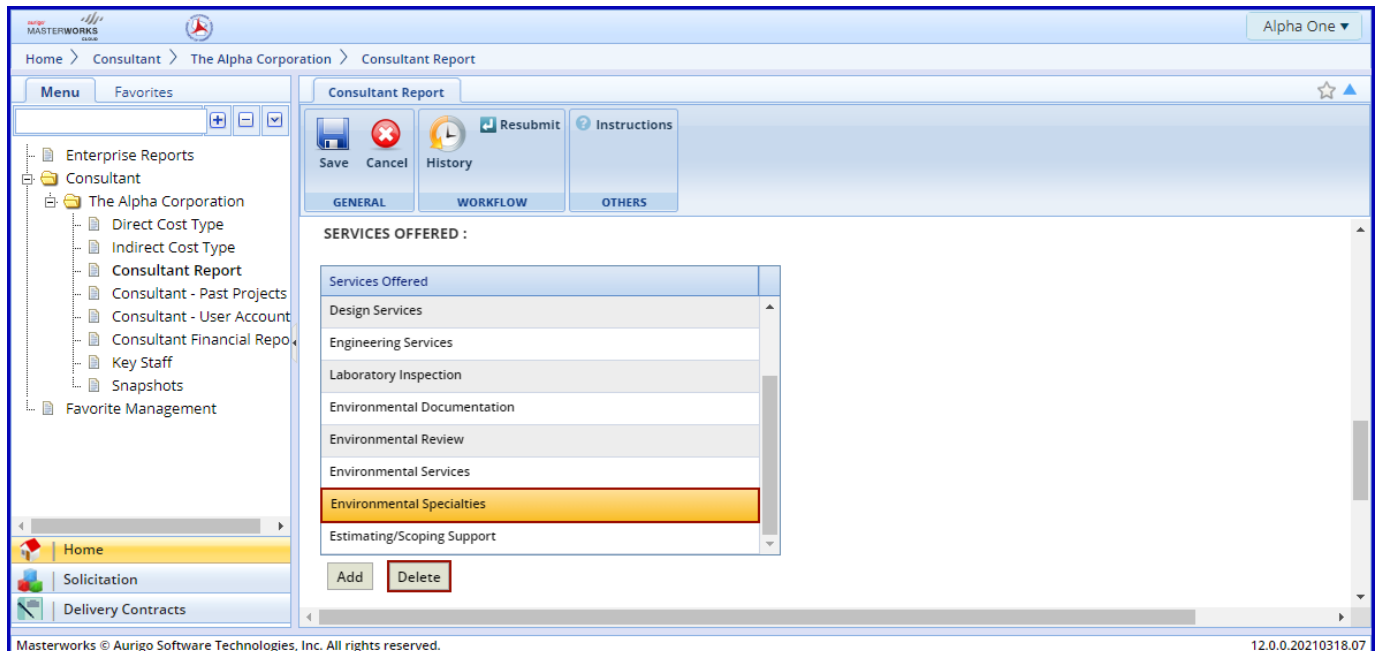
Add the types of services the firm performs.

Click **Add** underneath the **SERVICES OFFERED**. Select one or more services from the popup and click **Select**.

If a service the firm offers is not on the list, add only the services the firm offers.



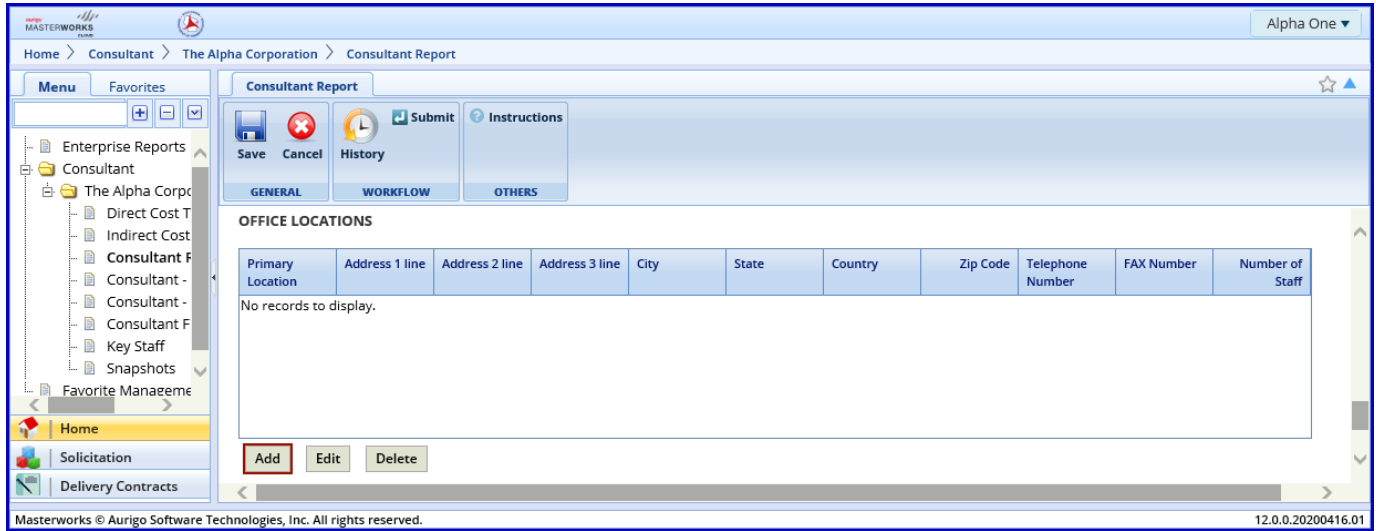
If a service needs to be removed select it and click **Delete**.



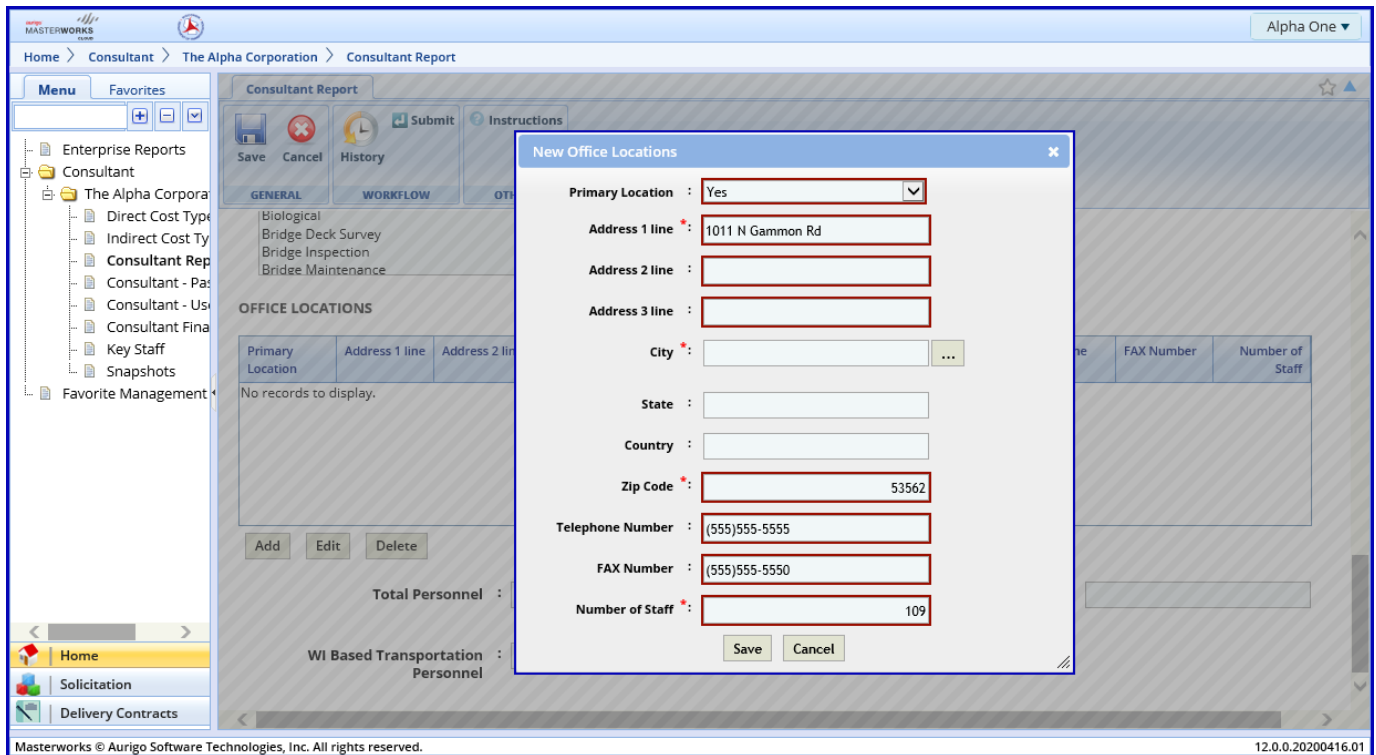
Complete a Consultant Report

2.5 Add Office Locations

Click **Add** under the **OFFICE LOCATIONS** grid to add the first office.



If the office is the **Primary Location** use the dropdown and select Yes; otherwise leave the default No. Add the address using **Address 1 line**, **Address 2 line** and **Address 3 line**; **Zip Code**; **Telephone Number**; **FAX Number** and **Number of Staff** (at that location.)



Complete a Consultant Report

Add the City, State and Country by clicking on the ellipses ... next to **City**.

The screenshot shows the 'New Office Locations' dialog box in the Masterworks software. The dialog box contains the following fields and values:

- Primary Location: Yes
- Address 1 line: 1011 N Gammon Rd
- Address 2 line: (empty)
- Address 3 line: (empty)
- City: (empty) with an ellipsis button next to it
- State: (empty)
- Country: (empty)
- Zip Code: 53562
- Telephone Number: (555)555-5555
- FAX Number: (555)555-5550
- Number of Staff: 109

The background shows the 'Consultant Report' form with a table for 'OFFICE LOCATIONS' and a 'Total Personnel' field.

In the popup select a city, using the filters, and click **Select**.

The screenshot shows the 'City' popup dialog box in the Masterworks software. The popup displays a list of cities with columns for City, State, and Country. The first row is highlighted:

City	State	Country
Middleton	WISCONSIN	United States
Middletown	CALIFORNIA	United States
Middlebury	CONNECTICUT	United States
Middlefield	CONNECTICUT	United States
Middleburg	FLORIDA	United States
New Middletown	INDIANA	United States
Middle Amana	IOWA	United States
Middlesborough	Kentucky	United States

The 'Select' button is highlighted in the bottom right corner of the popup.

Complete a Consultant Report

After all information has been added click **Save**.

The screenshot shows the 'New Office Locations' dialog box in the Masterworks software. The dialog box has the following fields and values:

- Primary Location: Yes
- Address 1 line: 1011 N Gammon Rd
- Address 2 line: (empty)
- Address 3 line: (empty)
- City: Middleton
- State: WISCONSIN
- Country: United States
- Zip Code: 53562
- Telephone Number: (555)555-5555
- FAX Number: (555)555-5550
- Number of Staff: 109

The 'Save' button is highlighted with a red box. The background shows the 'OFFICE LOCATIONS' section of the software interface, which is currently empty.

Add additional locations if necessary.

The screenshot shows the 'OFFICE LOCATIONS' table in the Masterworks software. The table has the following columns and data:

Primary Location	Address 1 line	Address 2 line	Address 3 line	City	State	Country	Zip Code	Telephone Number	FAX Number	Number of Staff
Yes	1011 N Gam...			Middleton	WISCONSIN	United States	53562	(555)555-5555	(555)555-5550	109
No	1555 N Wat...			Milwaukee	WISCONSIN	United States	53202	(555)555-5565	(555)555-5560	63

The 'Add', 'Edit', and 'Delete' buttons are visible below the table.

Complete a Consultant Report

2.6 Add Personnel

Add the number of personnel employed.

1. **Total Personnel:** Total number of employees employed by the firm.
2. **WI Based Personnel:** Total number of employees based in Wisconsin
3. **WI Based Transportation Personnel:** Number of employees performing transportation services

The screenshot shows the 'Consultant Report' form in the Masterworks software. The 'GENERAL' tab is active. Three input fields are highlighted with red boxes and numbered 1, 2, and 3. Field 1 is 'Total Personnel' with a value of 10269. Field 2 is 'WI Based Personnel' with a value of 172. Field 3 is 'WI Based Transportation Personnel' with a value of 72. The left sidebar shows a navigation menu with 'Home' selected. The top right corner displays 'Alpha One' and the bottom right corner shows the version '12.0.0.20200416.01'.

Total Personnel	10269	WI Based Personnel	172
WI Based Transportation Personnel	72		

2.7 Saving and/or Submitting

2.7.1 Save for Later

To save the report for later click the **Save** button at any time.

The screenshot shows the 'Consultant Report' form in the Masterworks software, displaying firm information. The 'GENERAL' tab is active. The 'Save' button in the top toolbar is highlighted with a red box. The form fields include: 'Firm Name' (The Alpha Corporation), 'Firm Federal Identification Number' (empty), 'Legal Name' (The Alpha Corporation), 'Firm Type' (Private Entity), 'Year Present Firm Established' (1986), 'Fiscal Year End Month and Date' (December 31), 'Name of Parent Company & Address' (Significant Consultants, LLC, 4822 Madison Yards Way, Madison, WI 53707), and 'CR Submission Year' (2020). The left sidebar shows a navigation menu with 'Home' selected. The top right corner displays 'Alpha One' and the bottom right corner shows the version '12.0.0.20200416.01'.

Complete a Consultant Report

2.7.2 Save and Submit

To save and submit the report from the form screen, click **Submit**.

The screenshot shows the Masterworks software interface for a Consultant Report. The breadcrumb navigation is Home > Consultant > The Alpha Corporation > Consultant Report. The left sidebar contains a menu with options like Enterprise Reports, Consultant, and Favorite Management. The main form area has tabs for GENERAL, WORKFLOW, and OTHERS. The Submit button is highlighted with a red box. The form contains the following fields:

Firm Name :	The Alpha Corporation	Firm Federal Identification Number :	
Legal Name * :	The Alpha Corporation	Firm Type * :	Private Entity
Year Present Firm Established :	1986	Fiscal Year End Month and Date :	December 31
Name of Parent Company & Address :	Significant Consultants, LLC 4822 Madison Yards Way Madison, WI 53707	CR Submission Year :	2020

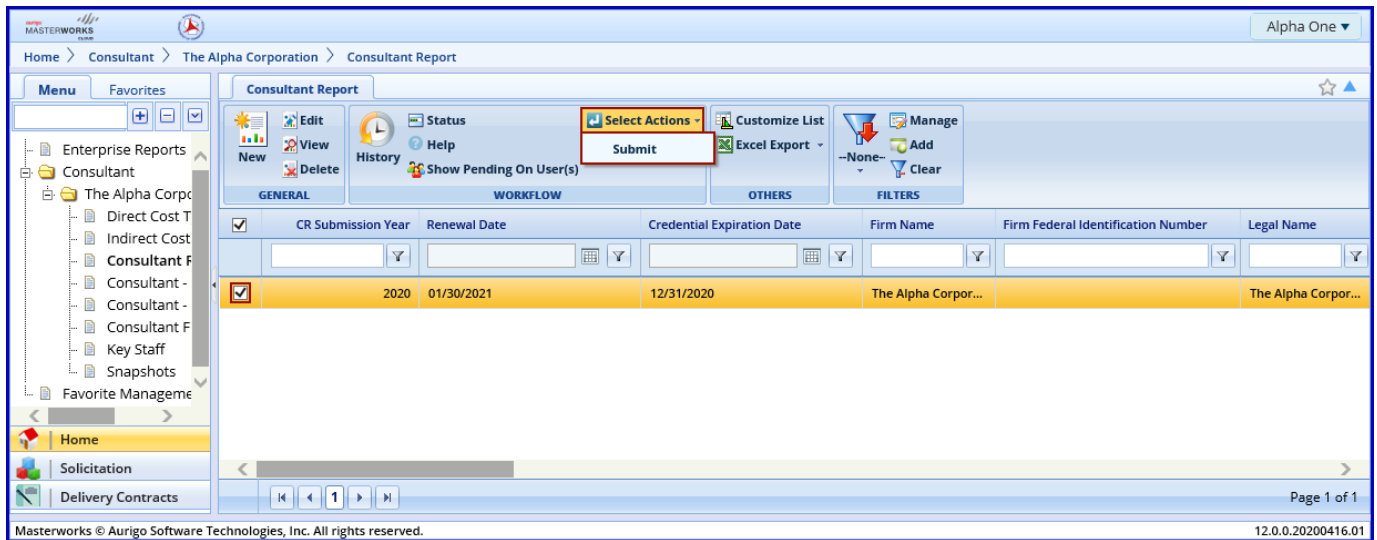
Click **OK** on the acknowledgement screen.

The screenshot shows the same Masterworks software interface, but with an acknowledgement dialog box open in the foreground. The dialog box is titled "Masterworks" and contains a table with the following columns: Document Name, Title, Uploaded By, Uploaded Date, and File. The message "No Attachments available" is displayed in the table area. There is an "Upload Document" button and "OK" and "Cancel" buttons at the bottom of the dialog. The "OK" button is highlighted with a red box. The background form is dimmed.

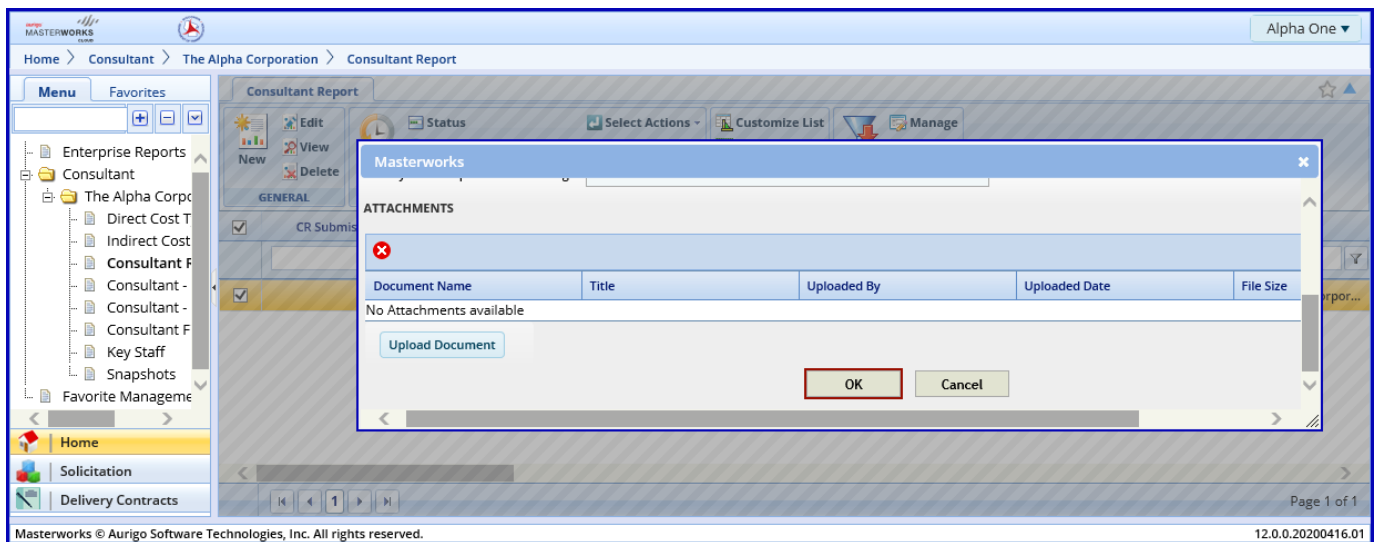
Complete a Consultant Report

2.7.3 Submit from the List Page

To submit from the list page, select the report using the checkbox ✓ and click **Select Actions**, then **Submit**.



Click **OK** on the acknowledgement screen.



The form has now been submitted to WisDOT

2.8 View Status

The consultant report flows through the following statuses:

- Draft: Viewable only to the consultant and the consultant may make updates
- Submitted: Under review by WisDOT
- Approved: Accepted by WisDOT
- Returned for more info: Returned to the consultant for revisions
- Rejected: Not accepted by WisDOT
- Returned for Re-submission: Reopened by consultant to make updates

Complete a Consultant Report

2.8.1 View Current Status

To view the current status from the list page, scroll to be able to see the **Workflow Status** column.

The screenshot shows the Masterworks software interface for viewing Consultant Reports. The breadcrumb path is Home > Consultant > The Alpha Corporation > Consultant Report. The left sidebar shows a tree view with 'The Alpha Corporation' selected. The main area displays a table with columns: DBE Type of Ownership, Total Personnel, WI Based Transportation Personnel, Services Offered, WI Based Personnel, Workflow Status, and Pending On Role(s). The 'Workflow Status' column for the selected report is highlighted in red and contains the text 'Submitted'.

DBE Type of Ownership	Total Personnel	WI Based Transportation Personnel	Services Offered	WI Based Personnel	Workflow Status	Pending On Role(s)
Other	10269	72	Analytical Service...	172	Submitted	WisDOT - CR Reviewer

2.8.2 View Complete History

To view the complete history, select the report using the checkbox ✓ and click **History**.

The screenshot shows the Masterworks software interface with the 'History' button highlighted in the top toolbar. A 'WorkFlow History' dialog box is open, displaying a table of workflow actions. The 'Status' column for the selected action is highlighted in red and shows 'Submitted'.

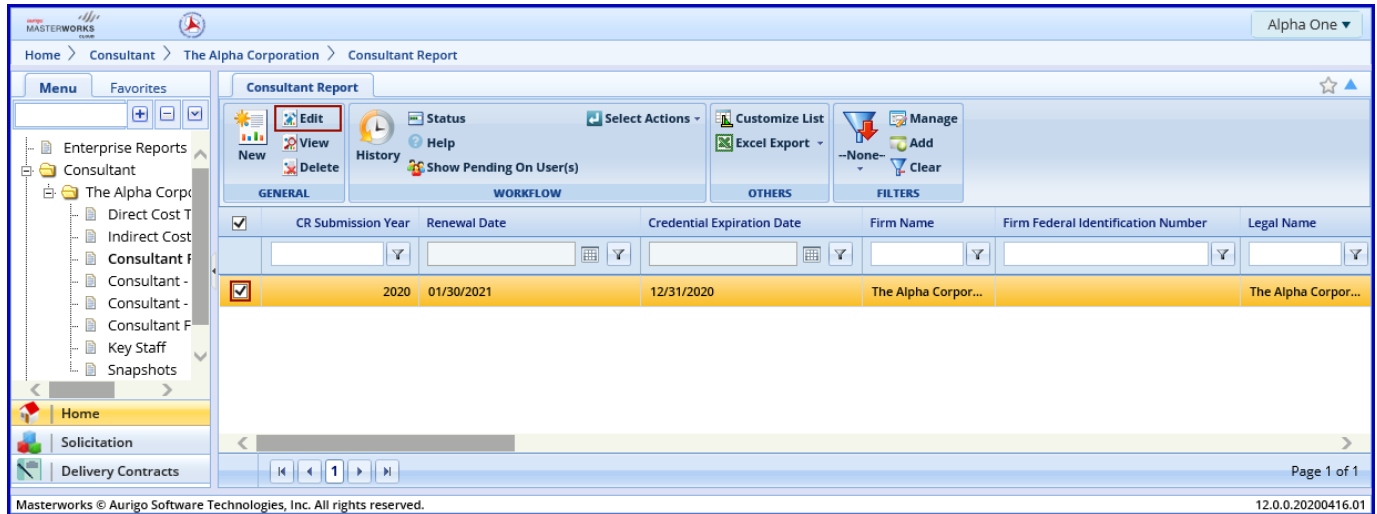
Status	Pending On Role(s)	Received On	Action	Action User
Submitted	Administrator, Consultant - CR, WisDOT - CR Reviewer	06/17/2020 9:42 AM	Submit	alpha
	WisDOT - CR Reviewer	06/17/2020 10:24 AM		

Complete a Consultant Report

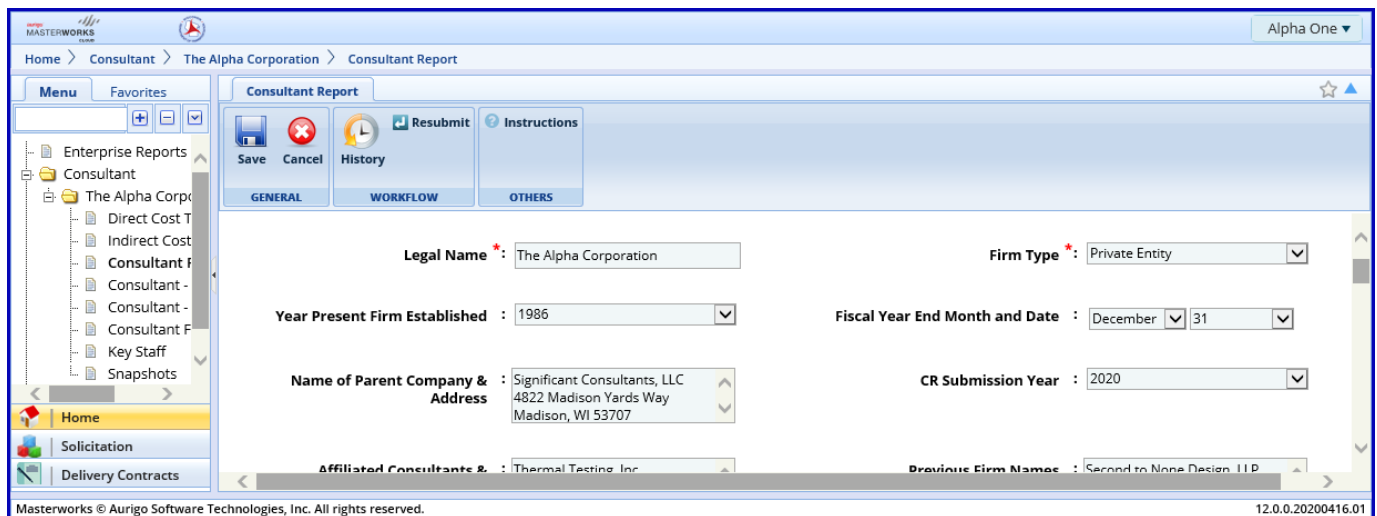
2.9 Complete Consultant Report

If a report was saved without submitting or returned by WisDOT for more info the report may be edited.

To complete a report that has been saved or returned by WisDOT to make changes, select the report using the checkbox ✓ and click **Edit**.



The form may now be completed/updated. Resubmit as shown above.

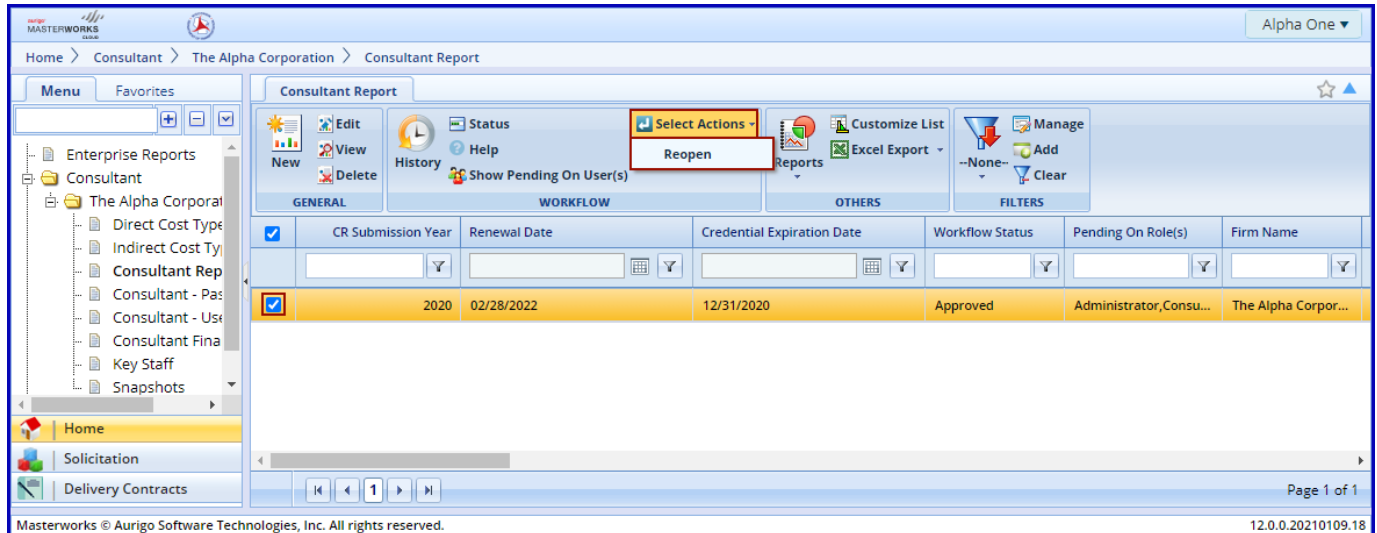


Complete a Consultant Report

2.10 Update an Approved Report

An approved Consultant Report may be resubmitted if the firm's information needs to be updated before the next Consultant Report is due. For example to update an address.

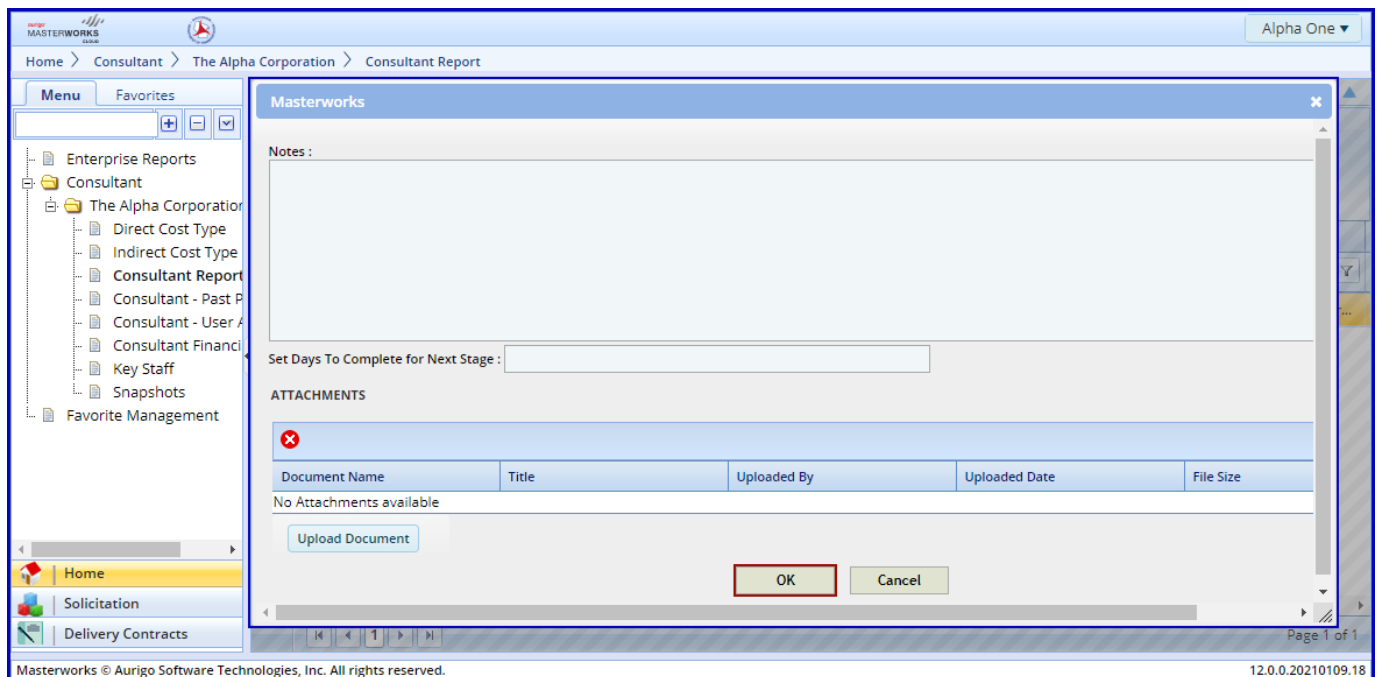
Select the report using the checkbox ✓, click **Select Actions** and **Reopen**.



The screenshot shows the Masterworks software interface. The breadcrumb navigation is Home > Consultant > The Alpha Corporation > Consultant Report. The left sidebar shows a tree view with 'The Alpha Corporation' expanded, listing various report types. The main area displays a table of Consultant Reports. The first row is highlighted in yellow and has a checked checkbox in the first column. A red box highlights the 'Select Actions' dropdown menu, which is open, showing the 'Reopen' option. The table has columns for CR Submission Year, Renewal Date, Credential Expiration Date, Workflow Status, Pending On Role(s), and Firm Name.

	CR Submission Year	Renewal Date	Credential Expiration Date	Workflow Status	Pending On Role(s)	Firm Name
<input checked="" type="checkbox"/>	2020	02/28/2022	12/31/2020	Approved	Administrator, Consu...	The Alpha Corpor...

Click **OK** on the acknowledgement screen.



The screenshot shows the Masterworks software interface with an acknowledgement dialog box open. The dialog box has a title bar 'Masterworks' and a close button. It contains a 'Notes' section with a text area, a 'Set Days To Complete for Next Stage' input field, and an 'ATTACHMENTS' section with a table. The table has columns for Document Name, Title, Uploaded By, Uploaded Date, and File Size. Below the table is an 'Upload Document' button. At the bottom of the dialog box are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red box.

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

Complete a Consultant Report

The workflow status is now **Returned for Re-submission**. Select the report using the checkbox ✓, and click **Edit**.

The screenshot shows the Masterworks software interface for a Consultant Report. The left sidebar contains a navigation tree with 'Home' selected. The main area displays a table of reports. The 'Edit' button in the top toolbar is highlighted with a red box. The table below has a row highlighted in yellow, indicating it is selected. The 'Workflow Status' column for this row contains the text 'Returned for Re-submission'.

CR Submission Year	Renewal Date	Credential Expiration Date	Workflow Status	Pending On Role(s)	Firm Name
2020	02/28/2022	12/31/2020	Returned for Re-submission	Consultant - CR	The Alpha Co

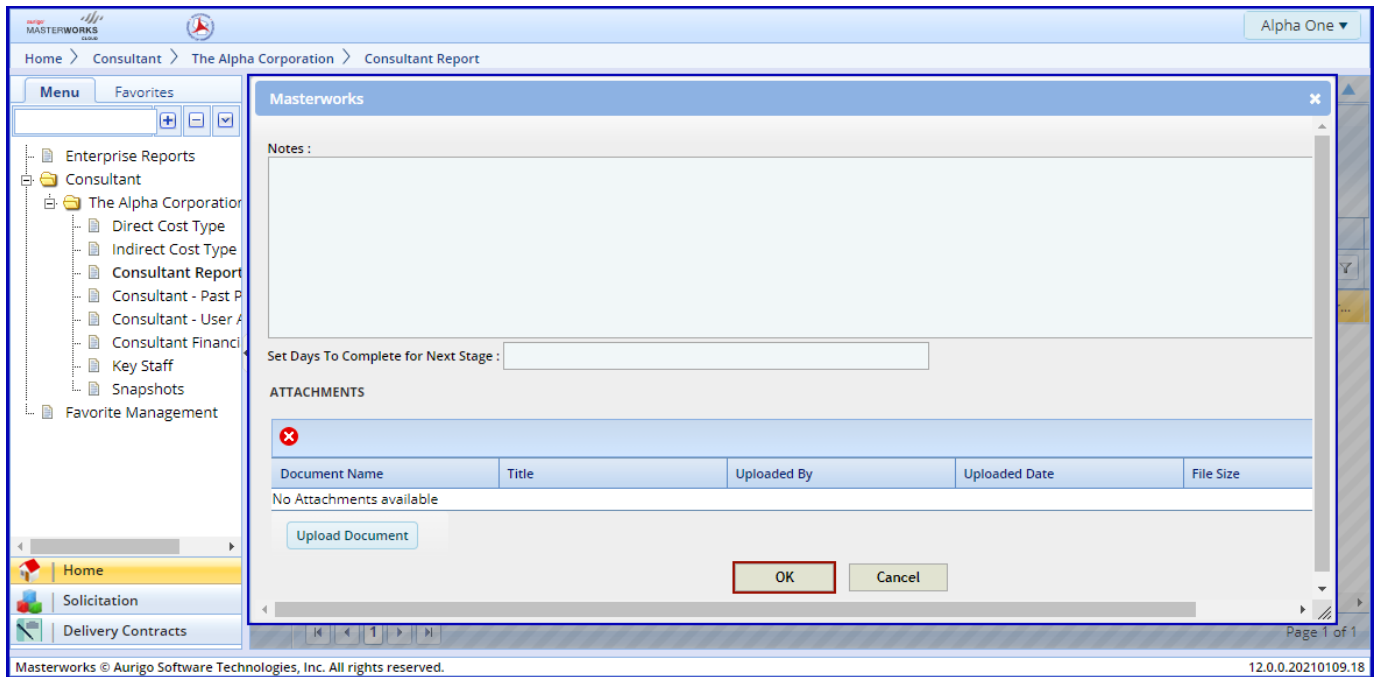
The report may now be updated. Click **Save** to complete changes later and/or Resubmit from the list page. To submit from the form, click **Resubmit**.

The screenshot shows the Masterworks software interface for editing a Consultant Report. The 'Resubmit' button in the top toolbar is highlighted with a red box. The main area displays a form with various fields for firm information.

Firm Name	: The Alpha Corporation	Firm Federal Identification Number	:
Legal Name	: The Alpha Corporation	Firm Type *	: Private Entity
Year Present Firm Established	: 1986	Fiscal Year End Month and Date	: December 31
Name of Parent Company & Address	: Significant Consultants, LLC 4822 Madison Yards Way Madison, WI 53707	CR Submission Year	: 2020

Complete a Consultant Report

Click **OK** on the acknowledgement screen.



The form has now been resubmitted to WisDOT.

2.11 Review Previous Submissions

Previous submissions of the Consultant may be reviewed by click on the Snapshots link. Select the report using the checkbox ✓ and click **View**.

