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MASTERWORKS

CLOUD

WisDOT Staff Manual

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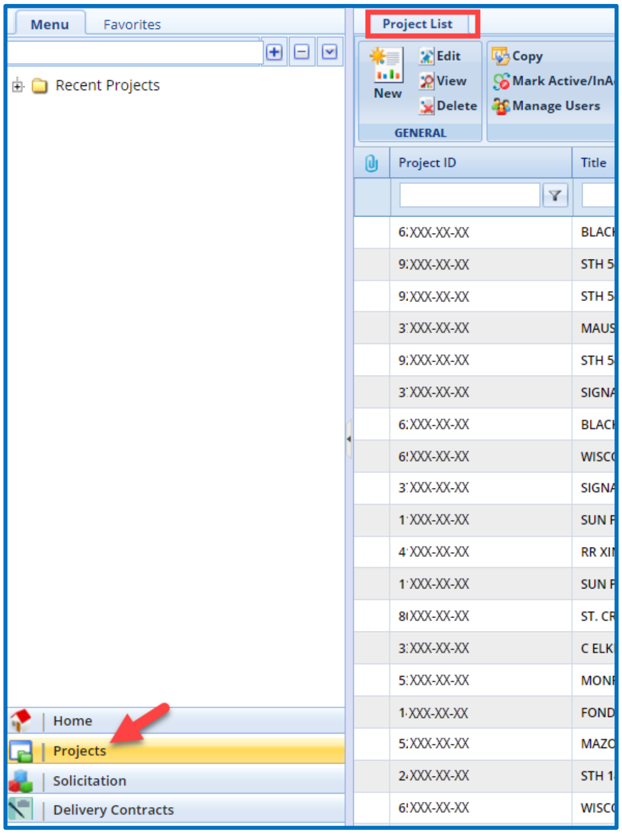
Contents

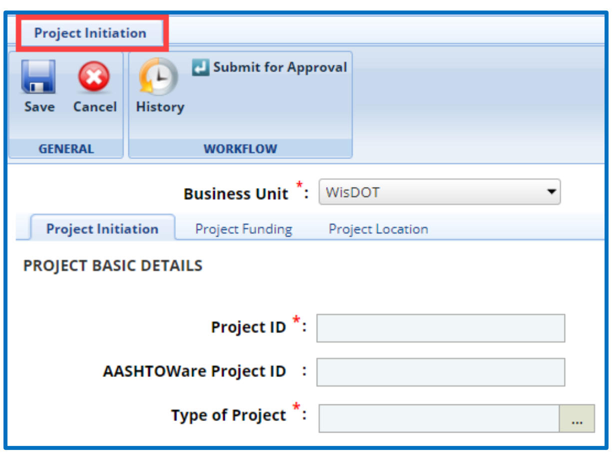
1. Initiating a Project

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

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

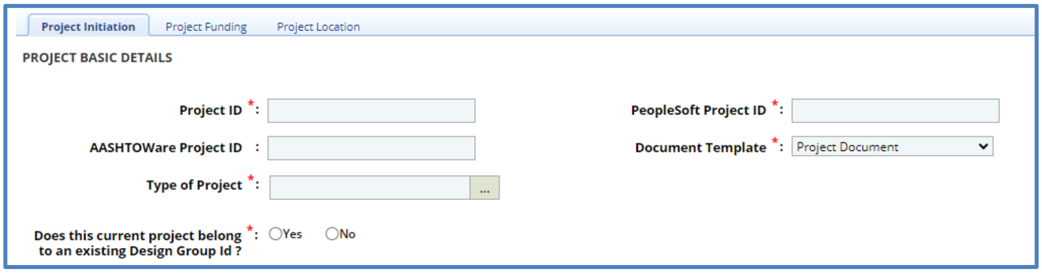


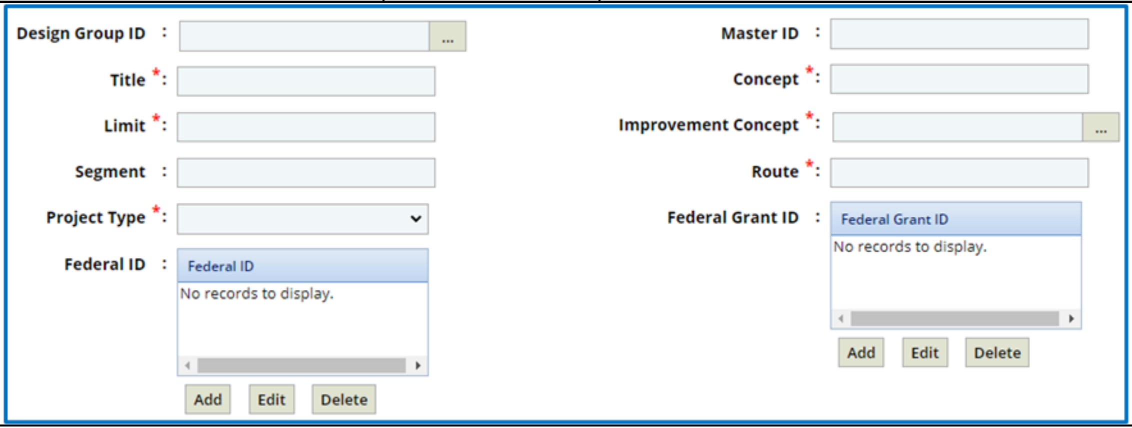
2. In the **Project List** page, click **New**. The **Project Initiation** page is displayed.

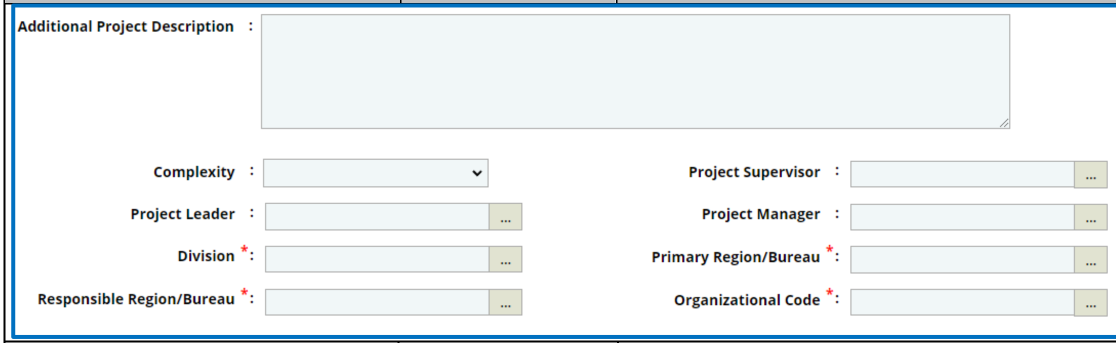


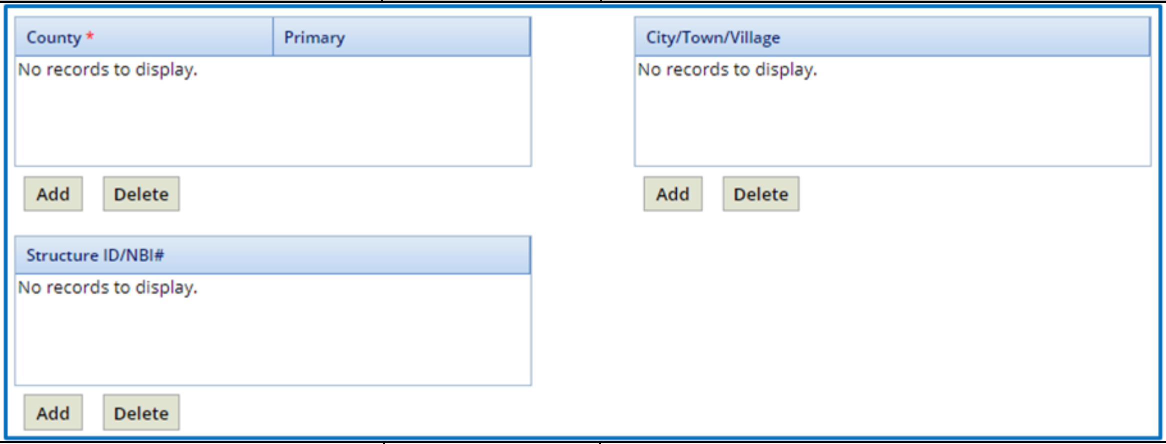
3. In the **Business Unit** drop-down list, the **WisDOT** business unit is auto populated. However, you can select the business unit to which the project belongs. The drop-down lists only those business units to which you have access.

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

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

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

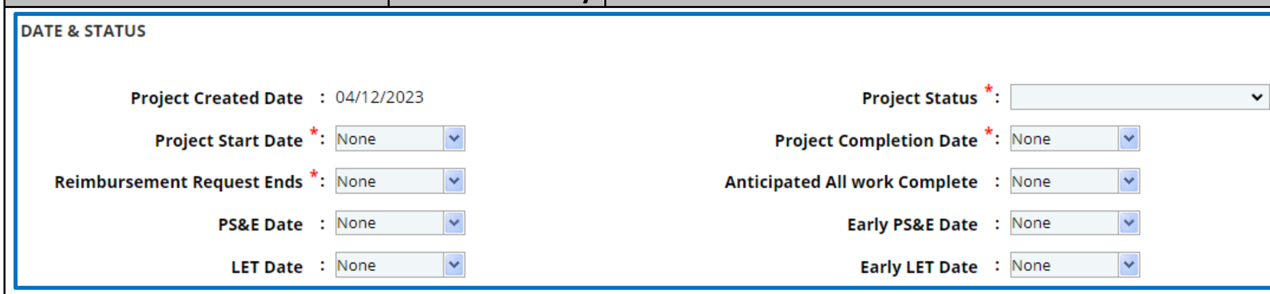
Field	Mandatory / Non-mandatory	Description
		
Additional Project Description	Non-mandatory	Enter additional description about the project.
Complexity	Non-mandatory	From the drop-down list, select the required option. • **High** • **Medium** • **Low** The complexity selected in this field is the default complexity for all the tasks in the project.
Project Supervisor	Non-mandatory	To select a supervisor for the project: 1. Click ... and the Users dialog box is displayed. The dialog box lists all active users from the list of User Accounts in the enterprise. 2. Select a user and click **Select**.
Project Leader	Non-mandatory	To select a project leader for the project: 1. Click ... and the Users dialog box is displayed. The dialog box lists all active users from the list of User Accounts in the enterprise. 2. Select a user and click **Select**.
Project Manager	Non-mandatory	To select a project manager for the project: 1. Click ... and the Project Manager dialog box is displayed. 2. Select the project manager for the contract.
Division	Mandatory	To select a division for the project: 1. Click ... and the Division dialog box is displayed. For availability of options in the dialog box, divisions must be defined in the Division catalog of the library. 2. Select a division and click **Select**.
Primary Region/Bureau	Mandatory	To select primary region/bureau for the project: 1. Click ... and the Region/Bureau dialog box is displayed. For availability of options in the dialog box, regions/bureaus must be defined in the Region-Bureau catalog of the library. 2. Select a region/bureau and click **Select**.
Responsible Region/Bureau	Mandatory	To select region/bureau responsible for the project: 1. Click ... and the Region/Bureau dialog box is displayed. For availability of options in the dialog box, regions/bureaus must be defined in the Region-Bureau catalog of the library. 2. Select a region/bureau and click **Select**.
Organizational Code	Mandatory	To select an organizational code for the project: 1. Click ... and the Organization Code dialog box is displayed. For availability of options in the dialog box, organizational codes must be defined in the Organizational Code catalog of the library. 2. Select a region/bureau and click **Select**.

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

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

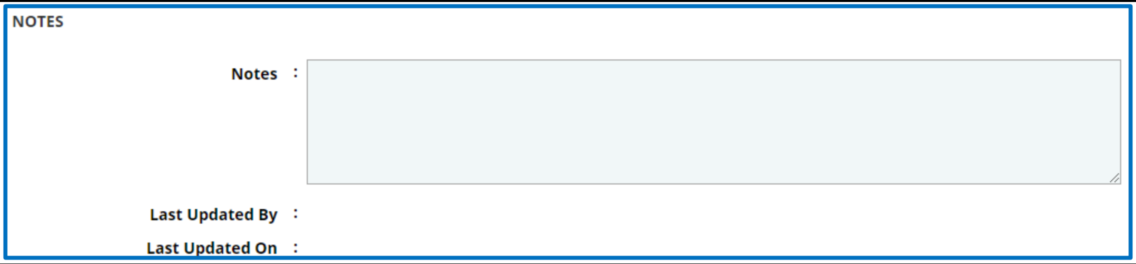
Field	Mandatory / Non-mandatory	Description
Purpose and need	Mandatory	Enter purpose and need details of the project.
Description	Mandatory	Enter a brief description about the project.
Type of Work	Non-mandatory	Enter details about the type of work associated with the project.

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

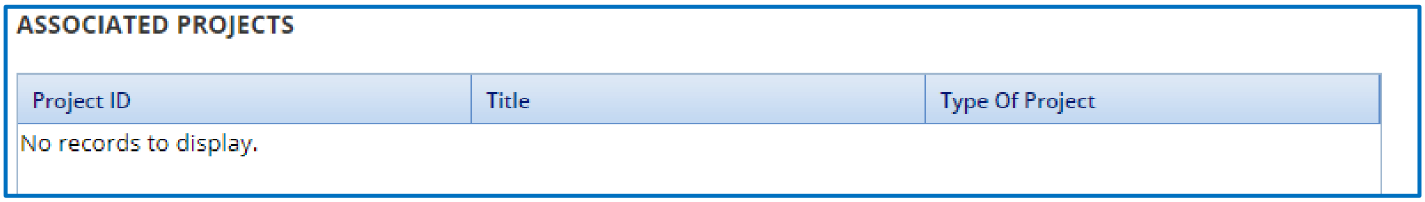


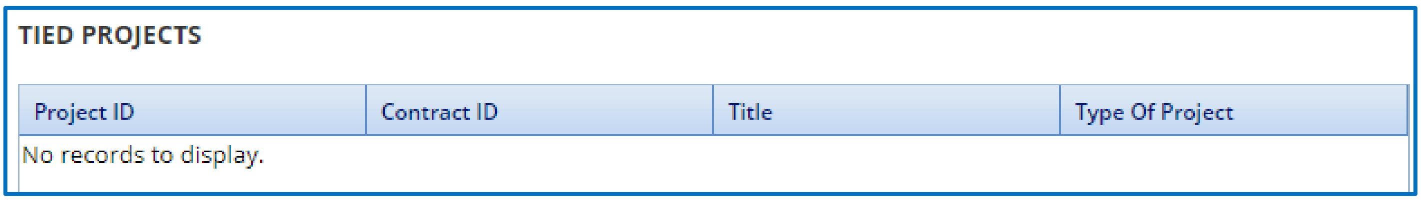
Field	Mandatory / Non-mandatory	Description
Project Created Date	Non-Mandatory	The date when the project was created is auto populated.
Project Status	Mandatory	From the **Project Status** drop-down list, select the current status of the project. For availability of options in the dialog box, project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

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

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

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

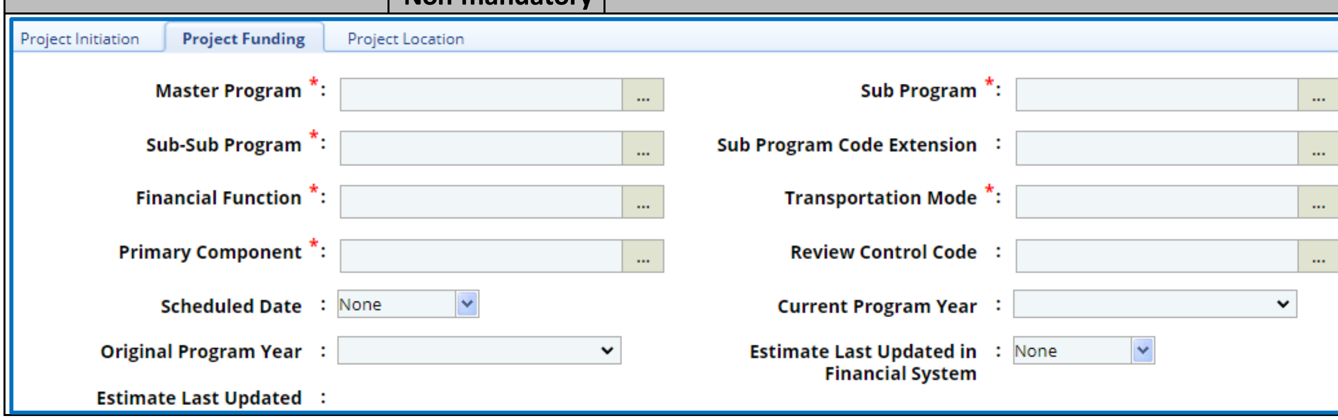




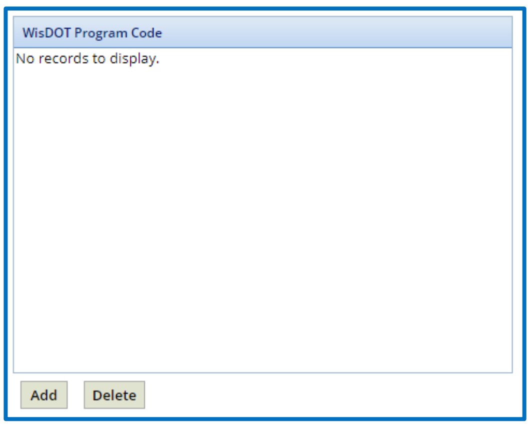
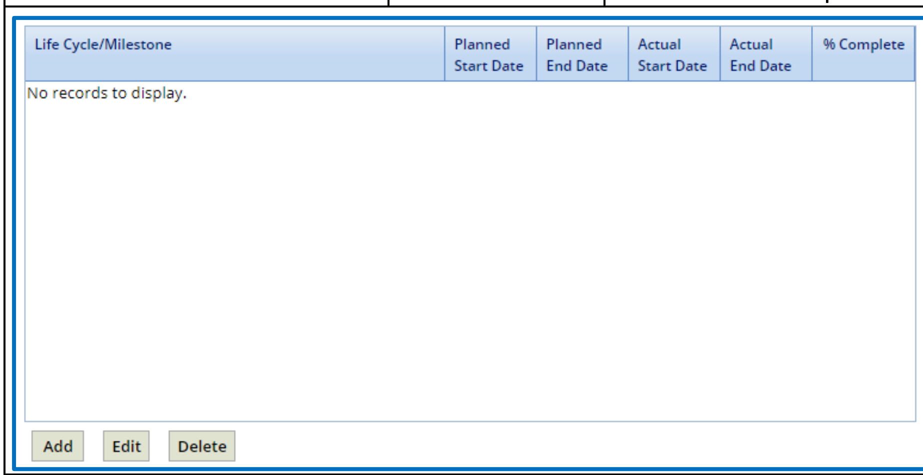
***Note:** The **MODULES** section is not in use at this time and should not be adjusted.*

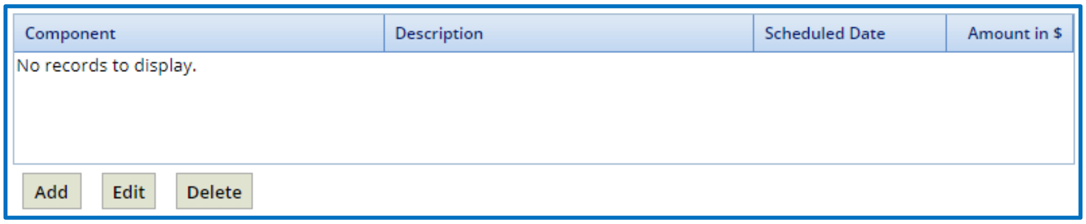
e. Expand **Attachments** to upload images and files relevant to the project.

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

Field	Mandatory / Non-mandatory	Description
		

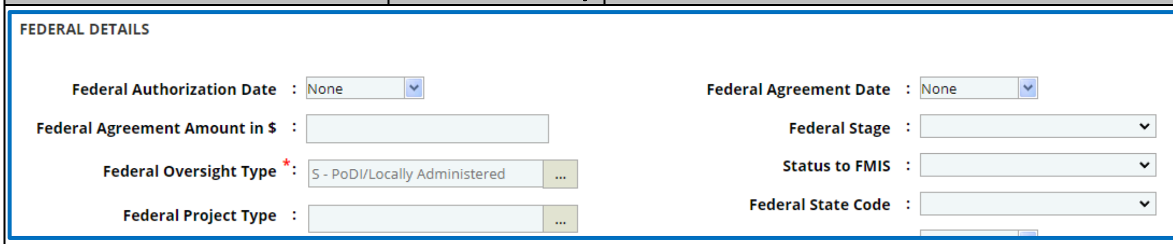
Field	Mandatory / Non-mandatory	Description
Master Program	Mandatory	To select a Master Program for the project: 1. Click ... and the **Master Program** dialog box is displayed. For availability of options in the dialog box, master programs must be defined in the **Master Program** catalog of the library. 2. Select a master program and click **Select**.
Sub Program	Mandatory	To select a Sub Program for the project: 1. Click ... and the **Sub Program** dialog box is displayed. For availability of options in the dialog box, sub programs must be defined in the **Sub Program** catalog of the library. 2. Select a sub program and click **Select**.
Sub-Sub Program	Mandatory	To select a Sub-Sub Program for the project: 1. Click ... and the **Sub-Sub Program** dialog box is displayed. For availability of options in the dialog box, sub-sub programs must be defined in the **Sub-Sub Program** catalog of the library. 2. Select a Sub-Sub Program and click **Select**.
Sub Program Code Extension	Non-mandatory	To select a Sub Program Code Extension for the project: 1. Click ... and the **Sub Program Code Extension** dialog box is displayed. For availability of options in the dialog box, Sub Program Code Extensions must be defined in the **Sub Program Code Extension** catalog of the library. 2. Select a sub program code extension and click **Select**.
Financial Function	Mandatory	To select a **Financial Function** for the project: 1. Click ... and the **Financial Function** dialog box is displayed. For availability of options in the dialog box, financial functions must be defined in the **Financial Function** catalog of the library. 2. Select a financial function and click **Select**.
Transportation Mode	Mandatory	To select a **Transportation Mode f**or the project: 1. Click ... and the **Transportation Mode** dialog box is displayed. For availability of options in the dialog box, transportation modes must be defined in the **Transportation Mode** catalog of the library. 2. Select a Transportation Mode and click **Select**.
Primary Component	Mandatory	To select a Primary Component for the project: 1. Click ... and the Primary Component dialog box is displayed. For availability of options in the dialog box, primary components must be defined in the Primary Component catalog of the library. 2. Select a Primary Component and click Select.
Review Control Code	Non-mandatory	To select a Review Control Code for the project: 1. Click ... and the Review Control Code dialog box is displayed. For availability of options in the dialog box, the Review Control Codes must be defined in the Review Control Code catalog of the library. 2. Select a Review Control Code and click Select.
Scheduled Date	Non-mandatory	From the drop-down calendar, select scheduled date of the project.

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

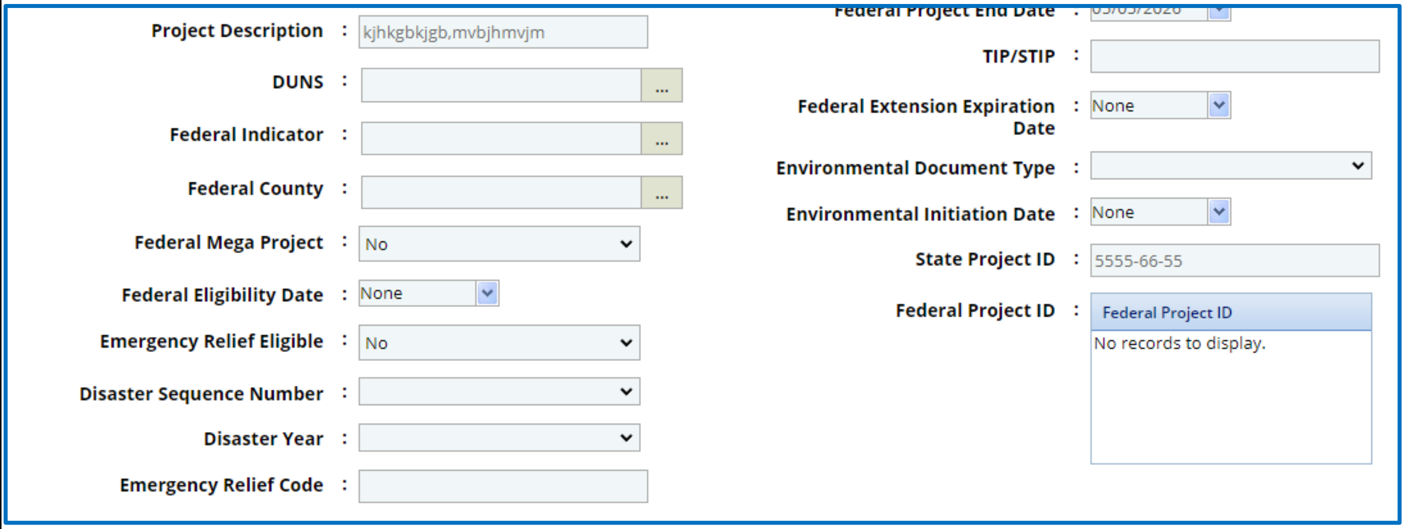


Field	Mandatory / Non-mandatory	Description
Component	Mandatory	To select a component for the project: 1. Click **Add**. The **Component** dialog box is displayed. For availability of options in the dialog box, components must be defined in the **Component** catalog of the library. 2. Select the required components and click **Select**. The component is added to the table. 3. Select a record and click **Edit**. The **Edit** dialog box is displayed. 4. Enter the **Description**, **Amount**, and select the **Scheduled Date** of the component. 5. Click **Save**.

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



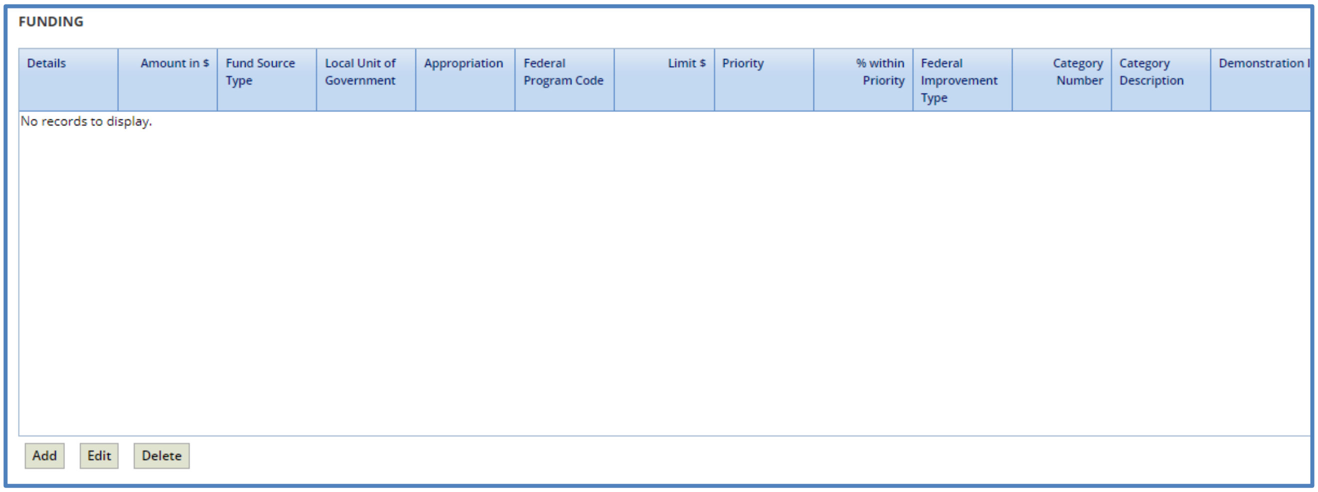
Field	Mandatory / Non-mandatory	Description
Federal Authorization Date	Non-mandatory	From the drop-down, select the date that the project was federally authorized on. ***Note:*** *This field defaults to "**None**".*
Federal Agreement Date	Non-mandatory	From the drop-down, select the date that the federal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



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

Disaster Year	Non-mandatory	From the drop-down, select the disaster year associated with the project.
Emergency Relief Code	Non-mandatory	Enter the associated emergency relief code for the project.

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



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

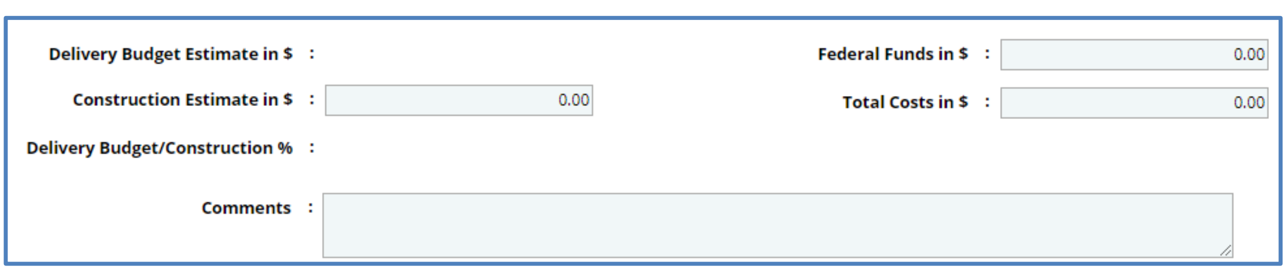
***Note**: All the fields described in the below table are non-mandatory fields.*

Field	Description
Details	From the drop-down, select the associated project detail number.
Amount in $	Indicates the project fund amount that is auto populated based on the values entered in the **Limit $** and **%w/in priority** fields.
Fund Source Type	From the drop-down list, select the type of fund source for the project. For availability of options in the drop-down list, fund source types must be defined in the **Fund Source Type** catalog of the library.
Local Unit of Government	This field is not currently in use and cannot be edited.
Appropriation	To select an appropriation for the fund: 1. Click ... and the **Appropriation** dialog box is displayed. For availability of options in the dialog box, appropriations must be defined in the **Appropriation** catalog of the library. 2. Select a federal improvement type and click **Select**.
Federal Program Code	To select an appropriation for the fund: 1. Click ... and the **Appropriation** dialog box is displayed. For availability of options in the dialog box, appropriations must be defined in the **Appropriation** catalog of the library. 2. Select a federal improvement type and click **Select**.
Limit $	Enter the limit amount.
Priority	From the drop-down list, select the priority for the fund.
% within Priority	Enter the percentage of the limit amount within the priority.
Federal Improvement Type	To select a Federal Improvement Type for the fund: 1. Click ... and the **Federal Improvement Type** dialog box is displayed. For availability of options in the dialog box, federal improvement types must be defined in the **Federal Improvement Type** catalog of the library. 2. Select a federal improvement type and click **Select**.

Field	Description
Category Number	From the drop-down list, select the category number.
Category Description	To select a Category Description for the fund: 1. Click ... and the **Category Description** dialog box is displayed. For availability of options in the dialog box, category descriptions must be defined in the **Category Description** catalog of the library. 2. Select a **Category Description** and click **Select**.
Demonstration ID	Enter the demonstration ID.
Federal Aid Type	To select a federal aid type: 1. Click ... and the **Federal Aid Type** dialog box is displayed for availability of options in the dialog box. 2. Select a **Federal Aid Type** and click **Select**.
GIS Omission Justification	To select a code to justify omission of GIS: select a federal aid type: 1. Click ... and the **Federal Aid Type** dialog box is displayed for availability of options in the dialog box. 2. Select a **GIS Omission Justification Code** and click **Select**.
Federal Prefix	The only option available will be WISC for Wisconsin.
100% Safety	Select Yes or No from the dropdown menu.
Construction	Select Yes or No from the dropdown menu.
Activity Number	Enter the Activity Number.
Activity Description	Enter the Activity description.
Supplemental Activity Description	To select a supplementary activity description for the fund: 1. Click ... and the **Supplemental Activity Description** dialog box is displayed for availability of options in the dialog box, category descriptions must be defined in the **Supplementary Activity** catalog of the library. 2. Select a **Supplemental Activity Description** and click **Select**.
Advanced Construction Funds in $	The fiscal management information system advance construction amount is the monetary value of federal dollars that is an advanced construction portion expressed in terms of currency of a fiscal management information system detail record.
Supplemental Category Description	To select a supplementary category description for the fund: 1. Click ... and the **Supplemental Category Description** dialog box is displayed for availability of options in the dialog box, category descriptions must be defined in the **Supplementary Category** catalog of the library. 2. Select a **Supplemental Category Description** and click **Select**.
Federal Urban Area	Enter the appropriate code if the area is classified as a Federal Highway Administration urban area.

iii. Click **Save**.

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



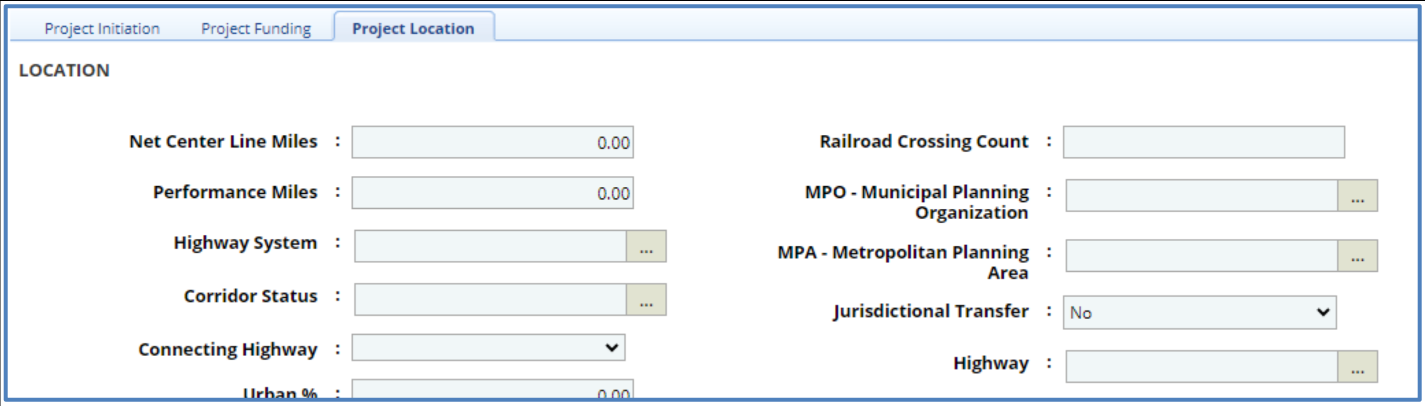
***Note**: The value in the **Delivery Budget/Construction %** field is auto calculated and displayed. The value is calculated based on the values in the **Delivery Budget estimate** and **Construction Estimate** fields.*

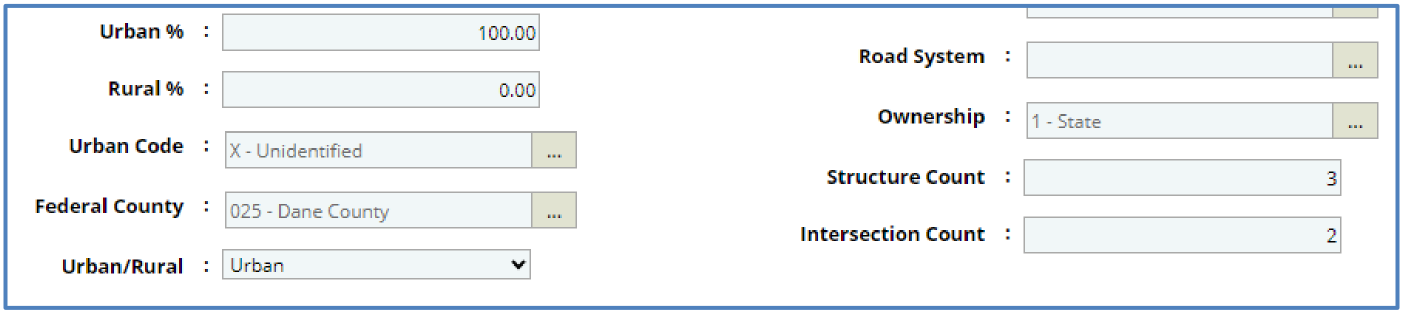
iv. In the **Construction Estimate in $** field, enter the estimated amount of construction.
v. In the **Federal Funds in $** field, enter the estimated amount of federal funds.
vi. In the **Total Costs in $** field, enter the estimated total cost.

d. Expand **Attachments** to upload images and files relevant to the fund.

6. Click the **Project Location** tab to enter location details of the project.
   a. In the location section, provide required information in the fields. The fields are described in the following table.

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

Field	Description
	
Net Center Line Miles	Enter measurement of the net center line in miles.
Railroad Crossing Count	Enter number of railroad crossings in the project location.
Performance Miles	Enter the length of the planned project in miles.
MPO - Municipal planning organization	To select a Municipal Planning Organization associated with the project: 1. Click ... and the Municipal Planning Organization dialog box is displayed. For availability of options in the dialog box, municipal planning organizations must be defined in the **Municipal Planning Organization** catalog of the library. 2. Select a **Municipal Planning Organization** and click **Select**.
Highway System	To select a Highway System associated with the project: 1. Click ... and the Highway System dialog box is displayed. 2. Select a **Highway System** and click **Select**.
MPA – Metropolitan Planning Area	To select a Metropolitan Planning Area associated with the project: 1. Click ... and the MPA - Metropolitan Planning Area dialog box is displayed. 2. Select a **Metropolitan Planning Area** code and click **Select**.
Corridor Status	To select a Corridor status: 1. Click ... and the Corridor Status dialog box is displayed. 2. Select a **Corridor Status** and click **Select**.
Jurisdictional Transfer	From the drop-down list, select **Yes** or **No** to indic+ate whether there is a jurisdictional transfer in the project.
Connecting Highway	From the drop-down list, select **Yes** or **No** to indicate whether a connecting highway is associated with the project.
Highway	To select a Highway: 1. Click ... and the Highway dialog box is displayed. 2. Select a **Highway** and click **Select**.



Field	Description
Urban % and **Rural %**	Enter the percentage of either the urban area in the **Urban %** field or rural area in the **Rural %** field. If the **Urban %** is entered, the **Rural %** is auto populated. If the **Rural %** is entered, then the **Urban %** is auto populated. The total of **Urban%** and **Rural%** is 100%.
Road System	To select a Road System: 1. Click ... and the Road System dialog box is displayed. 2. Select a **Road System** and click **Select**.
Ownership	To state who is the owner of this contract: 1. Click ... and the Ownership dialog box is displayed. 2. Select an owner and click **Select**.
Urban Code	To select an Urban Code: 1. Click ... and the Urban Code dialog box is displayed. Select an **Urban Code** and click **Select**.
Federal County	To select the Federal County: 1. Click ... and the Federal County dialog box is displayed. Select an **Urban Code** and click **Select**.
Structure Count	Enter the number of structures being billed to this project.
Urban/Rural	From the drop-down list, select **Urban** or **Rural** to indicate if the project location is urban or rural.
Intersection Count	Enter the number of intersections in the project area.

b. Expand **Attachments** to upload images and files relevant to the project location.

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

2. Scope\Budget\Estimate\Schedule

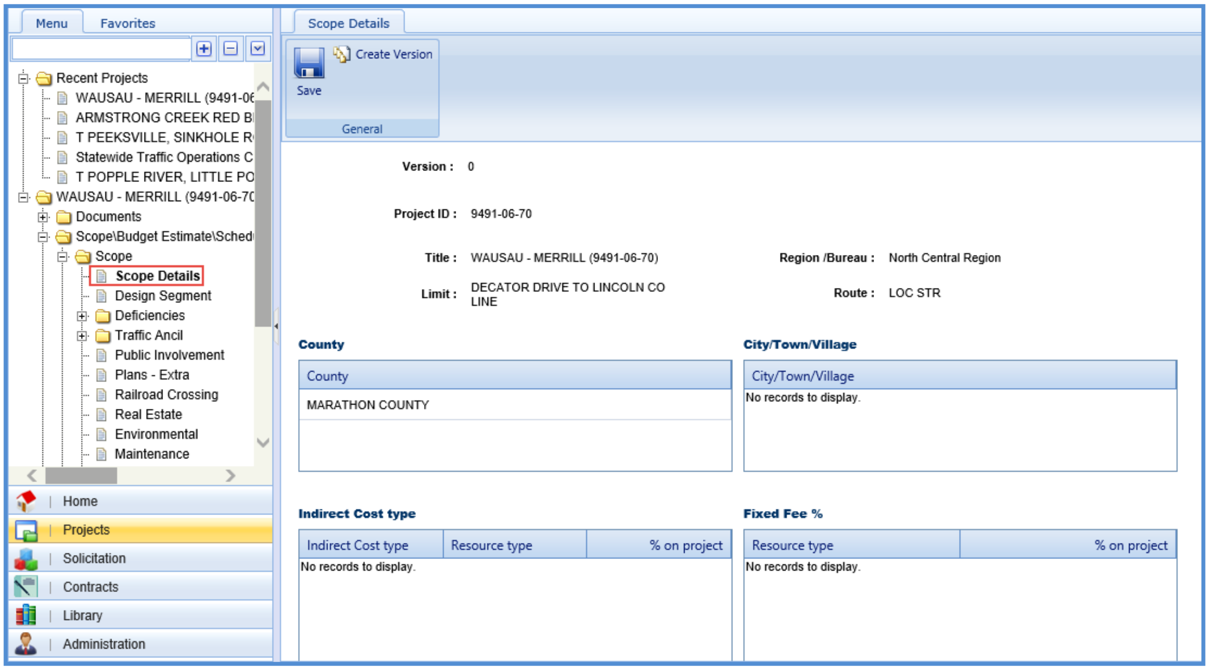
The procedure to define project scope, delivery estimate, and project schedule are described in the following sections.

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

2.1 Defining Project Scope Details

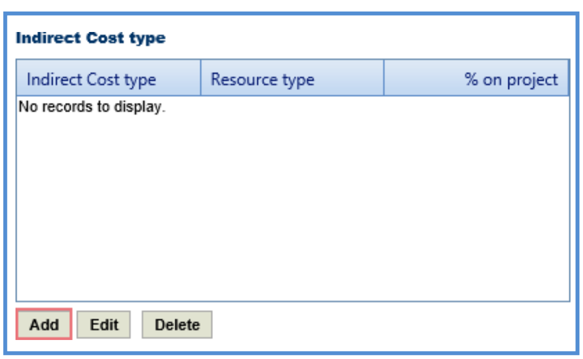
Steps

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



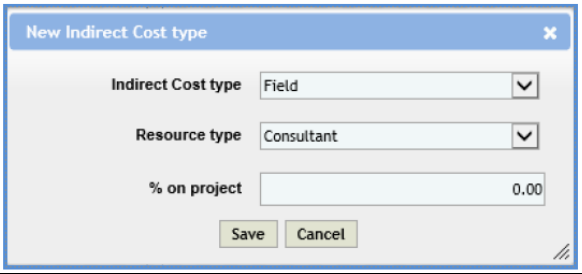
The values in the **Version, Project ID, Title, Region /Bureau, Limit, Route, County, City/Town/Village** fields/sections are auto populated.

4. To add indirect cost type for the project, perform the following steps: In the **Indirect Cost type** section, click **Add**.
   a. The **New Indirect Cost type** dialog box is displayed.



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

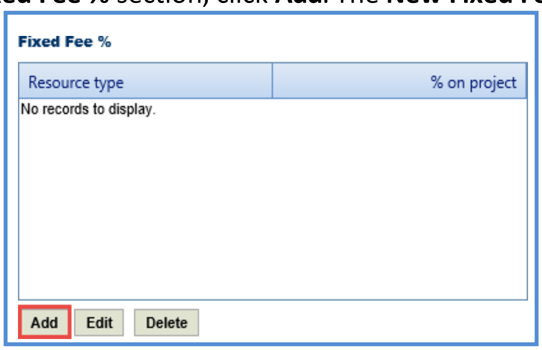
Note: *All the fields described in the below table are non-mandatory fields.*

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

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

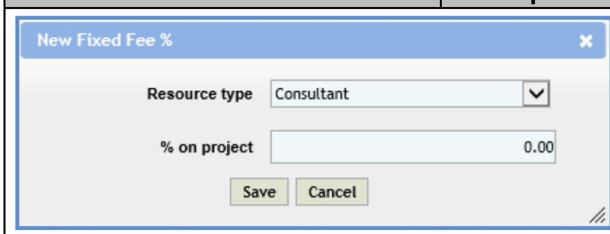
5. To add Fixed Fee percentage, perform the following steps:

a. In the **Fixed Fee %** section, click **Add**. The **New Fixed Fee %** dialog box is displayed.



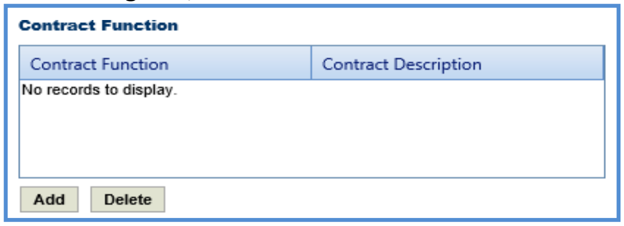
b. Enter information in the required fields. The fields are described in the following table.

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

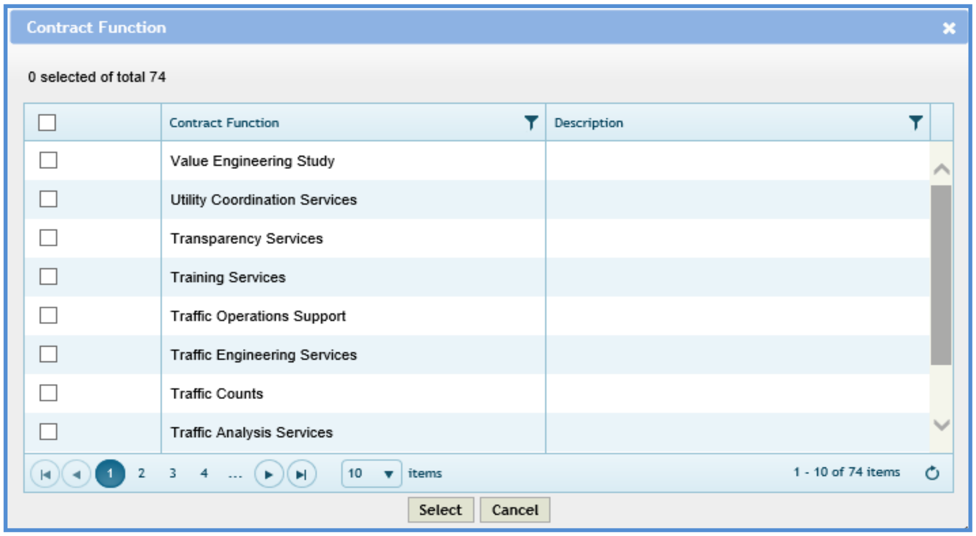
Field	Description
	
Resource type	From the drop-down list, select the resource type for the fixed fee. The fixed fee is primarily applicable for consultants. For availability of options in the drop- down list, the resource types must be defined in the **Resource Type** catalog of the library.
% On project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

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

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



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



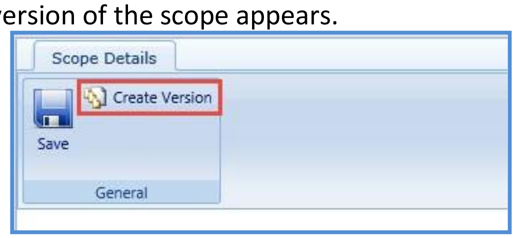
   c. In the **Comments** field, enter notes about the project scope.

   d. Click **Save**.

2.2 Creating a Scope Version

Steps:

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



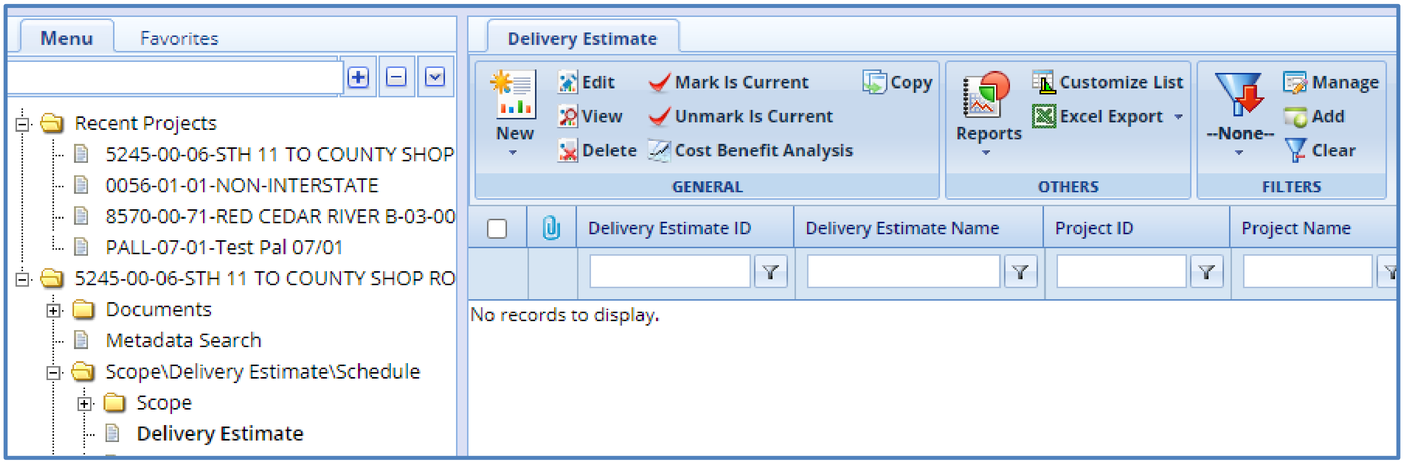
2. Click **OK**. The **Version** number on the **Scope Details** page is updated with the current version number.

2.3 Creating Delivery Estimates

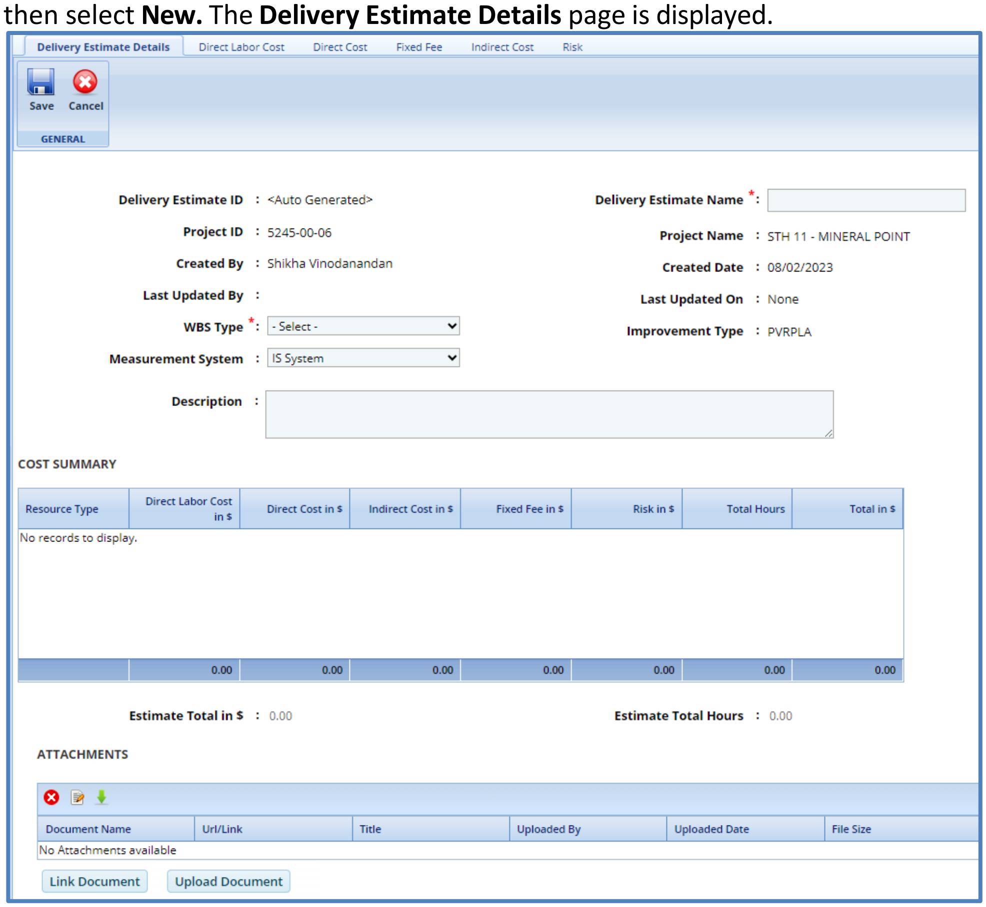
Delivery Estimates can be newly created or by copying from an existing delivery estimate of the same project or a different project. Multiple delivery estimates can be created for what-if analysis and one of the delivery estimates is marked as the current delivery estimate.

To create a delivery estimate, perform the following steps:

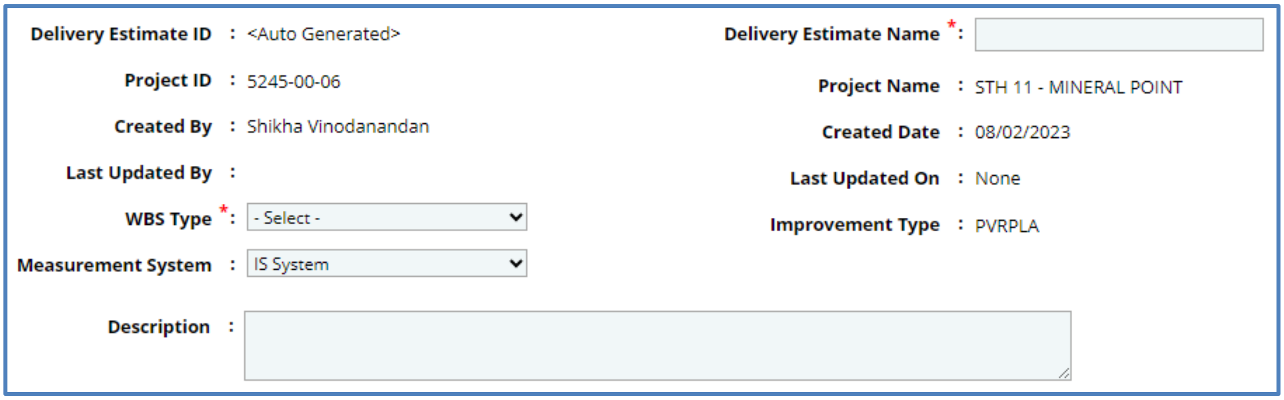
1. Select the project for which you want to create a delivery estimate. The **Project Dashboard** is displayed.
2. In the navigation pane, expand the project folder and then expand the **Scope\Delivery Estimate\Schedule** folder.
3. Click **Delivery Estimate** in the navigation pane. The **Delivery Estimate**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



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



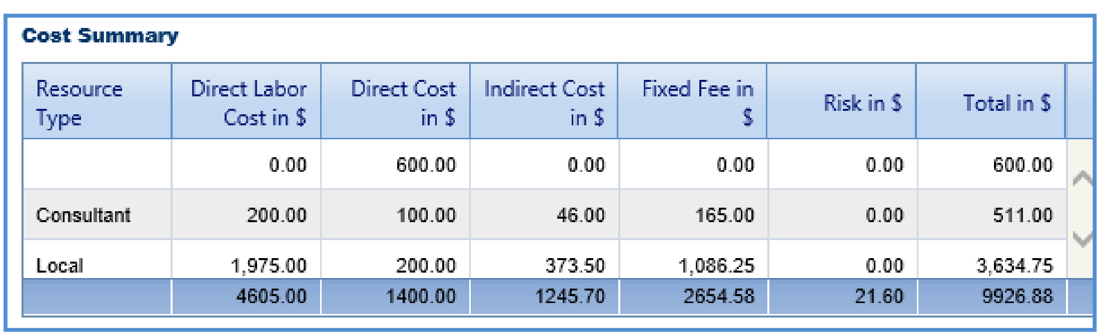
5. In the **Delivery Estimate Details** tab, perform the following steps:
   a. Enter information in the required fields. The fields are described in the following table.



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

b. In the **Description** section, enter in a description of the delivery estimate.

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



Cost Summary

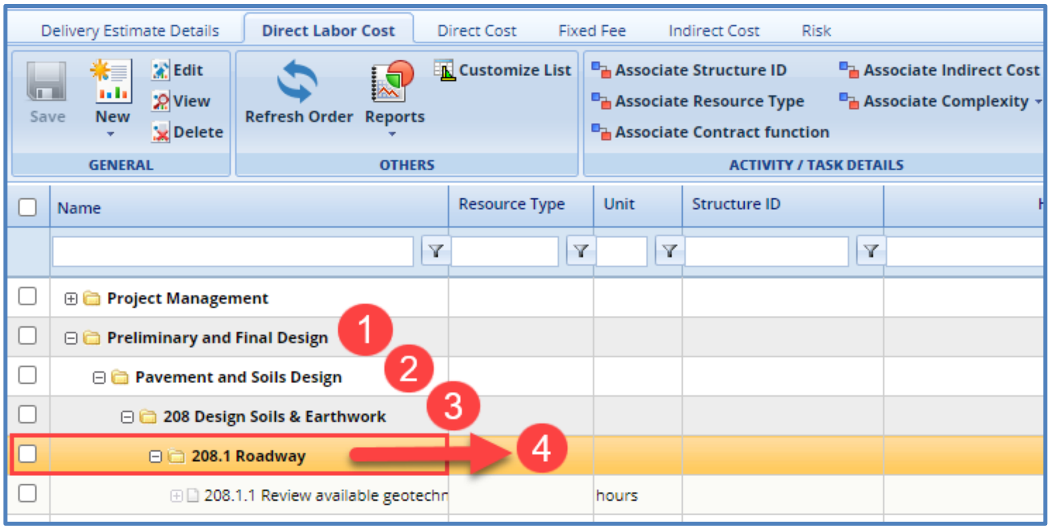
Resource Type	Direct Labor Cost in $	Direct Cost in $	Indirect Cost in $	Fixed Fee in $	Risk in $	Total in $
	0.00	600.00	0.00	0.00	0.00	600.00
Consultant	200.00	100.00	46.00	165.00	0.00	511.00
Local	1,975.00	200.00	373.50	1,086.25	0.00	3,634.75
	4605.00	1400.00	1245.70	2654.58	21.60	9926.88

c. In the **Attachments** section, upload images and files relevant to the project budget estimate.
d. Click **Save.**

6. Click the **Direct Labor Cost** tab. The tasks that are associated with the selected **WBS Type** in the **Project Budget Estimate Details** tab and **Improvement Concept** of the project is displayed. For the tasks to be displayed in the **Direct Labor Cost** tab, tasks must be associated with the WBS types and improvement types in the **Associate WBS Type** catalog of the library. If required, additional direct labor cost tasks can be added in the tab. Multiple direct labor cost tasks can be added at a time from the library. You can also add additional activity folders for these tasks.

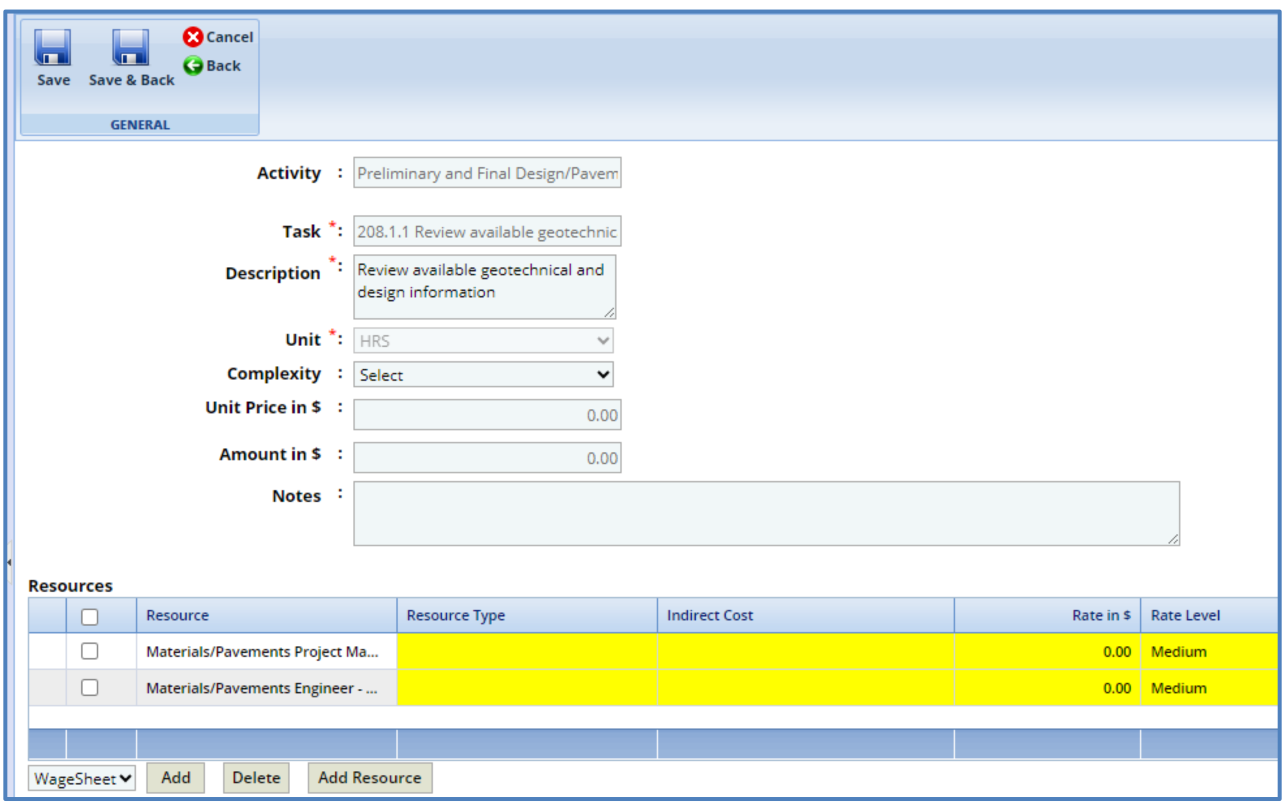
2.3.1 Adding a direct labor cost task

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

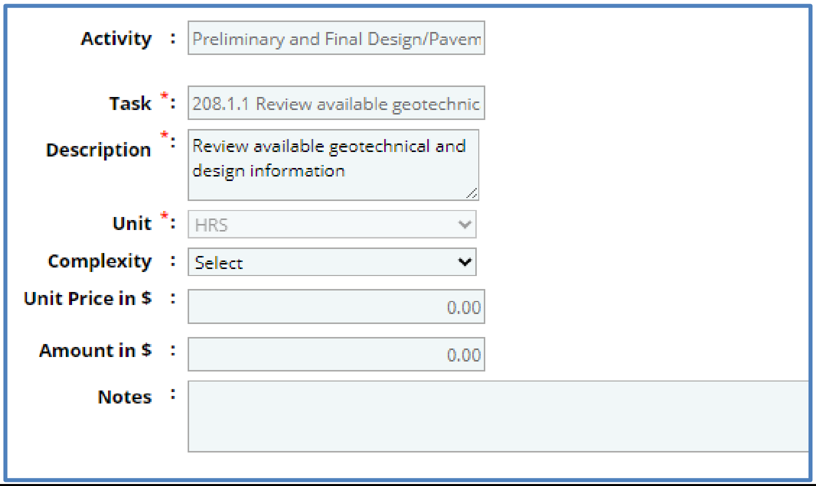


2. To add a direct labor cost task, perform the following steps:

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

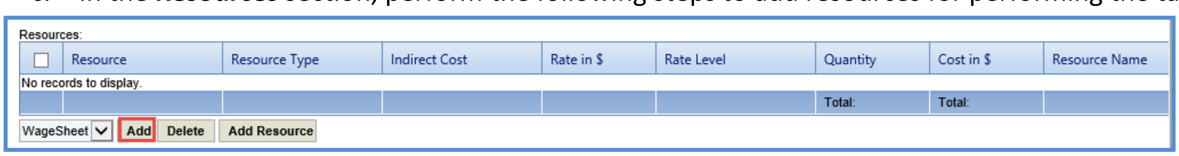


   b. Provide information in the required fields. The fields in the section are described in the following table:



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

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



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

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

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

- WisDOT
- Consultant
- Local

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

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

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

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

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

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

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

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

e. Click **Save**.

2.3.2 Adding Multiple Direct Labor Tasks

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

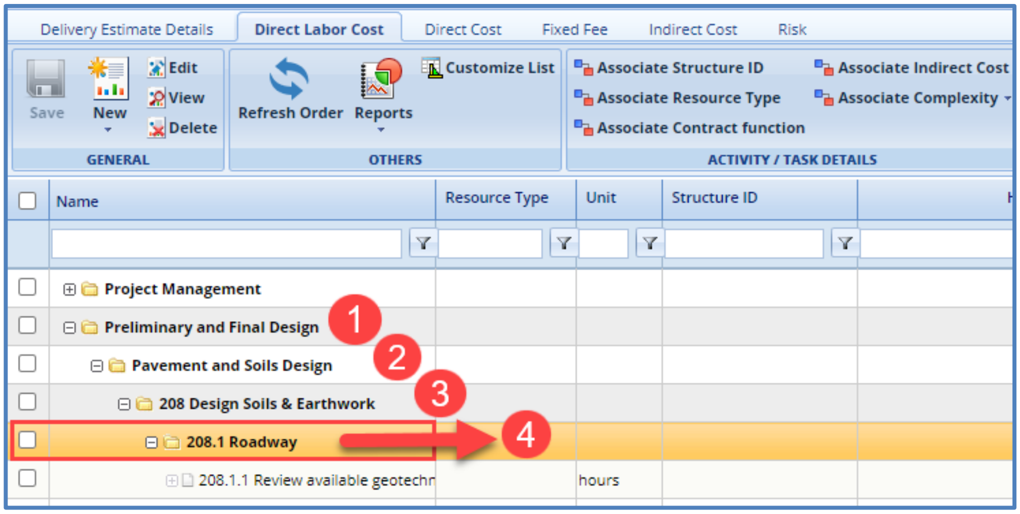
1. Click 

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

2. From the **Standard Tasks list** drop-down list, select the required **WBS Type**.
3. In the **General** group, click **Add**. The **Standard Items** dialog box is displayed. The dialog box displays all the tasks associated with the selected **WBS Type**. The tasks are associated with the WBS Type in the **Associate WBS Type** catalog of the library.
4. Select the required tasks that must be added and then click **Select**. The selected items are listed on the **Add Standard Tasks** page.
5. Click **Save**.

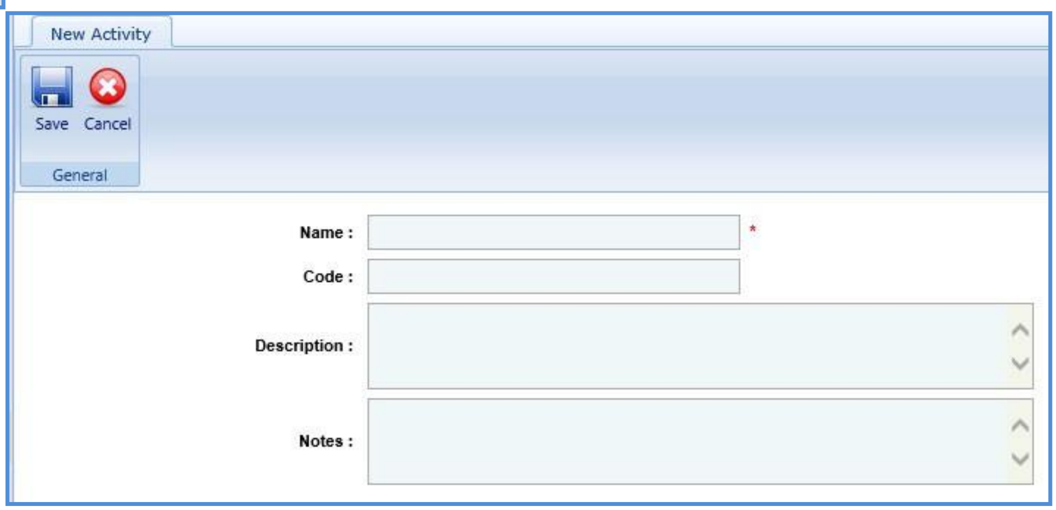
2.3.3 Adding an Activity

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



1. Click 

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

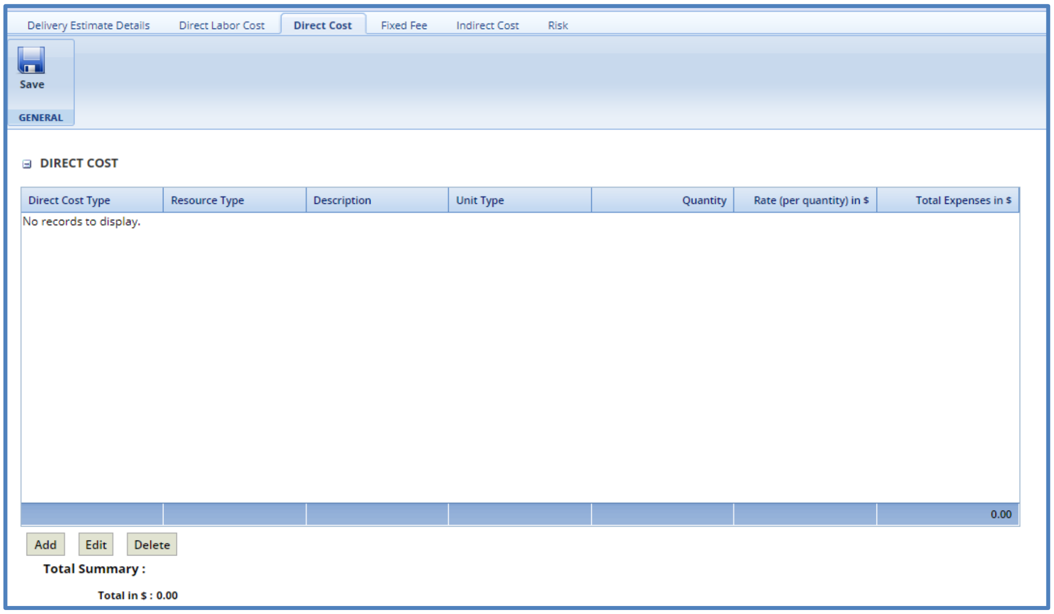


2. Enter information in the required fields. The fields are described in the following table.

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.

3. Click **Save**.

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

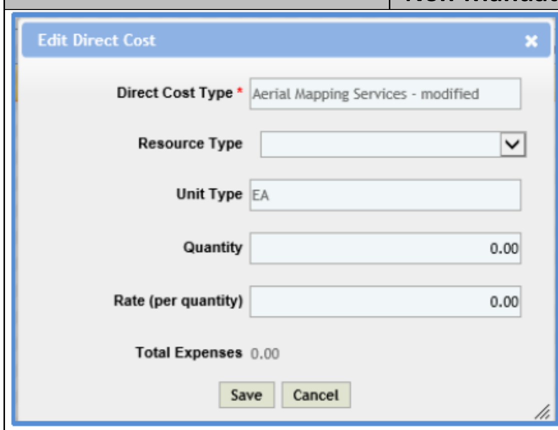


a. Click **Add**. The **Direct Cost** dialog box is displayed listing all the direct costs. For availability of direct costs in the dialog box, direct costs must be defined in the **Direct Cost Type** catalog of the library.

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

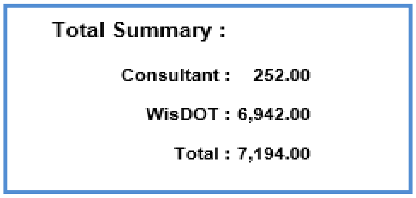
c. Select the direct cost for which you want to add/edit quantity and rate details, and then click **Edit**. The **Edit Direct Cost** dialog box is displayed.

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

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

e. Click **Save**.

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



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

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

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

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

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

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

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

6. Click the **Indirect Cost** tab.

   The indirect cost details of the project budget estimate are displayed. The different details that are displayed are described in the following table.

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

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

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

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

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

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

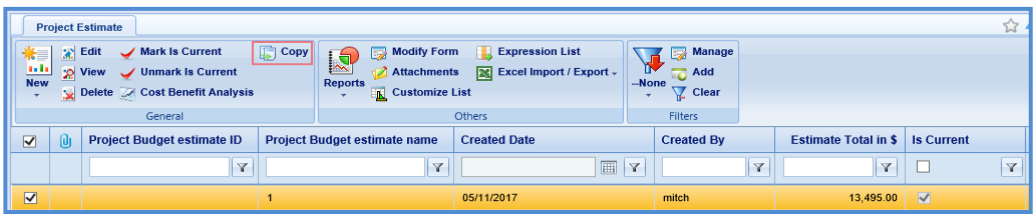
Note:

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

2.4 Creating Project Estimate by Copying from an Existing Estimate

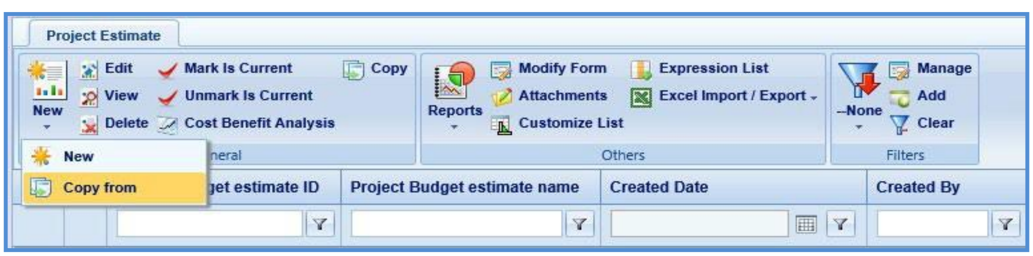
The system allows you to create project estimates by copying an existing estimate from the same project or a different project. Only the tasks of the project estimate can be copied to the newly created project. If you are copying a project estimate from a different project, only estimates that are marked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

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



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

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



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

2.5 Bulk Association

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

2.5.1 Associate Structure ID

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

Note: *At this time, WisDOT does not utilize this function.*

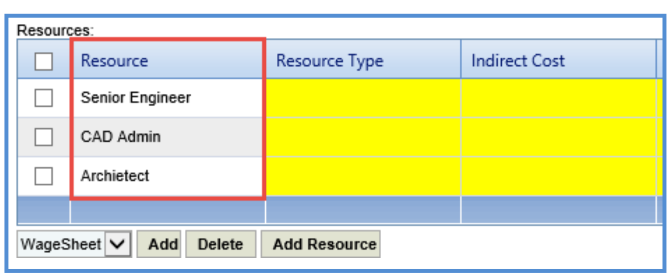
Steps:

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

2.5.2 Associate Resource Type

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

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



Steps:

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

2.5.3 Associate Contract Function

You can associate a single contract function to multiple direct labor cost tasks at a time. Perform the following steps to associate the contract function with the direct labor cost tasks.
Note: *At this time, WisDOT does not utilize this function.*

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

2.5.4 Associate Indirect Cost

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

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

2.5.5 Associate Complexity

You can associate a single complexity to multiple direct labor cost tasks at a time. Perform the following steps to associate the complexity with the direct labor cost tasks.
Note: *At this time, WisDOT does not utilize this function.*

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

3. Solicitation

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

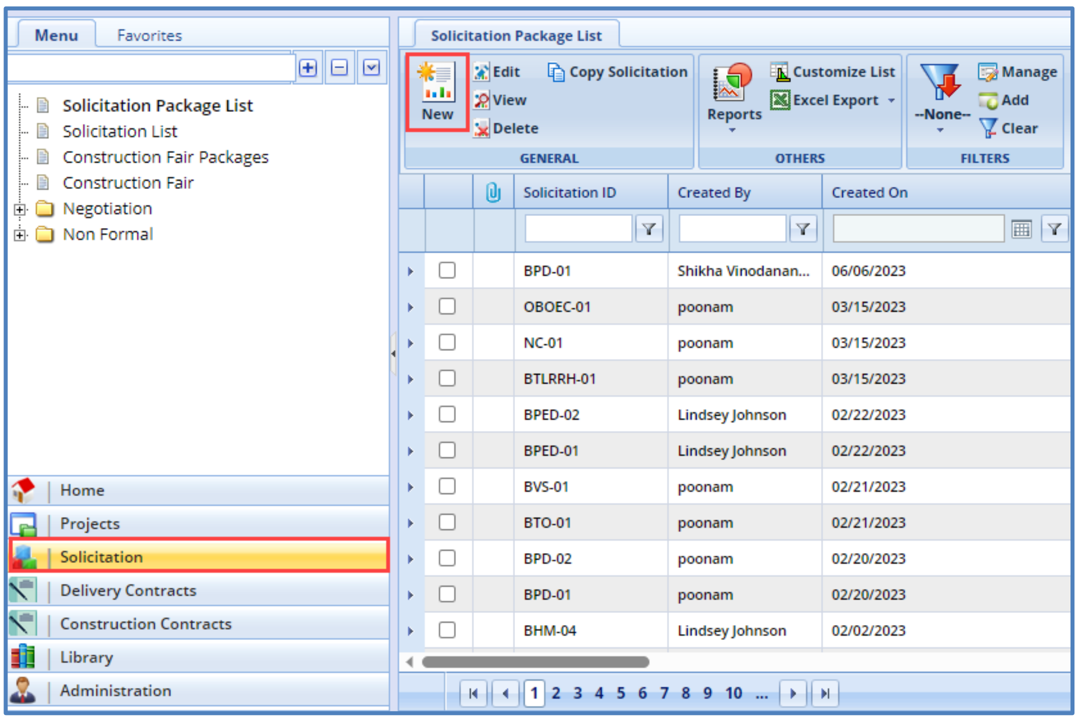
3.1 Functional Flow for Solicitation

The following sequential tasks comprise the functional flow for solicitation.

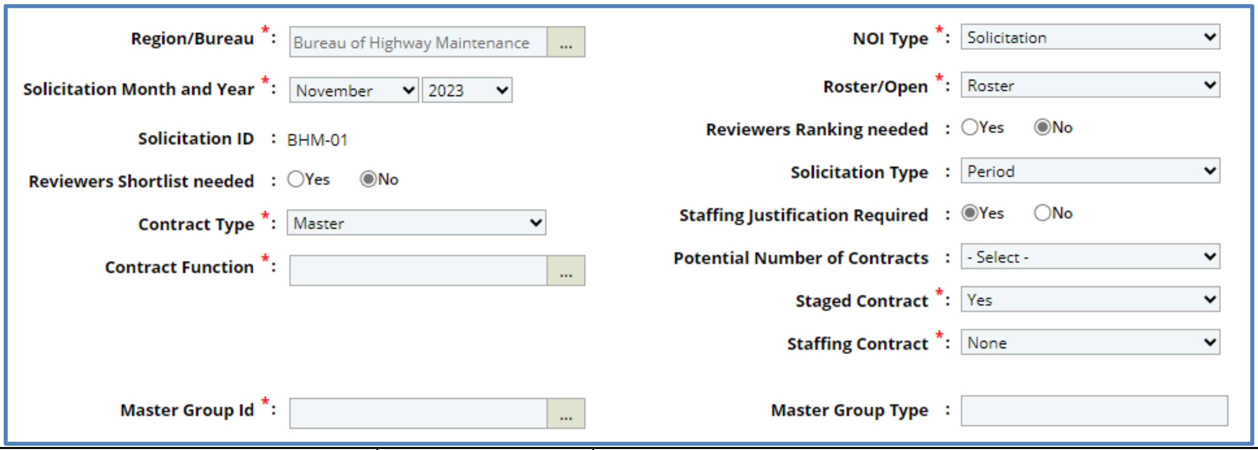
1. Create Solicitation.
2. Create Solicitation by adding multiple Solicitation Forms, publish the Solicitation, and mark as **Is Current**. Consultants respond to the current solicitation.
3. View the NOI responses received from the consultants.
4. Shortlist consultants based on the NOI responses.
5.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

3.1.1 Creating a Solicitation Package

1. Click **Solicitation** in the module menu. Click **Solicitation Package** List.



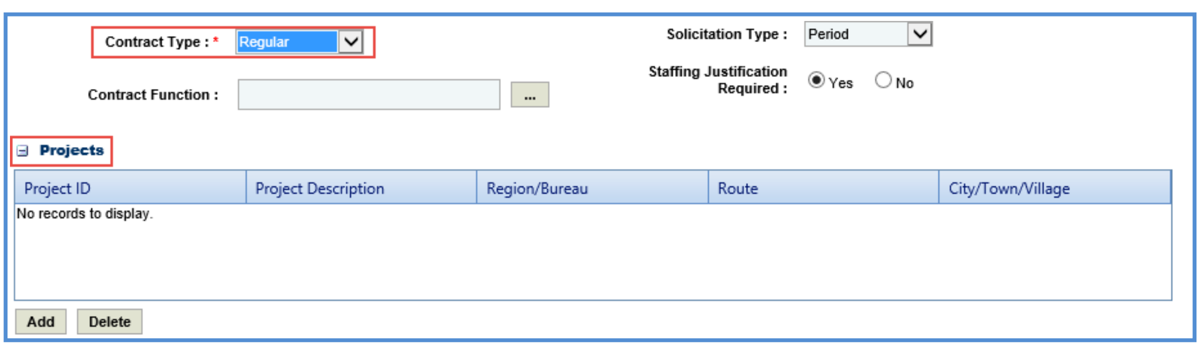
2. Click **New**. The **Solicitation** page is displayed.
3. Enter information in the required fields. The fields are described in the following table.



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

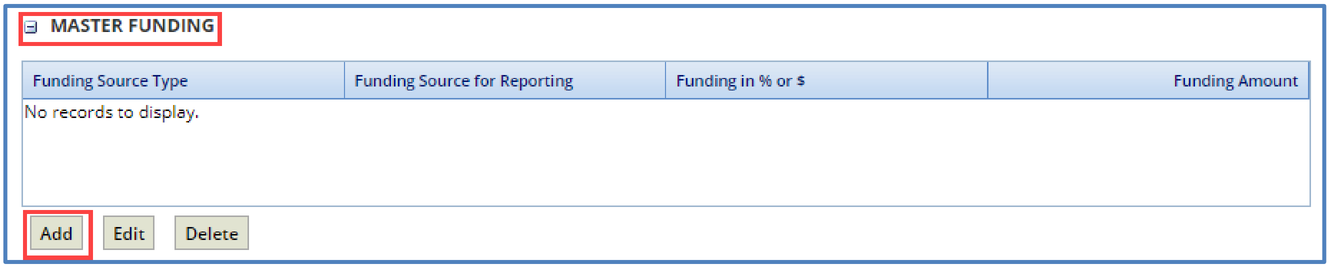
Field	Mandatory / Non-mandatory	Description
Solicitation Type	Non-mandatory	From the drop-down list, select if the contract type is **Period**. If **Period** is selected, the **Staffing Justification Required** field is displayed.
Contract Function	Non-mandatory	To select contract function of the solicitation: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

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



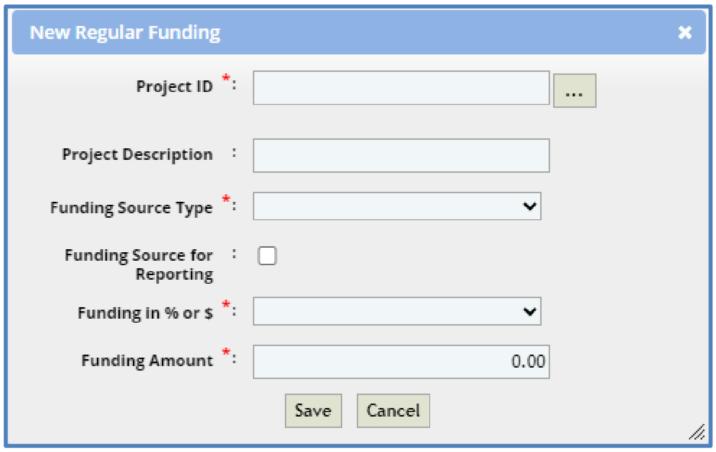
a. Click **Add**. The **Select Project** dialog box is displayed listing all the projects that are associated with the region/bureau of the solicitation.
b. Select the required projects and click **Select**.

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



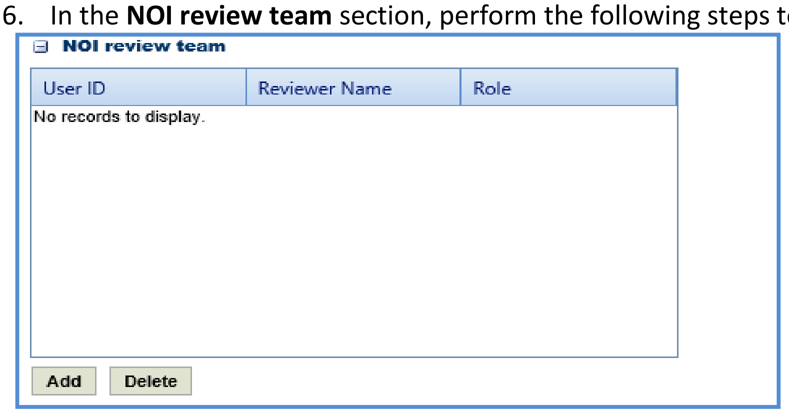
Depending on if this is for a Master or Regular contract, the funding section will display “Master Funding” or “Regular Funding”.

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



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

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



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

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

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

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

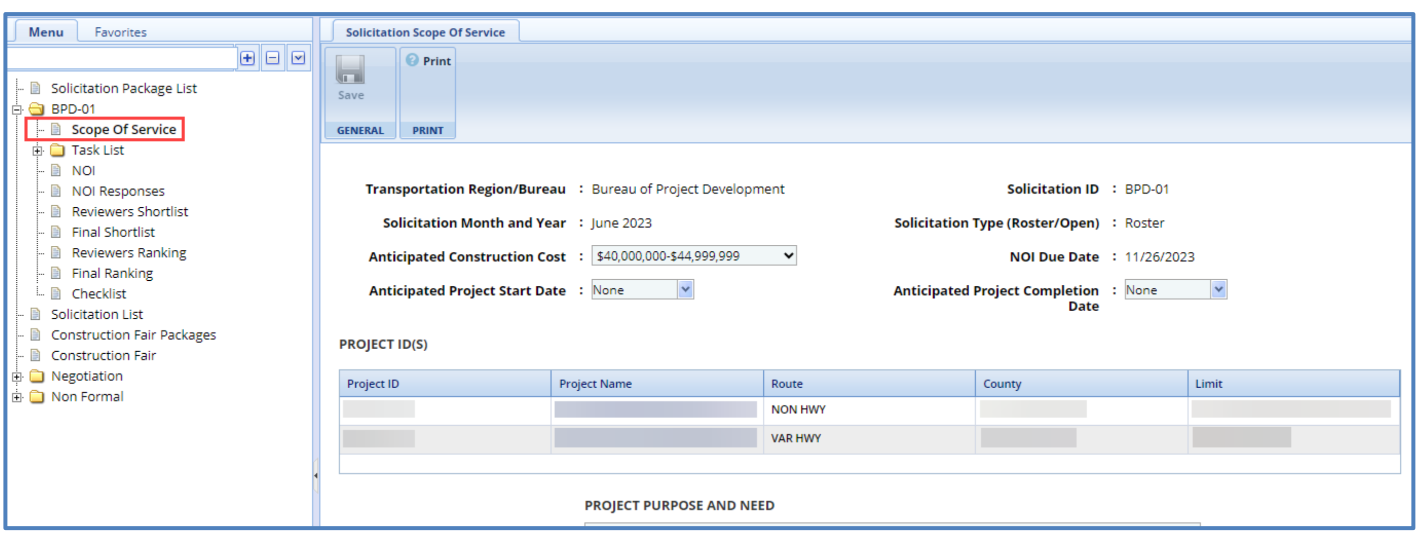
***Note**: When the **Selection team** is **Yes**, then all the reviewers selected in the **Selection Team** section must complete the ranking of consultants.*

8. In the **Attachments** section, upload images and files relevant to the solicitation.

3.2 Solicitation Scope of Service

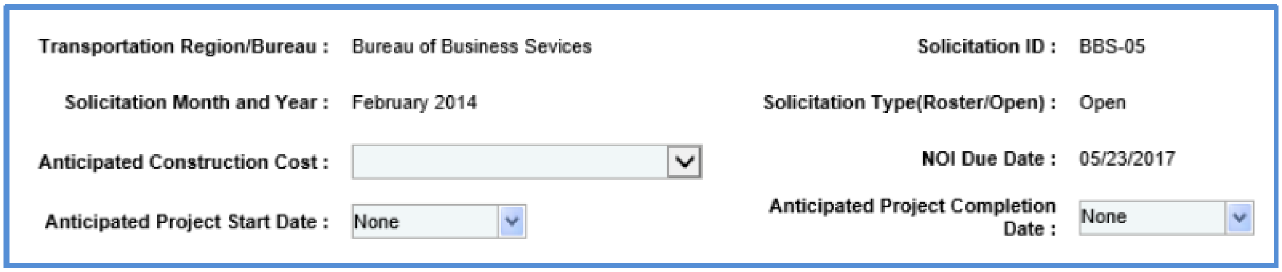
The system allows you to define scope of service for the solicitation package. Perform the following steps to define the scope of service:

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



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

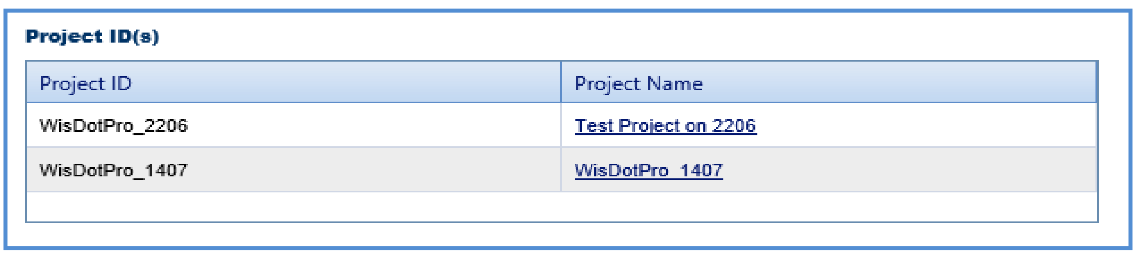
***Note**: All the fields described in the below table are non-mandatory fields.*

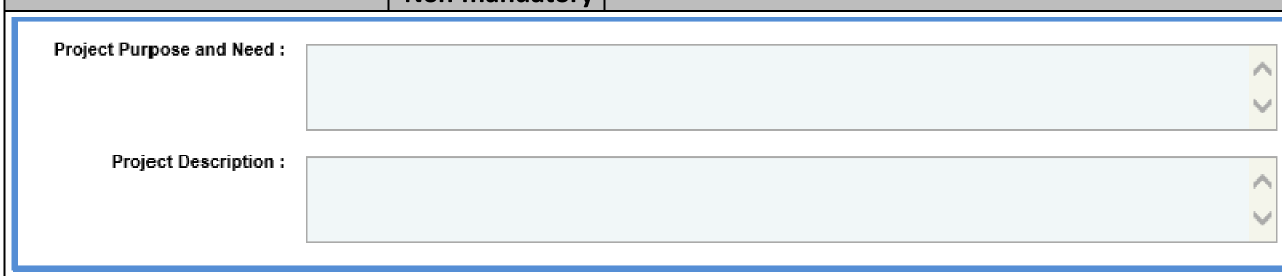


Field	Description
Transportation Region/Bureau	The transportation region/bureau of solicitation is auto populated.
Solicitation ID	The unique ID of the solicitation is auto populated.
Solicitation Month and Year	The month and year of solicitation is auto populated.
Solicitation Type (Roster/Open)	The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

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

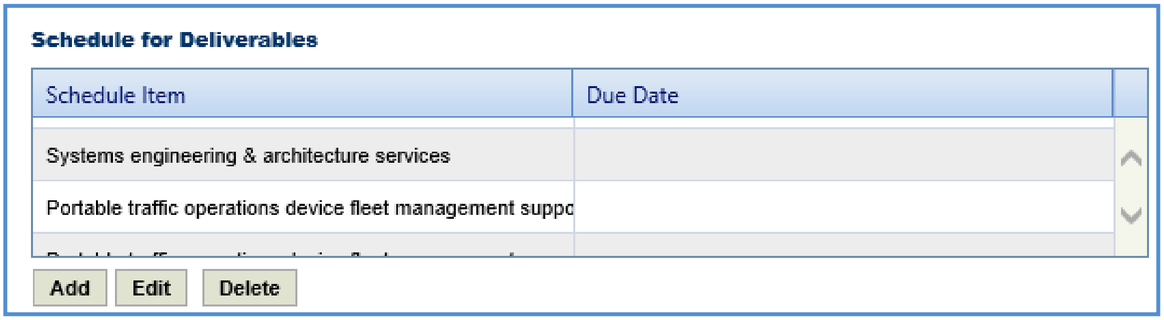
***Note**: The table in the section lists all the projects that are associated with the solicitation. You can click the required **Project Name** link to view the **Project Details** page in a different tab.*



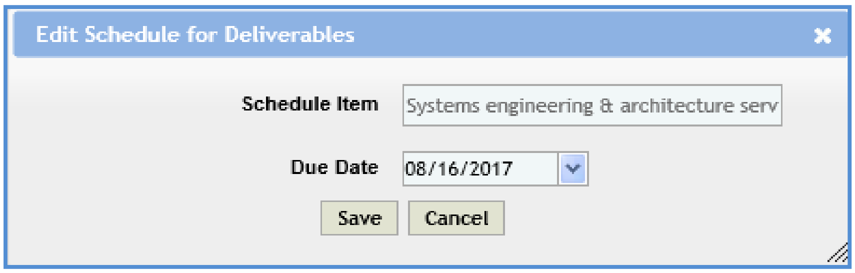


Field	Mandatory / Non-mandatory	Description
Project Purpose and Need	Non-mandatory	Enter the purpose and need for the project.
Project Description	Non-mandatory	Enter the description about the project.

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

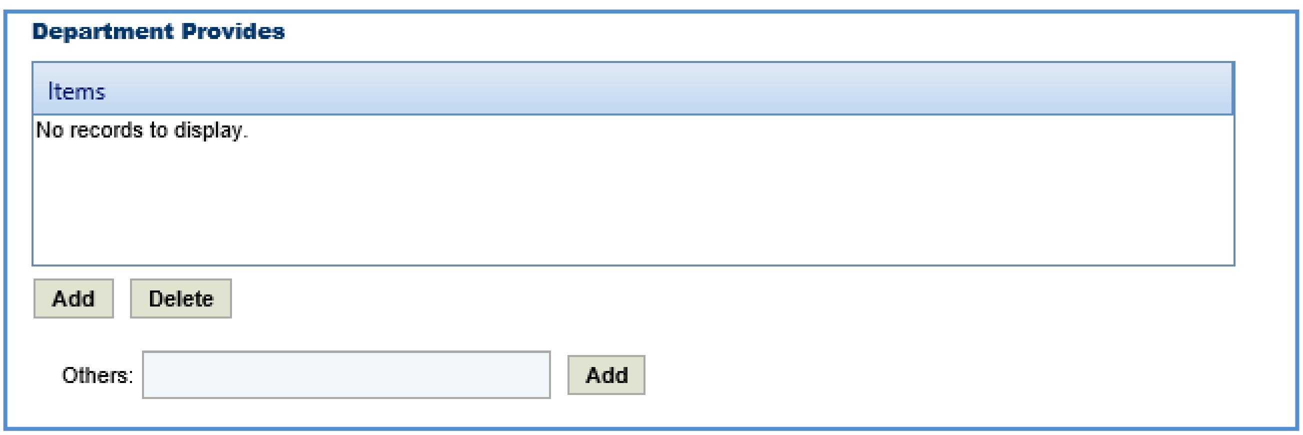


- To add schedule for deliverables from library:
  a. Click **Add**. The **Schedule for Deliverables** dialog box is displayed listing all the deliverables that are defined in the **Deliverables** catalog of the library.
  b. Select the required deliverables and click **Select**. The selected schedule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



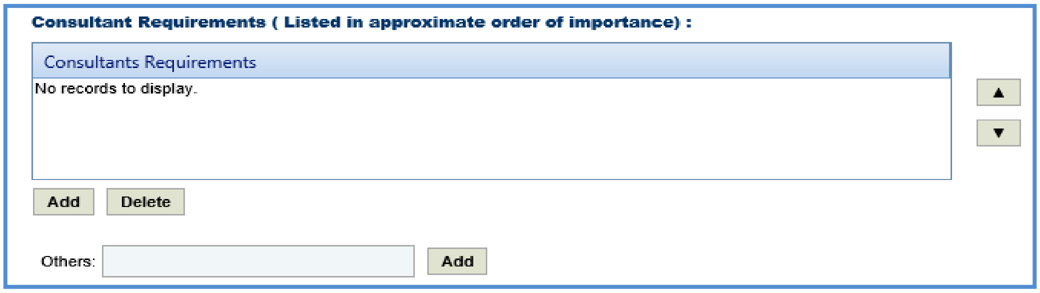
  d. From the **Due Date** drop-down calendar, select the due date for the deliverable.
  e. Click **Save**.
- To add schedule for deliverables that are not defined in the library:
  a. In the **Others** field, enter the name of the item.
  b. Click **Add.** The item is displayed in the table.

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



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

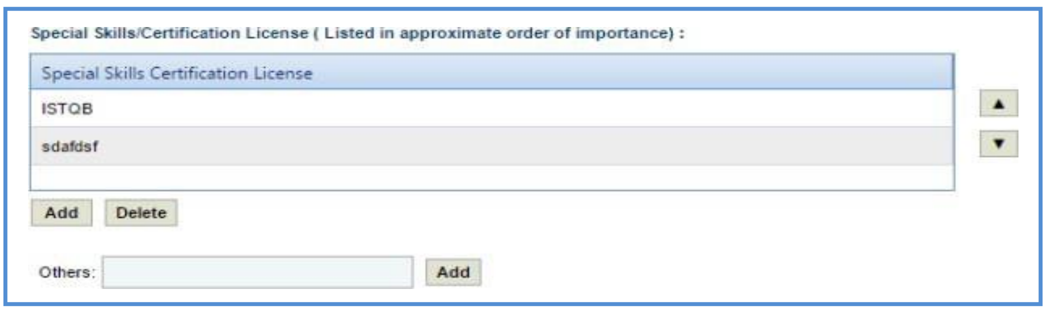
7. In the **Consultant Requirements (Listed in approximate order of importance)** section, perform the following steps to add consultant requirements.



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

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

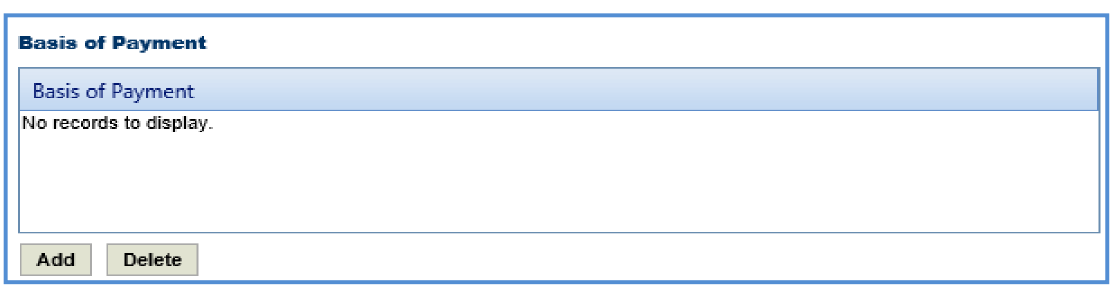
8. In the **Special Skills/Certification License (Listed in approximate order of importance)** section, perform the following steps to add Special Skills/Certification License details.



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

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

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

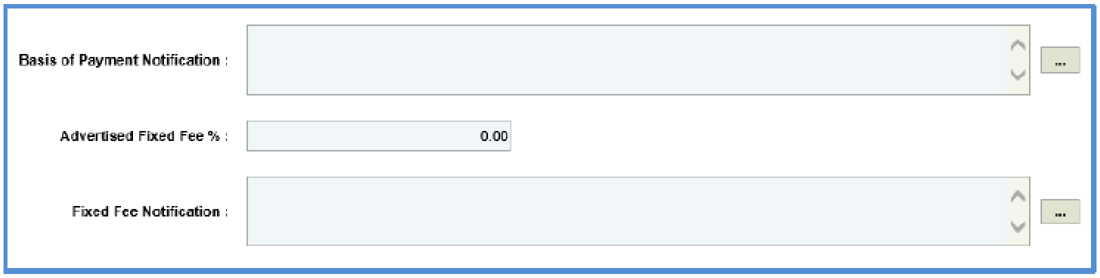


  a. Click **Add**. The **Basis of Payment** dialog box is displayed listing all the basis of payments defined in the **Basis of Payment** catalog of the library.

b. Select the required basis of payments and click **Select**. The selected basis of payments is listed in the table

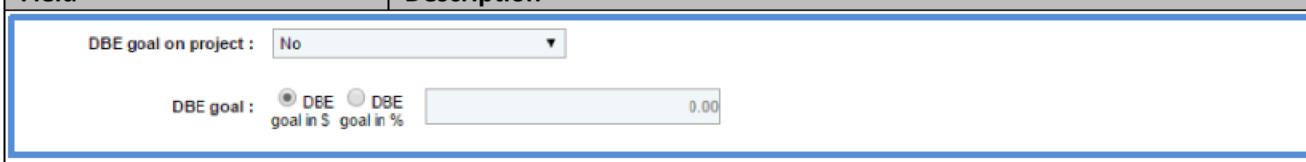
10. Enter information in the other required fields. The fields are described in the following table.

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

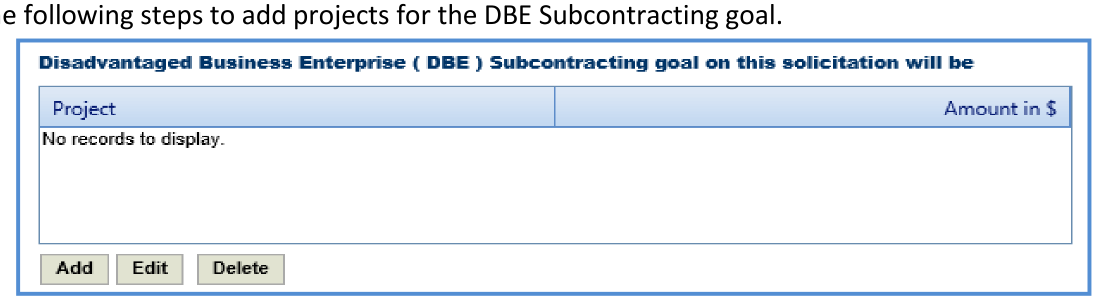
Field	Description
	
Basis of Payment Notification	To add basis of payment notification: 1. Click ... The **Basis of Payment Notification** dialog box is displayed listing all the basis of payment notifications defined in the **Basis of Payment Notification** catalog of the library. 2. Select the required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

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

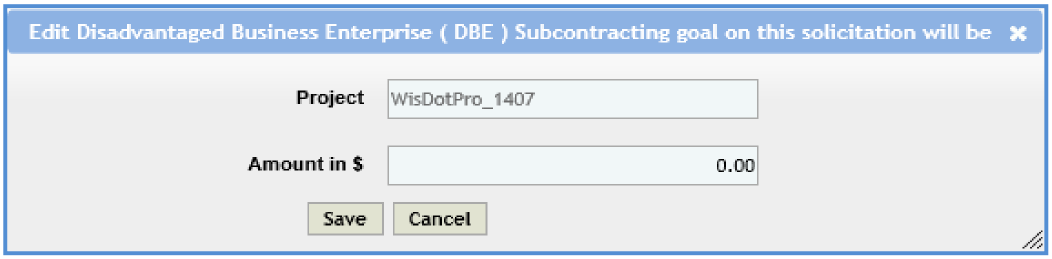
***Note**: All the fields described in the below table are non-mandatory fields.*

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

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

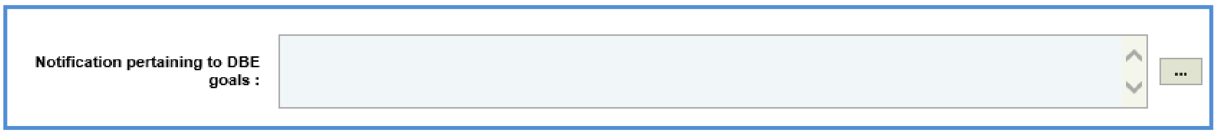


a. Click **Add**. The **Project Name** dialog box is displayed listing the projects associated with the solicitation.
b. Select the required projects and click **Select**. The project is displayed in the table.
c. Select the project and click **Edit**. The **Edit Disadvantaged Business Enterprise (DBE) Subcontracting goal on this solicitation will be** dialog box is displayed.



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

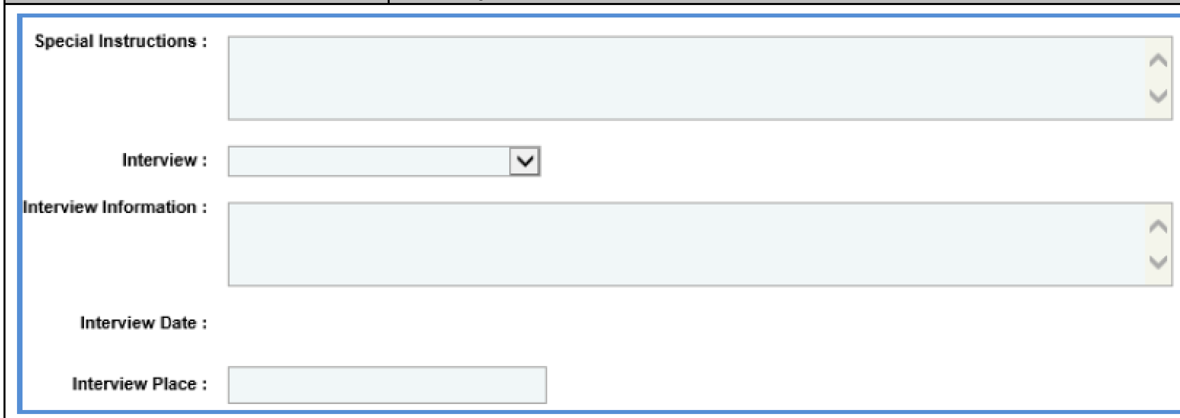
13. In the **Notification pertaining to DBE goals** field, the system allows you to select notifications pertaining to DBE goals in this field only when the value in the **DBE goal on project** field is **No**.



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

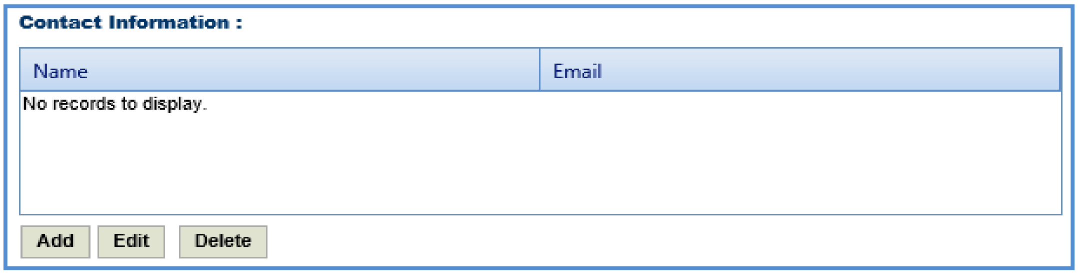
14. Enter information in the required fields. The fields are described in the following table.

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



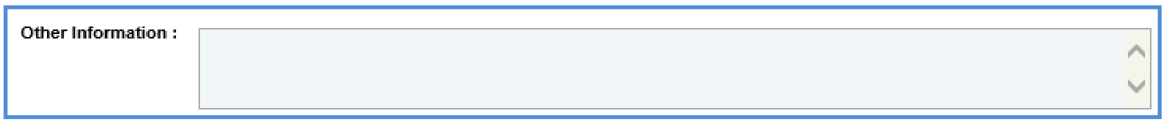
Field	Description
Special Instructions	Enter special instructions about the solicitation.
Interview	From the drop-down list, select the required option to indicate if an interview will be held with the shortlisted consultants. If the select option is I**nterview will be conducted**, then the I**nterview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

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



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

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



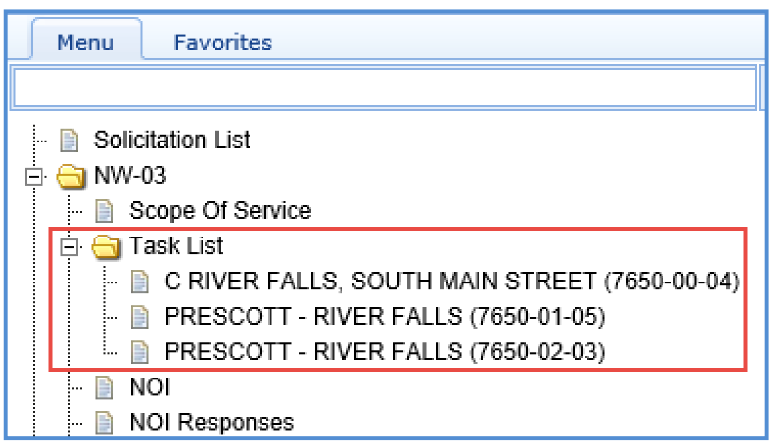
17. Click **Save**.

3.3 Solicitation Task List

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

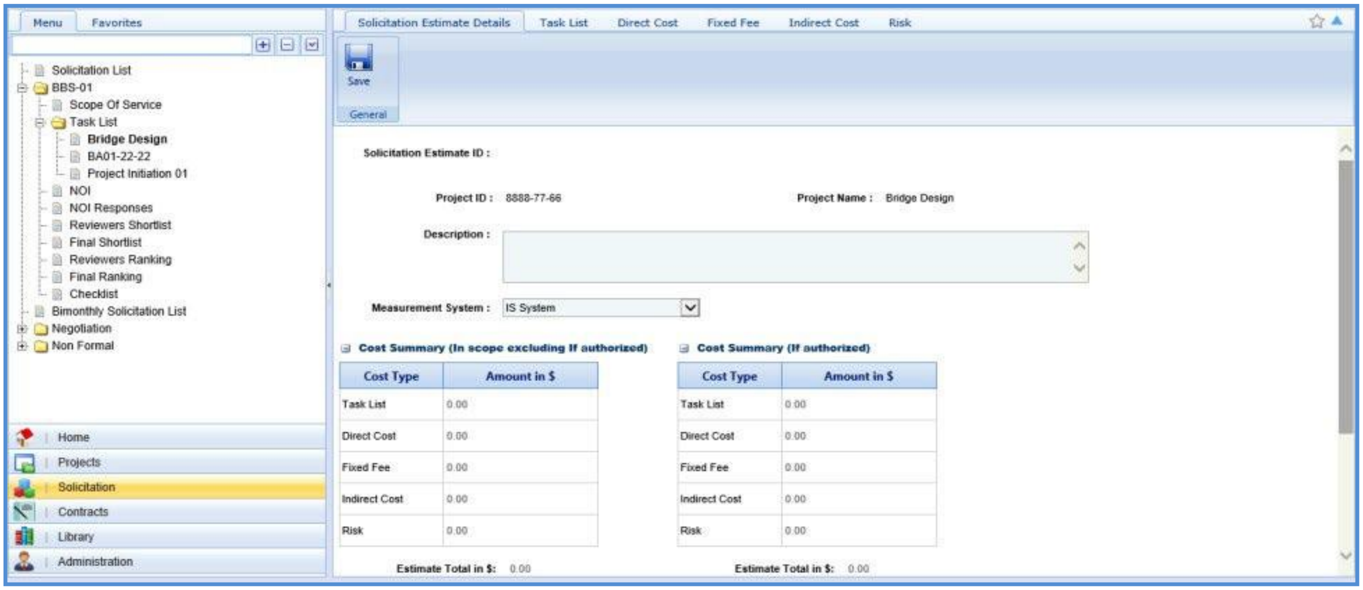
3.3.1 Solicitation Task List for Regular Contract Type

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



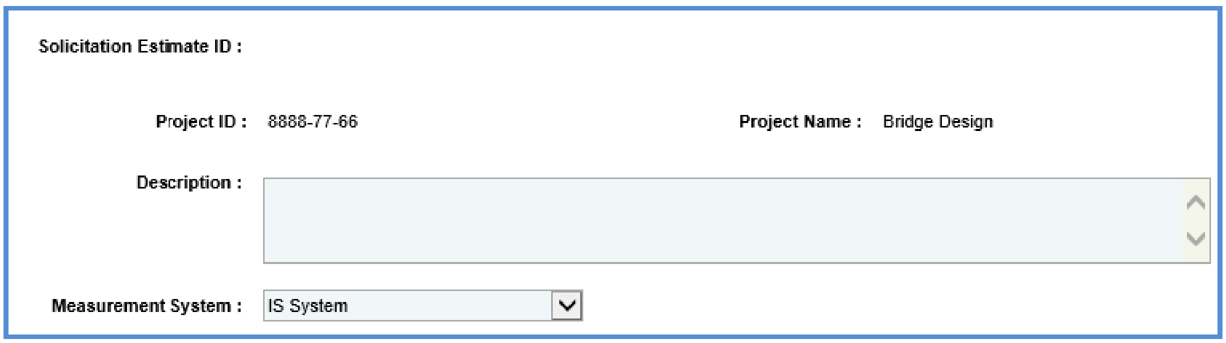
To define the solicitation task list for regular contract type:

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



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

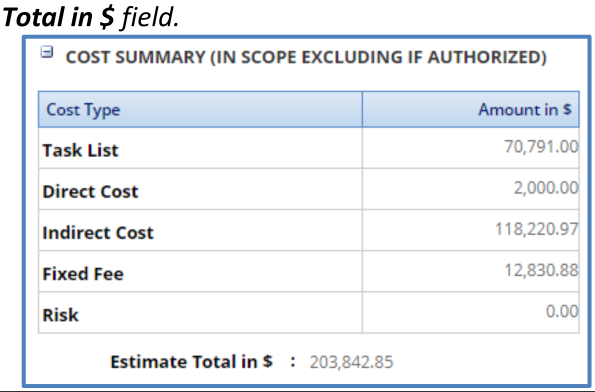
Field	Mandatory / Non-mandatory	Description



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

Note:

- *The **Cost Summary (In Scope excluding If authorized)** section auto-populates the total of Task List, Direct Cost, Fixed Fee, 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 is also auto calculated and displayed in the **Estimate Total in $** field.*



COST SUMMARY (IN SCOPE EXCLUDING IF AUTHORIZED)

Cost Type	Amount in $
Task List	70,791.00
Direct Cost	2,000.00
Indirect Cost	118,220.97
Fixed Fee	12,830.88
Risk	0.00

Estimate Total in $: 203,842.85

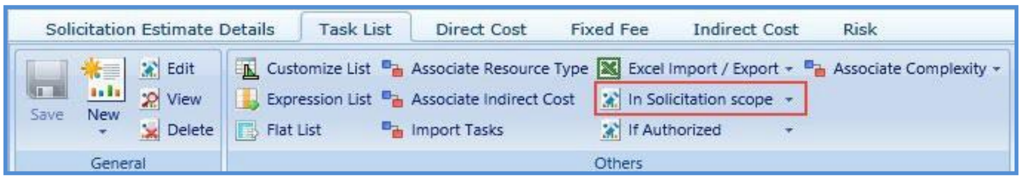
- *The **Cost Summary (If authorized)** section auto-populates the total of Task List, Direct Cost, Fixed Fee, and Indirect Cost based on the values entered in the respective tabs and that are marked **If authorized** as **Yes**. The sum of all these costs is also auto calculated and displayed in the **Estimate Total in $** field. **WisDOT does not utilize this section currently.***

b. In the **Attachments** section, upload images and files relevant to the solicitation estimate.
c. Click **Save.**

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

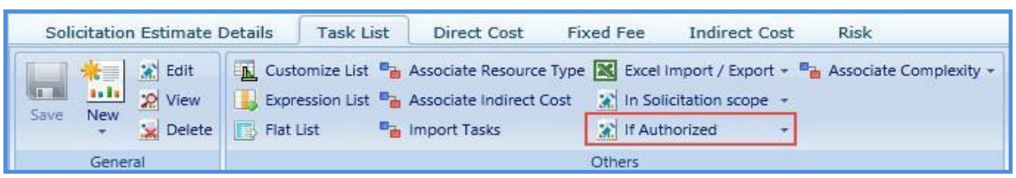
***Note:** All the tasks that are associated with the project estimate are auto populated. However, you can add additional tasks. To add additional tasks, assign resources, and indirect costs, refer to the adding direct labor cost task as described in the **Creating Project Estimates** topic.*

a. To indicate tasks that are in scope of the solicitation, perform the following steps.
   i. Select the tasks and then click **In Solicitation Scope** in the **Others** group.



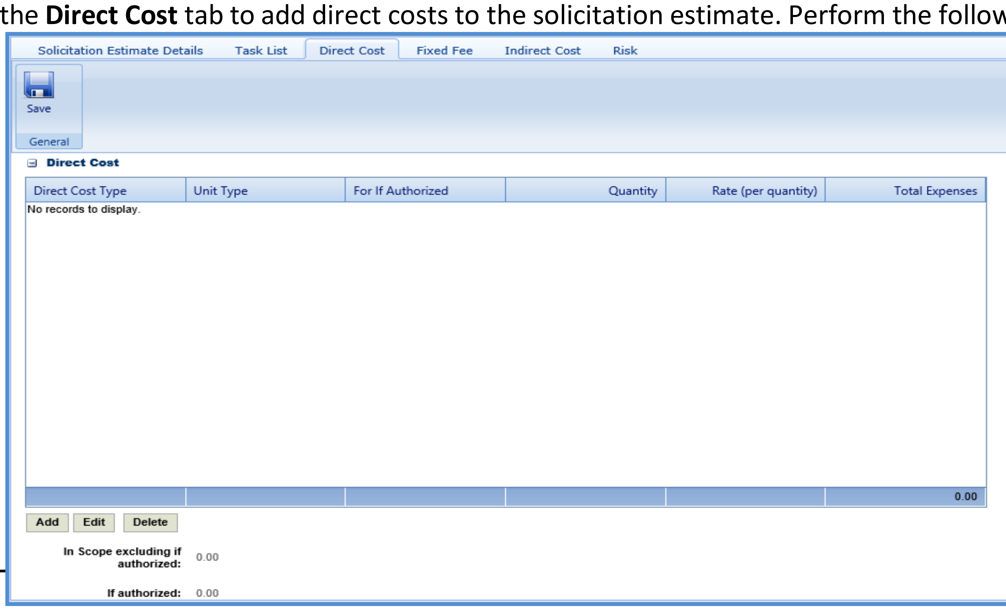
   ii. From the **In Solicitation Scope** drop-down list, select **Yes**.

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

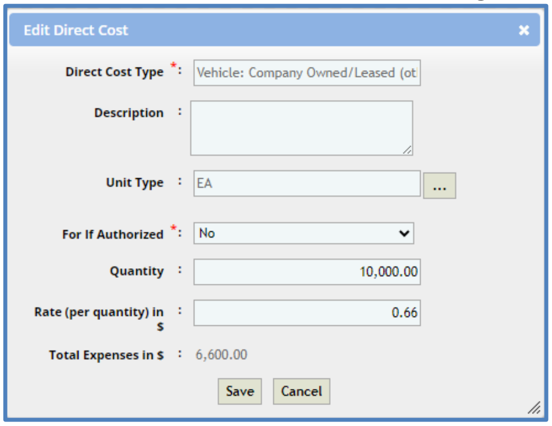


The total of task list costs that are marked as in scope and excluding task list costs that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of task list costs that are marked as authorized are displayed in the **Cost Summary (If authorized)**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

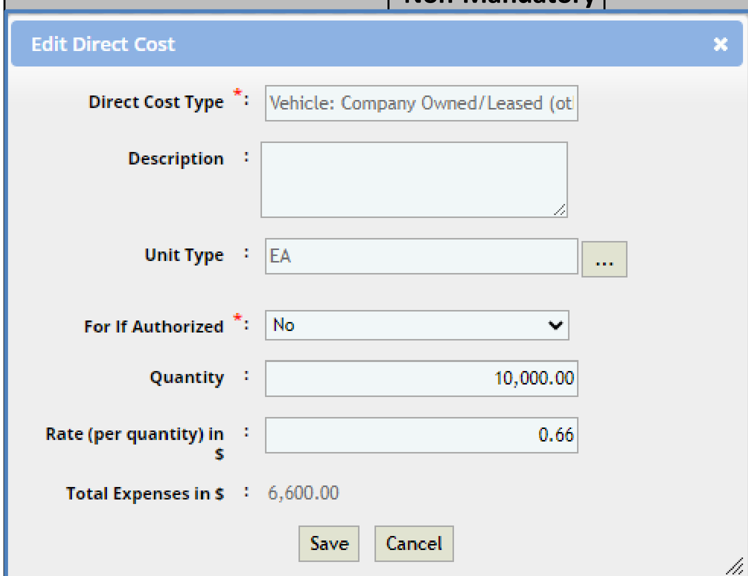
6. Click the **Direct Cost** tab to add direct costs to the solicitation estimate. Perform the following steps:



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



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

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

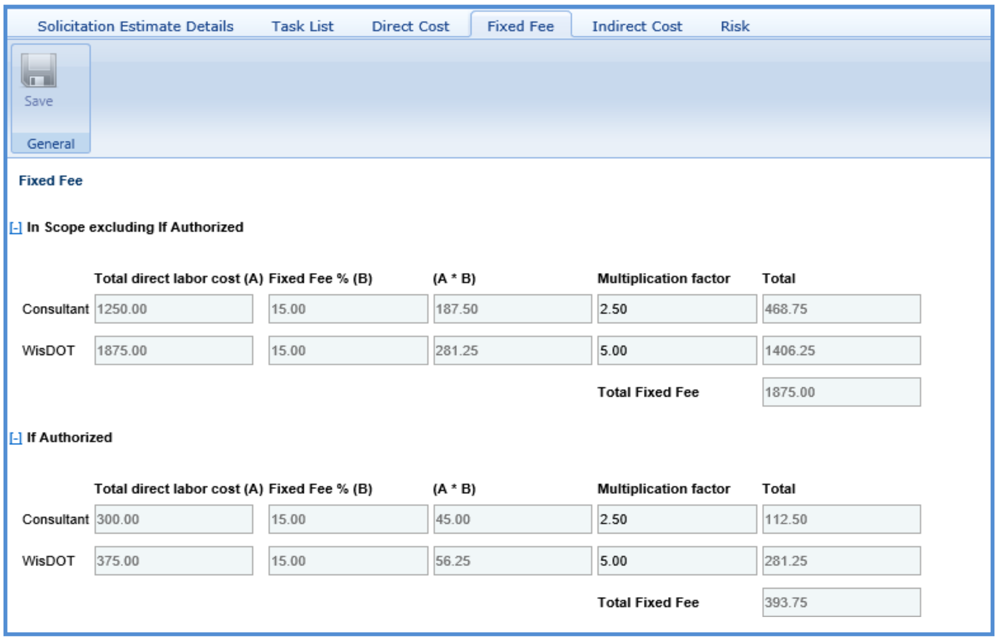
Note: *The total of direct costs that are in scope for the solicitation is auto calculated and displayed in the* ***In Scope excluding if authorized*** *field and the total of direct costs that are indicated as authorized is auto calculated and displayed in the* ***If authorized*** *field.*

f. Click **Save**.

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

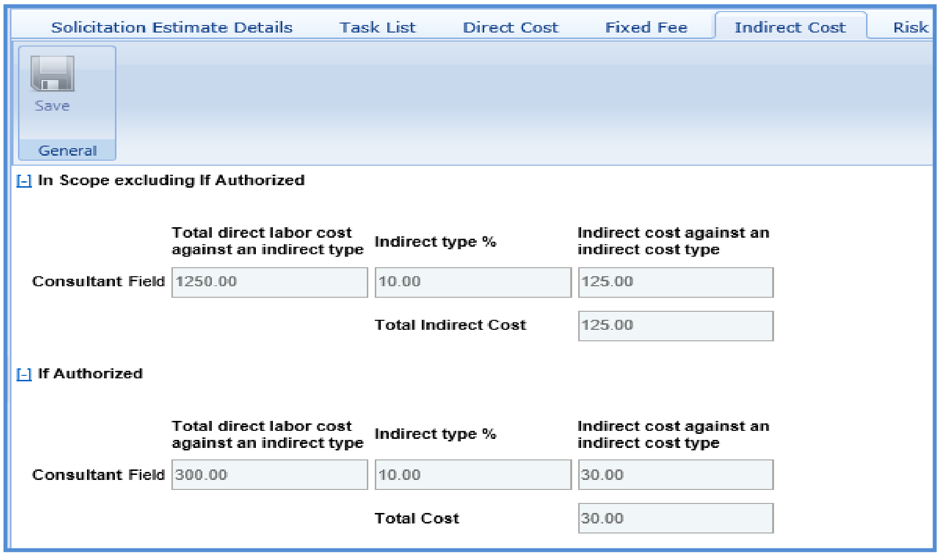
7. Click the **Fixed Fee** tab. The fixed fee details from the project estimate are displayed based on the tasks that are marked **In Scope** and **If Authorized**. The different field details that are displayed are described in the following table.

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



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

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



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

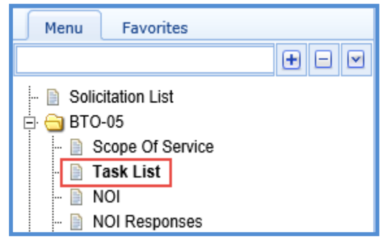
***Note**: The Indirect Cost details can be viewed only when:*

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

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

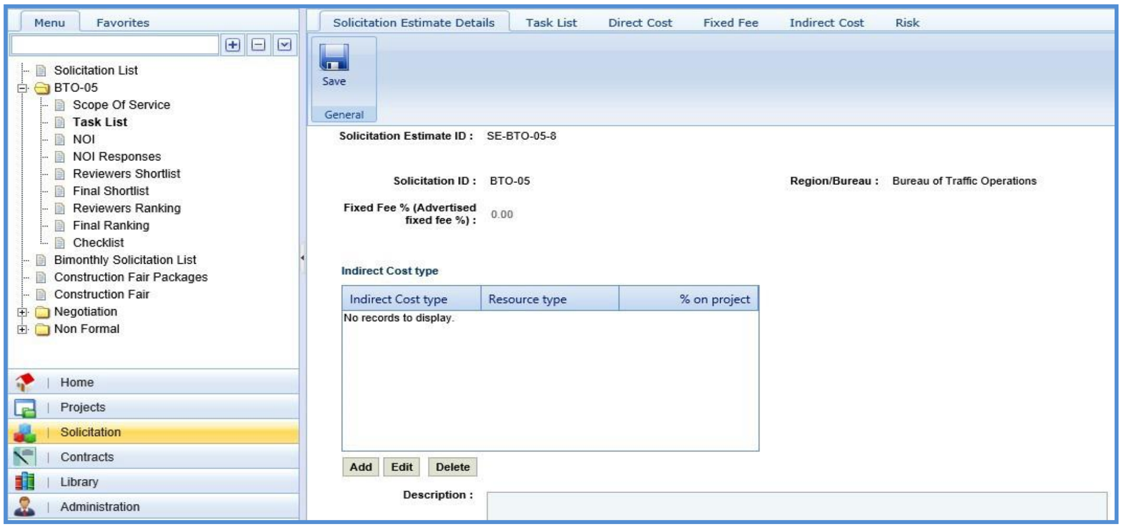
3.3.2 Solicitation Task List for Master Contract Type

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



To define the solicitation task list for master contract type:

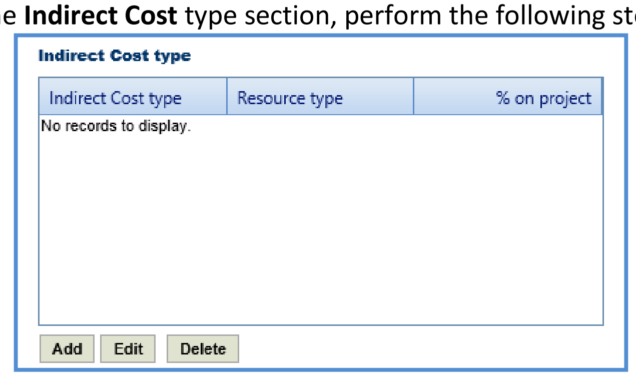
1. Select the solicitation for which you want to define the task list and click **Edit**.
2. In the navigation pane, expand the solicitation folder, and then click **Task List**. The **Solicitation Estimate Details** tab is displayed.



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

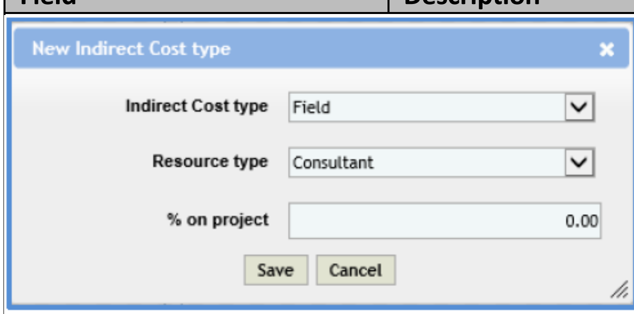
***Note**: The values in the **Solicitation Estimate ID, Solicitation ID, Region/Bureau,** and **Fixed Fee% (Advertised fixed fee %)** fields are auto populated.*

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



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

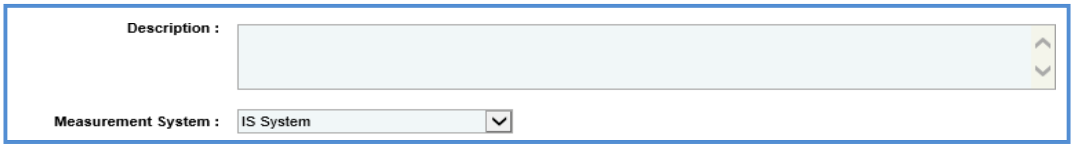
ii. Enter information in the required fields. The fields are described in the following table.

Field	Description
	

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

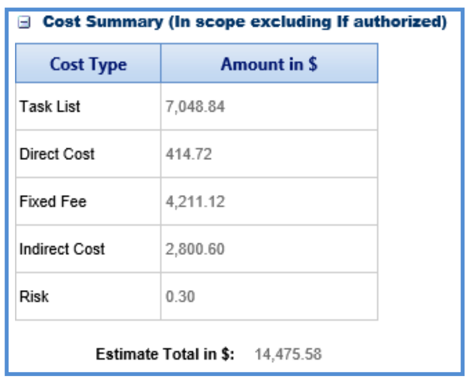
iii. Click **Save**.

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



Note:

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



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

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

d. Click **Save.**

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

a. You can add tasks, assign resources, and indirect costs for solicitation. To add tasks, refer to the [adding multiple direct labor cost tasks] step described in the **Creating Project Estimates** topic.

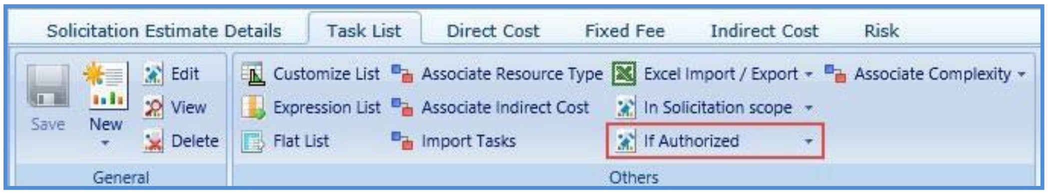
b. To indicate tasks that are in scope of the solicitation, perform the following steps.

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

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

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

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



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

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

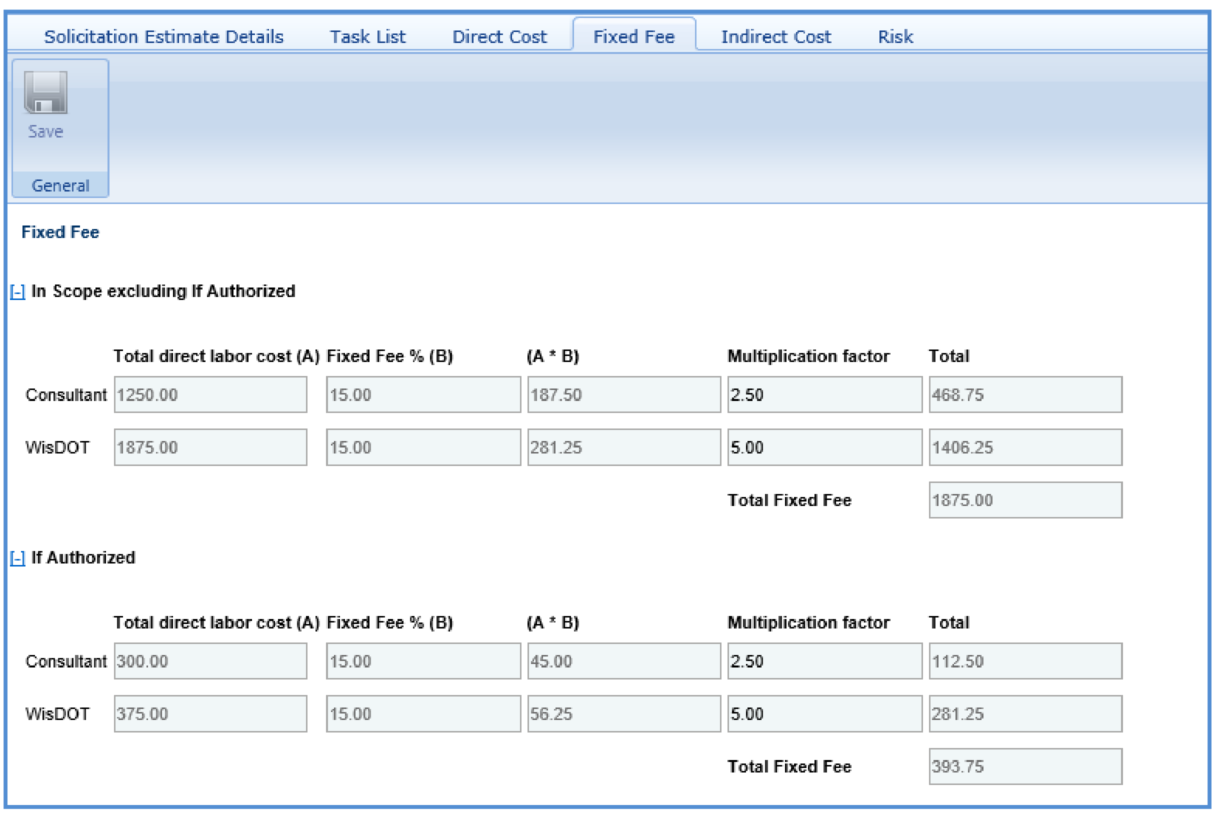
Note: *The system allows you to bulk associate multiple tasks with the same resource type, indirect cost, or and complexity. For more information, refer to [Bulk Association](#).*

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

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

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

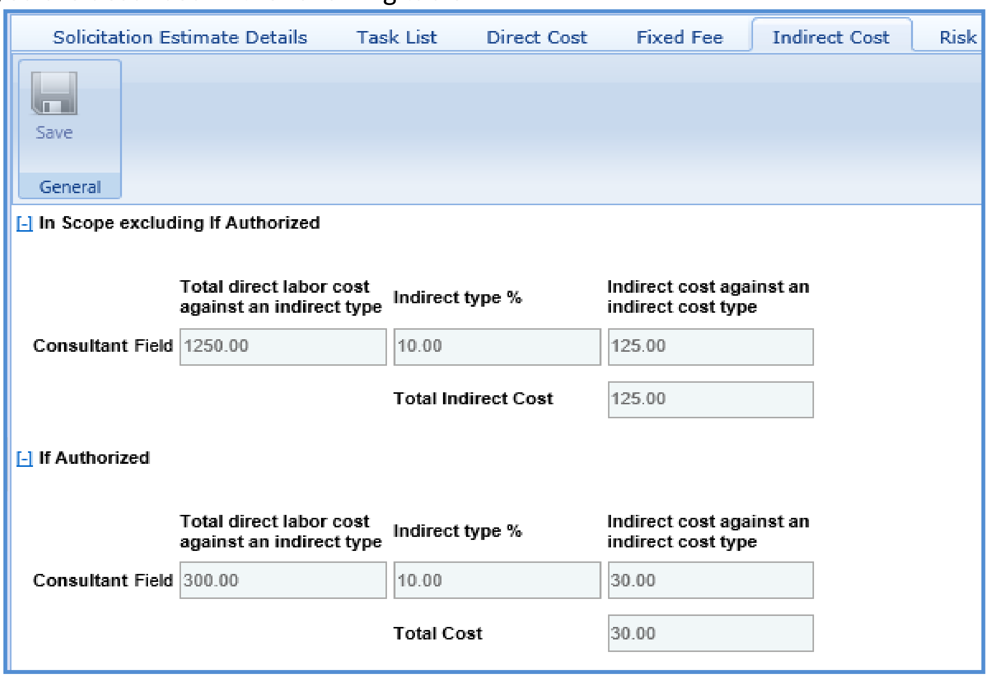
Note: *The information in the **If Authorized** section in the tab is displayed only if the value in the **Advertised Fixed Fee %** field is defined on the* Solicitation Scope of Service page.



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

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

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



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

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

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

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

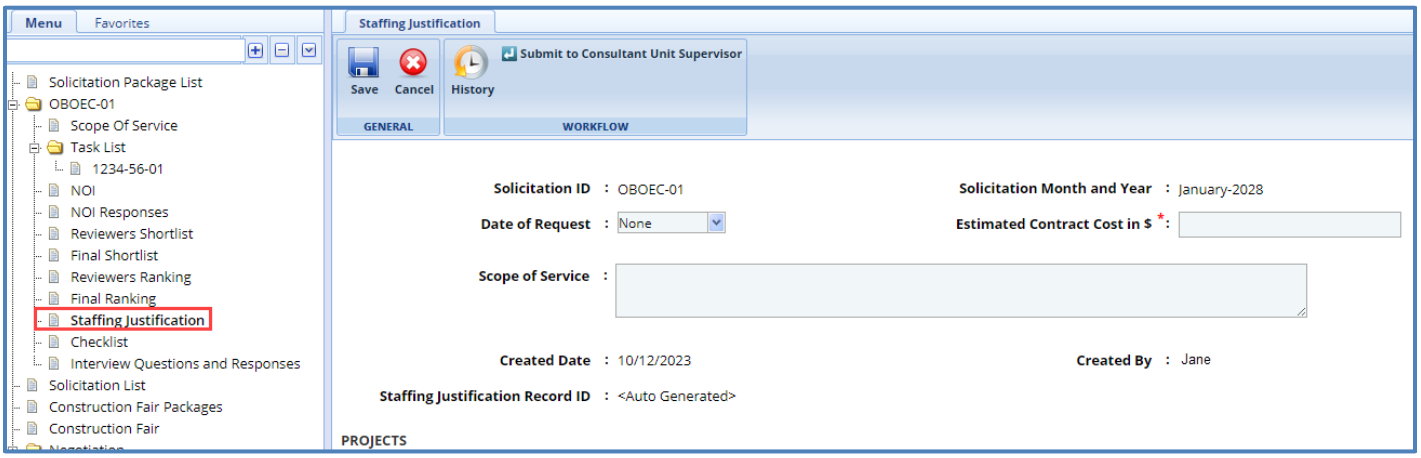
3.4 Staffing Justification

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

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

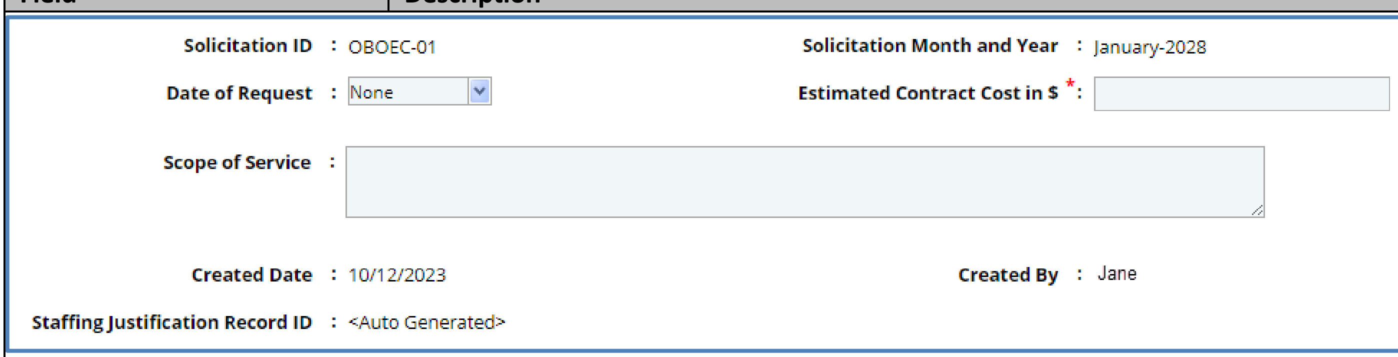
Steps:

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



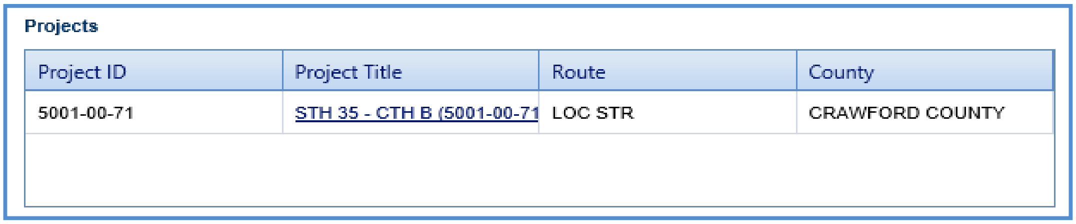
4. Enter information in the required fields. The fields are described in the following table.

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

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

Created By	The name of the person who is providing the staffing justification is auto populated.
Staffing Justification Record ID	The unique ID of the staffing justification record is auto generated.

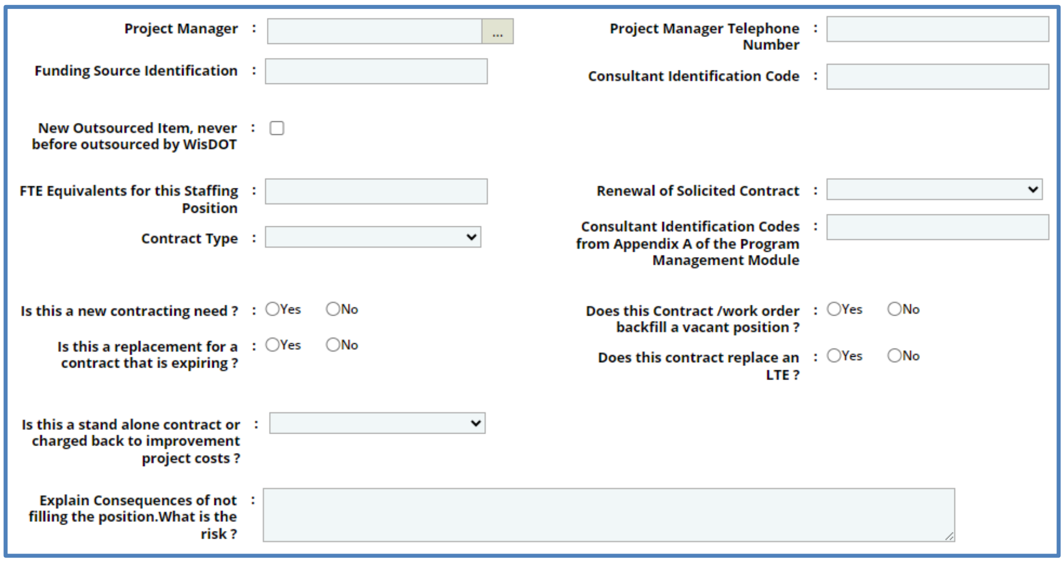
***Note**: The Projects table lists all the projects that are associated with the solicitation if the **Contract Type** is **Regular**. You can click the required **Project Title** link to view the **Project Details** page in a different tab.*


Projects

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

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

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



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

backfill a vacant position?	of the contract/work order or click **No** to indicate if the staffing requirements is not for filling a vacant position of the contract/work order.
Is this a replacement for a contract that is expiring?	Click **Yes** to indicate the staffing requirements is for replacing a contract that is expiring or click **No** to indicate the staffing requirements is not for replacing a contract that is expiring.
Does this contract replace an LTE?	Click **Yes** to indicate the contract is replacing an LTE or click No to indicate the contract is not replacing an LTE.
Is this a standalone contract or charged back to improvement project costs?	From the drop-down list, select whether the contract is a **Standalone Contract** or **Charged back** to improvement project costs.
Explain Consequences of not filling the position. What is the risk?	Enter risk and consequence details if the position is not filled.

6. In the table **List the Proposed Position Classifications**, click **Add** to add resource classifications.
7. Once the **Select Resource Classifications** dialogue box opens, check the appropriate classifications and hit **Select**.
8. Click **Save**.

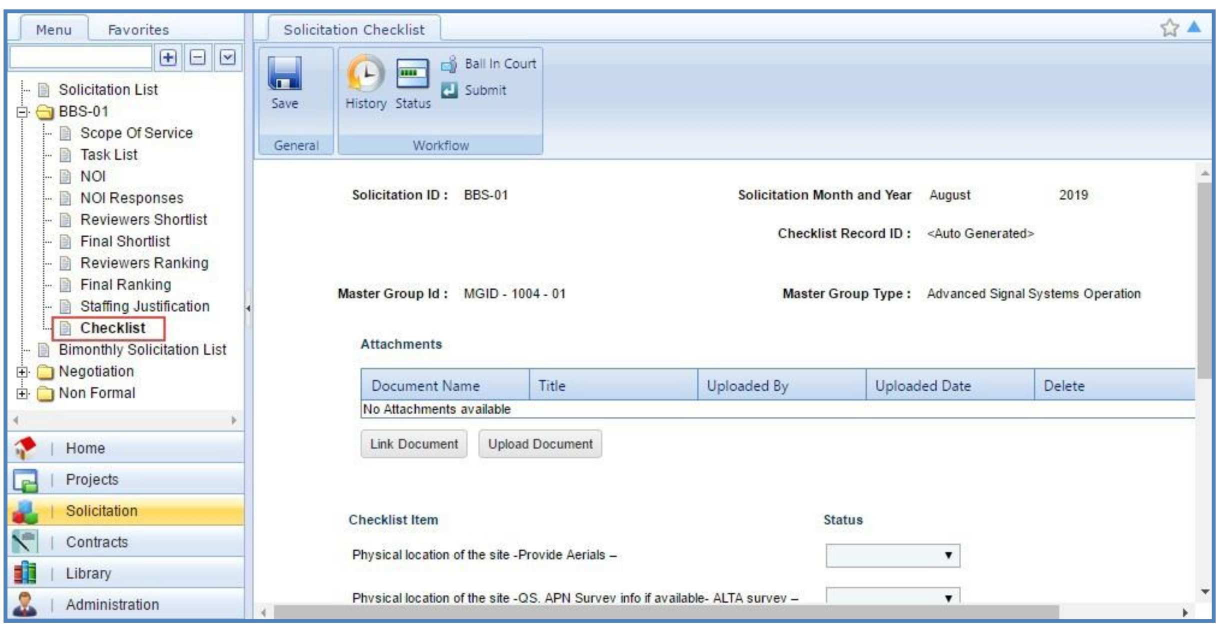
3.5 Submitting Solicitation Checklist

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

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

To update and submit the solicitation checklist:

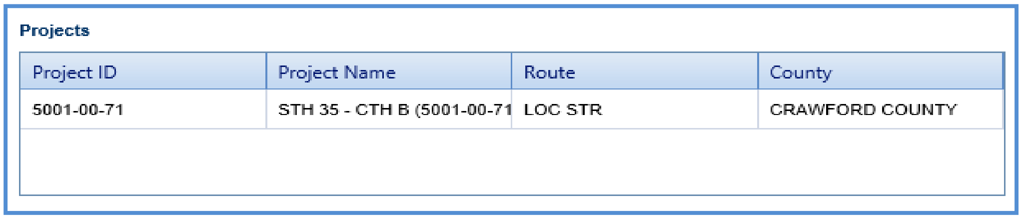
1. Select the solicitation, and then click **Edit**.
2. In the navigation pane, expand the solicitation folder, and then click **Checklist**. The **Solicitation Checklist** page is displayed.



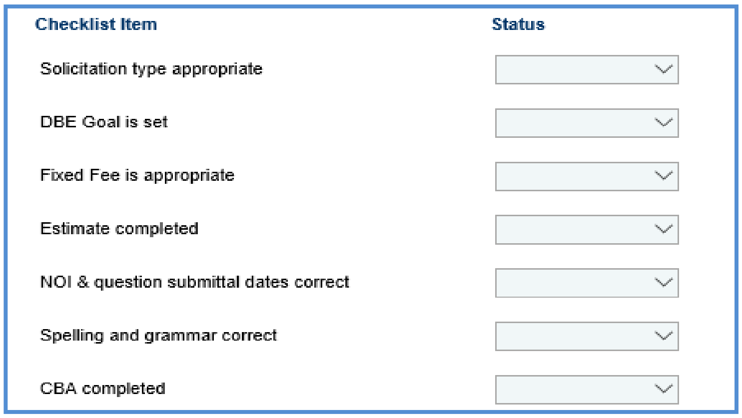
Note:

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

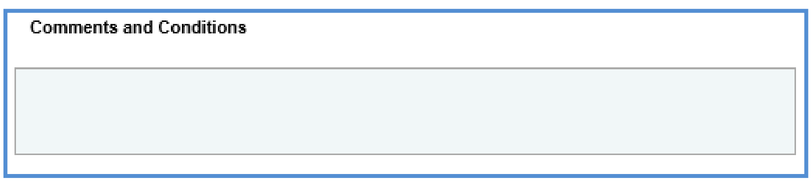
- *If the **Contract Type** is **Regular**, then the **Projects** table is displayed listing all the projects that are associated with the solicitation.*



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



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



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

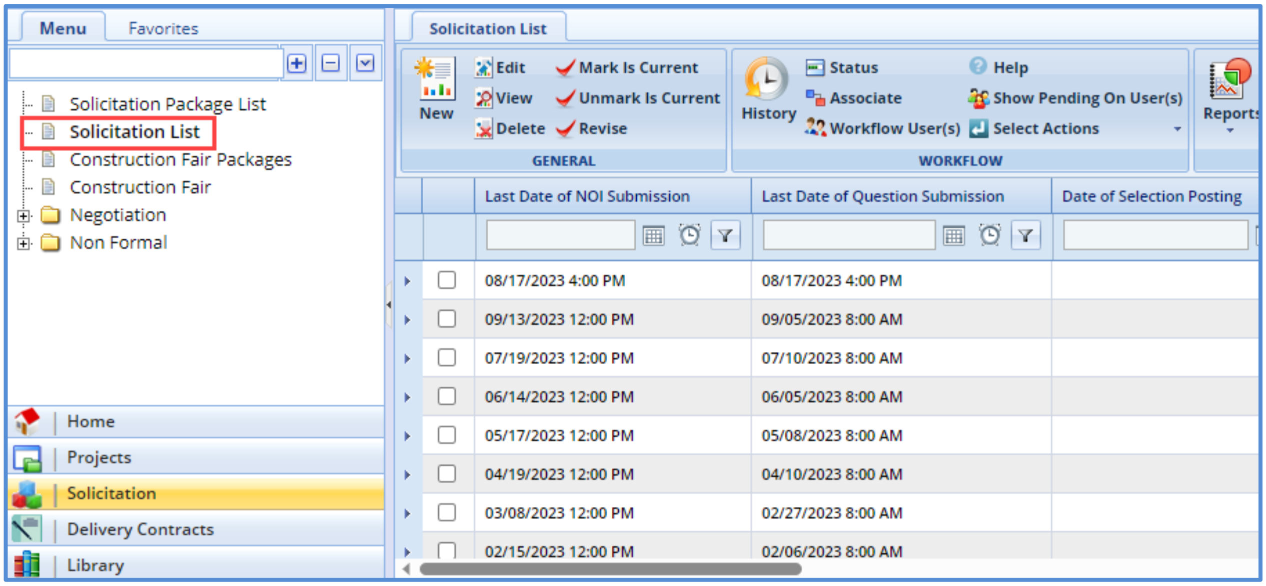
Note: *You can add a solicitation only when the checklist items status is updated and submitted.*

3.6 Creating and Publishing a Solicitation

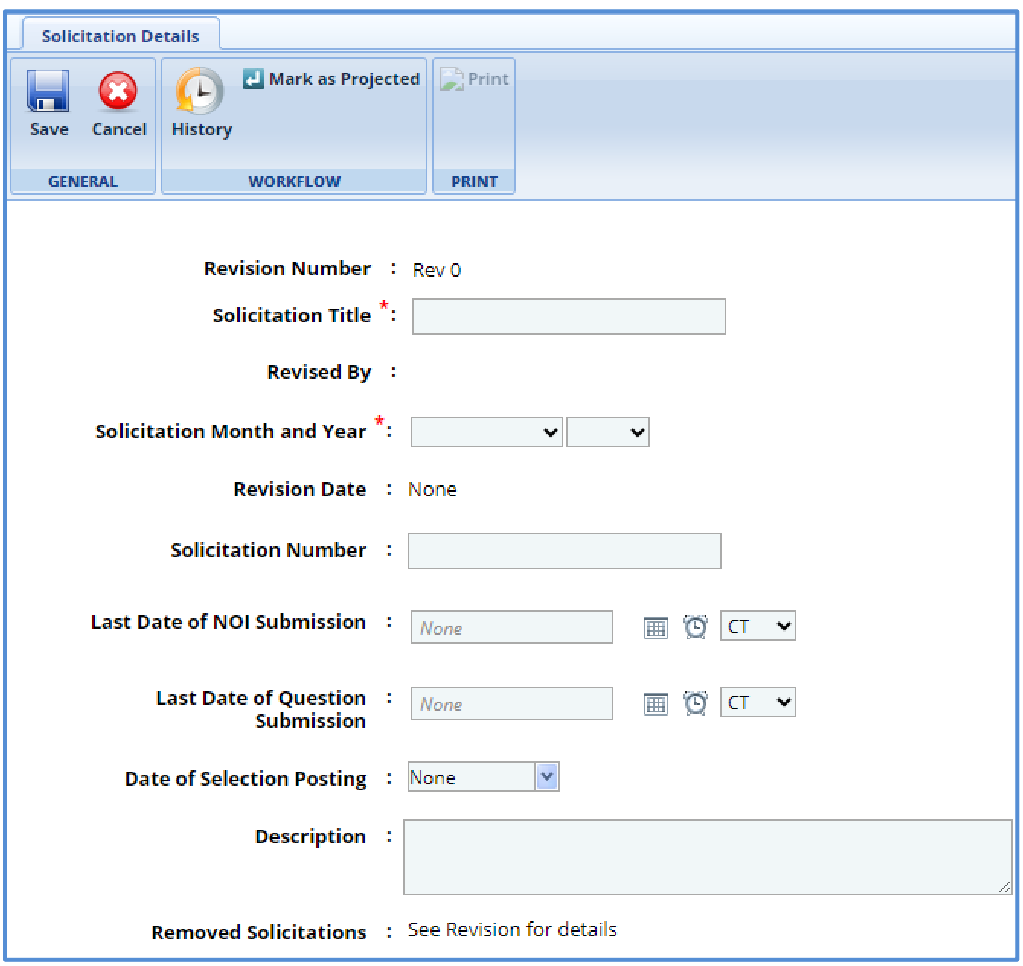
The system allows you to add multiple solicitations and create a **Solicitation** that will be published to the consultants. The consultants will provide response to the NOI questionnaire, based on which consultants will be shortlisted and ranked.

Steps:

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



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



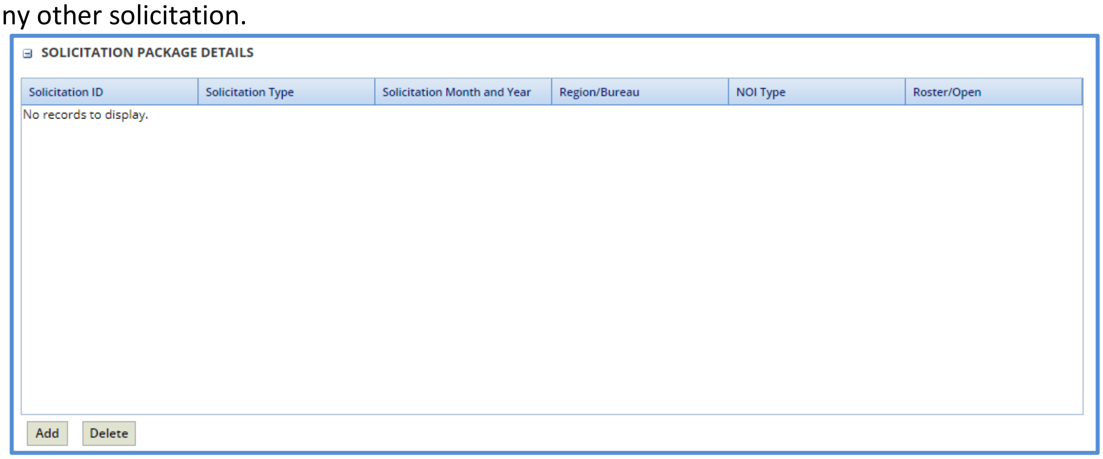
4. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
Revision Number	-	The revision number of the solicitation is auto populated. This is applicable only when a solicitation is revised.
Solicitation Title	Mandatory	Enter the title for the Solicitation.
Revised By	Non-mandatory	The name of the person who has revised the solicitation is auto populated. This is applicable only when a solicitation is revised.
Solicitation Month and Year	Mandatory	From the drop-down list, select the month and year of the solicitation. You can create only one solicitation for a specific combination of month and year.
Revision Date	Non-mandatory	The date when the solicitation is revised is auto populated. This is applicable only when a solicitation is revised.
Solicitation Number	Non-mandatory	Enter a unique number for the solicitation.
Last Date of NOI Submission	Mandatory	Enter the last date and time for submission of the NOI by the consultant. Alternatively, you can click the calendar icon and clock icon to select the date and time. From the drop-down list, select the time zone.
Last Date of Question Submission	Mandatory	Enter the last date and time for submission of questions related to the NOI by the consultant. Alternatively, you can click the calendar icon and clock icon to select the date and time. From the drop-down list, select the time zone.
Date of Selection Posting	Non-mandatory	From the drop-down calendar, select the date when the consultants will be intimated about their selection.
Description	Non-mandatory	Enter description about the solicitation.
Removed Solicitations	Non-mandatory	Indicates if any existing solicitations have been removed from the solicitation during the solicitation revision. This field is applicable only when a solicitation is revised.

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

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

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



b. Select the solicitations to add to the Solicitation.

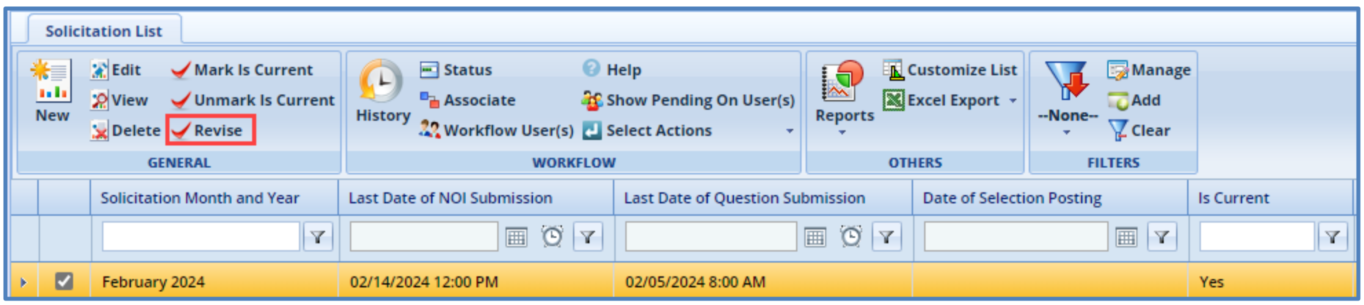
c. Click **Select**.

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

3.6.1 Revising Solicitation

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

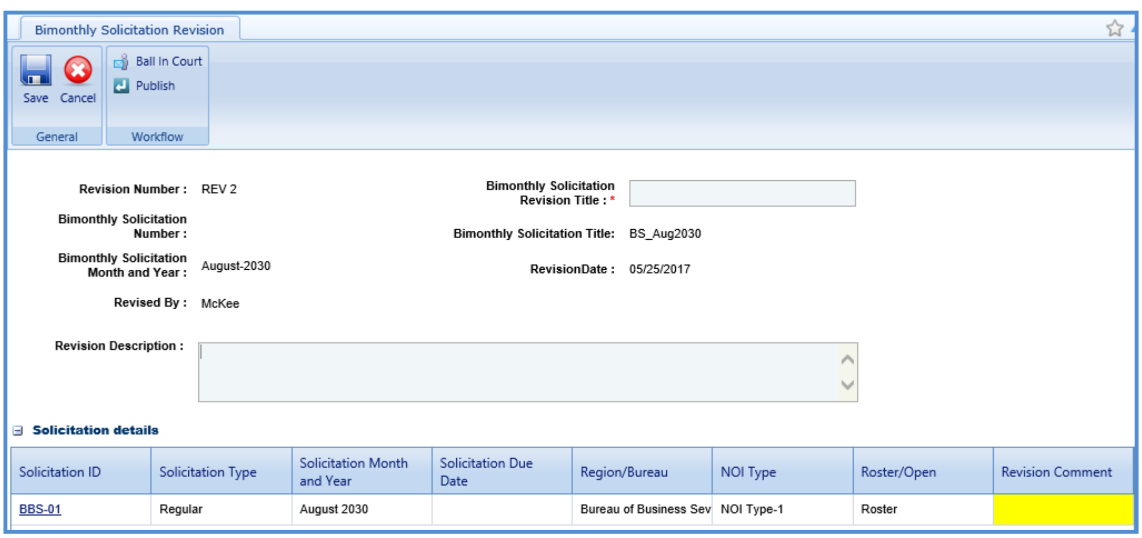
a. On the **Solicitation List** page, select the published Solicitation that is marked as current, which you want to revise.



b. In the **General** group, click **Revise.** The **Solicitation Revision** page is available in the Solicitation folder in the navigation pane.

c. In the navigation pane, expand the Solicitation folder and then click the **Solicitation Revision**. The **Solicitation Revision** page is displayed with the Solicitation record in **Work in progress** status.

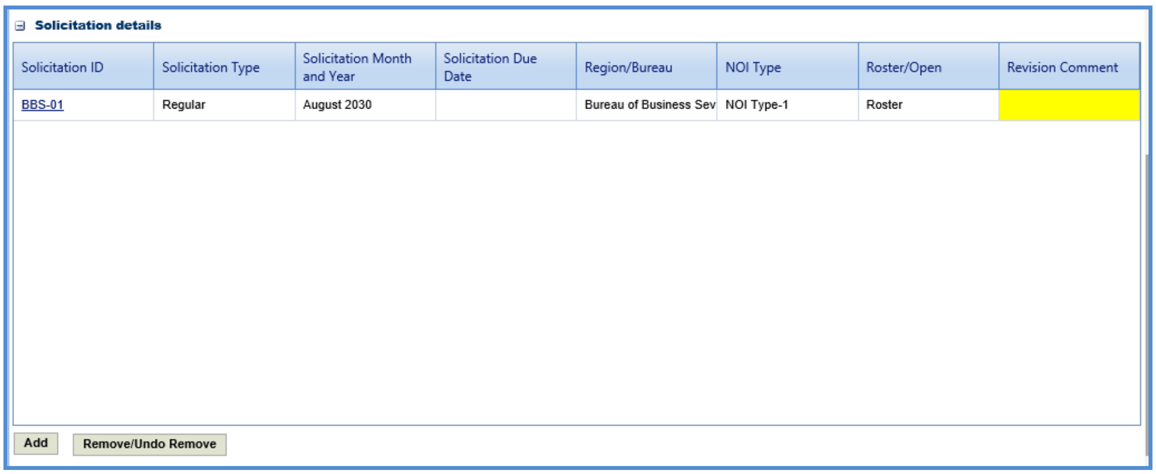
d. Select the record in the **Work in progress** status and click **Edit**. The **Solicitation Revision** details page is displayed.



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

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

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



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

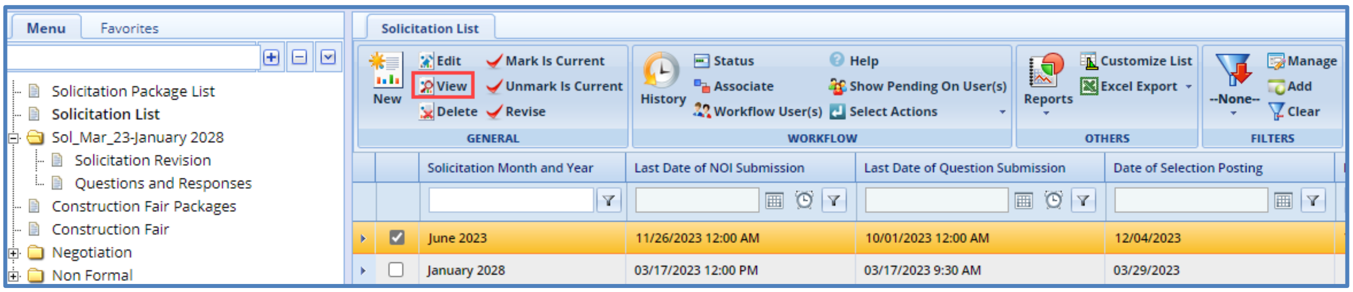
7. Select the revised Solicitation record. In the **Workflow** group, click **Select Actions**, click **Publish**, and then click **OK.** The revised Solicitation is published to the consultants and the **Revision Status** of the record on the **Solicitation** page is set to **Done**.
8. Optionally,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

3.7 Responding to NOI Questions

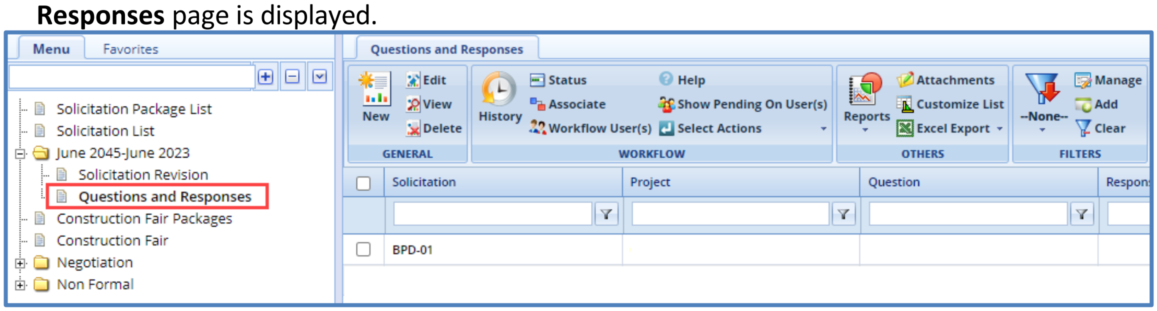
The consultants can raise questions related to the solicitations published to them. These questions can be raised before the expiry of the **Last Date of Question Submission** set in the **Solicitation Details** page. You can provide answers to these questions. However, the answers can be published to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

To answer the questions:

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

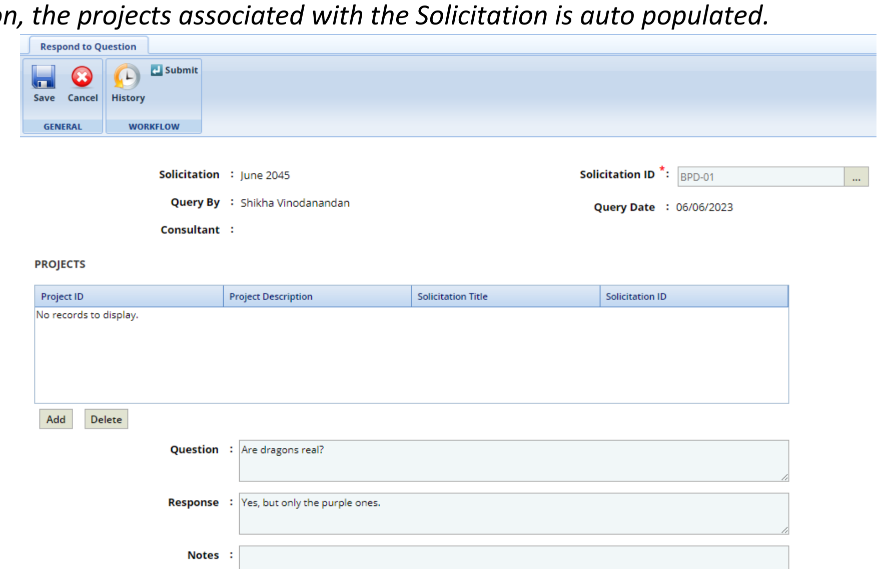


4. In the navigation pane, expand the solicitation folder, and then click **Questions and Responses**. The **Questions and Responses** page is displayed.

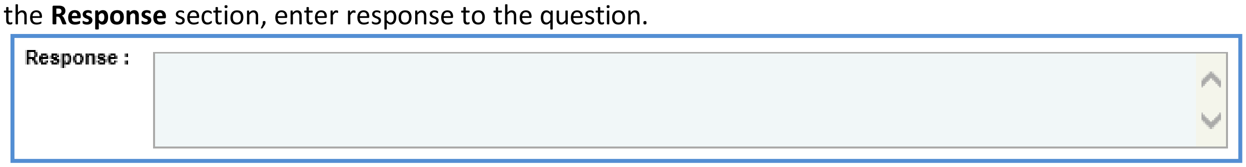


5. Select the question for which you want to respond and click **Edit**. The **Respond to Question** page is displayed.

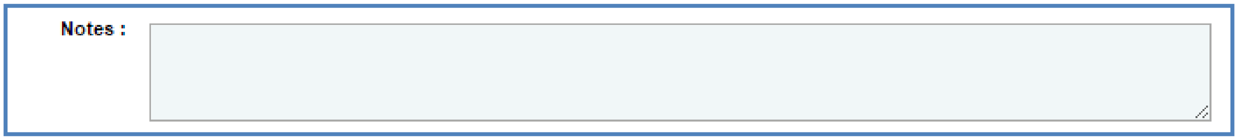
***Note**: The values in the **Solicitation, Solicitation, Query By, Query Date,** and **Consultant** fields are auto populated. In the Projects section, the projects associated with the Solicitation is auto populated.*



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



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

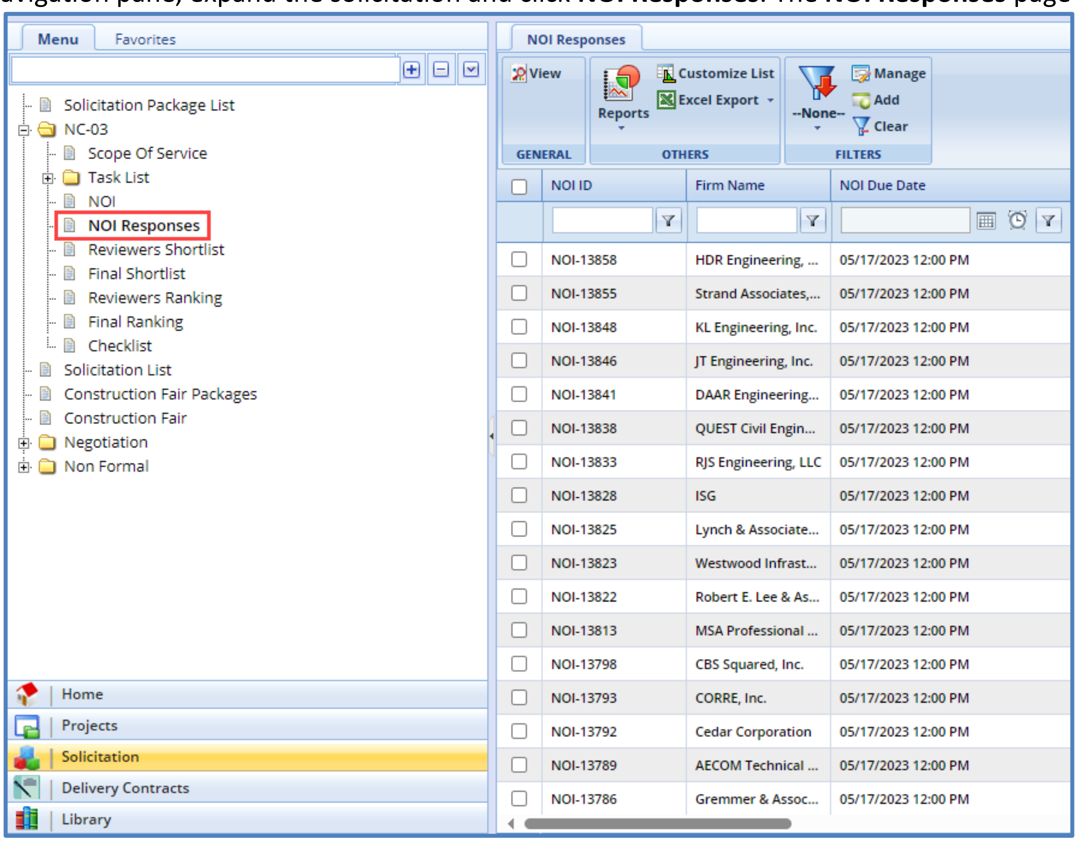


8. In the **Attachments** section, upload images and files relevant to the response.
9. Click **Save**.
10. Select the question and response record and in the **Workflow** group, click **Select Actions**.
11. Click **Publish.** The **WisDOT – Masterworks** dialog box is displayed.
12. Enter the required information and then click **OK.** The **Workflow Status** of the record is set to **Response Published**. The response to the question is published to the consultants.
13. Optionally, if the response to the question need not be published to the consultants, enter notes in the **Notes** section. In the **Workflow** group, click **Completed – Not Published**, in the dialog box, enter required information, and then click **OK**. In the **Workflow** group, you can also click **ReDraft**, enter required information in the dialog box that is displayed, and then click **OK** to close or redraft the record.

3.8 Viewing NOI Responses

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

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



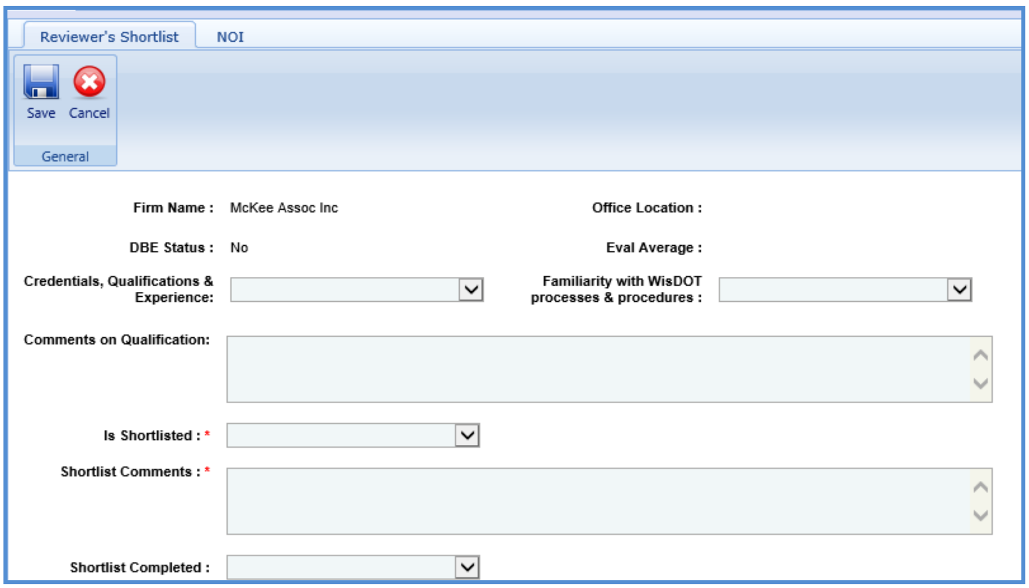
4. Select the **NOI Response** that you want to view and then click **View** in the **General** group. The duly filled **NOTICE OF INTEREST QUESTIONNAIRE** page is displayed.

3.9 Shortlisting Consultants

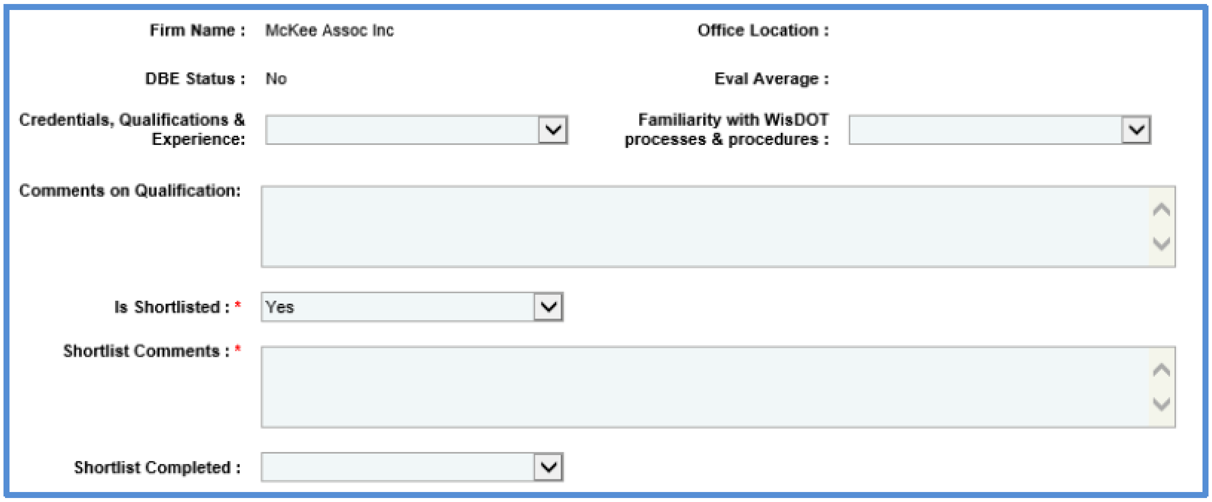
The consultant firms are shortlisted based on their NOI responses. The NOI responses are auto populated in the **Reviewer's Shortlist** page once the last date of NOI submission is expired. The procedure to shortlist the consultant firms is described.

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

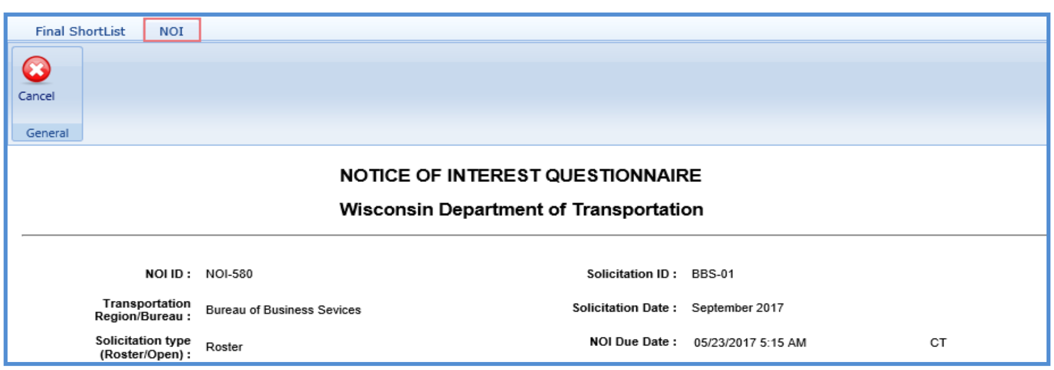
4. Select a consultant firm record and click **Edit**. The **Reviewer's Shortlist** page of the record is displayed.



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

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

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



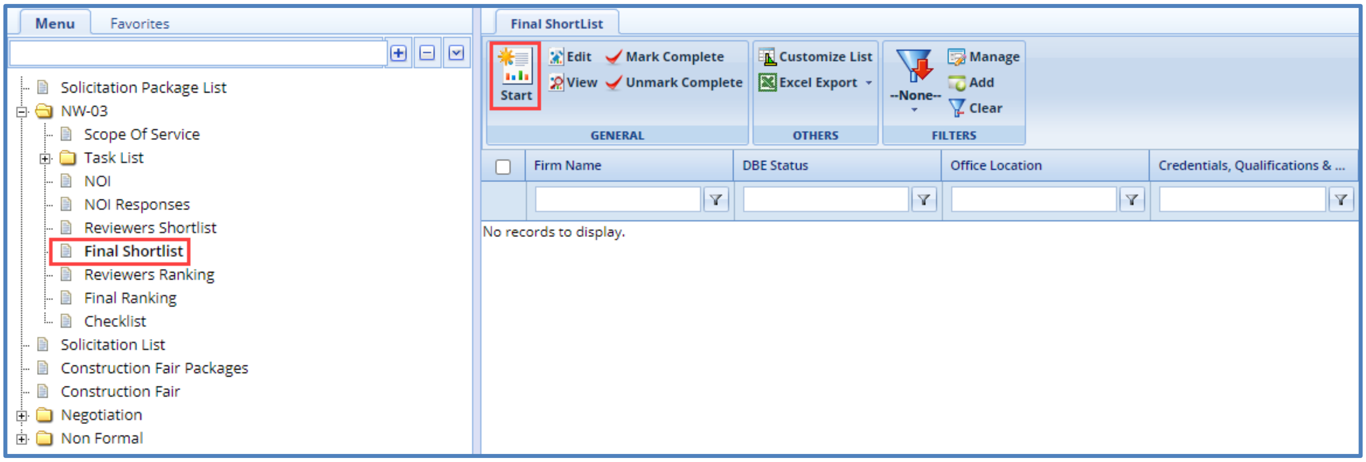
6. Click **Save.**
7. Select the records and click **Mark Complete** in the **General** group.

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

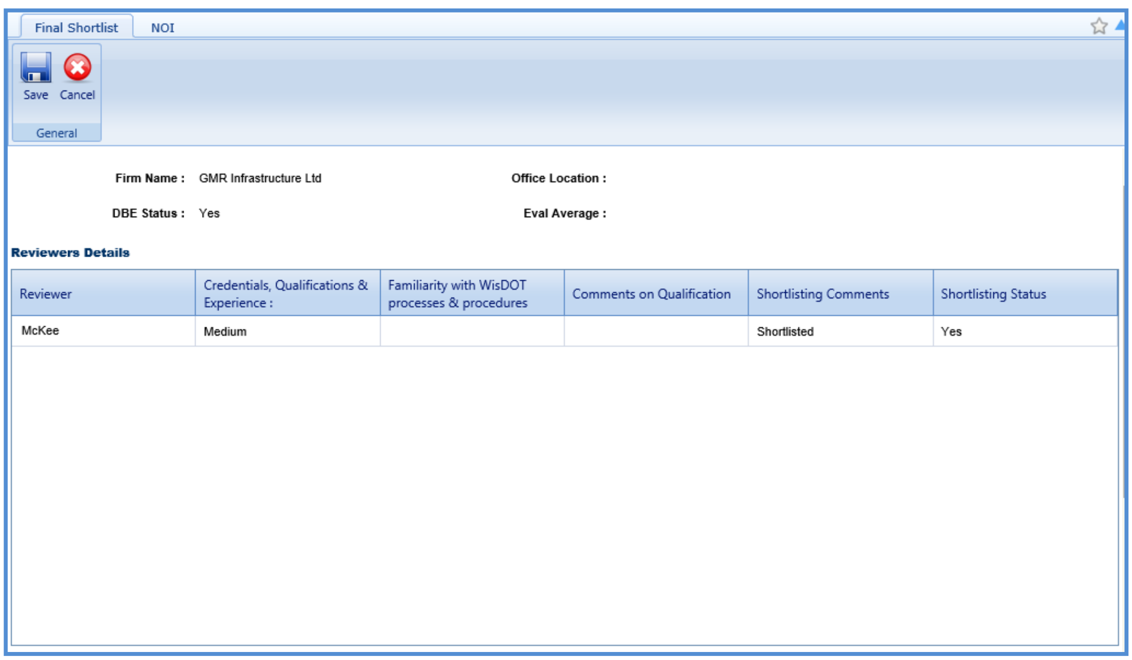
3.10 Final Shortlisting Consultants

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

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



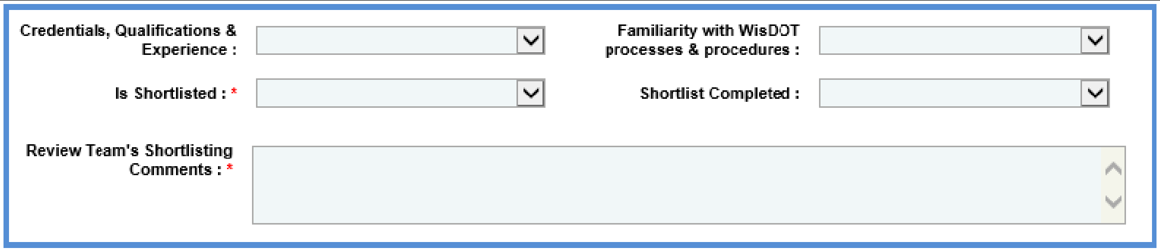
4. Click **Start** in the **General** group. All the consultant firm records are listed.
5. Select a consultant firm record which you want to final shortlist and click **Edit**. The **Final Shortlist** details page is displayed.



Note:

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

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

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

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

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

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

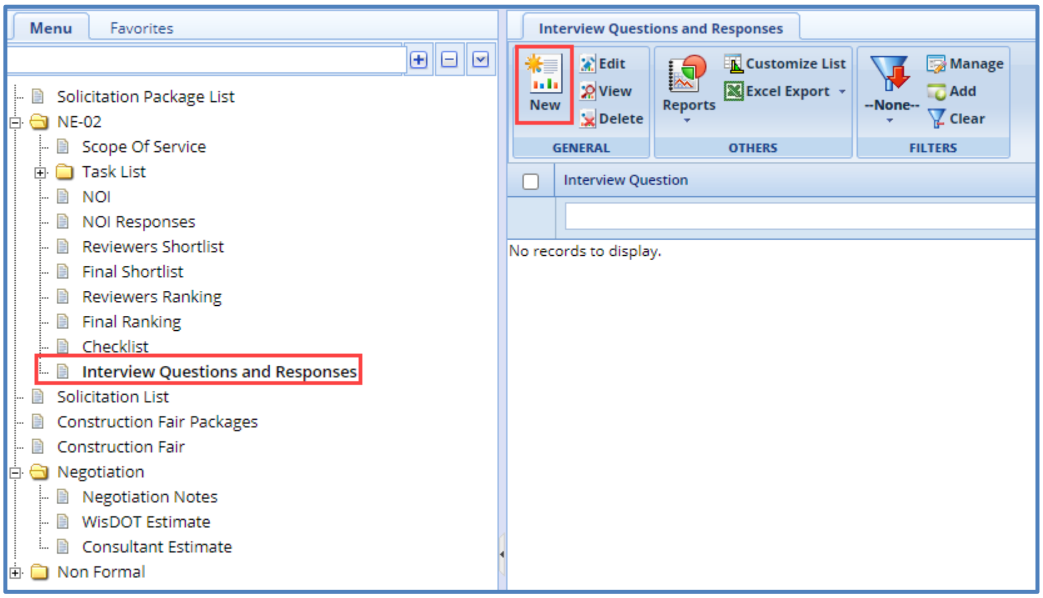
3.11 Interview Questions and Responses

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

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

3.11.1 Recording Interview Questions

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

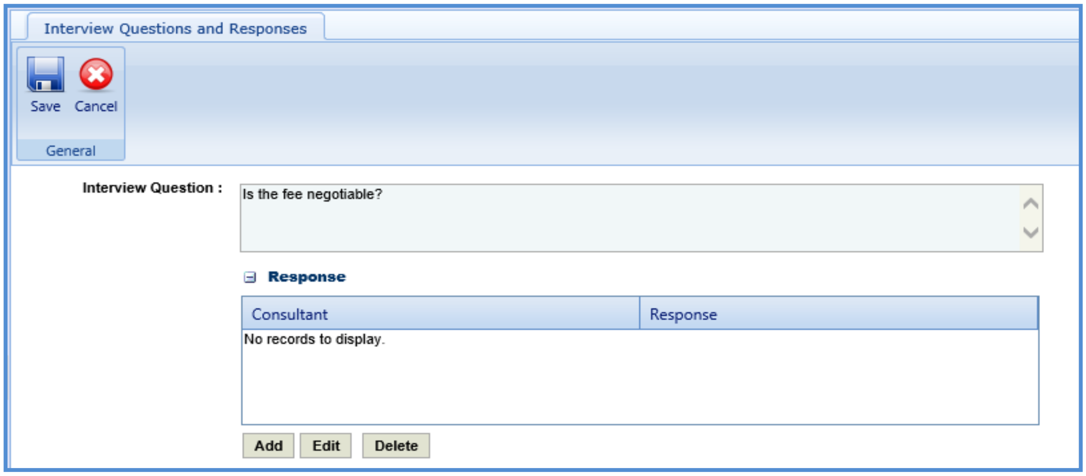


4. Click **New**. The **Interview Questions and Responses** page is displayed.
5. In the **Interview Question** field, enter the question asked during the interview.

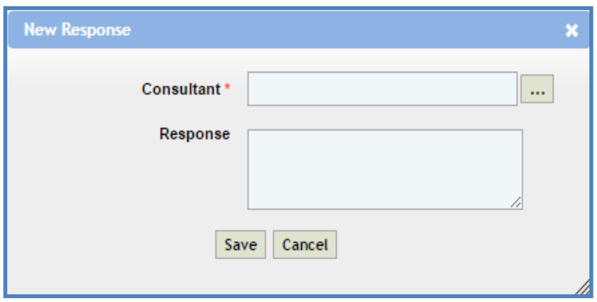
6. Click **Save**.

3.11.2 Recording Interview Responses

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



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



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

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

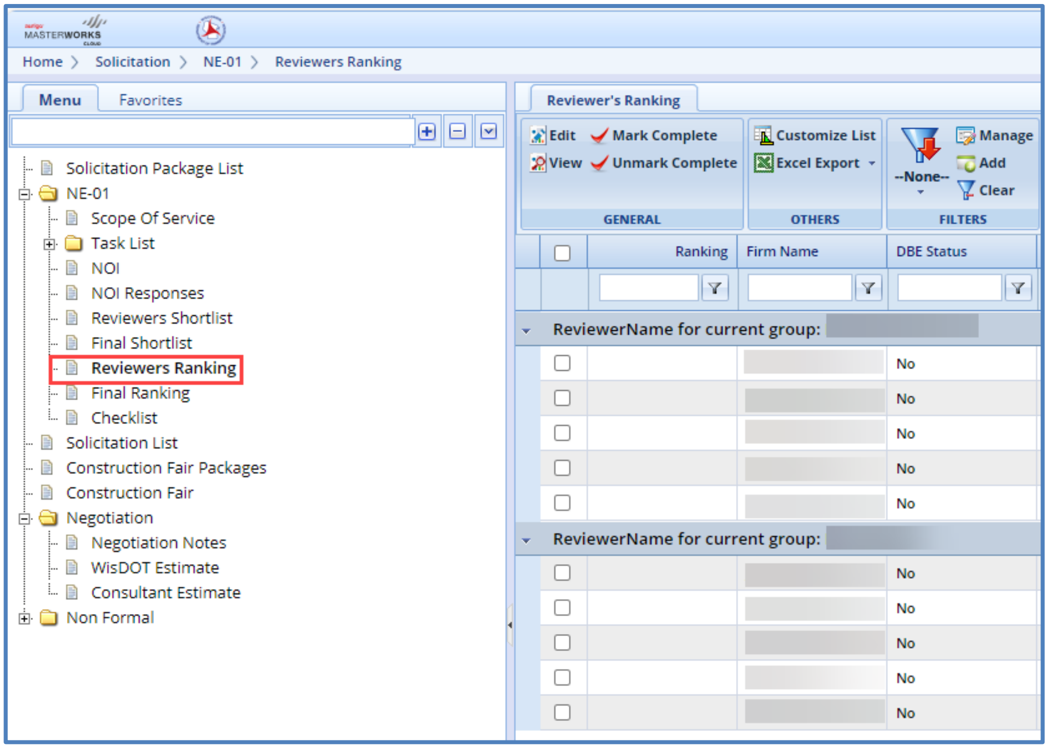
4. Click **Save**.

3.12 Ranking Consultants

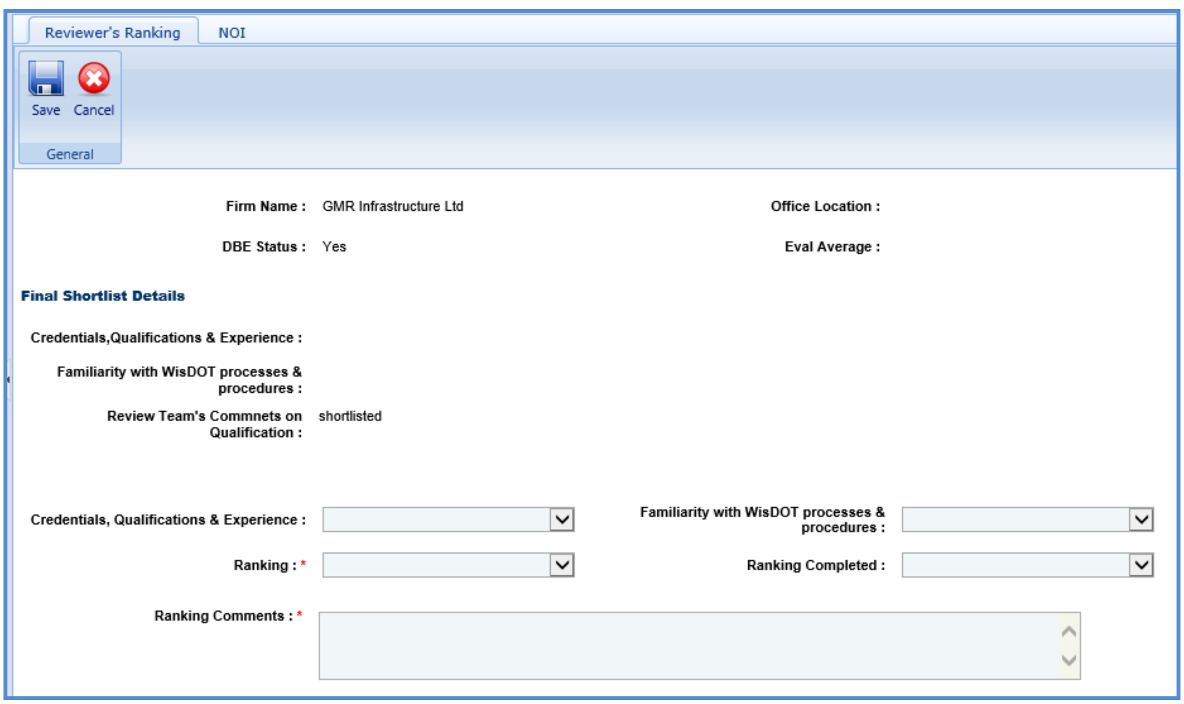
Prerequisite: The consultant firms must be final shortlisted. The procedure to rank the final shortlisted consultants is described.

1. Click **Solicitation** in the module menu. The **Solicitation Package List** page is displayed.
2. Select the solicitation for which the consultants must be ranked and click **View**. The **Solicitation Package** page is displayed.

3. In the navigation pane, expand the solicitation, and then click **Reviewers Ranking**. The **Reviewers Ranking** page is displayed.



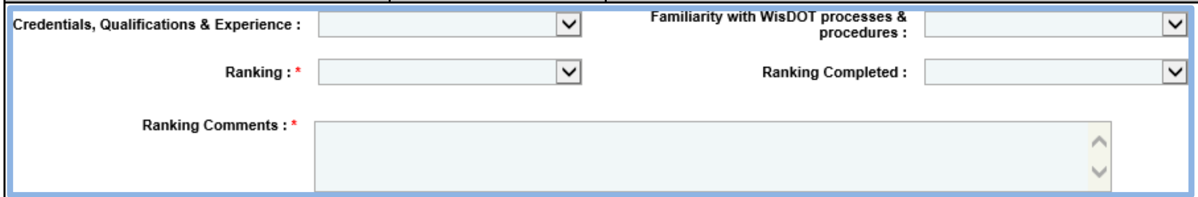
4. Select the consultant firm record that you want to rank, and then click **Edit**. The **Reviewers Ranking** details page is displayed.



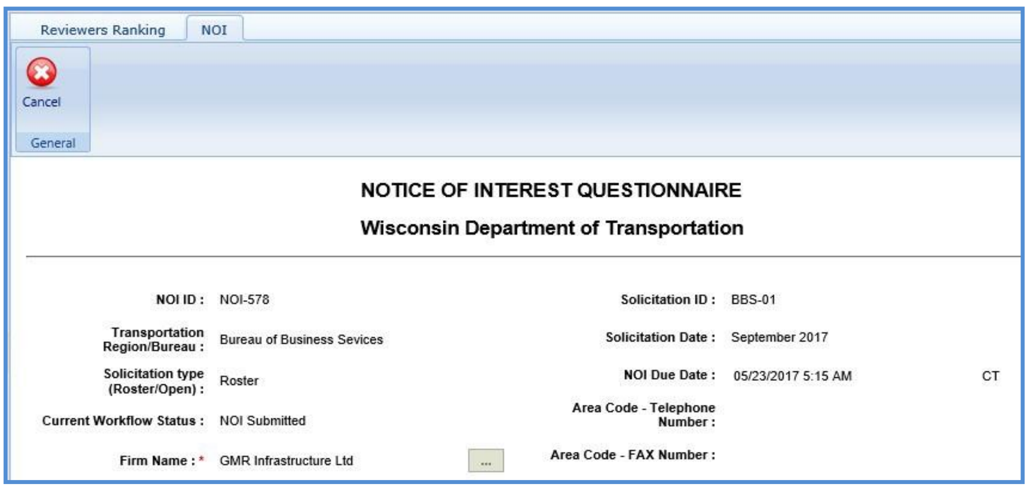
Note:

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

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

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

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



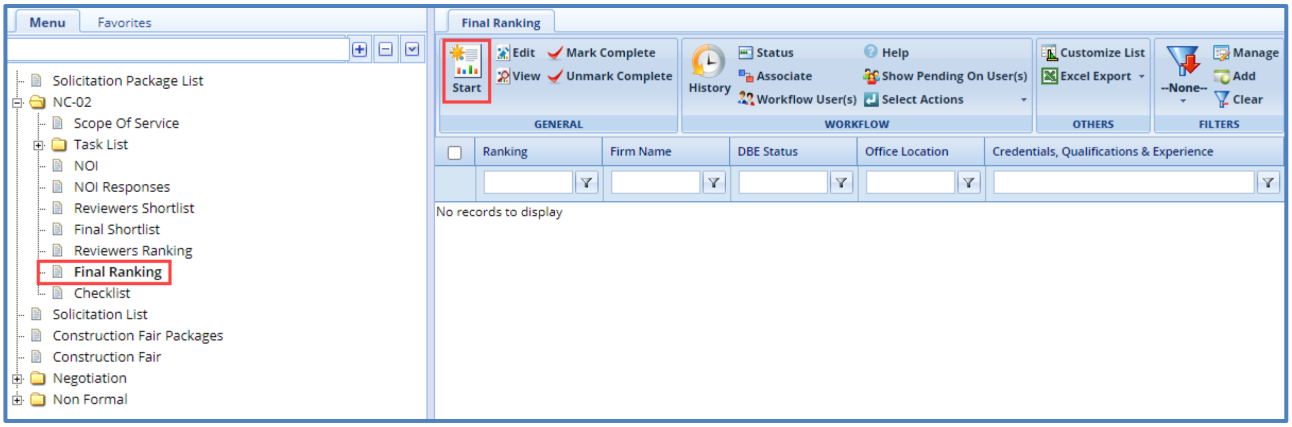
6. Click **Save.**
7. Select the records and click **Mark Complete** to complete the reviewer's ranking of the consultant firms.

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

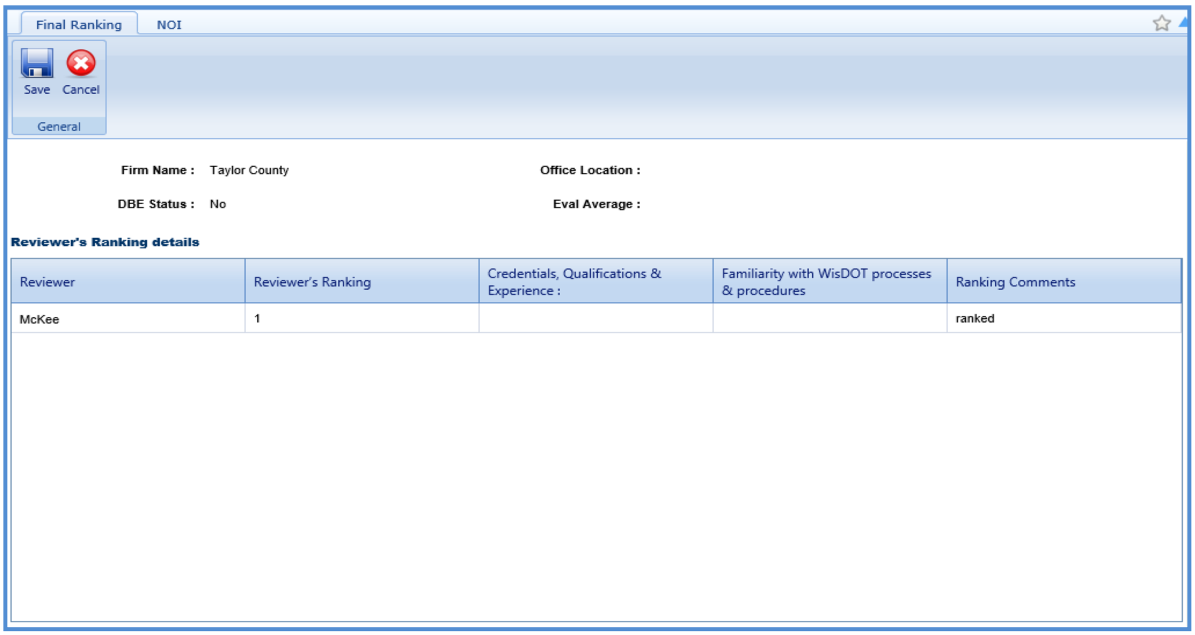
3.13 Final Ranking Consultants

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

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

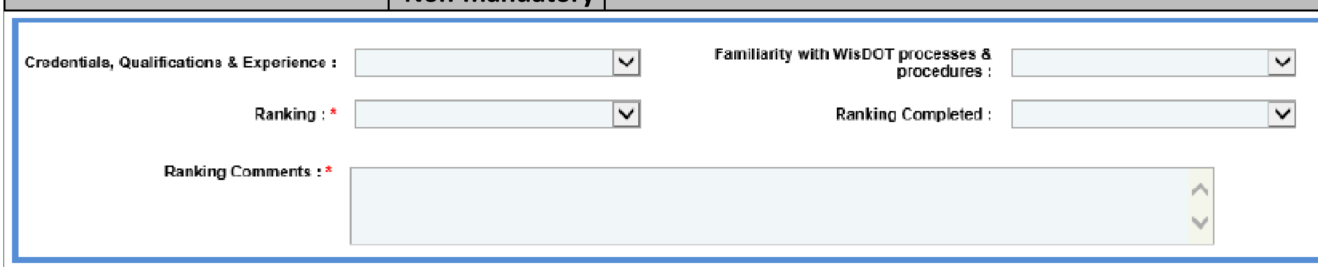


4. Click **Start** in the **General** group. The ranked consultant firm records are listed.
5. Select the consultant firm record that you want to final rank and click **Edit**. The **Final Ranking** details page of the consultant firm is displayed.



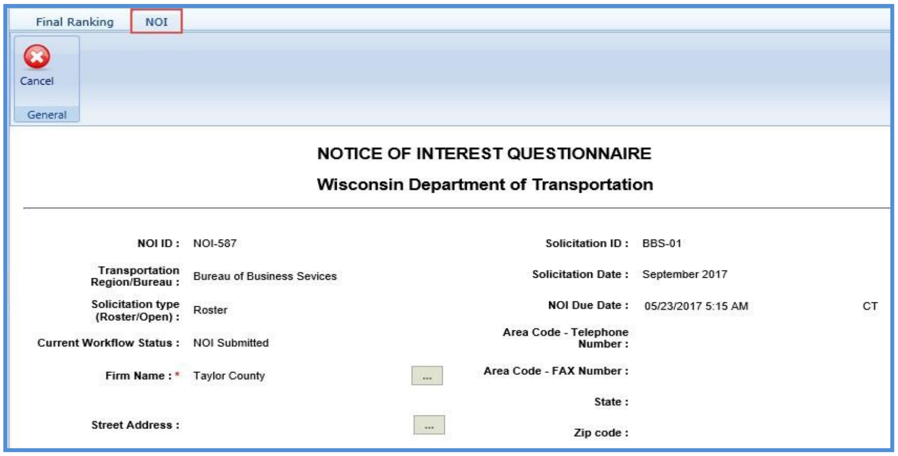
Note:
*The values in the **Firm Name, Office Location, DBE Status,** and **Eval Average** fields are auto populated.*
*The **Reviewers Ranking Details** section auto-populates the reviewer's ranking details of the consultant firm.*

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

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

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

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



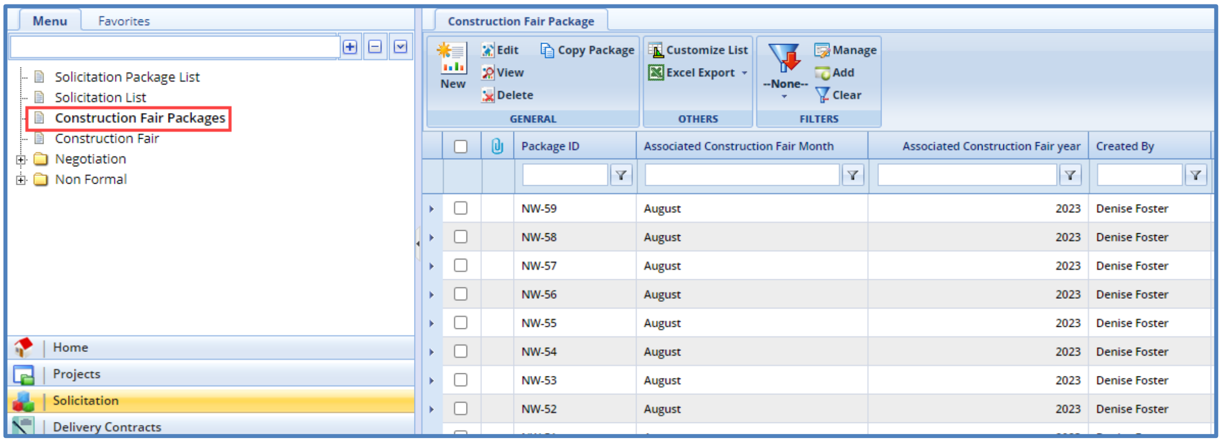
7. Once all the records are ranked, select the records, and then click **Mark Complete** to complete the final ranking of the consultant firms.

4. Construction Fair

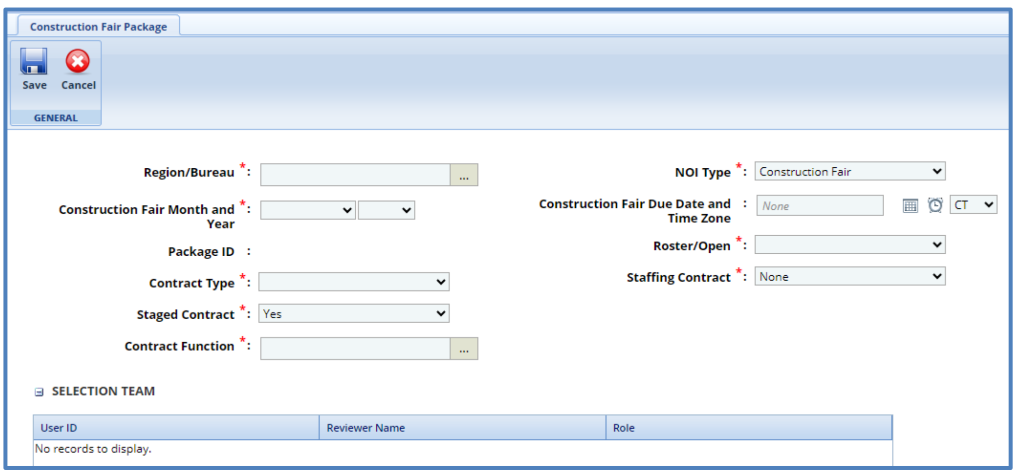
Construction fairs are conducted annually by WisDOT to select consultants who can carry out construction oversight/construction engineering for projects being executed across Wisconsin. The construction fair packages are created for a complete construction package and published to the consultants to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

4.1 Creating Construction Fair Packages

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



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

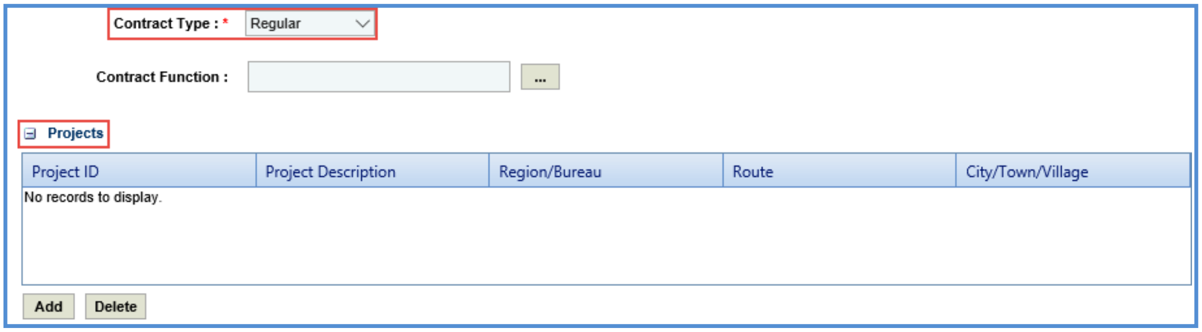


   i. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non- mandatory	Description
Region/Bureau	Mandatory	To select region/bureau of the construction fair package: 1. Click ... and the **Region/Bureau** dialog box is displayed. For availability of options in the dialog box, region/bureaus must be defined in the **Region- Bureau** catalog of the library. 2. Select the required region/bureau and click **Select**.
NOI Type	Mandatory	Indicates the NOI type. The value in this field is auto populated.
Construction Fair Month and Year	Mandatory	From the drop-down lists, select the month and year of construction fair package.

Field	**Mandatory / Non-** Mandatory	**Description**
Construction Fair Due Date and Time Zone	Non-mandatory	• Enter the due date and time of construction fair package. Alternatively, you can click the calendar icon and clock icon to select the due date and time. From the drop-down list, select the time zone.
Package ID	Non-mandatory	• The unique ID for the construction fair package is auto populate based on the selected **Region/ Bureau** and **Construction Fair Month and Year**.
Roster/Open	Mandatory	From the drop-down list, select the required option. • **Roster:** Select this option if the construction fair package is published only to the consultants who are marked as Roster at the enterprise level. • **Open:** Select this option if the construction fair package is published to all the consultant at the enterprise level.
Staffing Contract	Mandatory	• From the drop-down list, indicate if this is a staffing contract.
Contract Type	Mandatory	• **Master:** Select this when there is no definite project scope, and the work orders are placed as and when required for a project. • When **Master** is selected, the **Master Group Id** and **Master Group Type** fields are displayed. • **Regular:** Select this when the contract is associated with a definite project scope. • When **Regular** is selected, the **Projects** section is displayed.
Staged Contract	Mandatory	By default, 'Yes' is selected. • If Staged Contract is selected 'Yes', the user can create multiple contracts for the Package ID. • If Staged Contract is selected 'No', the user can create only one contract for the Package ID.
Contract Function	Mandatory	To select contract function of the construction fair package: 1. Click ... and **Contract Function** dialog box is displayed. For availability of options in the dialog box, contract functions must be defined in the **Contract Function** catalog of the library. 2. Select the required contract function and click **Select.**
Master Group Id	Mandatory	This field is displayed only when the **Contract Type** is **Master**. To select a Master Group ID: 1. Click ... The **Master Group ID** dialog box is displayed listing all the Master Group IDs from the **Master Group ID** page of the Contract. The Master Group IDs that are listed is of the same region as the construction fair package region and the date of creation of construction fair package is within the completion date of the Master ID. 2. Select the required Master Group ID and click **Select**.
Master Group Type	Non-mandatory	This field is displayed only when the **Contract Type** is **Master**. Indicates the type of the selected Master Group ID. The value in this field is auto populated when the **Master Group Id** is selected.

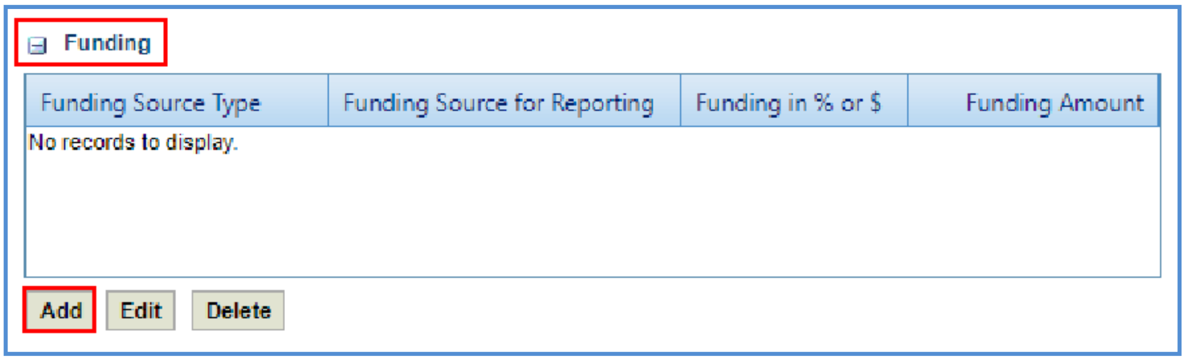
ii. The **Projects** section is displayed only when the **Contract Type** is **Regular**. In the **Projects** section, perform the following steps, to add the projects for the construction fair package.



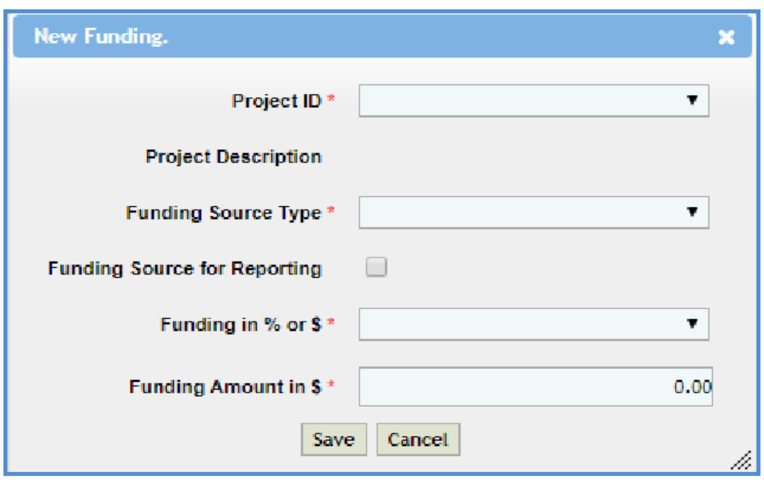
a. Click **Add**. The **Select Project** dialog box is displayed listing all the projects that are associated with the region/bureau of the construction fair package.

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

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



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



b. In the **Project ID** drop-down list, select the required project. The list displays all the projects that are part of the solicitation. **Project Description** is auto populated.

c. From the drop-down list, select the **Funding Source Type**. The options in the drop-down list are defined in the **Funding Source Type** catalog of the library.

d. Select the **Funding Source for Reporting** checkbox to allow the user to select any number of records in solicitation or a project record in case of regular contract.

e. In **Funding in % or $**, select % or $. Click **Save**.

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

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

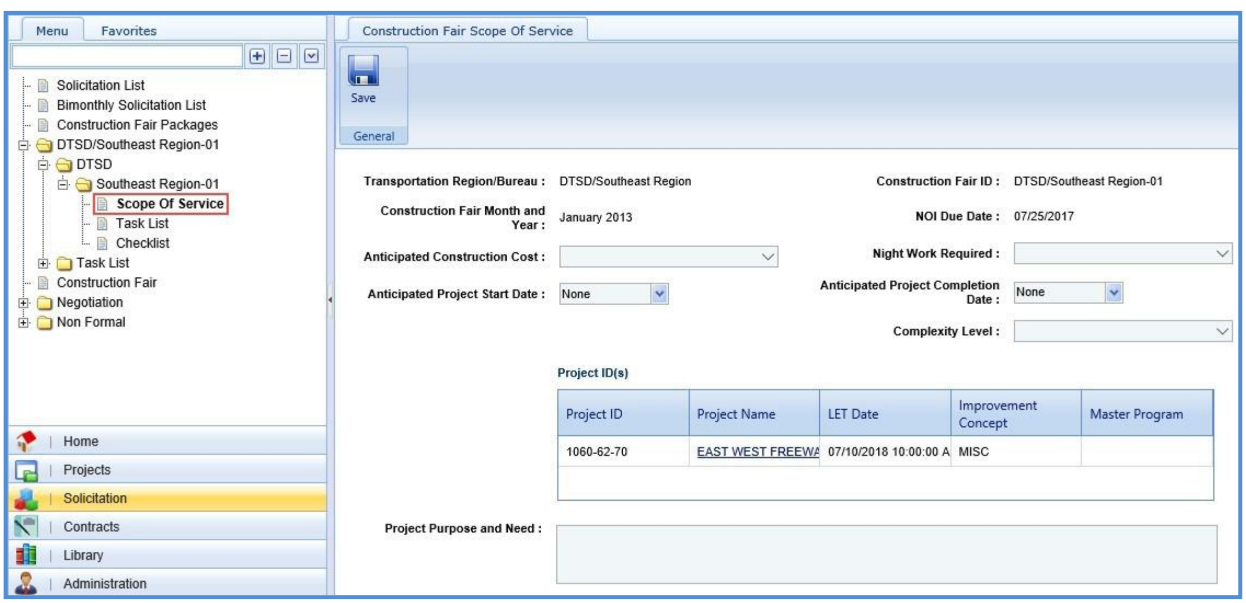
***Note**: When the **Selection team** is **Yes**, then all the reviewers selected in the **Selection Team** section must complete the ranking of consultants.*

6. In the **Attachments** section, upload images and files relevant to the construction fair package.

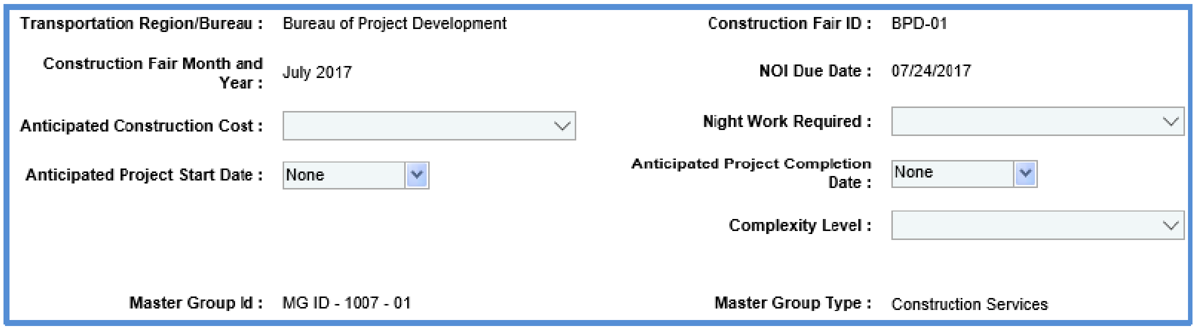
4.2 Construction Fair Package Scope of Service

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

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



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



Field	Description
Transportation Region/ Bureau	The transportation region/bureau of construction fair package is auto populated.
Construction Fair ID	The unique ID of the construction fair package is auto populated.
Construction Fair Month and Year	The month and year of the construction fair package is auto populated.
NOI Due Date	The due date of NOI is auto populated.
Anticipated Construction Cost	From the drop-down list, select the expected cost range for construction.
Night Work Required	From the drop-down list, select **Yes** if working at night is required or select **No** if working at night is not required.
Anticipated Project Start Date	From the drop-down calendar, select the expected start date of the project.
Anticipated Project Completion Date	From the drop-down calendar, select the expected completion date of the project.
Complexity Level	From the drop-down list, select the level of complexity of the construction fair package.
Master Group Id	This field is displayed only when the contract type of the construction fair package is Master. The master group ID associated with the construction fair package is auto populated.
Master Group Type	This field is displayed only when the contract type of the construction fair package is Master. The master group type associated with the construction fair package is auto populated.

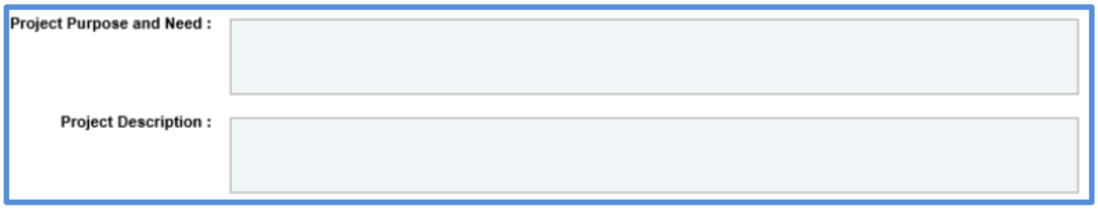
4. In the **Project ID(s)** section, enter information in the required fields. The fields are described in the following table.


Project ID(s)

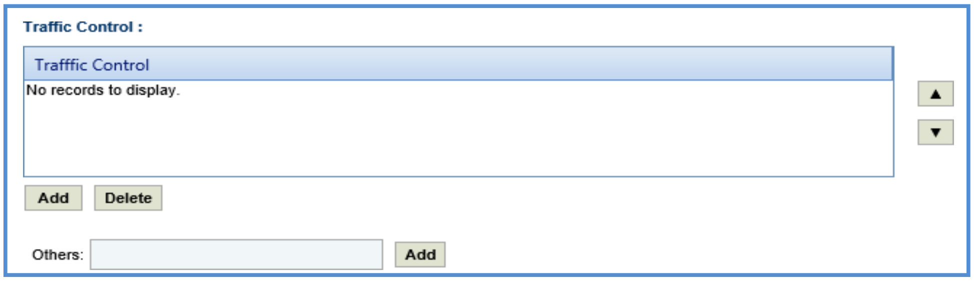
Project ID	Project Name	LET Date	Improvement Concept	Master Program
PROJ-10-04	Madison Beltline		BRELIM	
6464-44-44	6464-44-44		BRRHB	Local Transportation A

Note:

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

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

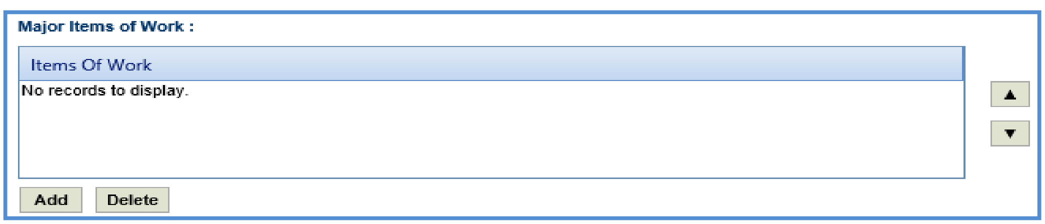
5. In the **Traffic Control** section, perform the following steps to add traffic control details.



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

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

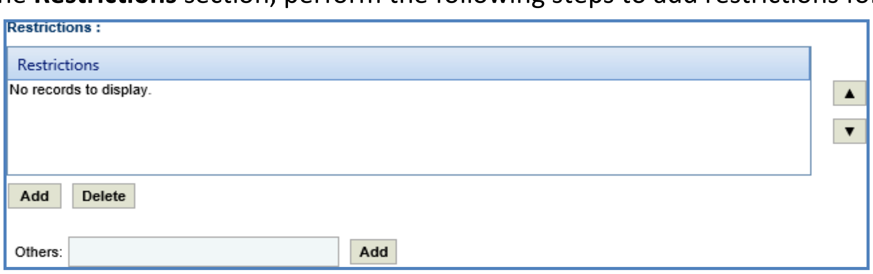
6. In the **Major Items of Work** section, perform the following steps to add major work items for the construction fair package.



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

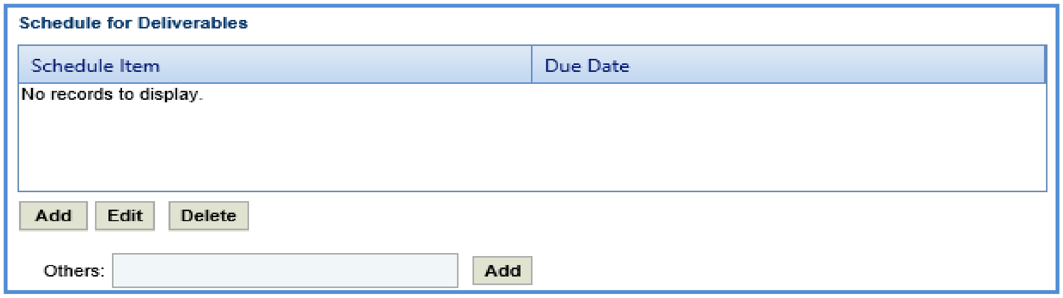
- To add items that are not defined in the library:
  a. In the **Others** field, enter the name of the item.
  b. Click **Add.** The item is displayed in the table.

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



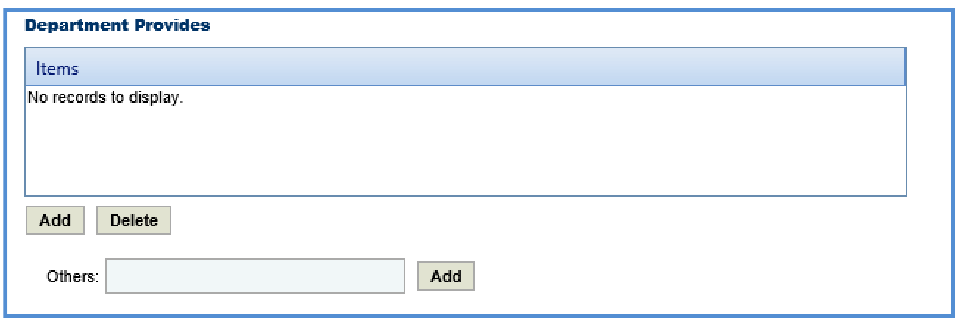
- To add restrictions from library:
  a. Click **Add**. The **Restrictions** dialog box is displayed listing all the items that are defined in the **Restrictions** catalog of the library.
  b. Select the required items of work and then click **Select**.
- To add restrictions that are not defined in the library:
  a. In the **Others** field, enter the restriction details.
  b. Click **Add.** The restriction is displayed in the table.

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



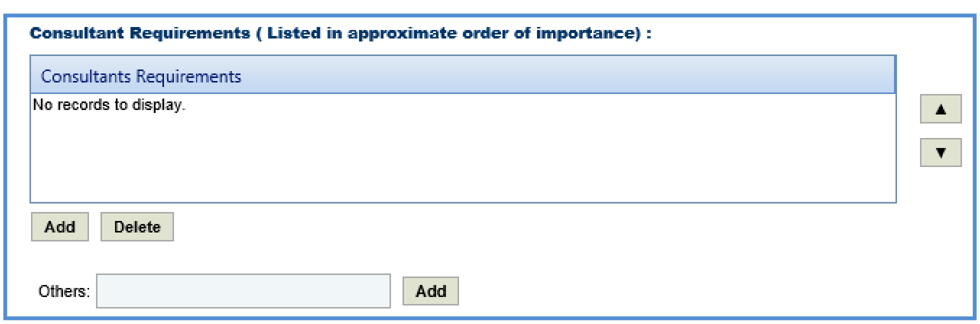
- To add schedule for deliverable items from library:
  a. Click **Add**. The **Schedule for Deliverables** dialog box is displayed listing all the schedule for deliverables that are defined in the **Deliverables** catalog of the library.
  b. Select the required schedule for deliverable items and click **Select**. The selected schedule for deliverables is listed in the table.
- To add schedule for deliverable items that are not defined in the library:
  a. In the **Others** field, enter the schedule for deliverables details.
  b. Click **Add.** The schedule for deliverables is displayed in the table.

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



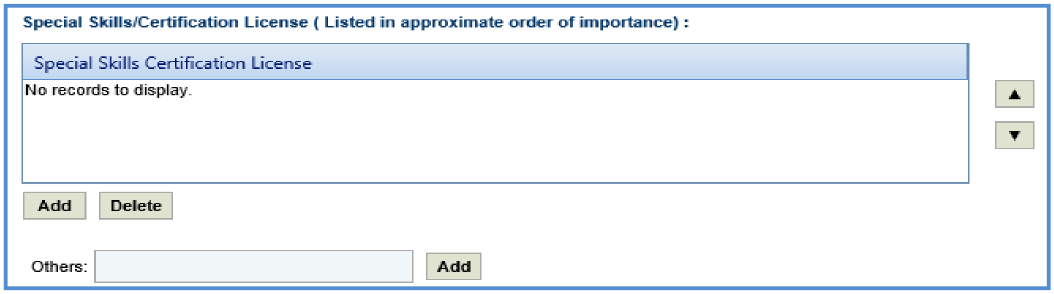
- To add items from library:
  a. Click **Add**. The **Department Provides** dialog box is displayed listing all the items that are defined in the **Department Provides** catalog of the library.
  b. Select the required items and click **Select**. The selected items are listed in the table.
- To add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

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



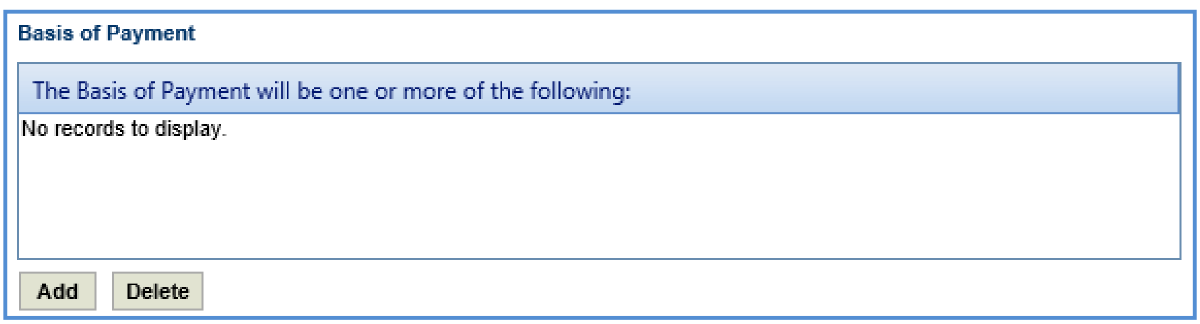
- To add items from library:
  a. Click **Add**. The **Consultants Requirements** dialog box is displayed listing all the consultants' requirements defined in the **Consultants Requirements** catalog of the library.
  b. Select the required consultant requirements and click **Select**.
- To add items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

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



- To add items from library:
  a. Click **Add**. The **Special Skills** dialog box is displayed listing all the special skills/certifications/ licenses defined in the **Special skills-certifications-Licenses** catalog of the library.
  b. Select the required special skills and click **Select**.
- To add items that are not defined in the library:
  a. In the **Others** field, enter the name of the skill/certification.
  b. Click **Add.** The skill/certification is displayed in the table.

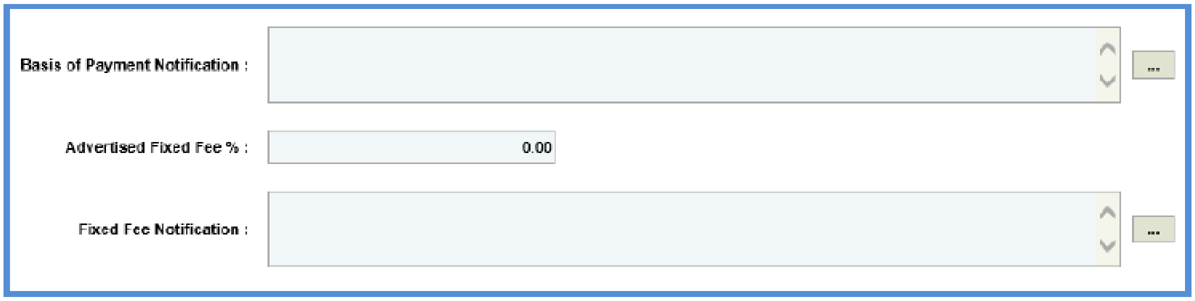
12. In the **Basis of Payment** section, perform the following steps to add basis of payment details.



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

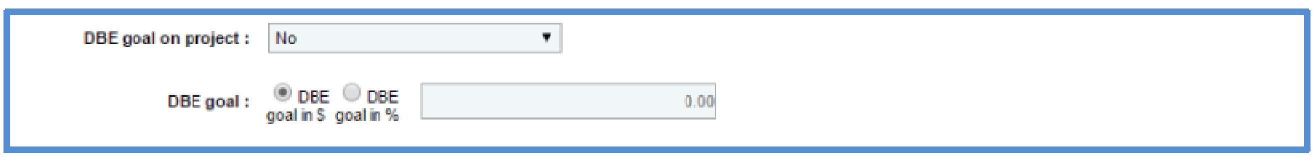
13. Enter information in the other required fields. The fields are described in the following table.

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

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

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

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

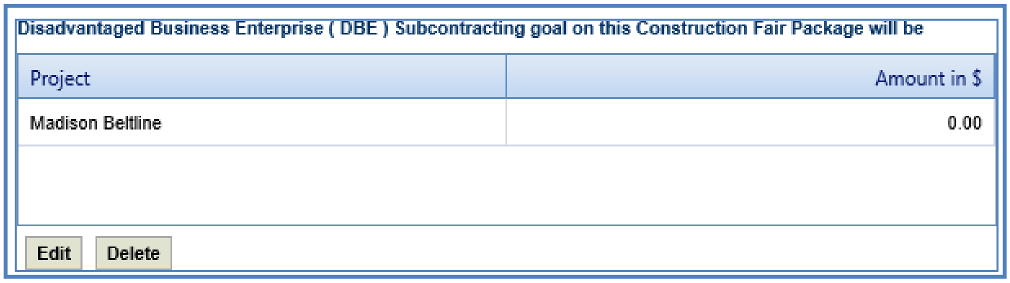
Field	Description
	

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

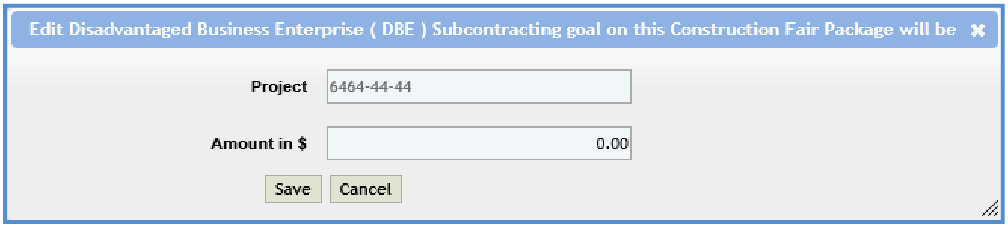
15. In the **Disadvantaged Business Enterprise (DBE) Subcontracting Goal on This Construction Fair Package Will Be** section, perform the following steps to add projects for the DBE Subcontracting goal. This section is displayed only when the Contract Type is Regular.

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

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



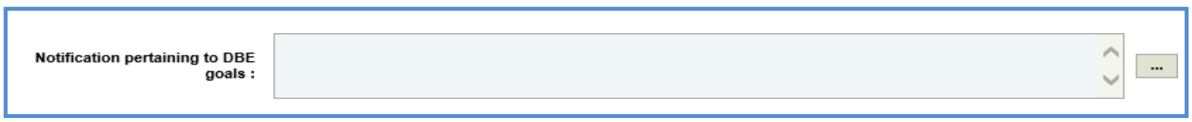
c. Select the project and click **Edit**. The **Edit Disadvantaged Business Enterprise (DBE) Subcontracting goal on this Construction Fair Package will be** dialog box is displayed.



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

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

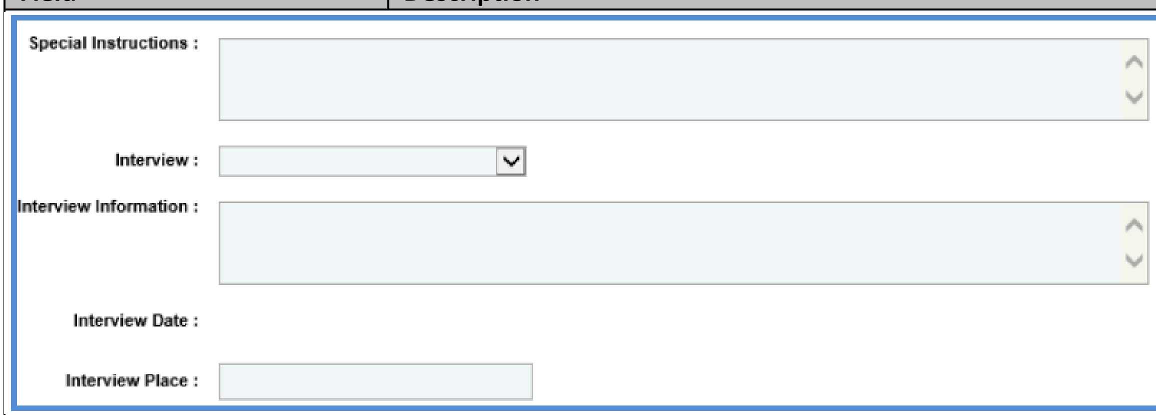
16. In the **Notification pertaining to DBE goals** field, the system allows you to select notifications pertaining to DBE goals in this field.



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

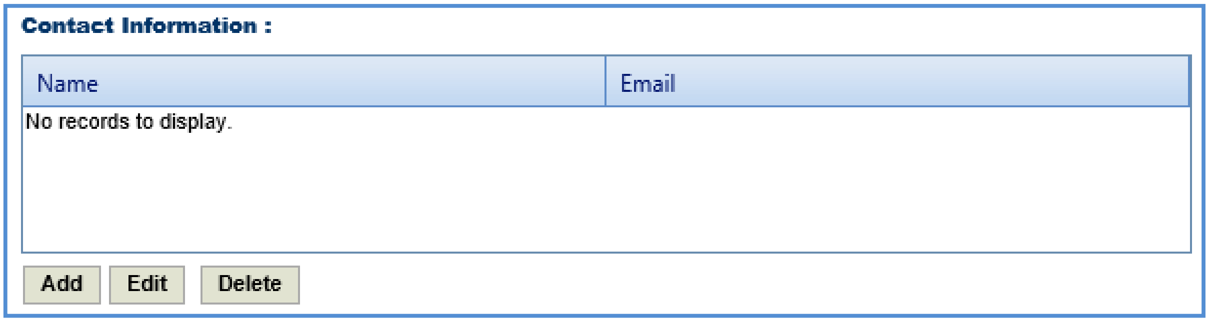
17. Enter information in the required fields. The fields are described in the following table.

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

Field	Description
	
Special Instructions	Enter special instructions about the construction fair package.
Interview	From the drop-down list, select the required option to indicate if an interview will be held with the consultants. If the selected option is **Interviews will be conducted**, then the **Interview Information**, **Interview Date**, and **Interview Place** fields are available.
Interview Information	The field is available only where the value in the **Interview** field is **Yes**. Enter

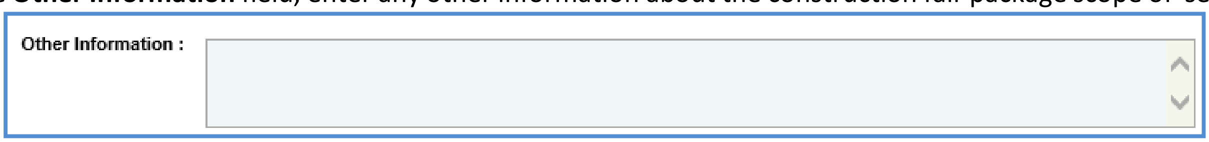
	information about the interview.
Interview Date	The field is available only where the value in the **Interview** field is **Yes**. From the drop-down calendar, select the date of interview.
Interview Place	To select an interview region/bureau: 1. Click ... The **Region/Bureau** dialog box is displayed listing all the regions/ bureaus that are defined in the **Region/Bureau** catalog of the library. 2. Select the required region/bureau and click **Select**. If the interview is over Microsoft Teams, you can simply type this in.

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



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

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



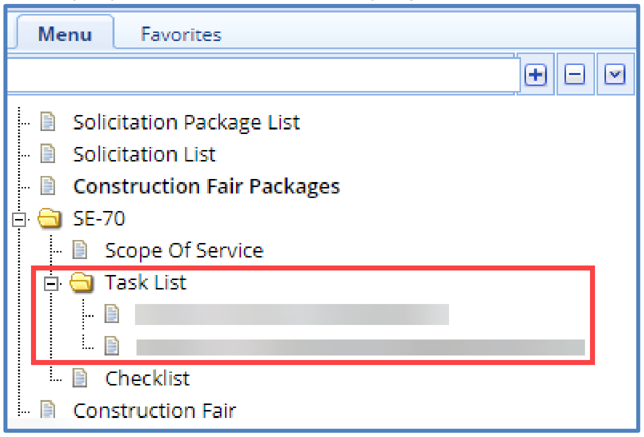
20. Click **Save**.

4.3 Construction Fair Package Task List

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

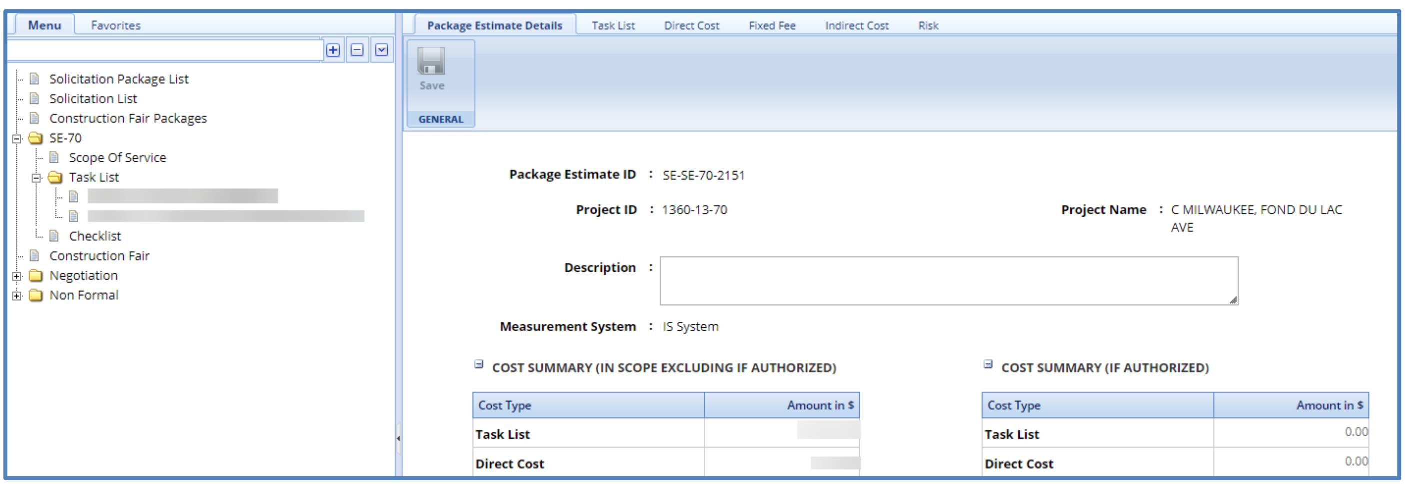
4.3.1 Construction Fair Package Task List for Regular Contract Type

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

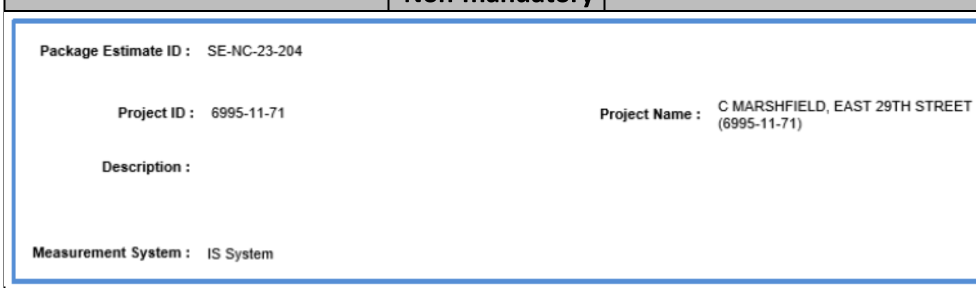


To define the construction fair package task list for regular contract type:

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



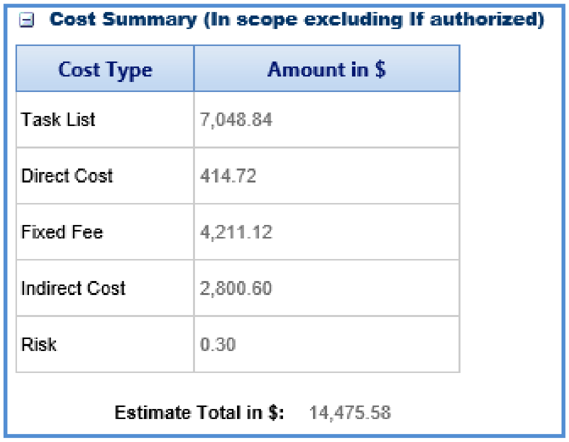
4. In the **Package Estimate Details** tab, perform the following steps:
   a. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		

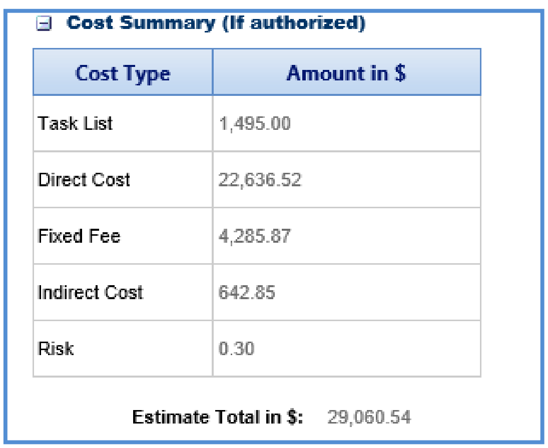
Package Estimate ID	-	The package estimate ID is auto-generated.
Project ID	-	The project ID is auto populated.
Project Name	-	The project name is auto populated.
Description	Non-mandatory	Enter description about the package estimate.
Measurement System	-	The measurement system is auto populated.

Note:

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



- *The **Cost Summary (If authorized)** section auto-populates the total of Task List, Direct Cost, Fixed Fee, Indirect Cost, and Risk based on the values entered in the respective tabs and that are marked **If authorized** as **Yes**. The sum of all these costs is also auto calculated and displayed in the **Estimate Total in $** field.*
  ***Note:** WisDOT does not recommend the use of If Authorized tasks at this time.*



b. In the **Attachments** section, upload images and files relevant to the construction fair package estimate.
c. Click **Save.**

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

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

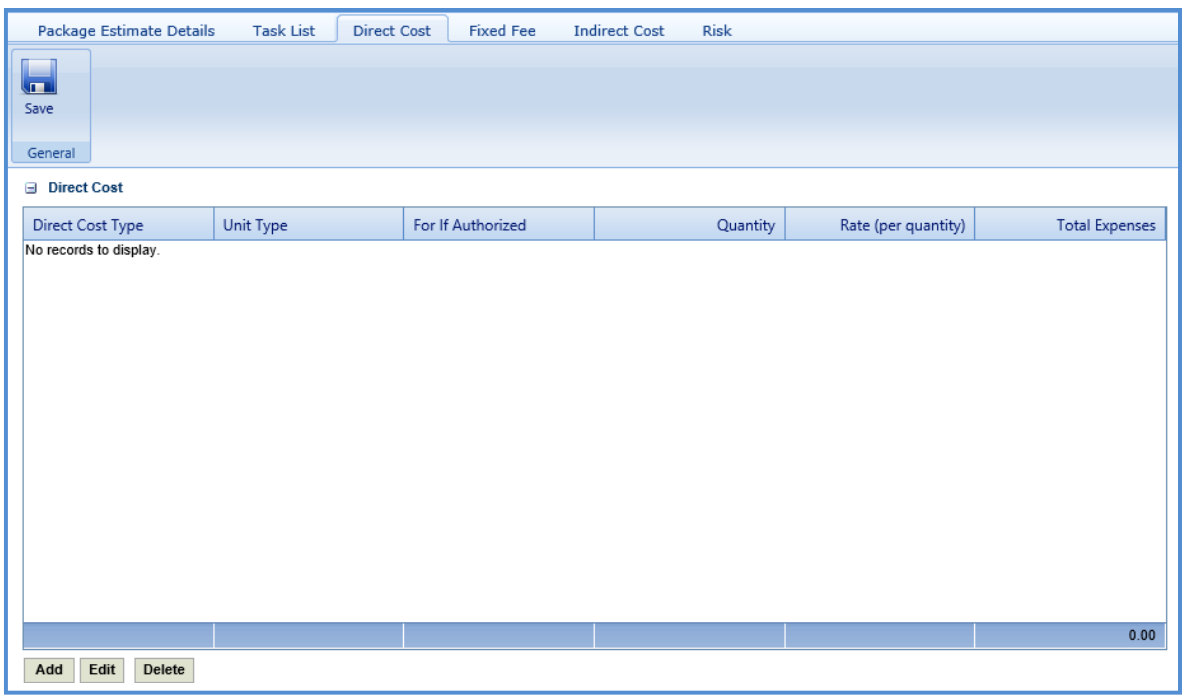
a. To indicate tasks that are in scope of the construction fair package, perform the following steps.
   i. Select the tasks and then click **In Scope** in the **Others** group.

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

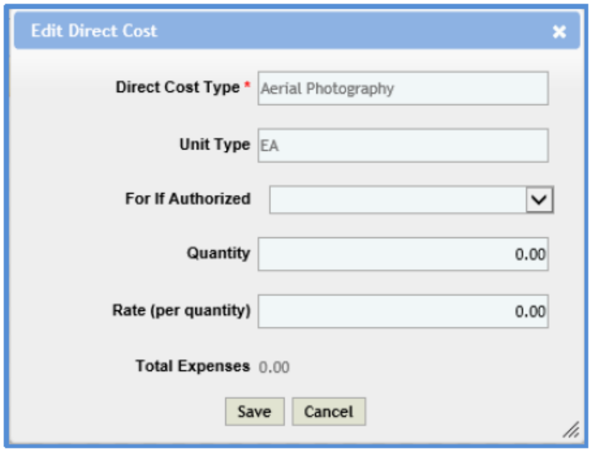
b. The tasks for which cost details are available for future implementation can be marked as authorized. To indicate tasks as authorized, perform the following steps:
   i. Select the tasks and then click **If Authorized** in the **Others** group.
   ii. From the **If Authorized** drop-down list, select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

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

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



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



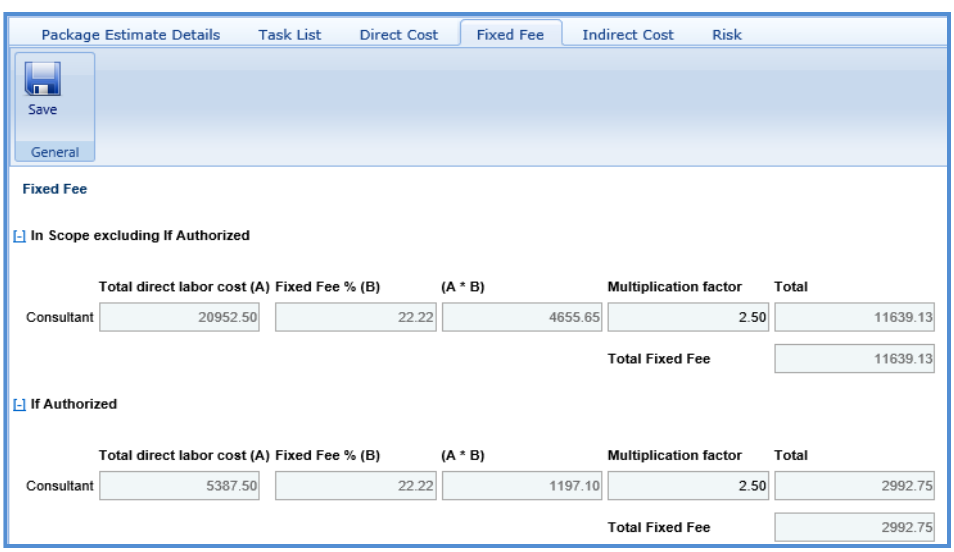
Field	Mandatory / Non-Mandatory	Description
Direct Cost Type	**-**	The name of the selected direct cost type is auto populated.
Unit Type	**Non-mandatory**	The unit type of the selected direct cost is auto populated.
For If authorized	**Non-mandatory**	From the drop-down list, select **Yes** or **No**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

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

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

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

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

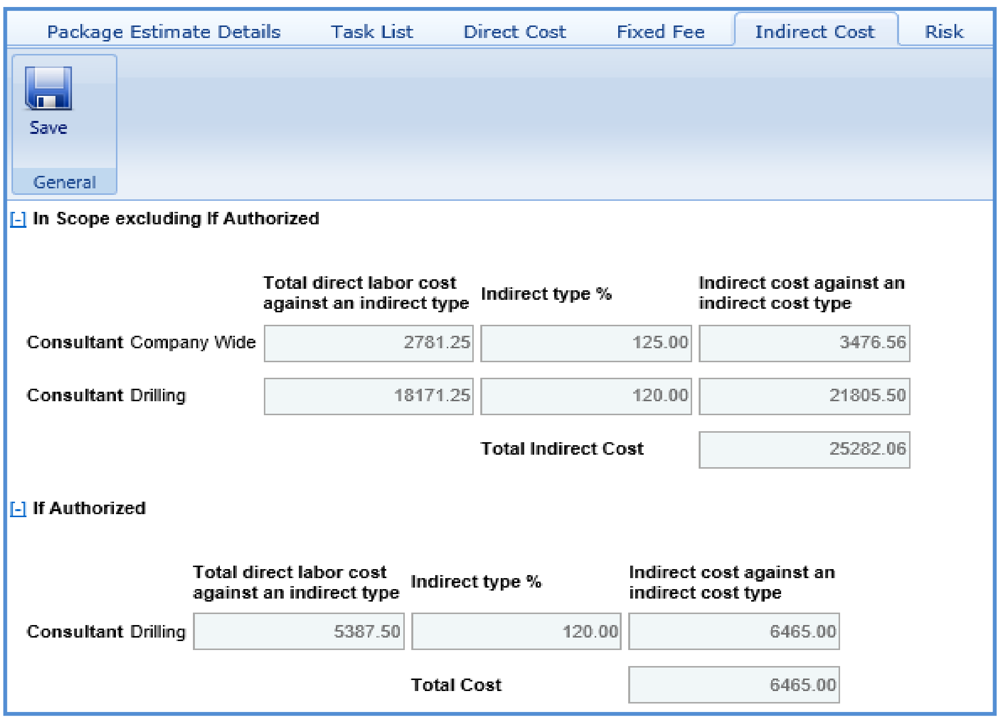


Field	Description
Total direct labor cost	Indicates the total direct labor cost of the resource. The value in this field is auto populated based on the total direct labor cost in the **Task** page of the **Task List** tab.
Fixed Fee %	Indicates the percentage of fixed fee defined in the **Advertised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

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

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

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



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

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

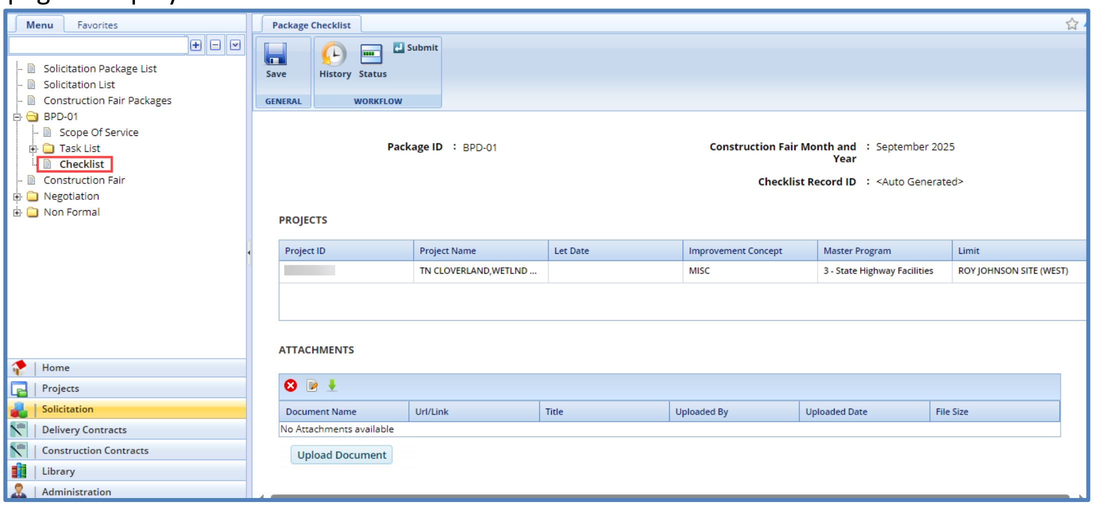
4.3.2 Submitting Construction Fair Package Checklist

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

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

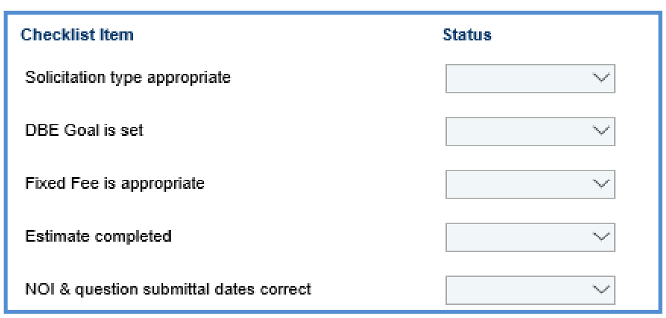
To update and submit the construction fair package checklist:

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



Note: *The Package ID, Construction Fair Month and Year, and Checklist Record ID are auto populated.*

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



5. In the **Comments and Conditions** section, enter comments and conditions about the construction fair package checklist.
6. Click **Save**.
7. In the **Workflow** group, click **Submit**. The **WisDOT – Masterworks** dialog box is displayed.
8. Enter required information and then click **OK.**
9. Optionally, in the **Workflow** group, you can click **Close** or **Redraft**, enter required information in the dialog box that is displayed, and then click **OK** to close or redraft the record.

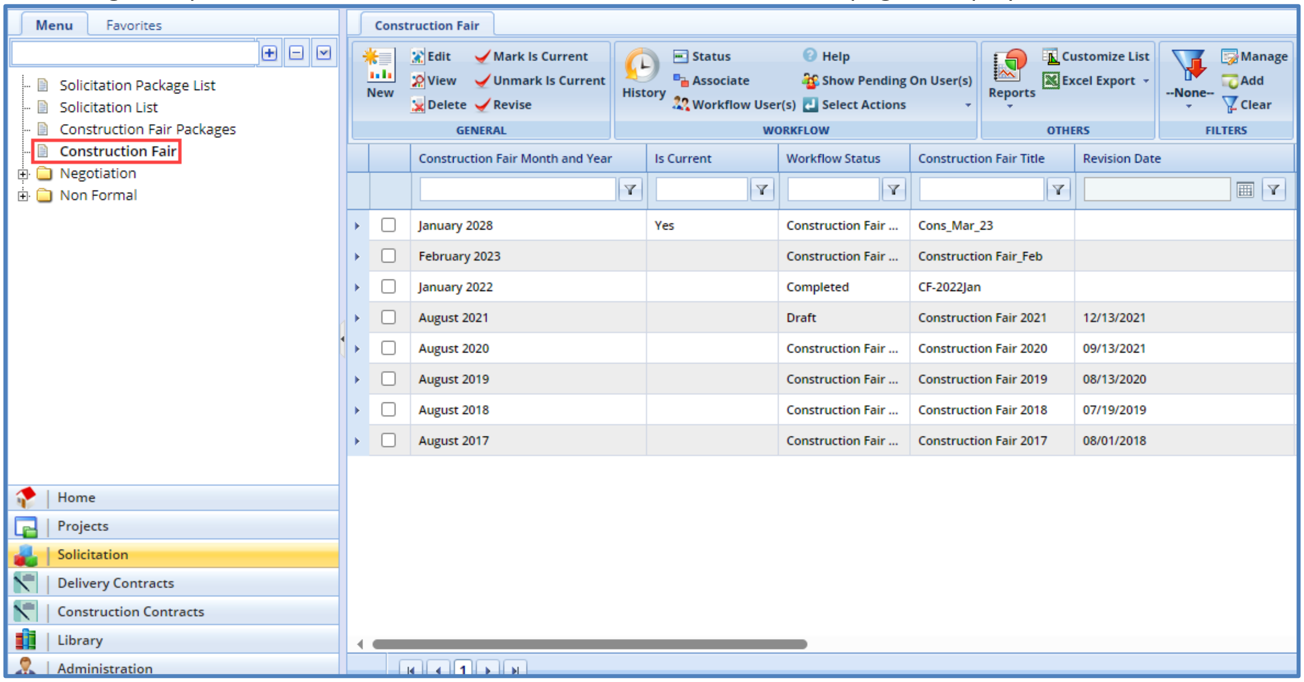
Note: *You can publish a construction fair only when the checklist of the associated construction fair packages is submitted.*

4.5 Creating and Publishing Construction Fair

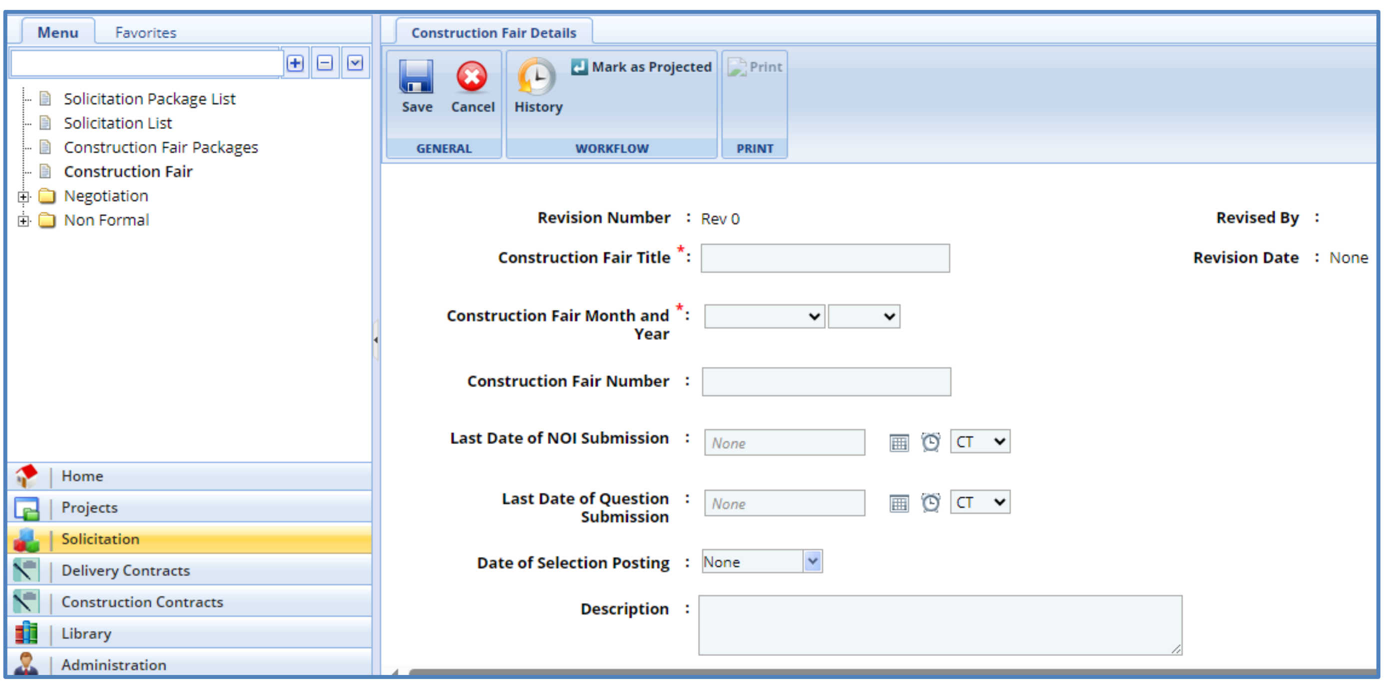
The system allows you to add multiple construction fair packages to a construction fair and create a construction fair detail that will be published to the consultants. The consultants will provide a response to the NOI questionnaire, based on which consultants are ranked.

Steps:

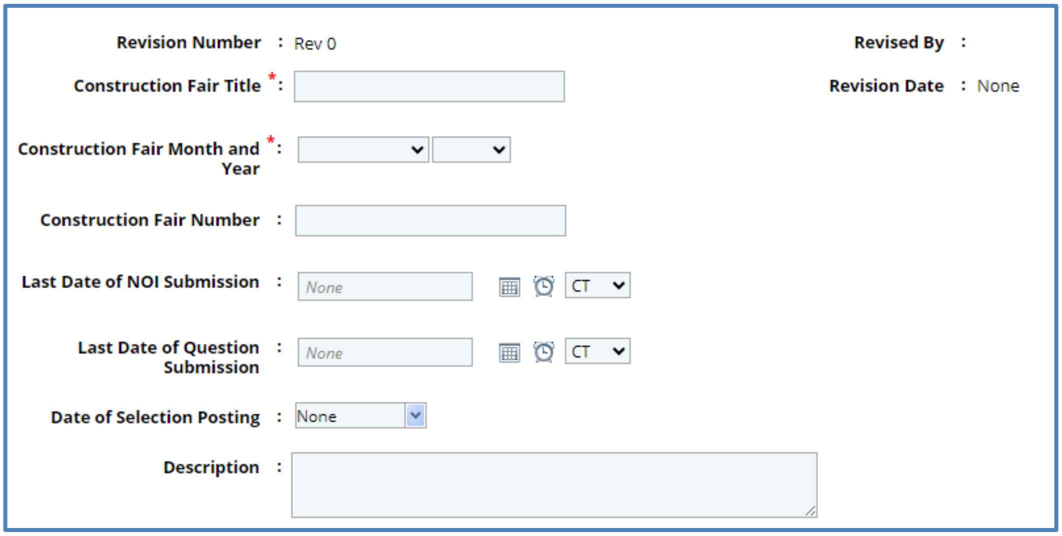
1. In the module menu, click **Solicitation**.
2. In the navigation pane, click **Construction Fair**. The **Construction Fair** list page is displayed.



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

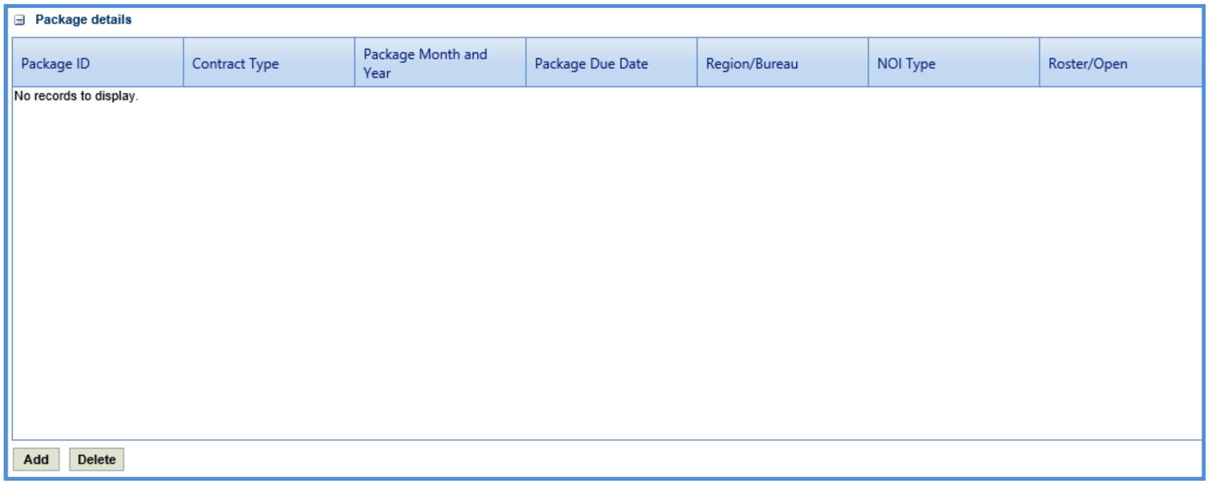


4. Enter information in the required fields. The fields are described in the following table.



Field	Mandatory / Non-mandatory	Description
Revision Number	-	The revision number of the construction fair is auto populated. This is applicable only when a construction fair is revised.
Revised By	-	The name of the person who has revised the construction fair is auto populated. This is applicable only when a construction fair is revised.
Construction Fair Title	Mandatory	Enter the title for the construction fair.
Revision Date	-	The date when the construction fair was revised is auto populated. This is applicable only when a construction fair is revised.
Construction Fair Month and Year	Mandatory	From the drop-down list, select the month and year of the construction fair. You can create only one construction fair for a specific combination of month and year.
Construction Fair Number	Non-mandatory	Enter a unique number for the construction fair.
Last Date of NOI Submission	Mandatory	Enter the last date and time for submission of the NOI by the consultant. Alternatively, you can click the calendar icon and clock icon to select the date and time. From the drop-down list, select the time zone.
Last Date of Question Submission	Mandatory	Enter the last date and time for submission of questions related to the NOI by the consultant. Alternatively, you can click the calendar icon and clock icon to select the date and time. From the drop-down list, select the time zone.
Date of Selection Posting	Non-mandatory	From the drop-down calendar, select the date when the consultants will be intimated about their selection.
Description	Non-mandatory	Enter description about the construction fair.
Reviewer's Ranking needed	Non-mandatory	Click **Yes** when the reviewer's ranking is required for the construction fair or click **No** when the reviewer's ranking is not required for the construction fair.

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



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

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

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

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

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

4.5.1 Revising Construction Fair

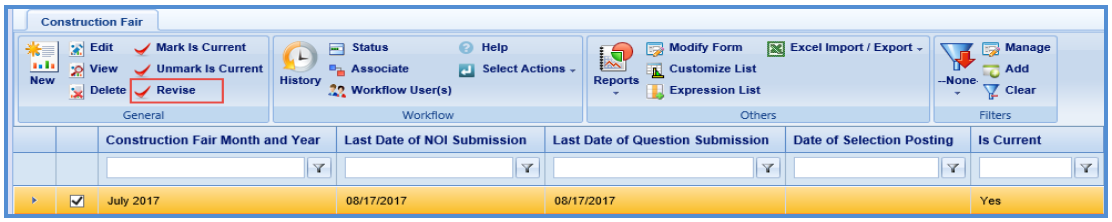
A current construction fair that is published and the NOI submission date of the construction fair has not expired can be revised to include changes. The construction fair packages associated with the construction fair that is being revised, can also be edited.

Pre-requisite:

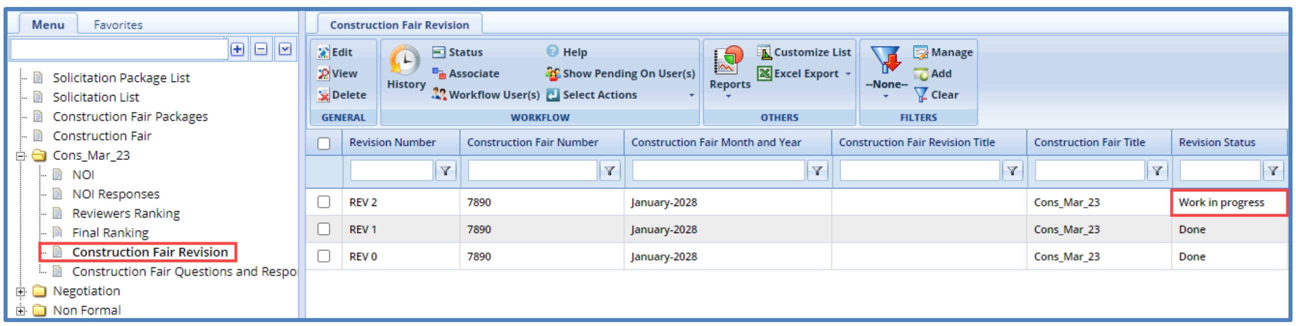
- The construction fair that is revised must be published and marked as current.
- The NOI submission date of the construction fair is valid and has not expired.

The procedure to revise a construction fair is described.

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

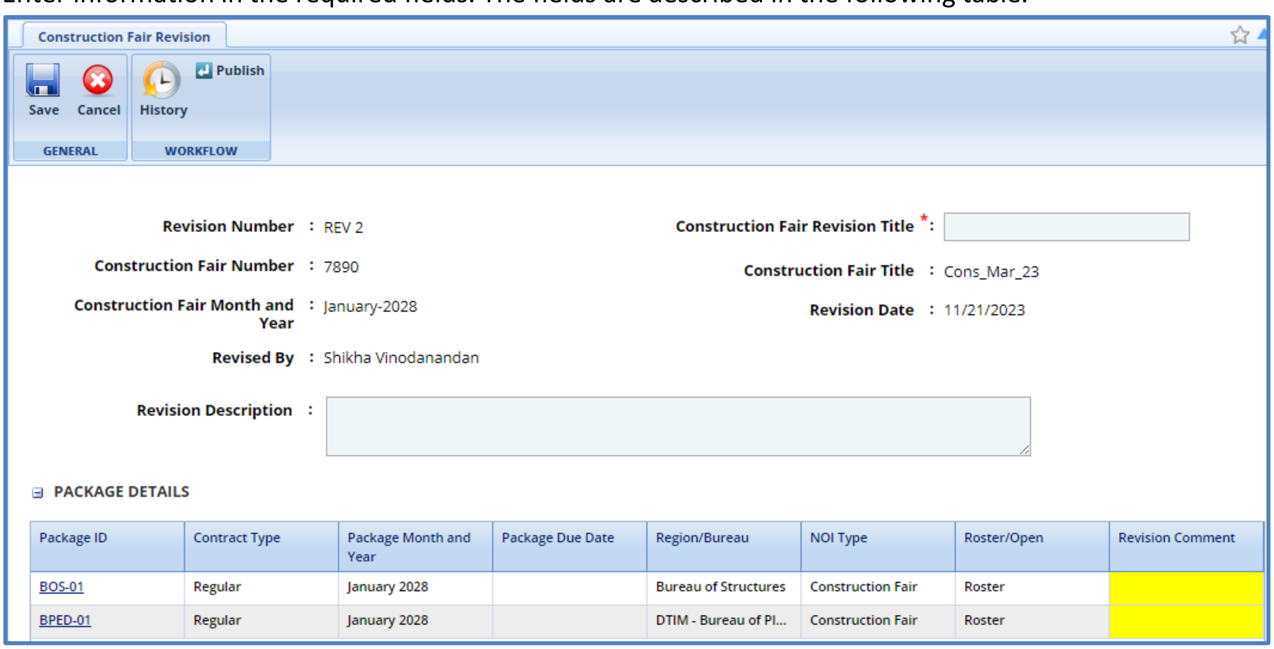


2. In the **General** group, click **Revise.** The **Construction Fair Revision** page is now created.
3. Click the construction fair to be revised and click **Edit**.
4. In the navigation pane, expand the construction fair folder and then click the **Construction Fair Revision**. The **Construction Fair Revision** page is displayed with the construction fair record in **Work in progress** status.



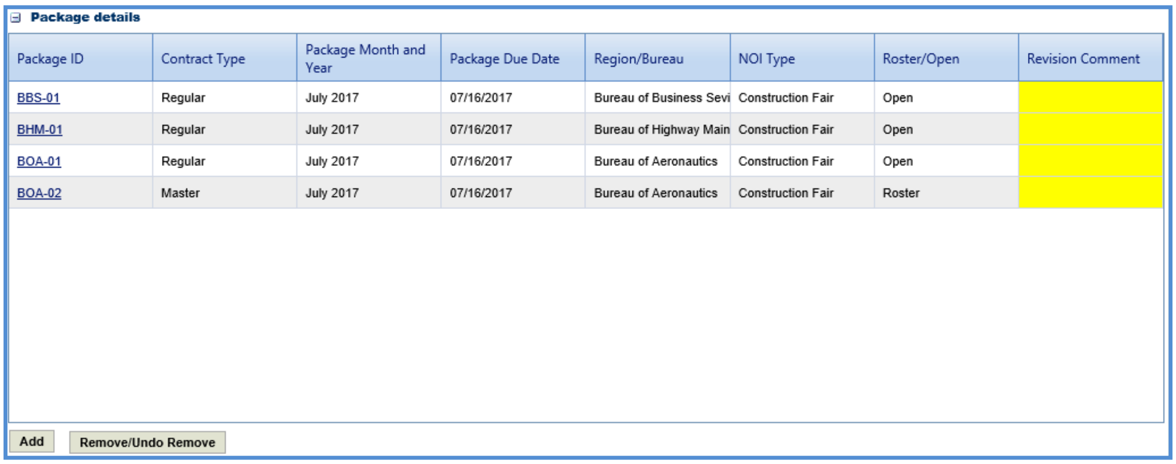
4. Select the record in the **Work in progress** status and click **Edit**. The **Construction Fair Revision** details page is displayed.

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



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

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



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

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

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

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

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

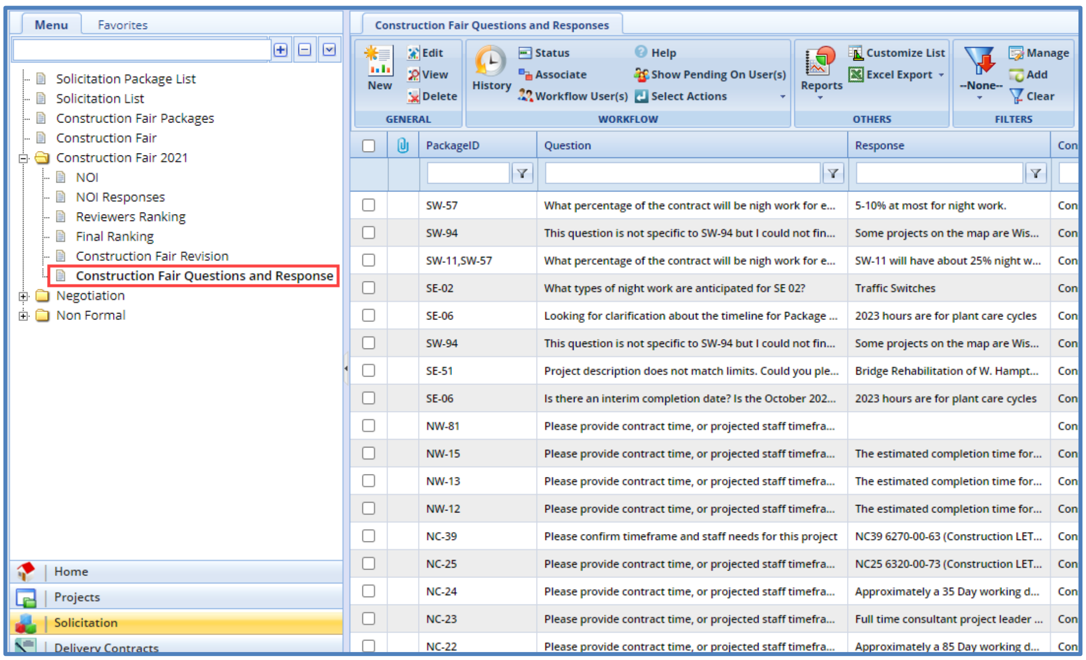
4.6 Responding to Construction Fair NOI Questions

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

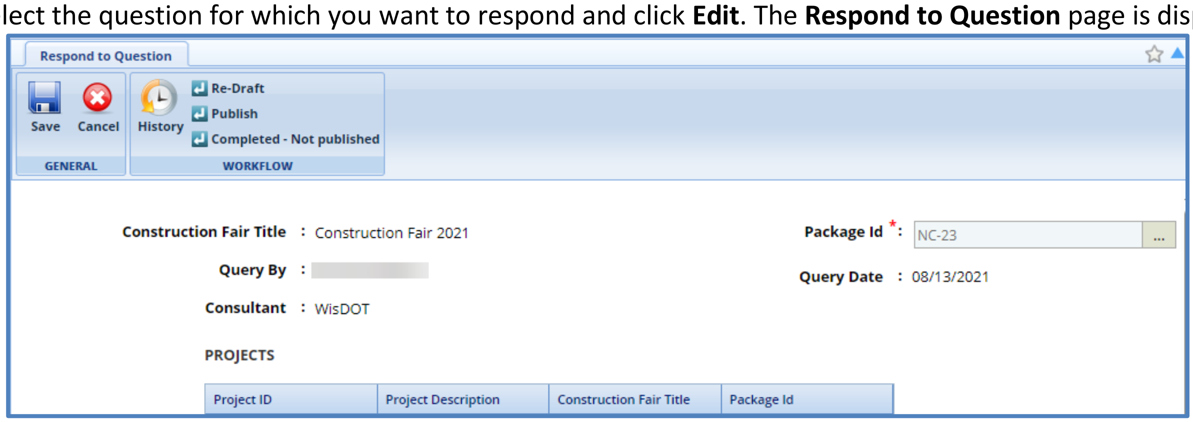
To answer the questions:

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

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

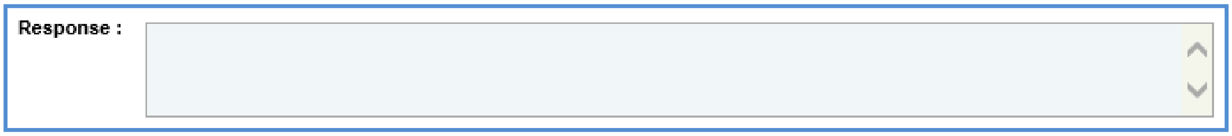


5. Select the question for which you want to respond and click **Edit**. The **Respond to Question** page is displayed.

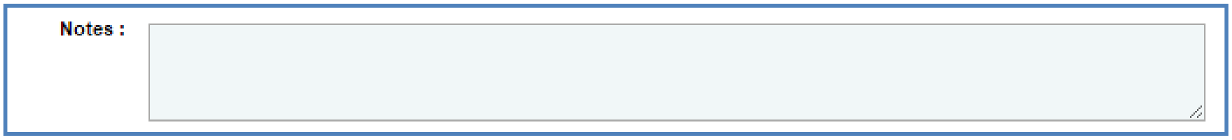


***Note**: The values in the **Construction Fair Title, Package Id, Query By, Query Date, Consultant,** and **Question** fields are auto populated. In the **Projects** section, the projects associated with the Construction Fair is auto populated.*

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



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

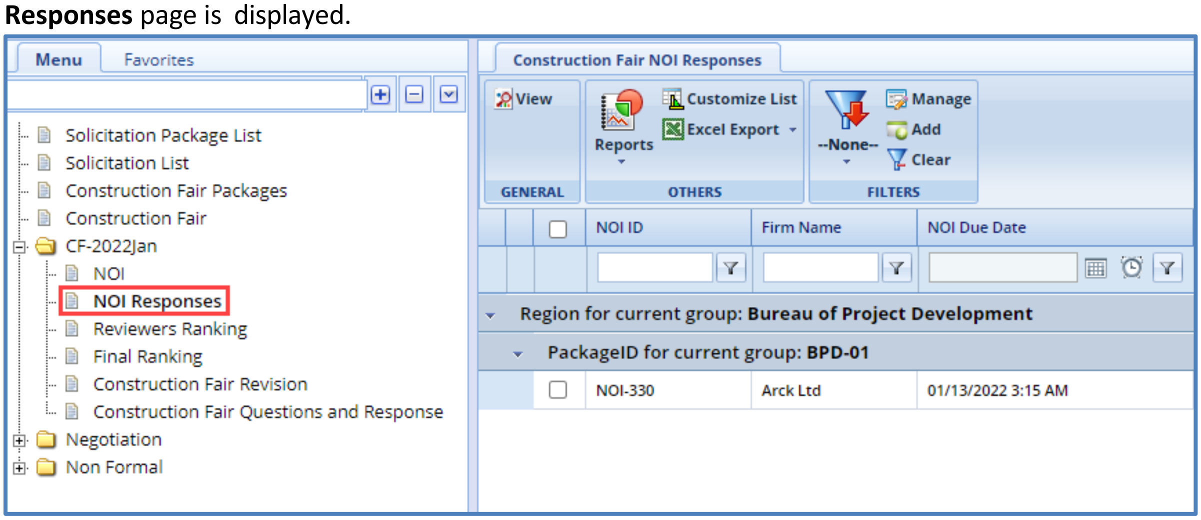


8. In the **Attachments** section, upload images and files relevant to the response.
9. Click **Save**.
10. Select the question and response record and in the **Workflow** group, click **Select Actions**. Click **Publish.** The **WisDOT – Masterworks** dialog box is displayed.
11. Enter the required information and then click **OK.** The **Workflow Status** of the record is set to **Response Published**. The response to the question is published to the consultants.
12. Optionally, if the response to the question need not be published to the consultants, enter notes in the **Notes** section. In the **Workflow** group, click **Completed – Not Published**, in the dialog box, enter required information, and then click **OK**.
13. In the **Workflow** group, you can also click **Redraft**, enter required information in the dialog box that is displayed, and then click **OK** to close or redraft the record.

4.7 Viewing NOI Responses for Construction Fair

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

1. Click **Solicitation** in the module menu.
2. In the navigation pane, click **Construction Fair**. The **Construction Fair** list page is displayed.
3. Select the construction fair record for which NOI response must be viewed and click **View**. The **Construction Fair details** page is displayed.
4. In the navigation pane, expand the construction fair folder, and click **NOI Responses**. The **Construction Fair NOI Responses** page is displayed.



***Note**: On the **Construction Fair NOI Responses** page, the NOI responses are grouped based on region and construction fair package.*

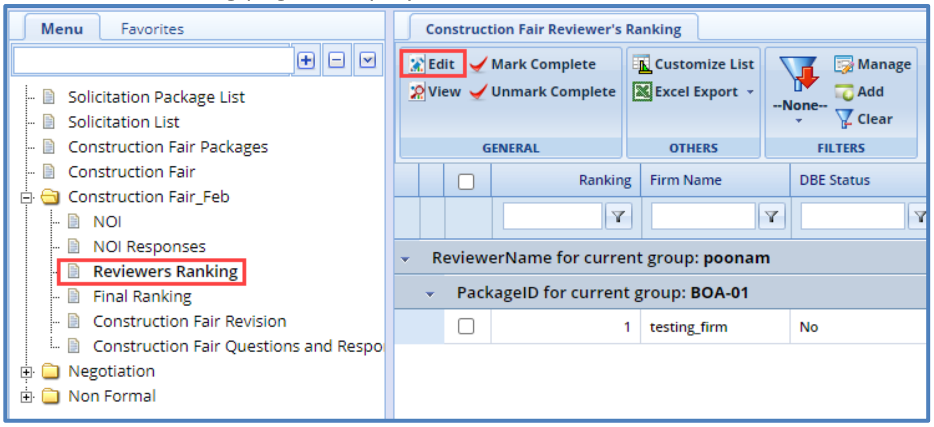
5. Select the **NOI Response** that you want to view and then click **View** in the **General** group. The **Construction Fair NOI** page is displayed. The page displays the duly filled **NOTICE OF INTEREST QUESTIONNAIRE** page.

4.8 Ranking Consultants for Construction Fair

The consultant firms are ranked by the reviewers based on their NOI responses. The NOI responses are auto populated in the **Reviewers Ranking** page once the last date of NOI submission is expired.

The procedure to rank the consultant firms is described.

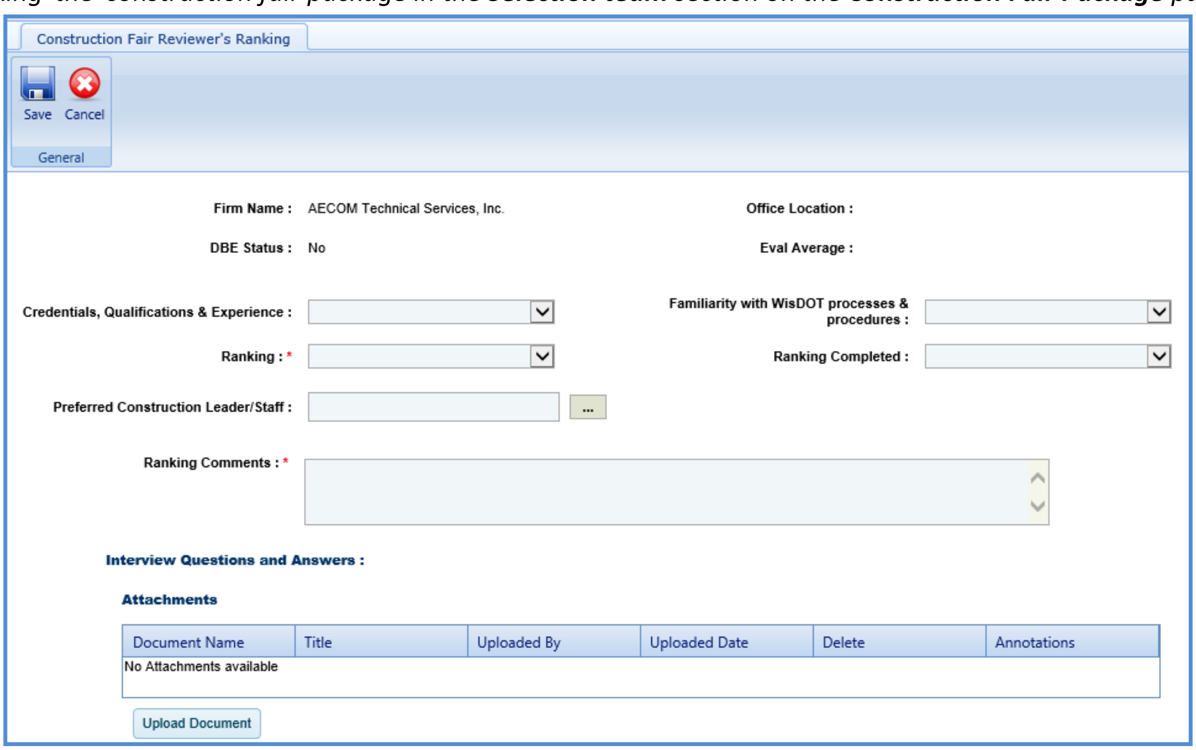
1. Click **Solicitation** in the module menu.
2. In the navigation pane, click **Construction Fair**. The **Construction Fair** list page is displayed.
3. Select the construction fair for which the consultants must be ranked and click **View**. The **Construction Fair Details** page is displayed.
4. In the navigation pane, expand the construction fair folder, and then click **Reviewers Ranking**. The **Construction Fair Reviewer's Ranking** page is displayed.



Note: *On the* ***Construction Fair Reviewer's Ranking*** *page, the NOI responses for ranking are grouped based on the reviewer's name and construction fair package.*

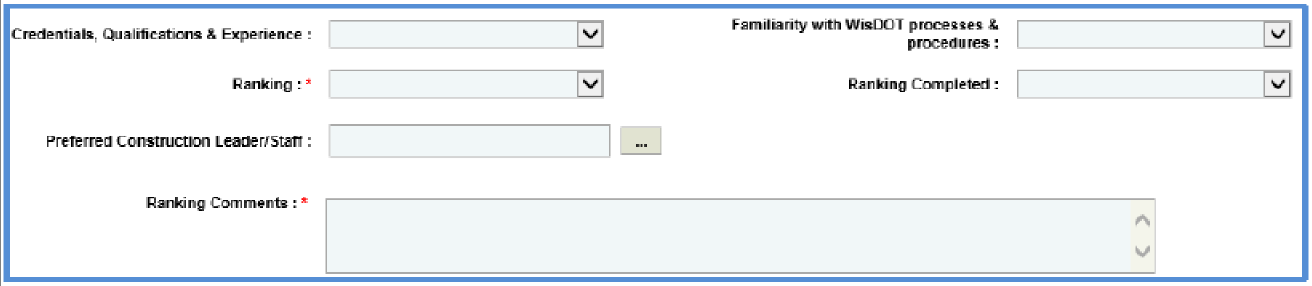
5. Select the consultant firm record that you want to rank, and then click **Edit**. The **Construction Fair Reviewer's Ranking** details page is displayed.

Note: *The* ***Construction Fair Reviewer's Ranking*** *details page is available only for the reviewers who are selected for ranking the construction fair package in the* ***Selection team*** *section on the* ***Construction Fair Package*** *page.*



Note: *The values in the* ***Firm Name, DBE Status, Office Location***, *and* ***Eval Average*** *are auto populated.*

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

Field	Mandatory/ Non-mandatory	Description
		
Credentials, Qualifications & Experience	Non-mandatory	From the drop-down list, select the required option.
Familiarity with WisDOT processes & procedures	Non-mandatory	From the drop-down list, select the required option.
Ranking	Mandatory	From the drop-down list, select a ranking for the consultant firm. When the contract type is Master for construction fair, then all the contractors are ranked 1.
Ranking Completed	Non-mandatory	From the drop-down list, select **Yes** to indicate that the ranking of the consultant firm is completed or select **No** to indicate that the ranking of consultant firm is not completed. When the contract type is Master, this field is not available. The ranking can be indicated as complete only from the **Construction Fair Reviewer's Ranking list** page. Refer to step 4.9 for more information.
Preferred Construction Leader/ Staff	Non-mandatory	To select a construction Leader: 1. Click ... and the **Construction Leaders** dialog box is displayed. 2. Select the construction leader for the construction fair and click **Select**.
Master Contract ID	-	The value in this field is auto populate when the contract type is **Master**.
Ranking Comments	Mandatory	Enter comments about ranking the consultant firm. When the contract type is Master for construction fair, then the comments is auto populated as 1.

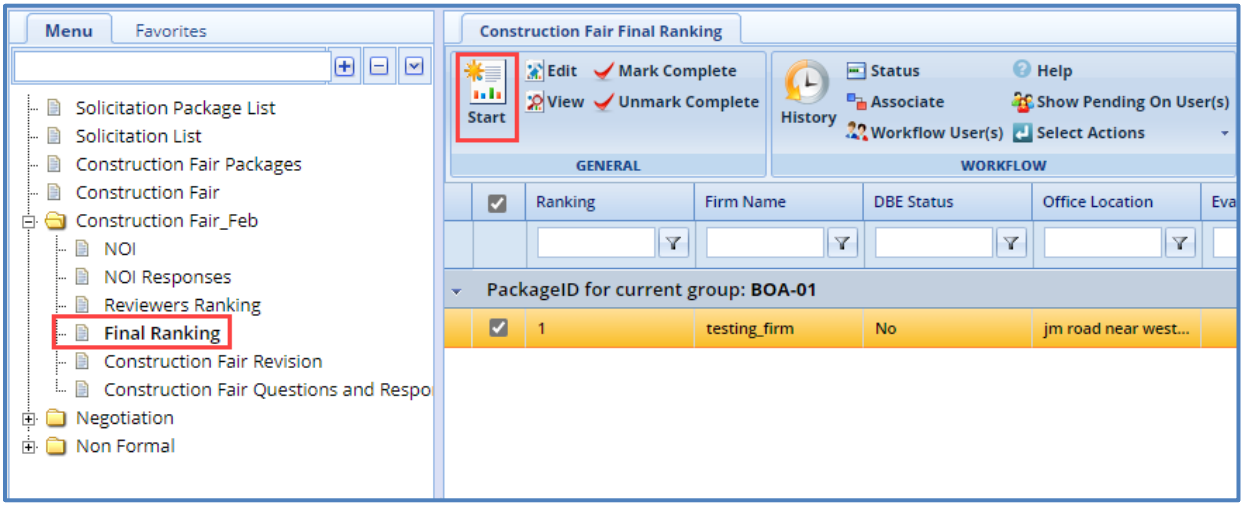
7. In the **Interview Questions and Answers** section, in **Attachments**, upload images and files relevant to the interview questions.
8. Click **Save.**
9. Select the record which is ranked and click **Mark Complete** to complete the reviewer's ranking of the consultant firms.

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

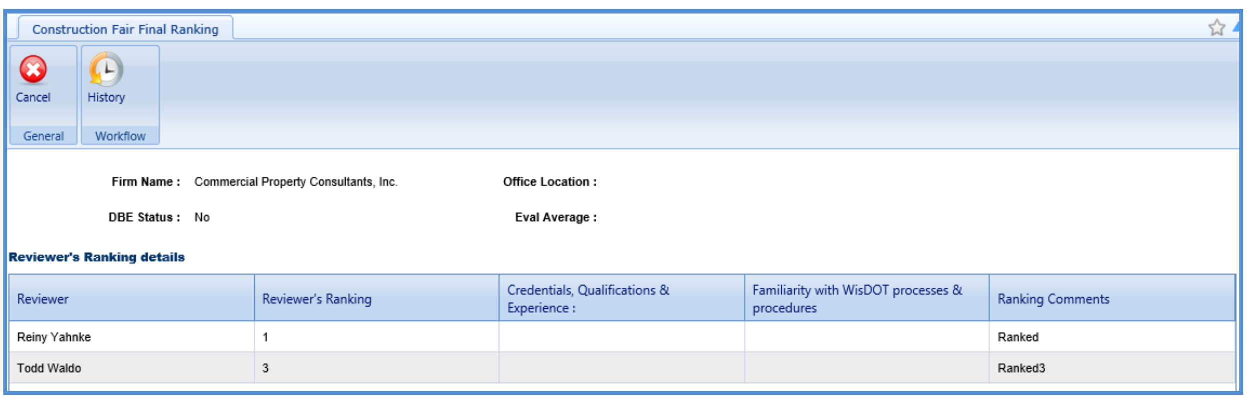
4.9 Final Ranking Consultants for Construction Fair

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

1. Click **Solicitation** in the module menu.
2. In the navigation pane, click **Construction Fair**. The **Construction Fair** list page is displayed.
3. Select the construction fair for which the consultants must be ranked and click **View**. The **Construction Fair details** page is displayed.
4. In the navigation pane, expand the construction fair folder, and then click **Final Ranking**. The **Construction Fair Final Ranking** page is displayed.



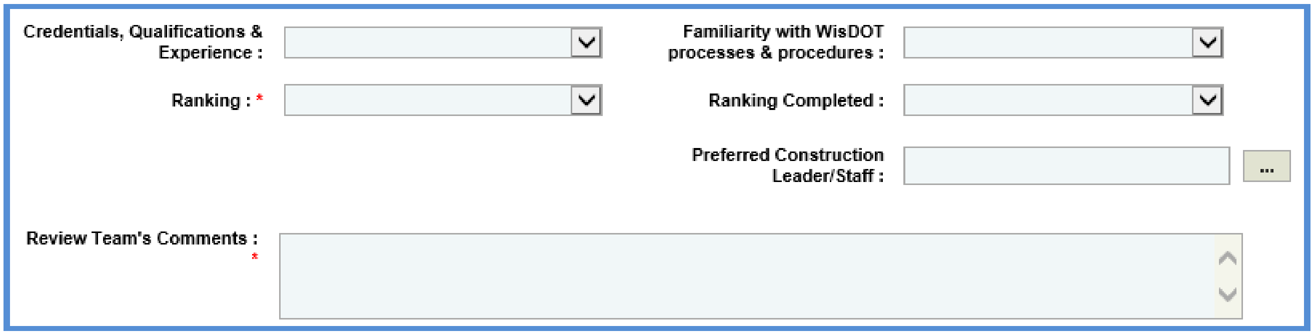
5. Click **Start** in the **General** group. The ranked consultant firm records are listed.
6. Select the consultant firm record that you want to final rank and click **Edit**. The **Construction Fair Final Ranking** details page of the consultant firm is displayed.



Note:

- *The **Construction Fair Reviewer's Ranking** details page is available only for the reviewers who are selected for ranking the construction fair package in the **Selection team** section on the **Construction Fair Package** page.*
- *The values in the **Firm Name, Office Location, DBE Status,** and **Eval Average** fields are auto populated.*
- *The **Reviewers Ranking Details** section auto-populates the reviewer's ranking details of the consultant firm.*

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

Field	Mandatory/ Non-mandatory	Description
		
Credentials, Qualifications & Experience	Non-mandatory	From the drop-down list, select the required option.
Familiarity with WisDOT processes & procedures	Non-mandatory	From the drop-down list, select the required option.
Ranking	Mandatory	From the drop-down list, select a final rank for the consultant firm. When the contract type is Master for construction fair, then all the contractors are ranked 1.
Ranking Completed	Non-mandatory	From the drop-down list, select **Yes** to indicate that the final ranking of the consultant firm is completed or select **No** to indicate that the final ranking of consultant firm is not completed. When the contract type is Master, this field is not available. The ranking can be indicated as complete only from the **Construction Fair Final Ranking list** page. Refer to step 8 for more information.
Preferred Construction Leader/Staff	Non-mandatory	To select a construction Leader: 1. Click ... and the **Construction Leaders** dialog box is displayed. 2. Select the construction leader for the construction fair and click **Select**.
Review Team's Comments	Mandatory	Enter comments about final ranking of the consultant firm. When the contract type is Master for construction fair, then the comments is auto populated as 1.

8. Click **Save.** The record is in the **Review and Ranking** workflow status.
9. Once the record is ranked, select the record, and then click **Mark Complete** to complete the final ranking of the consultant firms.

***Note**: All the records on the **Construction Fair Final Ranking** page should be in the **Review and Ranking** workflow status to proceed with the workflow.*

10. On the **Construction Fair Final Ranking** list page, select the ranking completed record and in the **Workflow** group, click **Ready for BPD Review**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The record is sent to BPD for review. The BPD can defer, accept, or re- evaluate the record.

11. Select the record in the **BPD Review** stage, in the **Workflow** group, click **Accepted**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The record is in the **Accepted** workflow stage.

12. Optionally, click **Deferred** to defer the record or **re-evaluate** to re-evaluate the record.
13. Select the record that is in the **Accepted** or **Deferred** workflow stage, in the **Workflow** group, click **Complete**. The **WisDOT – Masterworks**
dialog box is displayed. Enter required information and then click **OK.**

5. Non-Formal Solicitation

This section describes the procedure to create solicitations for the contract type '**Non-Formal**'. Non formal contracts are further categorized as below:

- Local Design
- Small Purchase
- Sole Source
- RFP (Request for Proposal)
- Work Order Request

5.1 Functional Flow for Solicitation of Non-Formal contracts

The following sequential tasks comprise the functional flow for solicitation of Non-Formal contracts.

1. Create details for the Non-Formal contract type.
2. Add projects and the consulting firms.
3. Rank the consulting firms.
4. Create **Non-Formal Estimate** to measure the work internally and mark '**Is Current**'.
5. Create **Consultant Estimate**.
6. View responses to the **Consultant Estimate**.
7. Approve **Consultant Estimate**.
8. Create a Non-Formal Contract.

5.2 Workflow for Non-Formal Solicitation

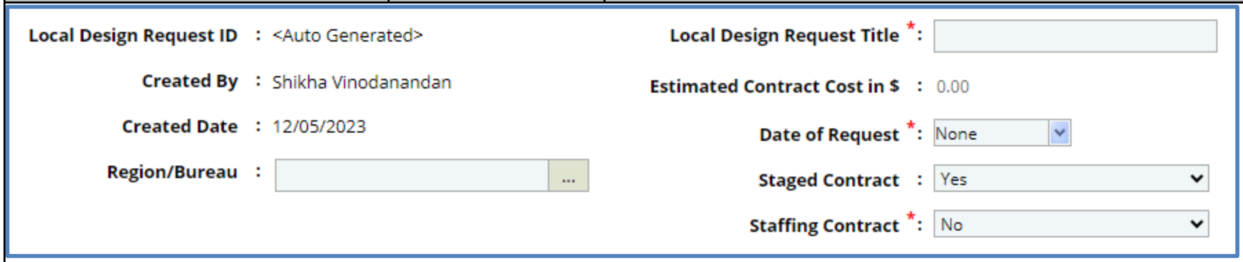
The workflow table below describes the stages involved in the following Non Formal Solicitation forms:

- Local Design
- Small Purchase
- Sole Source

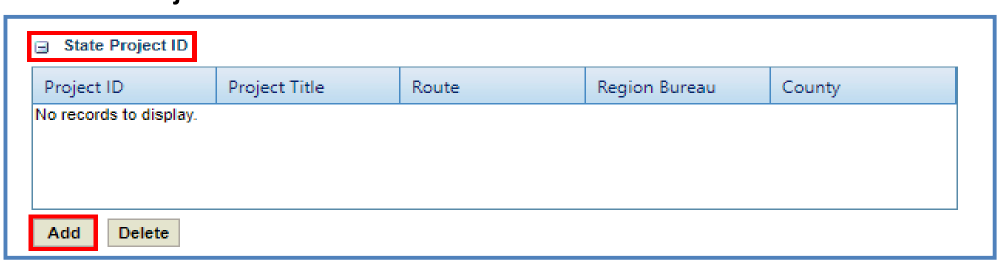
Current Stage	Action	Workflow Status (New Stage)	Comments
Draft	Submit for Review		–
Submitted for Review	Submit for Division Review or Approval	Submitted for Division Review / Submitted for Approval.	• If the contract value is greater than $50,000, the record moves to 'Submitted for Division Review' stage. • If the contract value is lesser than $50,000, the record moves to 'Submitted for Approval' stage
	Send Back for Revision	Draft	–
Submitted for Division Review	Submit For Approval	Submitted for Approval	–
	Send Back for Revision	Submitted for Review	
Submitted for Approval	Approved	Approved	–
	Send Back for Revision	Submitted for Review	

5.3 Creating Local Design Request

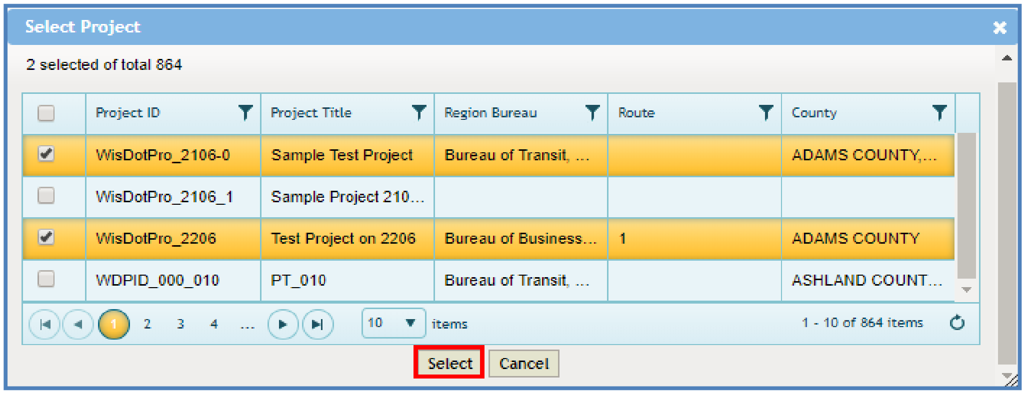
1. Click **Solicitation** in the module menu.
2. In the navigation pane, expand **Non-Formal** and click **Local Design**. The **Local Design List** page is displayed.
3. Click **New**. The **Local Design Request** details page is displayed.
4. Provide the information in the fields, as described in the following table:

Field	Mandatory / Non-mandatory	Description
		
Local Design Request ID	–	The unique ID for the **Local Design Request** is auto populated.
Local Design Request Title	Mandatory	Enter the title of the **Local Design Request**.
Created By	–	Displays the name of the user creating the record.
Estimated Contract Cost	–	Displays the internal estimate contract amount of the **Local Design Request** that is marked as '**Is Current**'.
Created Date	–	Displays the current date from the system calendar.
Date of Request	Mandatory	From the calendar drop-down, select the date of **Local Design Request**.
Region/Bureau	Mandatory	To Enter the region or bureau use the following steps: 1. Click ... and the Region/Bureau dialog box is displayed. For availability of options in the dialog box, region/bureaus must be defined in the **Region-Bureau** catalog of the library. Select the required region/bureau and click **Select**.
Staged Contract	Non-Mandatory	By default, '**Yes**' is selected. • If **Staged Contract** is selected '**Yes**', the user can create multiple contracts for the **Local Design Request ID**. If **Staged Contract** is selected '**No**', the user can create only one contract for the **Local Design Request ID**.
Staffing Contract	Mandatory	From the drop-down, select if this is or is not a staffing contract.

5. To add the **State Project ID:**

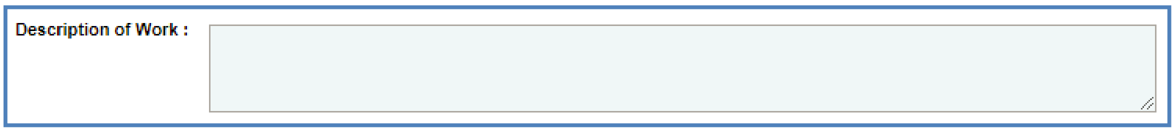


a. Click **Add.** The **Select Project** dialog box is displayed. Based on the Region/Bureau selected, the projects are listed in the dialog box.

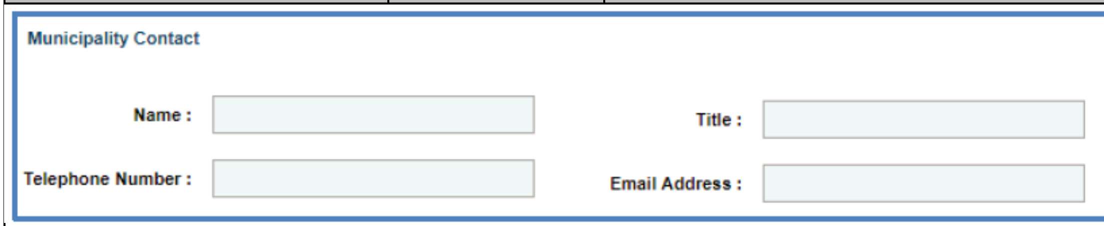


b. Select one or more projects and click **Select**. The selected projects are added to the grid.

6. In the **Description of Work**, enter the brief description of the Local Design Request.

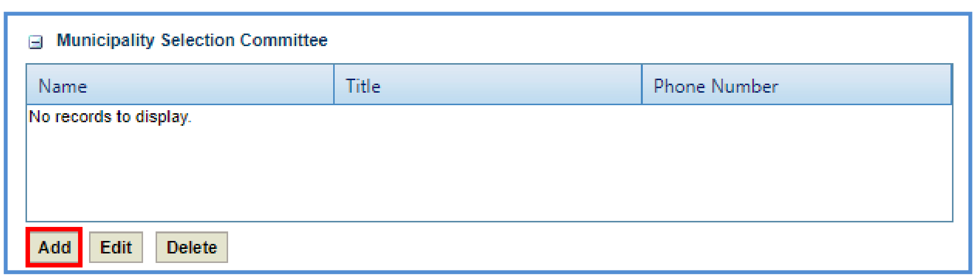


7. In the **Municipality Contact** section, provide the information in the fields, as described in the following table:

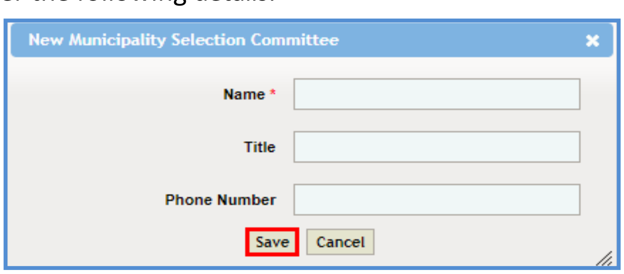


Field	Mandatory / Non-mandatory	Description
Name	Non-Mandatory	Enter the name of the municipality contact.
Telephone Number	Non-Mandatory	Enter the telephone number of the municipality contact.
Title	Non-Mandatory	Enter the title.
Email Address	Non-Mandatory	Enter the email address of the municipality contact.

a. To add Municipality Selection Committee, click **Add.** The **New Municipality Selection Committee** dialog box is displayed.

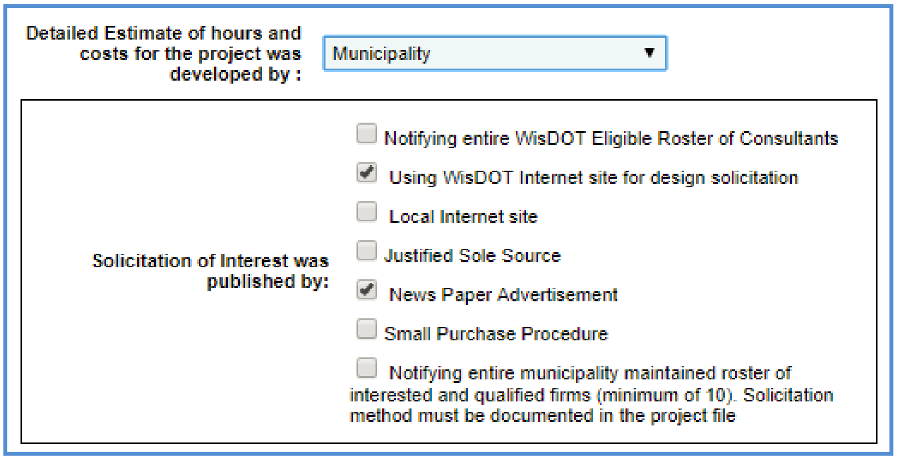


b. Enter the following details:



- Name: Enter the name of the selection committee member.
- Title: Enter the title.
- Phone Number: Enter the phone number of the selection committee member

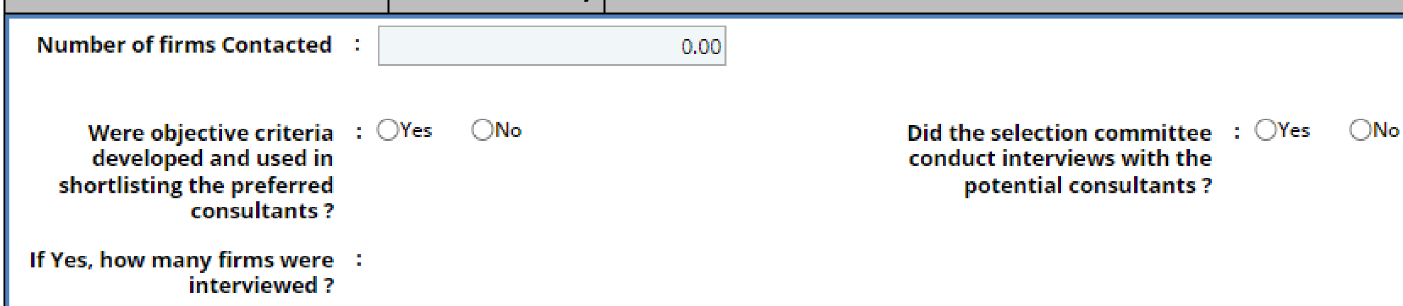
c. Click **Save**. The details are saved in the **Municipality Selection Committee** section.



8. In **Detailed Estimate of hours and costs for the project was developed by**, from the drop-down, select the entity which developed the detailed estimate of hours and costs for the project.

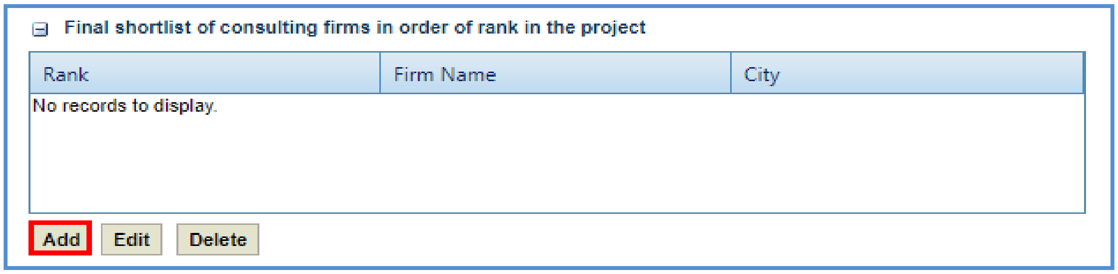
9. In **Solicitation of Interest was published by** grid, from the list, select one or more options where the Solicitation of Interest is published.

10. Enter the information in the required fields, as described in the following table.

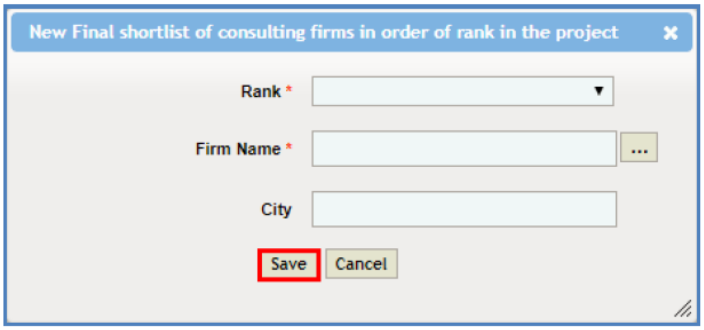


Field	Mandatory / Non-mandatory	Description
Number of firms Contacted	Non-mandatory	Enter the number of firms Contacted.
Were objective criteria developed and used in shortlisting the preferred consultants?	Non-mandatory	Select 'Yes' if the objective criteria are developed and used in shortlisting the preferred consultants.
Did the selection committee conduct interviews with the potential consultants?	Non-mandatory	Select 'Yes' if the selection committee has interviewed the potential consultants. The **If Yes, how many firms were interviewed?** field is displayed.
If Yes how many firms were interviewed?	Non-mandatory	Enter the number of firms interviewed.

11. In the **Final shortlist of consulting firms in order of rank in the project** section, do the following:
   a. To add the final shortlist of consulting firms, click **Add.** The **New Final shortlist of consulting firms in order of rank in the project** dialog box is displayed.

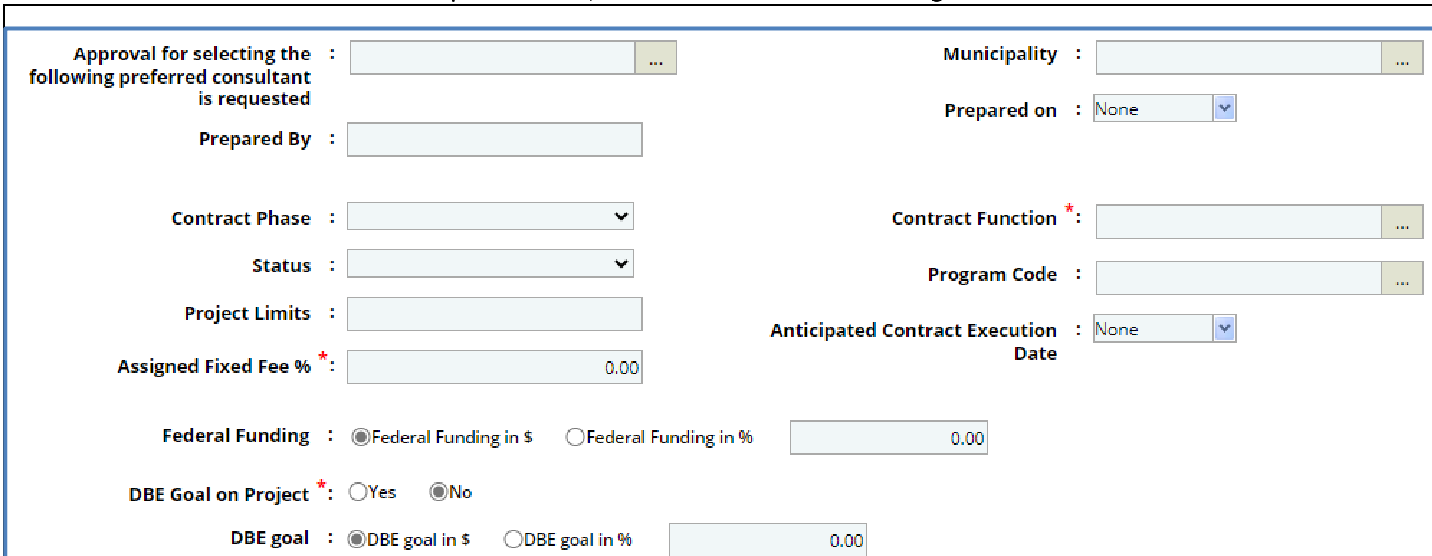


   b. Enter the information in the required fields, as described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Rank	Mandatory	From the drop-down, select the number from 1 to 10 to rank the consulting firm.
Firm Name	Mandatory	To enter a Firm Name, use the following steps: 1. Click ... . The **Select Consultant** dialog box is displayed. 2. Select the consultant from the list and click **Select**.
City	Non-Mandatory	The city is auto populated.

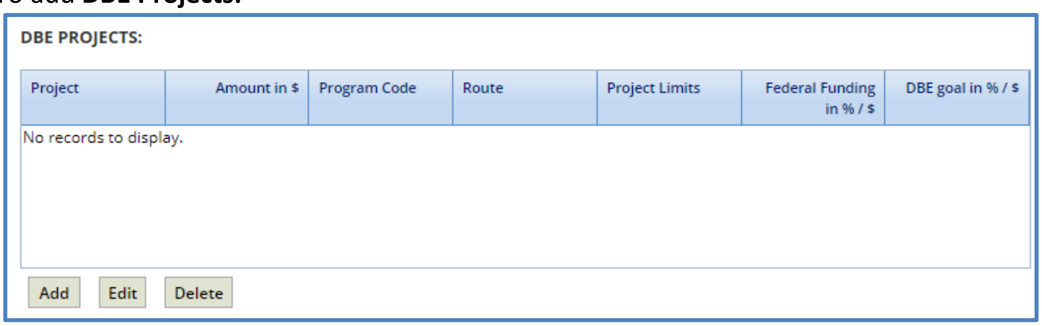
   c. Click **Save**. The details are saved in the **Final shortlist of consulting firms in order of rank in the project** section.

12. Enter the information in the required fields, as described in the following table.



Field	Mandatory / Non-mandatory	Description
Municipality	Non-mandatory	To add the Municipality details: 1. Click ... The **Location** dialog box is displayed. 2. From the list of location, select the preferred location and click **Select**. The selected location is displayed.
Prepared By	Non-mandatory	Enter the name of the person preparing the record.
Prepared on	Non-mandatory	From the calendar drop-down, select the date of preparing the record.
Contract Phase	Non-mandatory	From the drop-down, select the relevant phase for the contract.
Status	Non-mandatory	From the drop-down, select the relevant status for the contract.
Contract Function	Mandatory	To add the Contract Function details: 1. Click ... The Contract Function dialog box is displayed. 2. From the list, select the contract function and click Select.
Program Code	Non-mandatory	To add the Program Code details: 1. Click ... . The **Program Type Code** dialog box is displayed. 2. From the list of program code, select the program code and click **Select**. The selected program code is displayed.
Project Limits	Non-mandatory	Enter the project limits.
Assigned Fixed Fee %	Mandatory	Enter the fixed fee percentage to assign.
Anticipated Contract Execution Date	Non-mandatory	From the drop-down calendar, select the anticipated contract execution date
Federal Funding	Non-mandatory	To enter a federal funding amount, use the following steps: • Select Federal Funding in $ and enter the amount in the field. • Select Federal Funding in % and enter the percentage of the Federal Funding.
DBE Goal on Project	Mandatory	Select if there is a DBE goal on this project.
DBE goal	Non-mandatory	To enter an amount in this field, sue the following steps: • Select DBE goal in $ and enter the amount in the field. Select DBE goal in % and enter the percentage of the DBE goal.

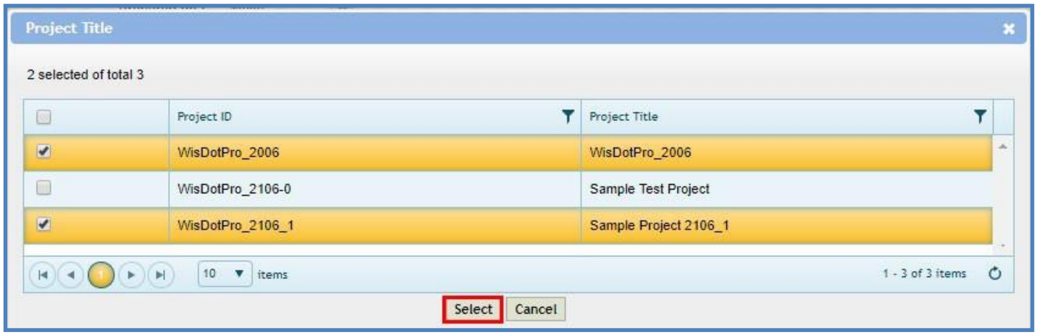
13. To add **DBE Projects:**



   a. Click **Add**. The **Project Title** dialog box is displayed listing the projects associated with the Local Design Request in the State Project ID grid.
   b. Select one or more DBE projects and click **Select**. The selected projects are added to the grid.

14. In **Selection for Design by Local Government Contract Approved By** field:
   a. Click ... . The **Select the User** dialog box is displayed.
   b. Select the WisDOT user from the list and click **Select**. The name of the user is displayed in the box.

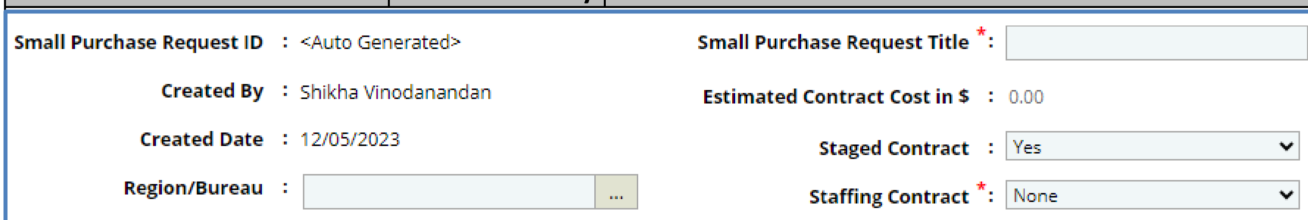
15. In the **Attachments** section, upload images and files relevant to the construction fair package.
16. Click **Save.** The **DBE Project total in % / $** box displays the total of the **DBE goal in % / $.** The new **Local Design**



Request is created in **'Draft'** workflow stage.

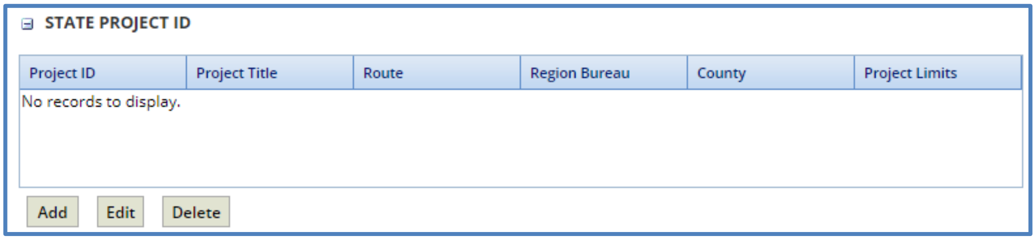
5.4 Creating Small Purchase Contract Request

1. Click **Solicitation** in the module menu.
2. In the navigation pane, expand **Non-Formal** and click **Small Purchase**. The **Small Purchase List** Page is displayed.
3. Click **New**. The **Small Purchase Contract Request** details page is displayed.
4. Provide the information in the fields, as described in the following table:

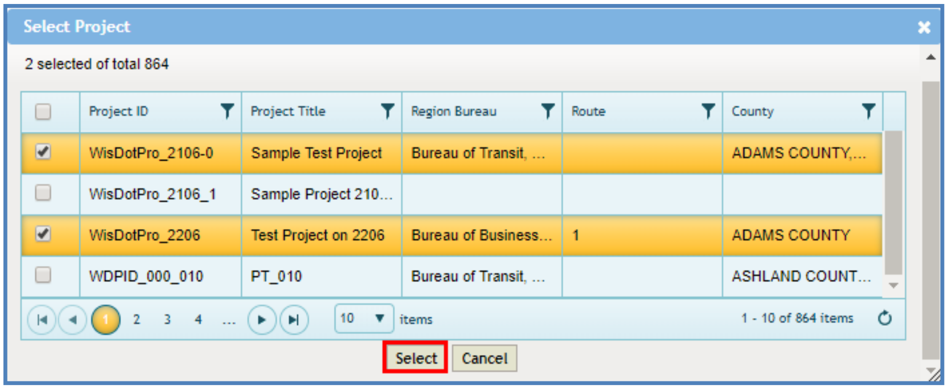


Field	Mandatory / Non-mandatory	Description
Small Purchase Request ID	–	The unique ID for the **Small Purchase Contract Request** is auto populated.
Small Purchase Request Title	Mandatory	Enter the title of the **Small Purchase Contract Request**.
Created By	–	Displays the username of the user creating the record.
Estimated Contract Cost in $	–	Displays the internal estimate contract amount of the **Small Purchase Contract Request** that is marked as '**Is Current**'.
Created Date	–	Displays the current date from the system calendar.
Staged Contract	Mandatory	By default, 'Yes' is selected. • If **Staged Contract** is selected '**Yes**', the user can create multiple contracts for the **Small Purchase Request ID**. • If **Staged Contract** is selected '**No**', the user can create only one contract for the **Small Purchase Request ID**.
Region/Bureau	Non-mandatory	To select region/bureau of the **Small Purchase Contract Request**: 1. Click ... and the **Region/Bureau** dialog box is displayed. For availability of options in the dialog box, region/bureaus must be defined in the **Region-Bureau** catalog of the library. 2. Select the required region/bureau and click **Select**.
Staffing Contract	Mandatory	Select if this is a staffing contract or not.

- To add the **State Project ID:**

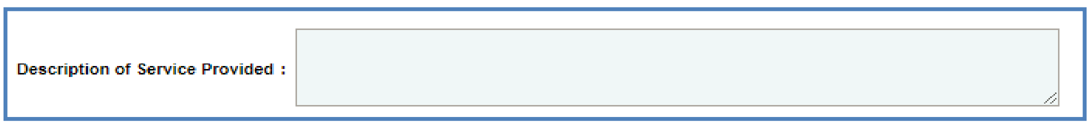


a. Click **Add**. The **Select Project** dialog box is displayed. Based on the Region/Bureau selected, the projects are listed in the dialog box.

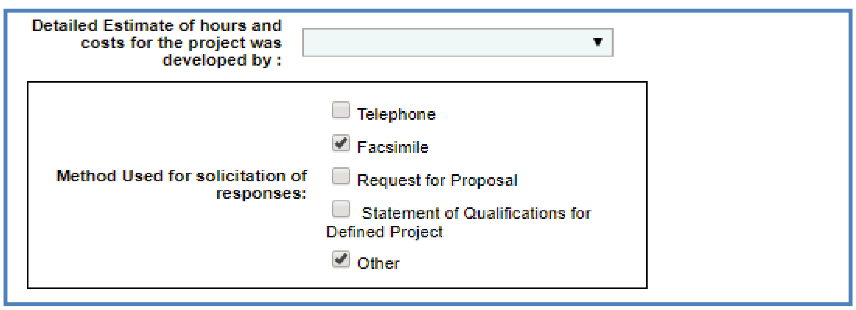


b. Select one or more projects and click **Select**. The selected projects are added to the grid.

c. In the **Description of Service Provided**, enter the brief description of the service provided.

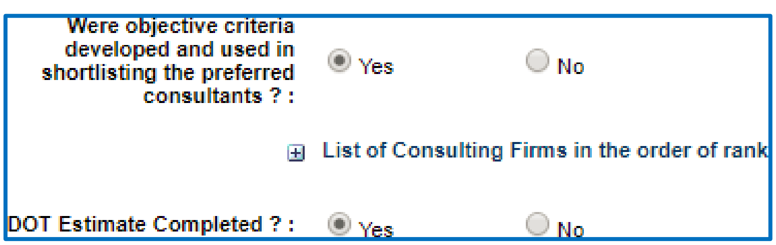


d. In **Detailed Estimate of hours and costs for the project was developed by**, from the drop-down, select the entity which developed the detailed estimate of hours and costs for the project.



e. In **Method Used for solicitation of responses** grid, from the list, select one or more options where the Solicitation of Interest is published.

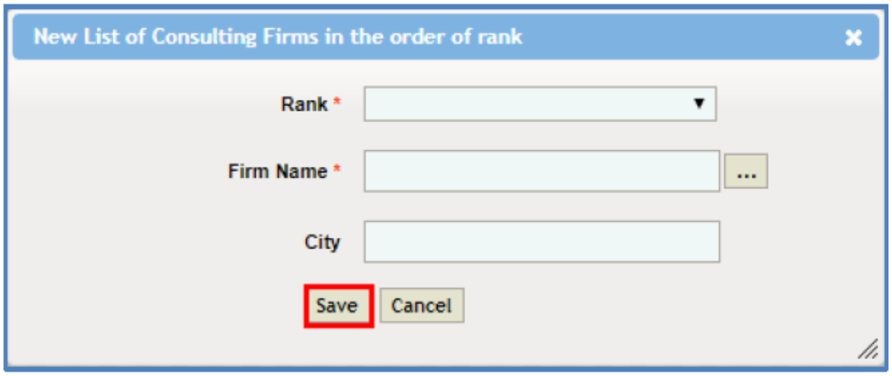
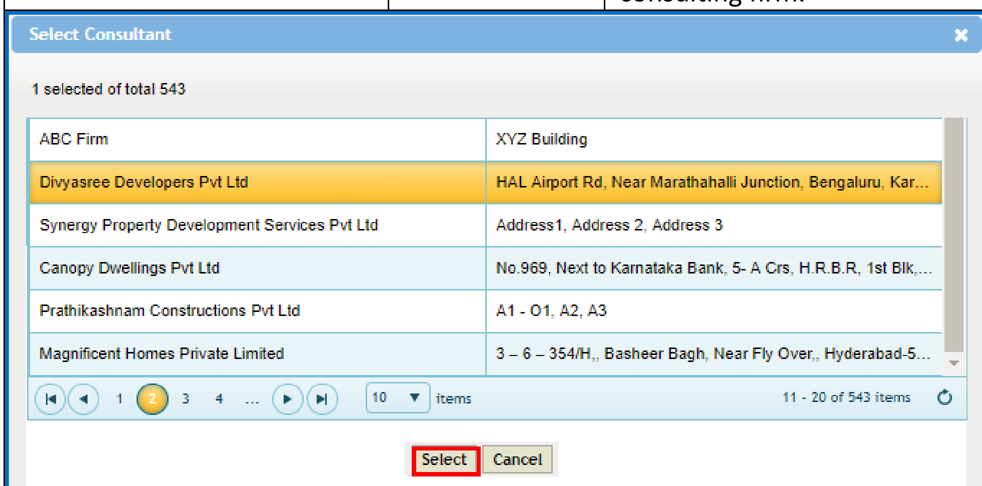
f. Enter the information in the required fields, as described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Were objective criteria developed and used in shortlisting the preferred consultants?	Non-Mandatory	Select 'Yes' if the objective criteria are developed and used in shortlisting the preferred consultants.
DOT Estimate Completed?	Non-Mandatory	Select 'Yes' if the DOT estimate is completed.

g. In the **List of consulting firms in the order of rank** section:

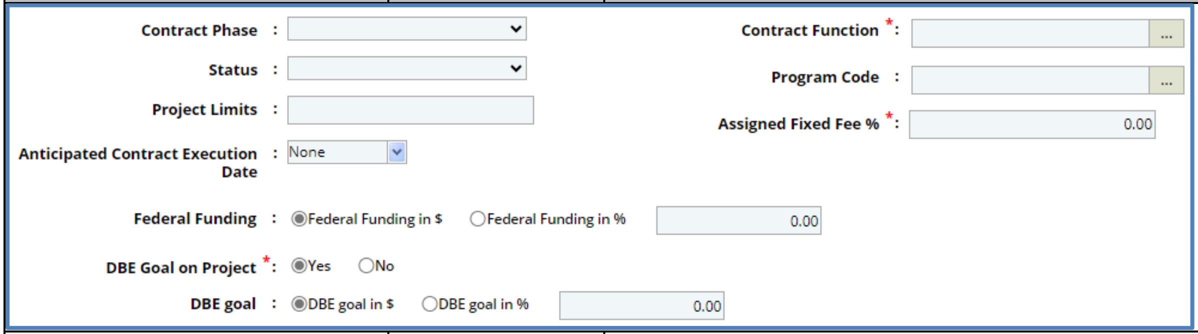
1. Click **Add.** The **New List of consulting firms in the order of rank** dialog box is displayed.

2. Enter the information in the required fields, as described in the following table.

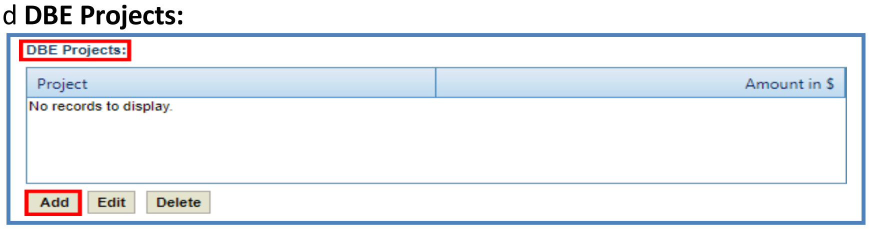
Field	Mandatory / Non-mandatory	Description
		
Rank	Mandatory	From the drop-down, select the number from 1 to 10 to rank the consulting firm.
		
Firm Name	Mandatory	To enter the firm name, use the following steps: 1. Click ... The **Select Consultant** dialog box is displayed. 2. Select the consultant from the list and click **Select**.
City	Mandatory	The city is auto populated.

3. Click **Save**. The details are saved in the **List of consulting firms in the order of rank** section.

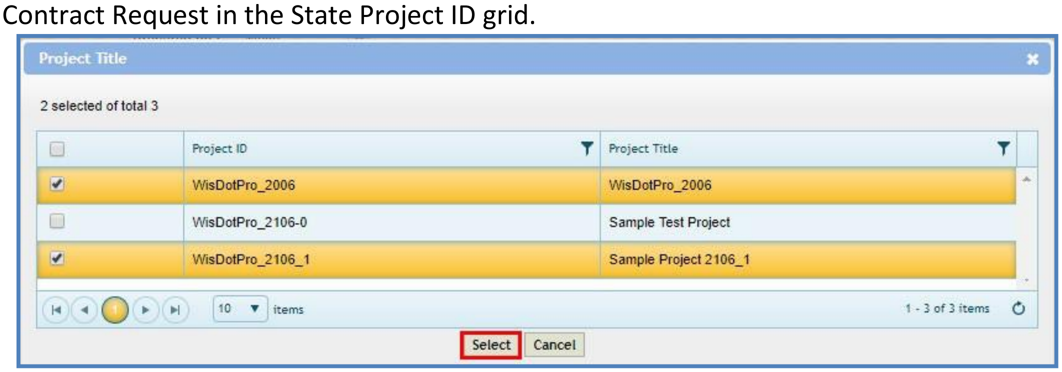
5. Enter the information in the required fields, as described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Contract Phase	Non-mandatory	From the drop-down, select the relevant phase for the contract.
Contract Function	Non-mandatory	To select a contract function, use the following steps: a. Click ... The **Contract Function** dialog box is displayed. b. From the list of contract function, select the contract function and click **Select**. The selected contract function is displayed.
Status	Non-mandatory	From the drop-down, select the relevant status for the contract.
Project Limits	Non-mandatory	Enter the project limits.
Program Code	Non-mandatory	Use the following steps to select a **Program Code**: a. Click ... The **Program Type Code** dialog box is displayed. b. From the list of program codes, select the **Program Code.**
Anticipated Contract Execution Date	Non-mandatory	From the drop-down calendar, select the anticipated contract execution date.
Assigned Fixed Fee %	Mandatory	Enter the fixed fee percentage to assign.
DBE goal	Non-mandatory	To enter a DBE goal, use the following steps: a. Select DBE goal in $ and enter the amount in the field. b. Select DBE goal in % and enter the percentage of the DBE goal.
Federal Funding	Non-mandatory	To enter the federal funding, use the following steps: a. Select **Federal Funding in $** and enter the amount in the field. b. Select **Federal Funding in %** and enter the percentage of the Federal Funding.

6. To add **DBE Projects:**

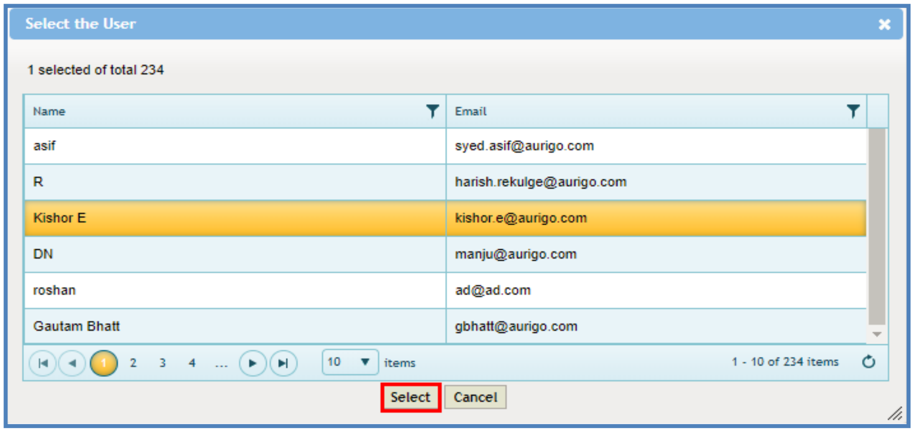


a. Click **Add**. The **Project Title** dialog box is displayed listing the projects associated with the Small Purchase Contract Request in the State Project ID grid.



b. Select one or more DBE projects and click **Select**. The selected projects are added to the grid.

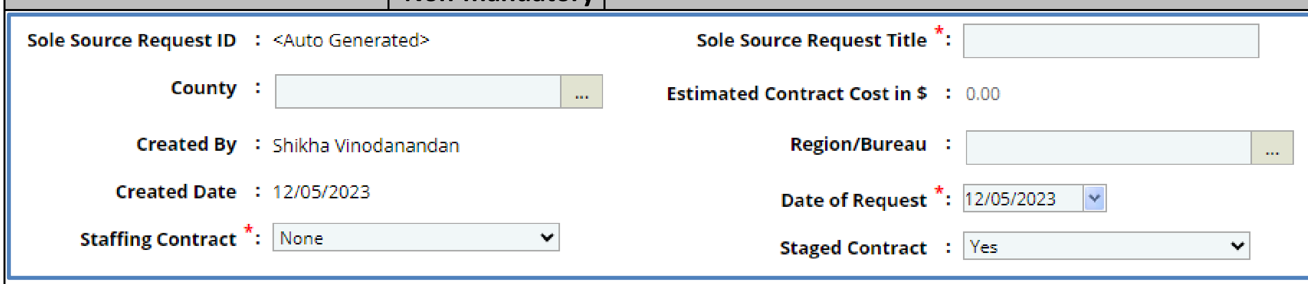
7. In **Selection for Small Purchase Contract Approved By** field complete the following steps:
   a. Click ... . The **Select the User** dialog box is displayed.



   b. Select the WisDOT user from the list and click **Select**. The name of the user is displayed in the box.
8. In the **Attachments** section, upload images and files relevant to the construction fair package.
9. Click **Save.** The **DBE Project total in % / $** box display the total of the **DBE goal in % / $**. The new **Small Purchase Contract Request** is created in **'Draft'** workflow stage.

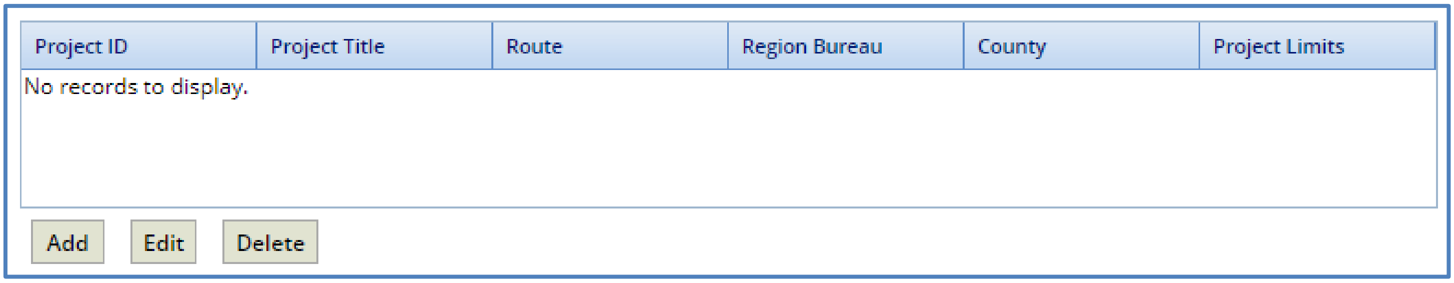
5.5 Creating Sole Source Request

1. Click **Solicitation** in the module menu.
2. In the navigation pane, expand **Non Formal** and click **Sole Source**. The Sole Source List Page is displayed.
3. Click **New**. The **Sole Source Request** page is displayed.
4. Provide the information in the fields, as described in the following table:

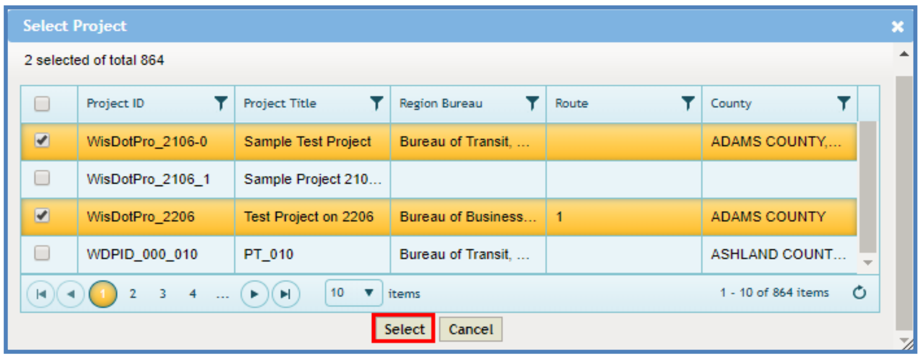
Field	Mandatory / Non-mandatory	Description
		
Sole Source Request ID	–	The unique ID for the **Sole Source Request** is auto populated.
Sole Source Request Title	Mandatory	Enter the title of the **Sole Source Request**.
Estimated Contract Cost in $	–	Displays the internal estimate contract amount of the **Sole Source Request** that is marked as **'Is Current'**.
County	Non-mandatory	To assign **County** details for the **Sole Source Request**: 1. Click ... The **County** dialog box is displayed. For availability of options in the dialog box, counties must be defined in the **County** catalog of the library. 2. Select the required counties and then click **Select**.
Created By	–	Displays the username of the user creating the record.
Created Date	–	Displays the current date from the system calendar
Region/Bureau	Non-mandatory	To select **Region/Bureau** of the **Sole Source Request**: 1. Click ... The **Region/Bureau** dialog box is displayed. For availability of options in the dialog box, region/bureaus must be defined in the **Region-Bureau** catalog of the library. 2. Select the required region/bureau and click **Select**.
Date of Request	Mandatory	By default, current date is displayed. From the calendar drop-down, select the date of **Sole Source Request**.

Field	Mandatory / Non-mandatory	Description
Staffing Contract	Mandatory	Select if this is a staffing contract.
Staged Contract	Non-Mandatory	By default, 'Yes' is selected.

- To add the **State Project ID:**

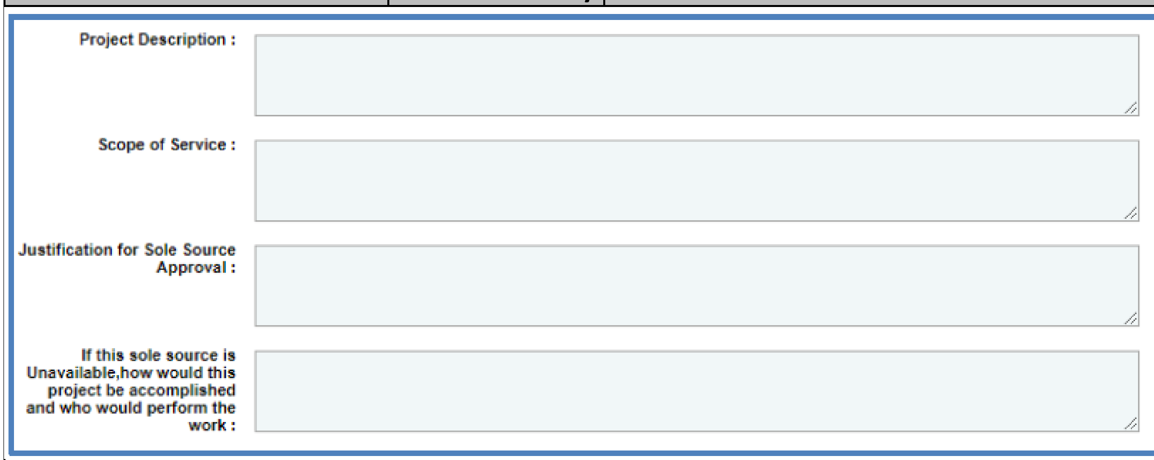


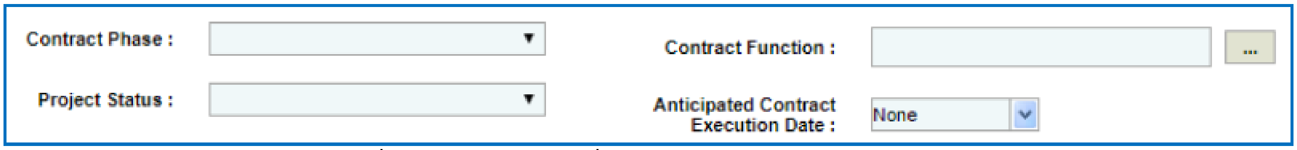
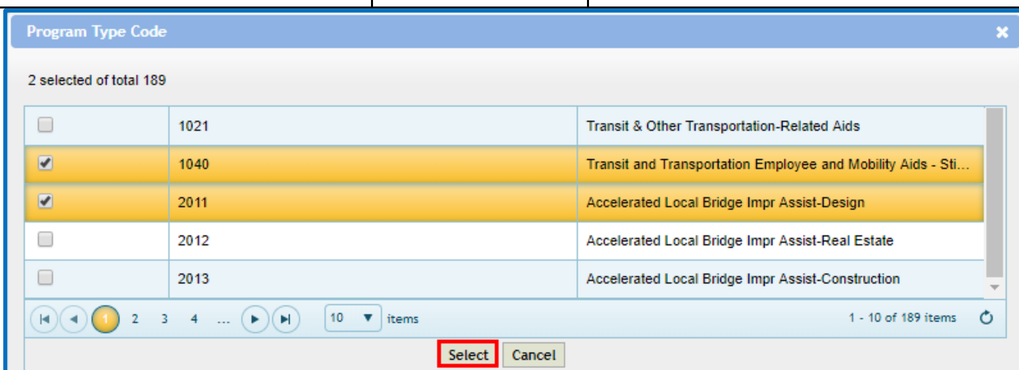
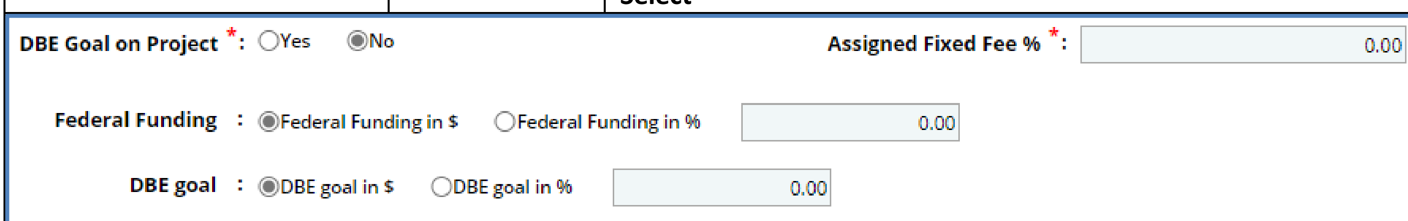
   a. Click **Add**. The **Select Project** dialog box is displayed. Based on the Region/Bureau selected, the projects are listed in the dialog box.



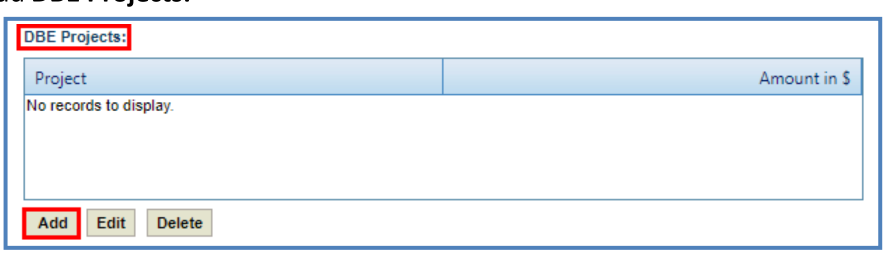
   b. Select one or more projects and click **Select**. The selected projects are added to the grid.

- Enter the information in the required fields, as described in the following table.

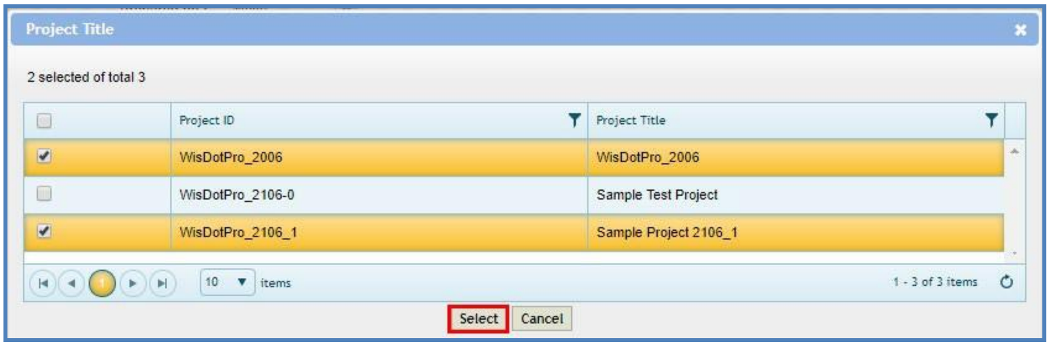
Field	Mandatory / Non-mandatory	Description
		
Project Description	Non-Mandatory	Enter the description for the project.
Scope of Service	Non-Mandatory	Enter the scope of service.
Justification for Sole Source Approval	Non-Mandatory	Enter the justification for Sole Source Approval.
If this sole source is unavailable, how would this project be accomplished and who would perform the work	Non-Mandatory	Enter the details of how the project is accomplished and who performs the work, if the sole source is unavailable.

Field	Mandatory / Non-mandatory	Description
		
Contract Phase	Non-Mandatory	From the drop-down, select the relevant phase for the contract.
Contract Function	Mandatory	To assign a contract function: a. Click ... . The **Contract Function** dialog box is displayed. b. From the list, select the contract function and click **Select**. List of options are defined in **Contract Function** catalog in the library.
Project Status	Non-Mandatory	From the drop-down, select the relevant project status for the **Sole Source request**.
Anticipated Contract Execution Date	Non-mandatory	From the drop-down calendar, select the anticipated contract execution date.
		
Program Code	Non-Mandatory	To add the Program Code: c. Click **Add**. The **Program Type Code** dialog box is displayed. From the list of program code, select the program code and click **Select**
		
Assigned Fixed Fee %	Mandatory	• Enter the fixed fee percentage to assign.
DBE goal	Non-Mandatory	• Select DBE goal in $ and enter the amount in the field. • Select DBE goal in % and enter the percentage of the DBE goal.

- To add **DBE Projects:**

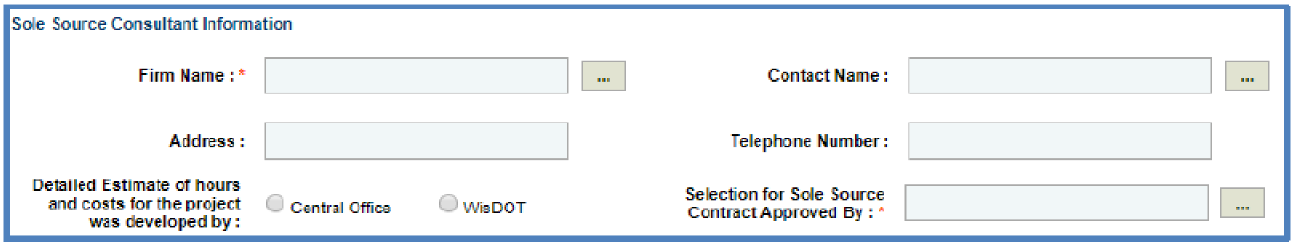


a. Click **Add**. The **Project Title** dialog box is displayed listing the projects associated with the Sole Source Request in the State Project ID grid.



b. Select one or more DBE projects and click **Select**. The selected projects are added to the grid.

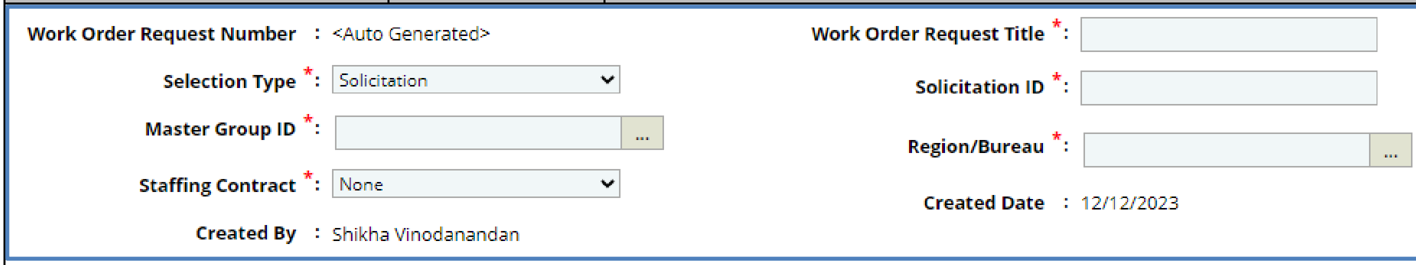
- In the **Sole Source Consultant Information** section, enter the information in the required fields, as described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Firm Name	Mandatory	1. Click ... The **Select Consultant** dialog box is displayed. 2. Select the consultant from the list and click **Select**.
Address	Non-Mandatory	On selecting the firm name, the address of the firm is auto populated. If required, make changes to the address of the firm.
Contact Name	Non-Mandatory	1. Click ... The **Select the User** dialog box is displayed. 2. Select the contact from the list and click **Select**. The name of the user is displayed in the box.
Telephone Number	Non-Mandatory	On selecting the **Contact Name**, the telephone number of the user is auto populated. If required, make changes to the telephone number of the user.
Detailed Estimate of hours and costs for the project was developed by	Non-Mandatory	• Select **Central Office**, if central office has developed the detailed estimate of hours and costs for the project. • Select **WisDOT**, if WisDOT has developed the detailed estimate of hours and costs for the project.
Selection for Sole Source Contract Approved By	Mandatory	1. Click ... The **Select the User** dialog box is displayed. 2. Select the WisDOT user from the list and click **Select**. The name of the user is displayed in the box.

- In the **Attachments** section, upload images and files relevant to the construction fair package.
- Click **Save.** The **DBE Project total in % / $** box display the total of the **DBE goal in % / $**. The new **Sole Source Request** is created in **'Draft'** workflow stage.

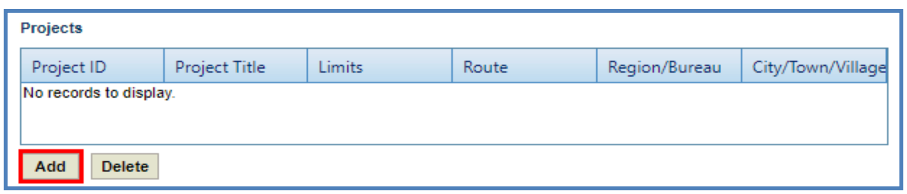
5.6.1 Creating Work Order Request

1. Click **Solicitation** in the module menu.
2. In the navigation pane, expand **Non-Formal** and click **Work Order Request**. The **Work Order Request List** page is displayed.
3. Click **New**. The **Work Order Request** page is displayed.
4. Provide the information in the fields, as described in the following table:

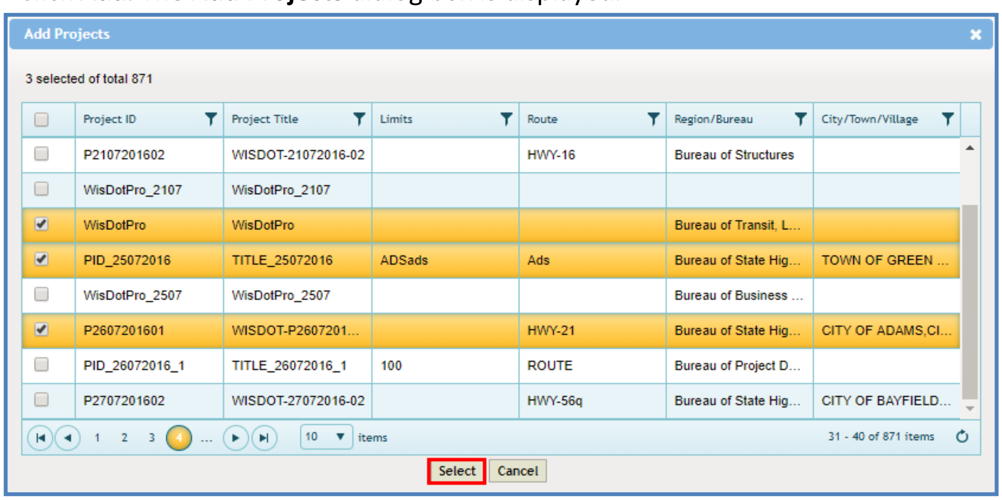


Field	Mandatory / Non-mandatory	Description
Work Order Request Number	–	The unique ID for the **Work Order Request** is auto populated.
Work Order Request Title	Mandatory	Enter the title of the **Work Order Request**.
Selection Type	Mandatory	Select Solicitation or Construction Fair from the drop down.
Master Group ID	Mandatory	To select the **Master Group ID**: 1. Click ... The **Select Master Group ID** dialog box is displayed. 2. Select the appropriate ID and then click **Select**.
Solicitation ID	–	**Solicitation ID** will be automatically filled in once you have entered the **Master Group ID**.
Staffing Contract	Mandatory	Select if this is a staffing contract.
Region/Bureau	Non-mandatory	To select **Region/Bureau** of the **Sole Source Request**: 1. Click ... The **Region/Bureau** dialog box is displayed. For availability of options in the dialog box, region/bureaus must be defined in the **Region-Bureau** catalog of the library. 2. Select the required region/bureau and click **Select**.
Created By	–	Displays the username of the user creating the record.
Created Date	–	Displays the current date from the system calendar

5. In the **Projects** section, to add the Project ID:

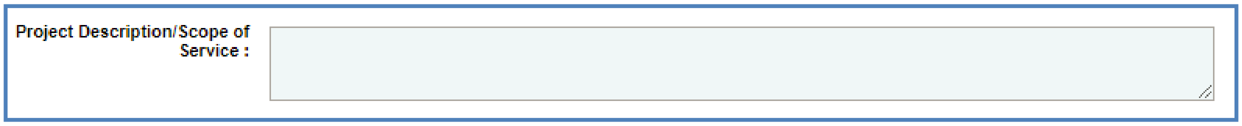


a. Click **Add.** The **Add Projects** dialog box is displayed.

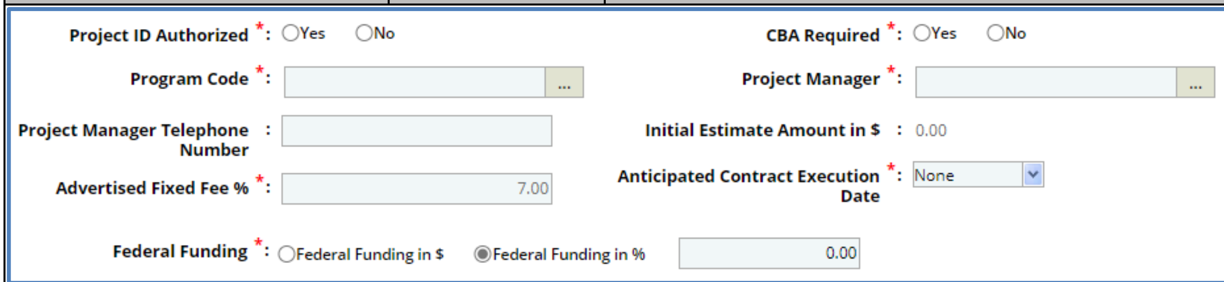


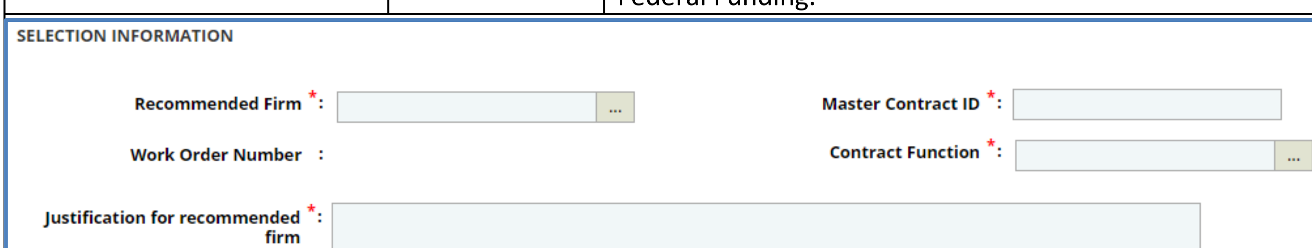
b. Select one or more projects and click **Select**. The selected projects are added to the grid.

6. In the **Project Description/Scope of Service**, enter the brief project description of the Work Order Request.



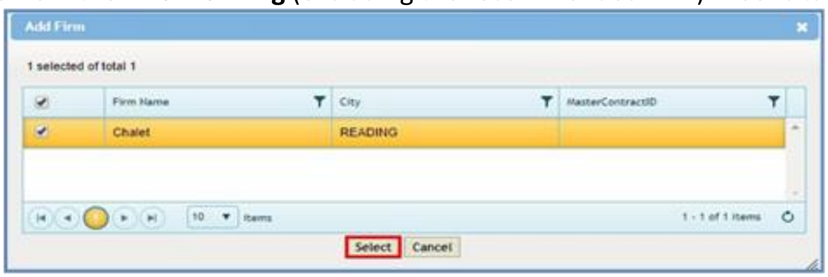
7. Enter the information in the required fields, as described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Project ID Authorized	Non-mandatory	Select '**Yes**' if the Project ID is authorized.
CBA Required	Non-mandatory	Select '**Yes**' if CBA is required.
Program Code	Non-mandatory	To add the Program Code details: 1. Click ... The **Program Type Code** dialog box is displayed. The options in the list are defined in the **Program Type Code** catalog of the library. 2. From the list of program code, select the program code and click **Select**. The selected program code is displayed.
Project Manager	Non-mandatory	To add the project manager: 1. Click ... The **Add Project Manager** dialog box is displayed. The dialog box displays all the WisDOT users listed in **User Accounts**. 2. Select the contact from the list and click **Select**. The name of the project manager is displayed in the box.
Project Manager Telephone Number	Non-Mandatory	On selecting the **Project Manager**, the telephone number is auto populated. If required, make changes to the telephone number of the project manager.
Initial Estimate Amount	–	Displays the initial estimate of the work order request that is marked '**Is Current**'.
Advertised Fixed Fee %	Mandatory	The percentage of fixed fee is auto populate based on the value defined in the **Advertised Fixed Fee %** on the **Solicitation Scope of Service** page.
Anticipated Contract Execution Date	Non-Mandatory	From the drop-down calendar, select the anticipated contract execution date.
Federal Funding	Non-mandatory	• Select **Federal Funding in $** and enter the amount in the field. Select **Federal Funding in %** and enter the percentage of the Federal Funding.

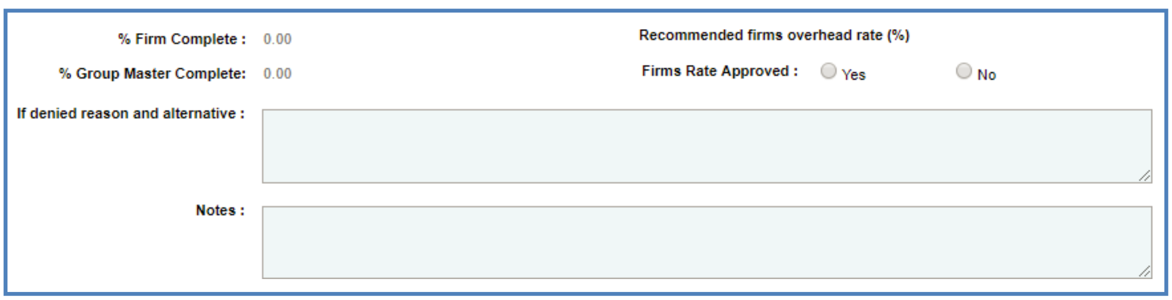


Recommended Firm	Mandatory	To add a **Recommend Firm,** follow the below steps: Click ... The **Add Firm** dialog box is displayed. The list of firms from the approved Master Contracts of the Solicitation are displayed. Select the firm and click Select. The selected firm is displayed.
Master Contract ID	Mandatory	Master Contract associated to the recommended firm is displayed.
Work Order Number	-	This field will automatically fill in.
Contract Function	Mandatory	To add the contract function: 1. Click ... The **Contract Function** dialog box is displayed. 2. Select the contract function and click **Select.**
Justification for recommended firm	Mandatory	Enter the justification for the recommended firm.

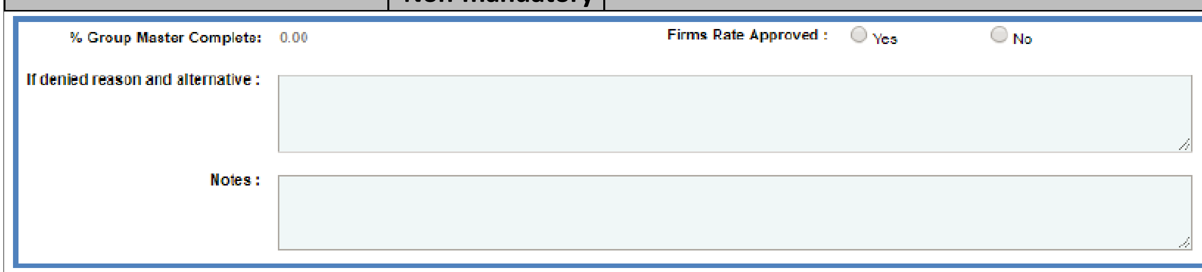
8. In the **List of Other firms qualified to complete the work** section:
   a. Click **Add** to add the other firms qualified to complete the work. The **Add Firm** dialog box is displayed. The list of firms from the **Final Ranking** (excluding the recommended firm) in Solicitation are displayed.



   b. Select the firm to add and click **Select**. The values of **% Firm Complete**, **% Group Master Complete** and **Recommended firms overhead rate (%)** are displayed.



9. Enter the information in the required fields, as described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Firms Rate Approved	Non-Mandatory	Select '**Yes**' if the firm's rate is approved**.**
If denied reason and alternative	Non-Mandatory	Enter the reason to deny and alternative.
Notes	Non-Mandatory	Enter the comments.

10. In the **Attachments** section, upload images and files relevant to the construction fair package.
11. Click **Save.** The new **Work Order Request** is created in **'Draft'** workflow stage.

5.6.2 Workflow for Work Order Request

The workflow table below describes the stages involved in the Work Order Request.

Current Stage	Action	Workflow Status (New Stage)	Comments
Draft	Submit for Review	Submitted for Review	To perform this action, the 'Internal Estimate Amount' in the Work Order Request must not exceed the 'Total Spending Authority Amount Remaining' or the 'Total Master Contract Amount Remaining'.
Submitted for Review	Submit for Division Review or Approval	Submitted for Division Review / Submitted for Approval.	• If the contract value is **greater** than $50,000, the record moves to 'Submitted for Division Review' stage. • If the contract value is **lesser** than $50,000, the record moves to 'Submitted for Approval' stage.
	Send Back for Revision	Draft	–
Submitted for Division Review	Submit for Approval	Submitted for Approval	-
	Send Back for Revision	Submitted for Review	
Submitted for Approval	Approved	Approved	-
	Send Back for Revision	Submitted for Review	

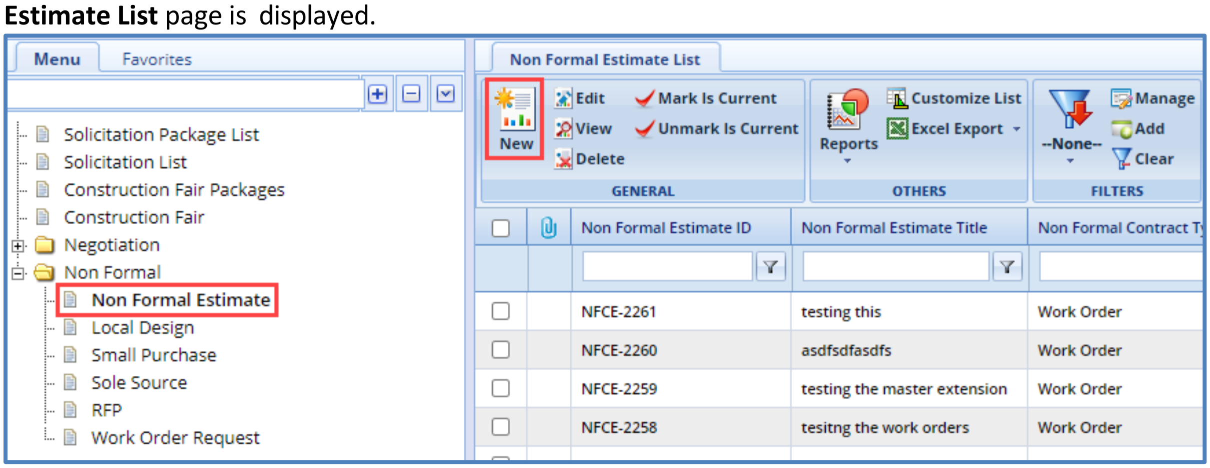
5.7 Creating Non Formal Estimate

Masterworks allow you to create an internal estimate for each of the Non Formal contract type. The functional flow of the Non Formal Estimate is described as below:

1. Select the **Non-Formal** contract type.
2. Associate the required contract **Request ID**.
3. Select the shortlisted consultant for the contract.
4. Mark the estimate as '**Is Current**' in the list page to import the task list to the **Consultant Estimate**.

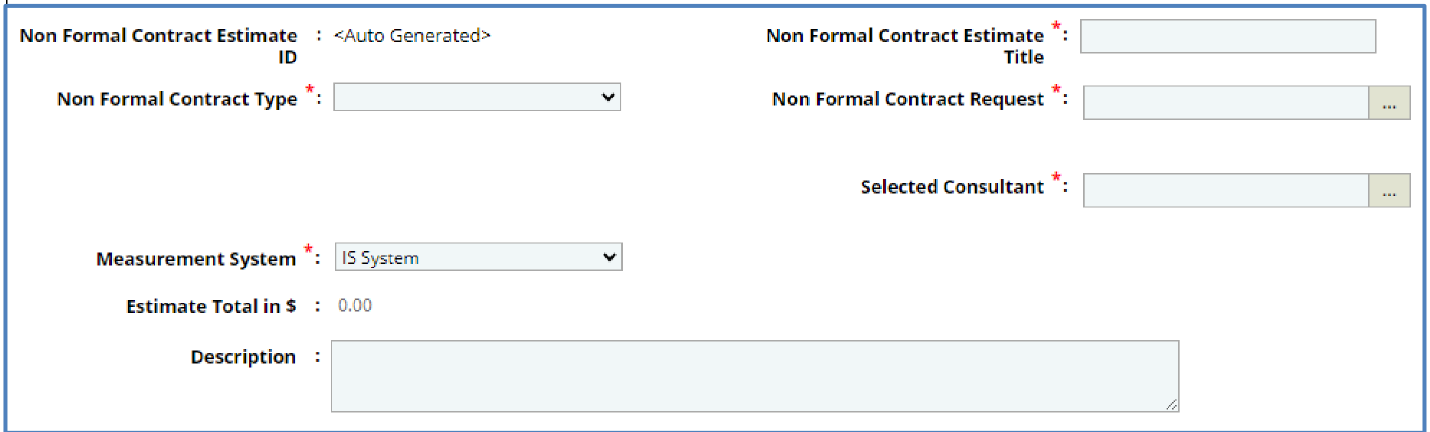
The procedure below describes the steps to create an internal **Non-Formal Estimate**. Steps:

1. In the navigation pane, expand the **Non Formal** folder, and then click **Non Formal Estimate**. The **Non Formal Estimate List** page is displayed.



2. Click **New.** The **Non Formal Contract Estimate Details** page is displayed.

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



Field	Mandatory/ Non-mandatory	Description
Non Formal Contract Estimate ID	-	A unique ID for the **Non-Formal Contract Estimate** is auto generated.
Non Formal Contract Estimate Title	Mandatory	Enter a title for the Non-Formal Contract Estimate.
Non Formal Contract Type	Mandatory	From the drop-down, select the Non-Formal contract type for which the estimate is created.
Non Formal Contract Request	Mandatory	To select a non formal contract for which estimate is being created: 1. Click ... The **Contract Request** dialog box is displayed listing all the non-formal contract requests for the selected **Non-Formal Contract Type**. 2. Select the required **Non-Formal Contract** and click **Select**.
Selected Consultant	Mandatory	To select a consultant: 1. Click ... The **Select Consultant** dialog box is displayed listing all the shortlisted consultants associated with the selected contract request. 2. Select the required consultant and click **Select**.
Measurement System	Non-Mandatory	By default, **IS System** is displayed.
Estimated Total in $	Non-Mandatory	Displays the total estimate of all the project budgets as estimate total budget.
Description	Non-Mandatory	Enter description about the project budget estimate.

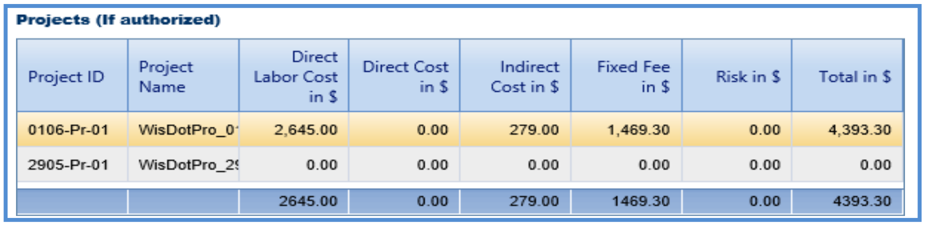
Note:

- *The **Projects (In scope excluding If authorized)** section auto-populates the total of Direct Labor Cost, Direct Cost, Indirect Cost, Fixed Fee, and Risk associated with the non formal contract. The values displayed are based on the values that are defined and marked **In Scope** as **Yes** on the **Non Formal Contract Project Estimation Details** page of the project. This section excludes the values from tasks that are marked **If authorized** as **Yes**.*

Projects (In scope excluding If authorized)

Project ID	Project Name	Direct Labor Cost in $	Direct Cost in $	Indirect Cost in $	Fixed Fee in $	Risk in $	Total in $
0106-Pr-01	WisDotPro_01	2,375.00	0.00	250.00	1,319.31	0.00	3,944.31
2905-Pr-01	WisDotPro_29	0.00	0.00	0.00	0.00	0.00	0.00
		2375.00	0.00	250.00	1319.31	0.00	3944.31

- *In the **Projects (If authorized)** section auto-populates the total of Direct Labor Cost, Direct Cost, Indirect Cost, Fixed Fee, and Risk associated with the project of non formal contract. The values displayed are based on the values defined and that are marked **If authorized** as **Yes** on the **Non Formal Contract Estimate Details** page of the project.*



Projects (If authorized)

Project ID	Project Name	Direct Labor Cost in $	Direct Cost in $	Indirect Cost in $	Fixed Fee in $	Risk in $	Total in $
0106-Pr-01	WisDotPro_0	2,645.00	0.00	279.00	1,469.30	0.00	4,393.30
2905-Pr-01	WisDotPro_29	0.00	0.00	0.00	0.00	0.00	0.00
		2645.00	0.00	279.00	1469.30	0.00	4393.30

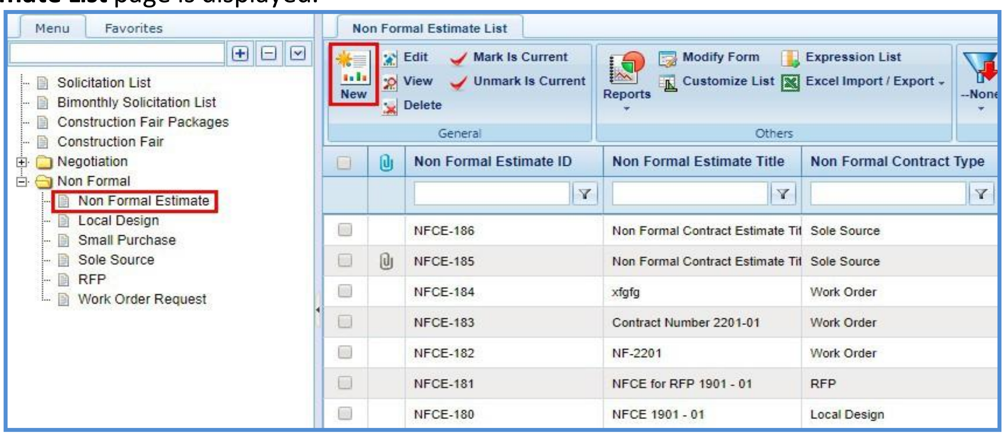
4. Click **Save**.

5.8 Defining Non-Formal Estimate Details

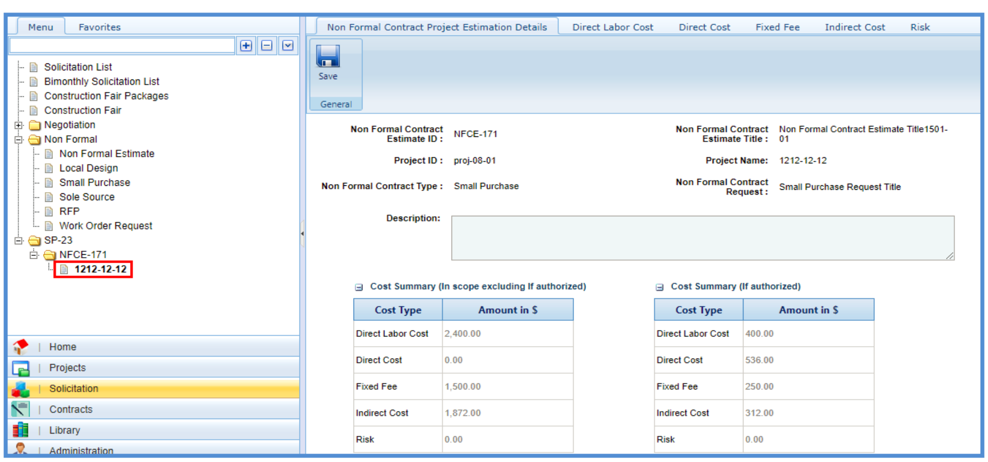
The system allows you to define estimate details for projects associated to the Non Formal contract. By default, the direct labor cost, fixed fee, and indirect costs from the Project Estimate that is marked 'Is Current' is imported to the Non Formal Estimate. The procedure to view or edit the Non Formal contract estimate details is described.

Steps:

1. Click **Solicitation** in the module menu. The **Solicitation List** page is displayed.
2. In the navigation pane, expand the **Non Formal** folder, and then click **Non Formal Estimate**. The **Non Formal Contract Estimate List** page is displayed.



3. Select a Non-Formal Estimate to define the estimate details, and then click **Edit**.
4. In the navigation pane, expand the non-formal estimate folder, click the project to define the estimate details. The **Non-Formal Contract Project Estimate Details** page is displayed.



***Note:** The values in the **Non Formal Contract Estimate ID, Non Formal Contract Estimate Title, Project ID, Project Name, Non Formal Contract Type** and **Non Formal Contract Request** are auto populated.*

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

Note:

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

Cost Summary (In scope excluding If authorized)

Cost Type	Amount in $
Direct Labor Cost	2,400.00
Direct Cost	0.00
Fixed Fee	1,500.00
Indirect Cost	1,872.00
Risk	0.00

Estimate Total in $: 5,772.00

Estimate Total Hours: 272.00

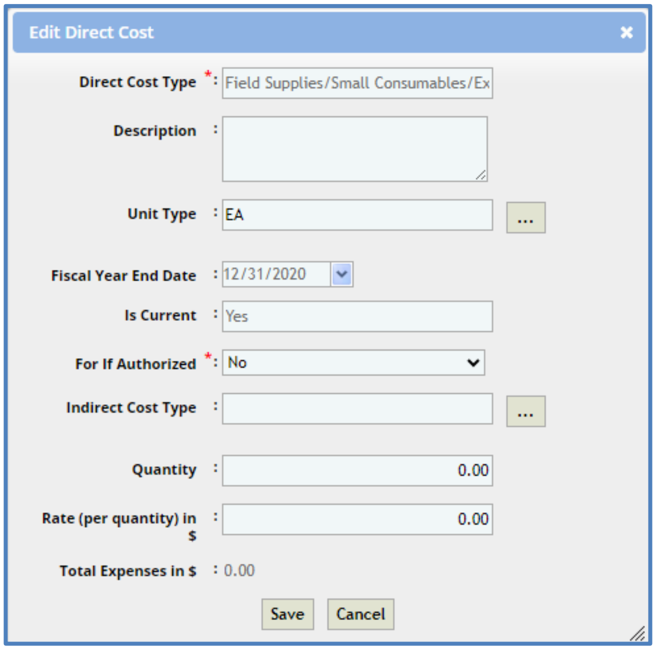
- *The **Cost Summary (If authorized)** section auto-populates the total of Direct Labor Cost, Direct Cost, Fixed Fee, Indirect Cost, and Risk based on the values entered in the respective tabs and that are marked **If authorized** as **Yes**. The sum of all these costs is also auto calculated and displayed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

Cost Summary (If authorized)

Cost Type	Amount in $
Direct Labor Cost	1,495.00
Direct Cost	3,510.00
Fixed Fee	1,255.80
Indirect Cost	224.25
Risk	0.30

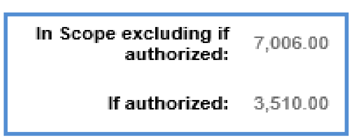
Estimate Total in $: 6,485.35

6. In the **Attachments** section, upload images and files relevant to the Non Formal estimate.
7. Click the **Direct Labor Cost** tab. The direct labor cost tasks that are defined in the project estimate are auto populated. However, you can add additional direct labor cost tasks. For more information on adding direct labor cost tasks, refer Adding Direct Labor Cost Tasks. The total of direct labor costs that are marked as in scope excluding direct labor costs that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of direct labor costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **Project Estimate Details** tab.
8. Click the **Direct Cost** tab to add direct costs associated with the project. Perform the following steps:
   a. Click **Add**. The **Direct Cost** dialog box is displayed listing all the direct costs associated with the consultant and marked as current.
   b. Select the required direct costs.
   c. Click **Select**. The selected direct costs are listed in the **Direct Cost** table.
   d. Select the direct cost for which you want to indicate as authorized, add/edit quantity, and rate details, and then click **Edit**. The **Edit Direct Cost** dialog box is displayed.
   e. Enter information in the required fields. The fields are described in the following table.



Field	Mandatory / Non-Mandatory	Description
Direct Cost Type	**-**	The name of the selected direct cost type is auto populated.
Description	**Non-mandatory**	Enter in a brief description of the direct cost.
Unit Type	**Non-mandatory**	The unit type of the selected direct cost is auto populated.
Fiscal Year End Date	**-**	The fiscal year end date associated with the direct cost is auto populate.
Is Current	**-**	Indicates whether the direct cost is marked as current.
For If authorized	**Mandatory**	From the drop-down list, select **Yes** to indicate that for the selected direct cost the **If authorized** is marked as **Yes** or select **No** to indicate that for the selected direct cost type the **If authorized** is marked as **No**. ***Note: WisDOT recommends selecting No unless there are special circumstances.***
Indirect Cost Type	**Non-mandatory**	Select the indirect cost type.
Quantity	**Non-mandatory**	Enter quantity for the direct cost.
Rate (per quantity)	**Non-mandatory**	Enter or edit the rate for one quantity of the direct cost.
Total Expenses	**-**	The total direct cost expenses based on the entered quantity and rate is auto calculated and displayed.

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



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

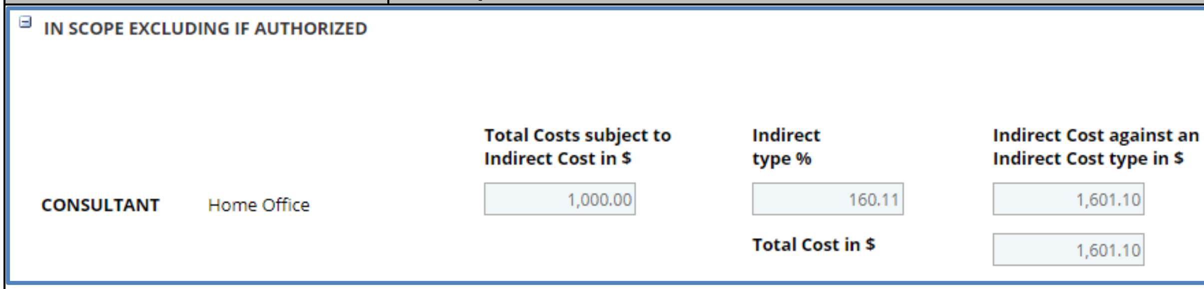
9. Click the **Fixed Fee** tab to view the fixed fee details based on the total direct labor cost defined on the **Direct Labor Cost** tab and fixed fee percentage defined on the **Solicitation Scope of Service** page. For more information on the details that are displayed, refer Fixed Fee Details step in Solicitation Task List for Regular Contract Type. The total of fixed fee that are marked as in scope excluding fixed fee that are marked as authorized are displayed in the

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

10. Click the **Indirect Cost** tab. The indirect cost details associated with the consultant and are marked as current are displayed. The different details that are displayed are described in the following table.

***Note*:**

- *Based on whether the indirect costs are marked as **Yes** for **In Scope** and **If Authorized,** the details are displayed in appropriate sections.*

Field	Description
	
Total Costs subject to Indirect Cost in $	The total cost associated with an indirect cost type for the consultant is auto populated.
Indirect type %	Indicates the percentage of indirect cost defined for the consultant.
Indirect Cost against an Indirect Cost type 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 %.
Total Cost in $	Indicates the total indirect cost amount of all the indirect cost types associated with the consultant. The value is the auto calculated based on the total of indirect costs of all the indirect cost types.

11. The total of indirect costs that are marked as in scope excluding indirect costs that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of indirect costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **WisDOT Negotiation Estimate Details** tab.
12. Click the **Risk** tab to add risks associated with the project. To add risks, refer Adding Risks step in Solicitation Task List for Regular Contract Type. The total of risks that are marked as in scope excluding fixed fee that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of risks that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **WisDOT Negotiation Estimate Details** tab.
13. Click **Save**.

6 Negotiations

The procedures to create an internal estimate and finalizing scope for the consultants to submit their estimate for negotiation are described.

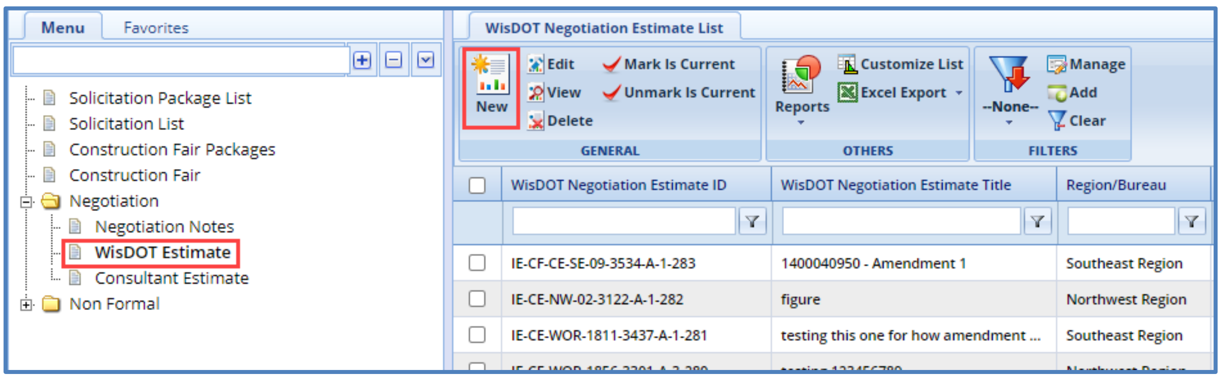
6.1 WisDOT Estimate

6.1.1 Creating WisDOT Estimate

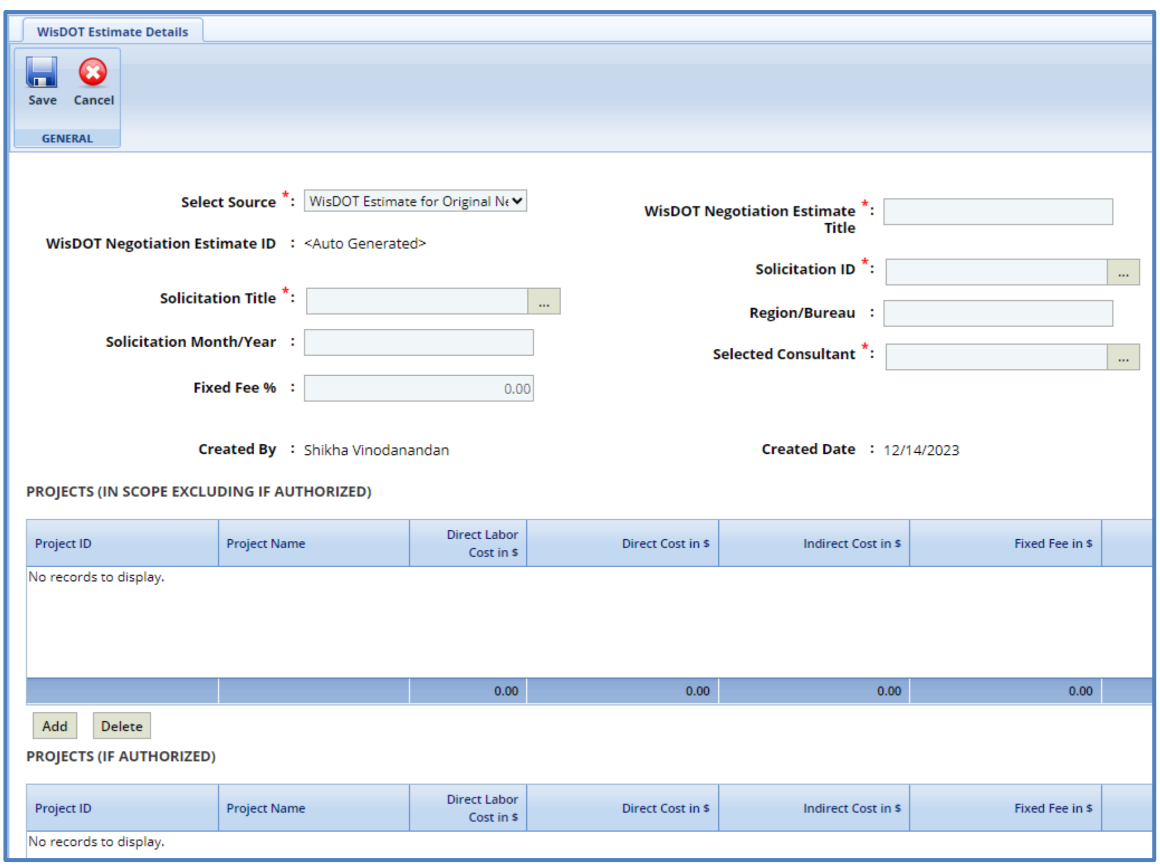
The system allows you to create an internal estimate for each of the finally ranked consultant for negotiation purposes. The internal estimate can be created only for solicitations of Regular Contract Type. The procedure to create an internal WisDOT Estimate is described.

Steps:

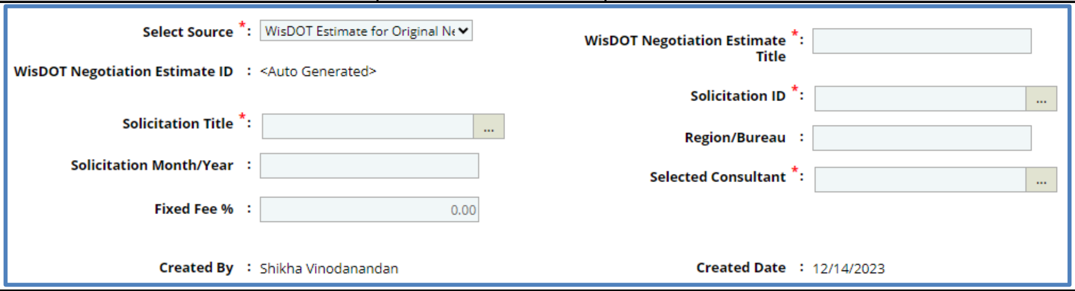
1. Click **Solicitation** in the module menu. The **Solicitation List** page is displayed.
2. In the navigation pane, expand the **Negotiation** folder, and then click **WisDOT Estimate**. The **WisDOT Negotiation Estimate List** page is displayed.



3. Click **New.** The **WisDOT Negotiation Estimate Details** page is displayed.



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

Field	Mandatory/ Non-mandatory	Description
		
Select Source	Mandatory	Select if this is an estimate for an original negotiation or an amendment.
WisDOT Negotiation Estimate ID	–	A unique ID for the internal negotiation estimate is auto generated.
WisDOT Negotiation Estimate Title	Mandatory	Enter a title for the internal negotiation estimate.
Solicitation Title	Mandatory	To select a Solicitation for which the internal negotiation estimate is being created: 1. Click ... The **Select Solicitation** dialog box is displayed listing all the published solicitations. 2. Select the required solicitation and click **Select**.
Solicitation ID	Mandatory	To select a Solicitation for which the internal negotiation estimate is being created: 1. Click ... The **Select Solicitation** dialog box is displayed listing all the solicitations associated with the selected solicitation and for which the **Contract Type** is Regular. 2. Select the required solicitation and click **Select**. The values in the **Solicitation Month/Year** and **Region/Bureau** fields are auto populate.
Solicitation Month/Year	–	The Solicitation Month/Year is auto populated.
Region/Bureau	–	The region/bureau with which the solicitation is associated is auto populate.
Fixed Fee %	–	The percentage of fixed fee is auto populate based on the value defined in the **Advertised Fixed Fee %** field on the **Solicitation Scope of Service** page.
Selected Consultant	Mandatory	To select a consultant associated solicitation for which the internal negotiation estimate is being created: 1. Click ... The **Select Consultant** dialog box is displayed listing all the finally ranked consultants associated with the selected solicitation. 2. Select the required consultant and click **Select**.
Created By	-	The author of the estimate is auto generated.
Created Date	-	The date of creation is auto generated.

Note:

- *In the **Projects (In scope excluding If authorized)** section auto-populates the total of Direct Labor Cost, Direct Cost, Indirect Cost, Fixed Fee, and Risk associated with the project of solicitation for negotiation. The values displayed are based on the values that are defined and marked **In Scope** as **Yes** on the **WisDOT Negotiation Estimate Details** page of the project. This section excludes the values that are marked **If authorized** as **Yes**.*
  - **Projects (In scope excluding If authorized)**

Project ID	Project Name	Direct Labor Cost in $	Direct Cost in $	Indirect Cost in $	Fixed Fee in $	Risk in $	Total in $
0106-Pr-01	WisDotPro_0	2,375.00	0.00	250.00	1,319.31	0.00	3,944.31
2905-Pr-01	WisDotPro_2	0.00	0.00	0.00	0.00	0.00	0.00
		2375.00	0.00	250.00	1319.31	0.00	3944.31

- *In the **Projects (If authorized)** section auto-populates the total of Direct Labor Cost, Direct Cost, Indirect Cost, Fixed Fee, and Risk associated with the project of solicitation for negotiation. The values displayed are based on the values defined and that are marked **If authorized** as **Yes** on the **WisDOT Negotiation Estimate Details** page of the project.*

Projects (If authorized)

Project ID	Project Name	Direct Labor Cost in $	Direct Cost in $	Indirect Cost in $	Fixed Fee in $	Risk in $	Total in $
0106-Pr-01	WisDotPro_0	2,645.00	0.00	279.00	1,469.30	0.00	4,393.30
2905-Pr-01	WisDotPro_2	0.00	0.00	0.00	0.00	0.00	0.00
		2645.00	0.00	279.00	1469.30	0.00	4393.30

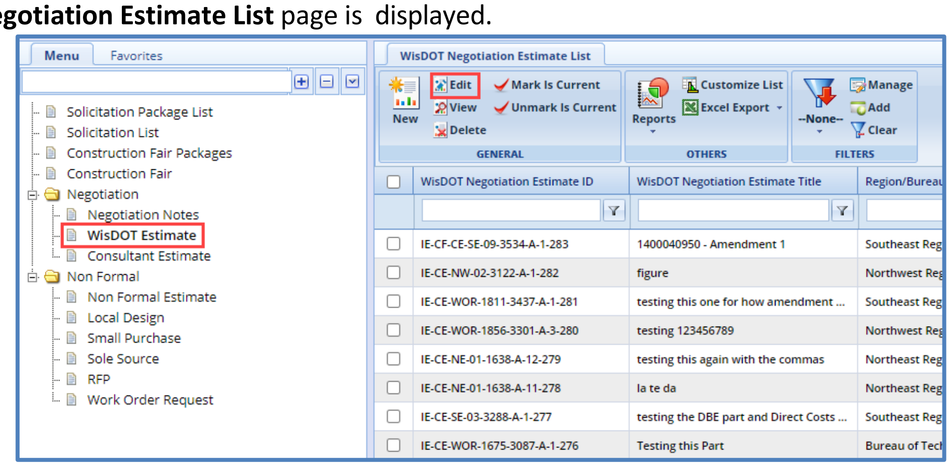
5. Click **Save**.

6.1.2 Defining WisDOT Estimate Details

The system allows you to define WisDOT estimate details for projects associated with the selected solicitation for negotiation. By default, the direct labor cost, fixed fee, and indirect costs associated with the project are part of the negotiation estimate. However, additional direct labor costs, direct costs, and risks associated with the project can be added to the negotiation estimate. The procedure to view and define WisDOT estimate details is described.

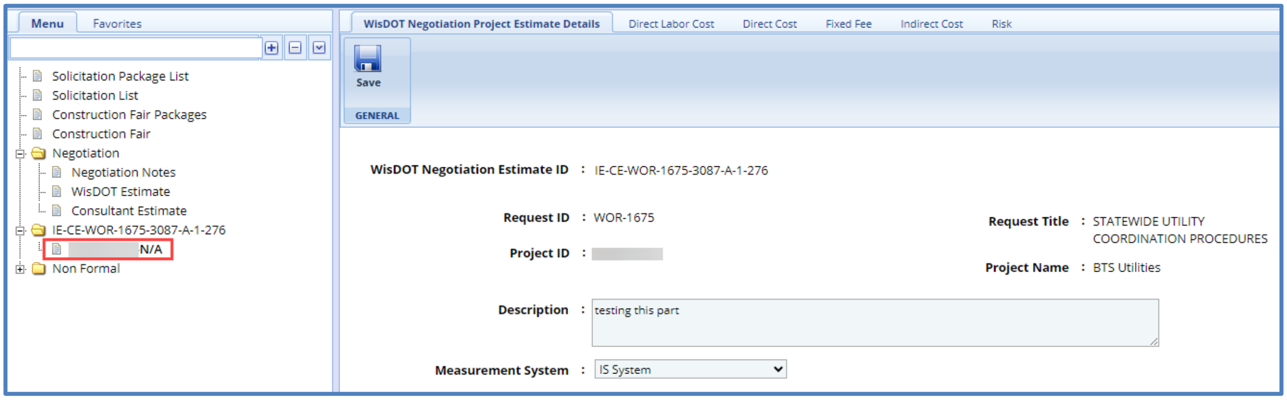
Steps:

1. Click **Solicitation** in the module menu. The **Solicitation List** page is displayed.
2. In the navigation pane, expand the **Negotiation** folder, and then click **WisDOT Estimate**. The **WisDOT Negotiation Estimate List** page is displayed.



3. Select a WisDOT negotiation estimate for which you want to view or define estimate details, and then click **Edit**.

4. In the navigation pane, expand the negotiation estimate folder, click the project ID to define the estimate details. The **WisDOT Negotiation Estimate Details** page is displayed.



Note: *The values in the* ***WisDOT Negotiation Estimate ID, Solicitation ID, Solicitation Month and Year, Project ID, Project Name,*** *and* ***Measurement System*** *are auto populated.*

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

Note:

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

Cost Summary (In scope excluding If authorized)

Cost Type	Amount in $
Direct Labor Cost	7,048.84
Direct Cost	7,006.00
Fixed Fee	1,867.08
Indirect Cost	746.15
Risk	0.30

Estimate Total in $: 16,668.37

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

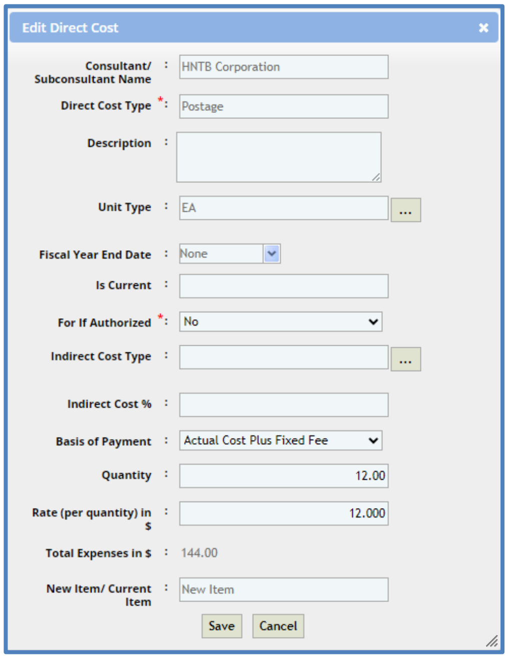
Cost Summary (If authorized)

Cost Type	Amount in $
Direct Labor Cost	1,495.00
Direct Cost	3,510.00
Fixed Fee	1,255.80
Indirect Cost	224.25
Risk	0.30

Estimate Total in $: 6,485.35

6. In the **Attachments** section, upload images and files relevant to the negotiation estimate.

7. Click the **Direct Labor Cost** tab. The direct labor cost tasks that are defined in the project estimate are auto populated. However, you can add additional direct labor cost tasks. For more information on adding direct labor cost tasks, refer Adding Direct Labor Cost Tasks. The total of direct labor costs that are marked as in scope excluding direct labor costs that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of direct labor costs that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **WisDOT Negotiation Estimate Details** tab.
8. Click the **Direct Cost** tab to add direct costs associated with the project. Perform the following steps:
   a. Click **Add**. The **Direct Cost** dialog box is displayed listing all the direct costs associated with the consultant and marked as current.
   b. Select the required direct costs.
   c. Click **Select**. The selected direct costs are listed in the **Direct Cost** table.
   d. Select the direct cost for which you want to indicate as authorized, add/edit quantity, and rate details, and then click **Edit**. The **Edit Direct Cost** dialog box is displayed.



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

Field	Mandatory / Non-Mandatory	Description
Direct Cost Type	**Mandatory**	The name of the selected direct cost type is auto populated.
Description	**Non-mandatory**	Enter in a brief description of the direct cost.
Unit Type	**Non-mandatory**	The unit type of the selected direct cost is auto populated.
Fiscal Year End Date	**-**	The fiscal year end date associated with the direct cost is auto populated.
Is Current	**-**	Indicates whether the direct cost is marked as current.
For If authorized	**Mandatory**	From the drop-down list, select **Yes** to indicate that for the selected direct cost the **If authorized** is marked as **Yes** or select **No** to indicate that for the selected direct cost type the **If authorized** is marked as **No**.
Indirect Cost Type	**Non-mandatory**	Indicate if this a part of indirect cost.
Indirect Cost %	**Non-mandatory**	Indicate the percentage of indirect cost.
Basis of Payment	**-**	The basis of payment is auto populated.
Quantity	**Non-mandatory**	Enter quantity for the direct cost.
Rate (per quantity)	**Non-mandatory**	Enter or edit the rate for one quantity of the direct cost.
Total Expenses	**-**	The total direct cost expenses based on the entered quantity and rate is auto calculated and displayed.
New Item/Current Item	**-**	Indicates if this is a new or current item.

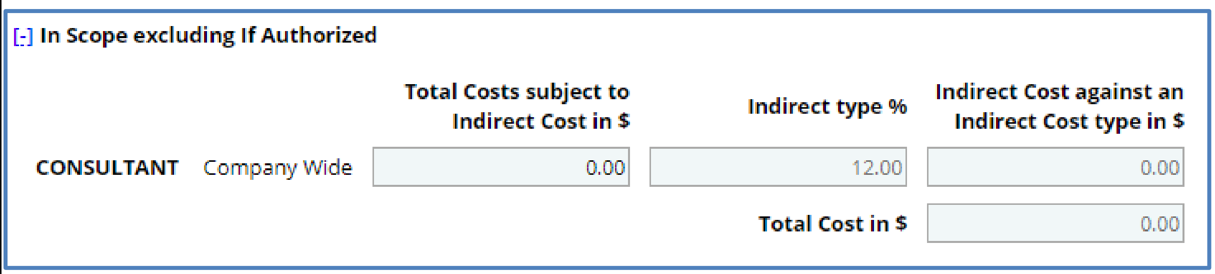
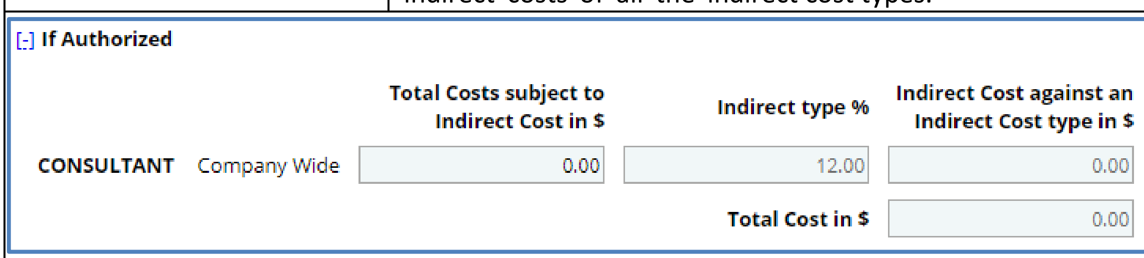
***Note**: The total of direct costs that are in scope is auto calculated and displayed in the **In Scope excluding if authorized** field and the total of direct costs that are indicated as authorized is auto calculated and displayed in the **If authorized** field.*

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

9. Click the **Fixed Fee** tab to view the fixed fee details based on the total direct labor cost defined on the **Direct Labor Cost** tab and fixed fee percentage defined on the **Solicitation Scope of Service** page. For more information on the details that are displayed, refer [Fixed Fee Details](#) step in Solicitation Task List for Regular Contract Type. The total of fixed fee that are marked as in scope excluding fixed fee that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of fixed fees that are marked as authorized are displayed in the **Cost Summary (If authorized)** section of the **WisDOT Negotiation Estimate Details** tab.
10. Click the **Indirect Cost** tab. The indirect cost details associated with the consultant and are marked as current are displayed. The different details that are displayed are described in the following table.

Note:

- *Based on whether the indirect costs are marked as **Yes** for **In Scope** and **If Authorized,** the details are displayed in appropriate sections.*

Field	Description
	
Total costs subject to indirect cost in $	The total direct labor cost associated with an indirect cost type for the consultant is auto populated.
Indirect type %	Indicates the percentage of indirect cost defined for the consultant.
Indirect cost against an indirect cost type 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 %.
Total Cost in $	Indicates the total indirect cost amount of all the indirect cost types associated with the consultant. The value is the auto calculated based on the total of indirect costs of all the indirect cost types.
	
Total costs subject to indirect cost in $	The total direct labor cost is auto populated.

Indirect type %	Indicates the percentage of indirect cost defined for the consultant.
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 %.
Total Cost In $	The total indirect cost in the **If Authorized** section including G&A costs of the section is auto calculated and displayed.

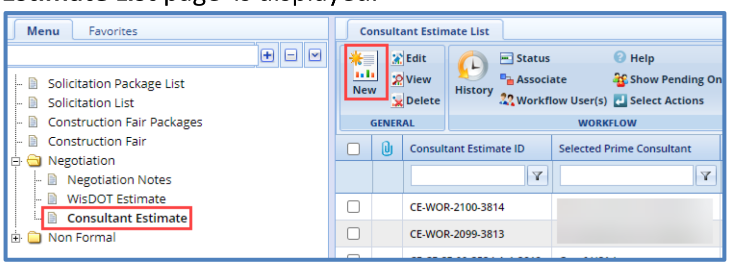
11. The total of indirect costs that are marked as in scope excluding indirect costs that are marked as authorized are displayed in the **Cost Summary (In scope excluding If authorized)** section and total of indirect costs that are marked as authorized are displayed in the **Cost Summary (If authorized)**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

6.2 Consultant Estimate

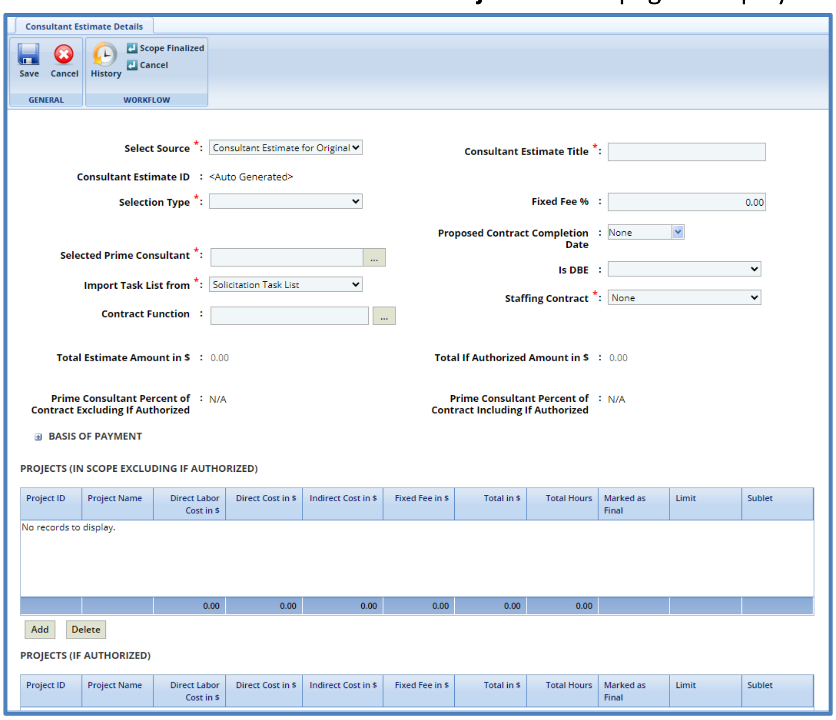
6.2.1 Finalizing the Scope of Consultant Estimate

The system allows you to finalize the scope items for the consultants to provide their estimate for these scope items.
Steps:

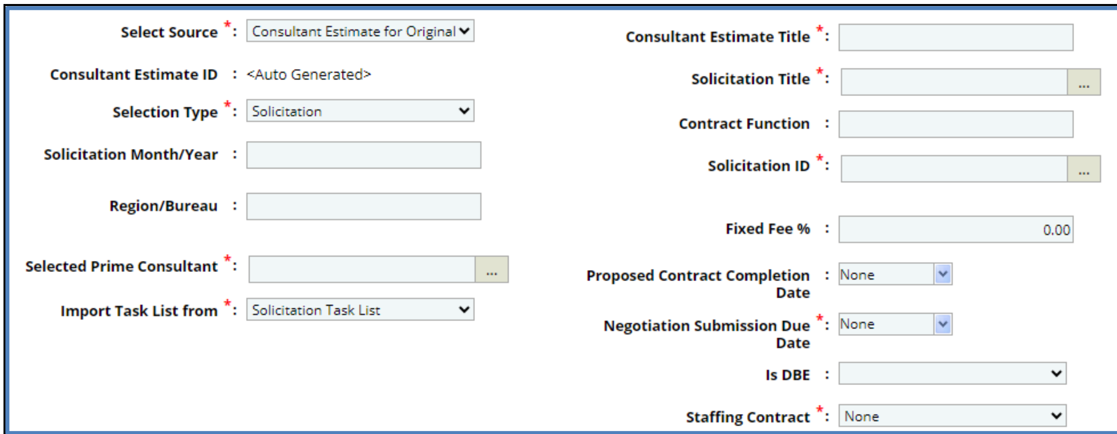
1. Click **Solicitation** in the module menu. The **Solicitation List** page is displayed.
2. In the navigation pane, expand the **Negotiation** folder, and then click **Consultant Estimate List**. The **Consultant Estimate List** page is displayed.



3. Click **New**. The **Consultant Estimate Project Details** page is displayed.



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



Field	Mandatory / Non-mandatory	Description
Select Source	Mandatory	Select from the drop down if this estimate is for a contract or an amendment.
Consultant Estimate ID	-	A unique ID for the consultant estimate is auto- generated.
Consultant Estimate Title	Mandatory	Enter a title for the consultant estimate.
Selection Type	Mandatory	From the drop-down list, select the required option. • **Solicitation: Select this option. The Solicitation Title, Solicitation Month/Year, Solicitation ID, and Region/Bureau fields are displayed.**
Solicitation Title	Mandatory	This field is displayed only when the value in the **Selection Type** field is **Solicitation**. To select a solicitation associated with the solicitation: 1. Click ... . The **Select Solicitation** dialog box is displayed listing all the finally ranked solicitations. 2. Select the required solicitation and click **Select**.
Solicitation ID	Mandatory	This field is displayed only when the value in the **Selection Type** field is **Solicitation**. To select a solicitation associated with the solicitation: 1. Click ... The **Select Solicitation** dialog box is displayed listing all the solicitations that are associated with the selected solicitation and the contract type is regular. 2. Select the required solicitation and click **Select**.
Solicitation Month/Year	-	When solicitation is selected, the month and year of the solicitation is auto populated.
Region/Bureau		When solicitation is selected, the region/bureau associated with the selected solicitation is auto populated.
Fixed Fee %	-	The fixed fee percentage of the consultant is auto populated.
Selected Prime Consultant	Mandatory	To select a prime consultant: 1. Click ... The Select Prime Consultant dialog box is displayed listing all the consultants listing all consultants who are finally ranked. Select the required consultant and click Select.
Proposed Contract Completion Date	Non-Mandatory	From the calendar select the proposed contract completion date.
Import Task List from	Mandatory	From the drop-down list, select the required option from where the tasks must be imported for the consultant estimation.
Negotiation Submission Due Date	Mandatory	From the calendar select the day the negotiation must be submitted.
Is DBE	Non-Mandatory	From the drop down, select if this is a DBE contract.

Staffing Contract	Mandatory	From the drop down, select if this is a staffing contract.

***Note**: When a solicitation is selected in the **Solicitation ID** field, the system auto-populates the projects*

Projects (In scope excluding If authorized)

Project ID	Project Name	Direct Labor Cost in $	Direct Cost in $	Indirect Cost in $	Fixed Fee in $	Marked as Final	Total in $
WD001	Budget Estim:	0.00	0.00	0.00	0.00		0.00
2313-12-32	3423423	0.00	0.00	0.00	0.00		0.00
		0.00	0.00	0.00	0.00		0.00

Projects (If authorized)

Project ID	Project Name	Direct Labor Cost in $	Direct Cost in $	Indirect Cost in $	Fixed Fee in $	Marked as Final	Total in $
WD001	Budget Estim:	0.00	0.00	0.00	0.00		0.00
2313-12-32	3423423	0.00	0.00	0.00	0.00		0.00
		0.00	0.00	0.00	0.00		0.00

*associated with the selected solicitation in the **Projects (In scope excluding If authorized)** and **Projects (If authorized)** sections. The projects are listed in the appropriate section based on the project tasks are marked as **Yes** for In Scope and If Authorized.*

5. For the **DBE Goal on Project** field, select if there is a DBE goal for this project.
6. If this is the first consultant estimate for this project, check the **Is First Consultant Estimate** box.
7. If there is a DBE goal for this project, select if you will enter this is dollar or as a percentage and enter in the goal.
8. In the **Notes** field, enter notes about the scope items for consultant estimation.
9. In the **Attachments** section, upload images and files relevant to the scope items for consultant estimate.
10. Click **Save**.
8. In the **Workflow** group, click **Select Actions**, and then click **Scope Finalized**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The scope of work is available for consultants to provide their estimation.

6.2.2 Completing Negotiation and Approving Estimates

Once all the estimates are received from consultants, you can close the negotiation by either approving or rejecting the consultant estimates.
Steps:

1. On the **Consultant Estimate List** page, select the record that is in the **Published** stage.
2. In the **Workflow** group, click **Select Actions**, and then click **Negotiation Completed**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.**
3. Select the record in the **Negotiation Completed** stage and in the **Workflow** group, click **Select Actions**, and then click **Approved for Contract**. Optionally, you can click **Send Back to Publish**, then **Redraft** to redraft the consultant estimation.

7 Contracts

Once the negotiation with consultants is completed, based on the contract type associated with the solicitation, regular or master contracts are created and approved. The procedure to create and approve regular and master contracts are described.

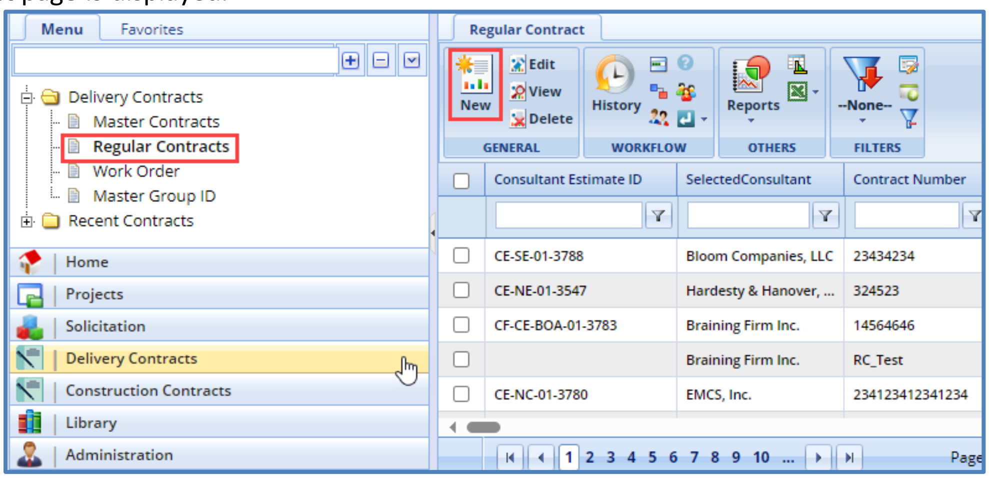
7.1 Creating Regular Contracts

Based on the selection type, the system allows you to create regular contracts, which has consultant estimate in the **Approved for Contract** stage. Each of these selection types is discussed below:

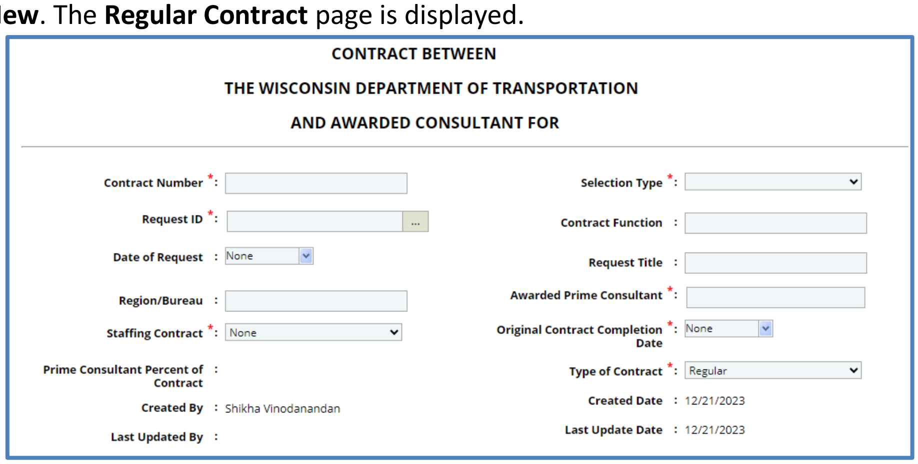
Pre-requisite: The consultant estimate must be in the **Approved for Contract** stage.

Steps:

1. In the module menu, click **Delivery Contracts**.
2. In the navigation pane, expand the **Delivery Contracts** folder, and then click **Regular Contracts**. The **Regular Contract** page is displayed.

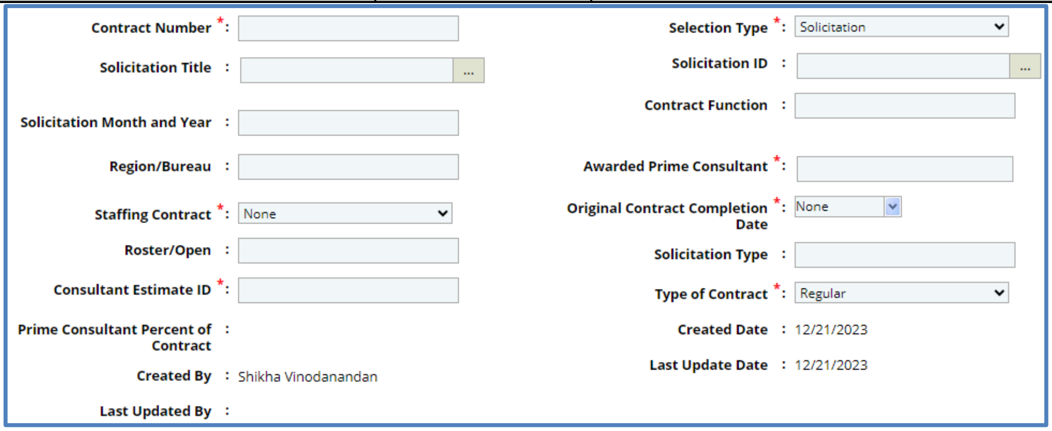


3. Click **New**. The **Regular Contract** page is displayed.



7.1.2 For Solicitation:

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



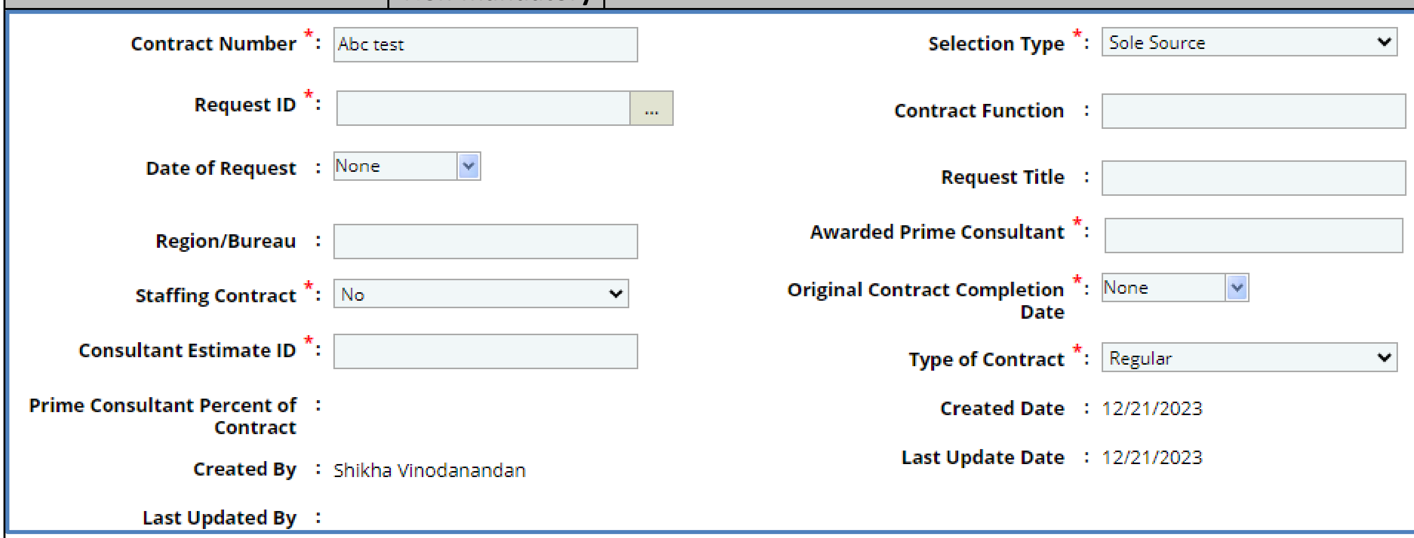
Field	Mandatory / Non-mandatory	Description
Contract Number	Mandatory	Enter a unique number for the contract.
Selection Type	Mandatory	From the drop-down list, select **Solicitation**.
Solicitation Title	Non-mandatory	This field is displayed only when the **Selection Type** is **Solicitation**. To select the solicitation: 1. Click ... The Select Solicitation dialog box is displayed listing all the published solicitations. 2. Select the required solicitation and click Select.
Solicitation ID	Mandatory	This field is displayed only when the **Selection Type** is **Solicitation**. To select a solicitation: 1. Click ... The Select Solicitation dialog box is displayed listing all the solicitations associated with the selected solicitation and for which the consultant estimate is in the Approved for Contract stage. Select the required solicitation and click Select. The values in the Solicitation Month/Year, Roster/Open, Awarded Prime Consultant, and Solicitation Type fields are auto populated.
Solicitation Month and Year	–	This field is displayed only when the **Selection Type** is **Solicitation**. The month and year of the selected solicitation is auto populated.
Contract Function	Non-mandatory	The contract function of the selected solicitation is auto populated.
Region/Bureau	Non-mandatory	The region/bureau of the selected solicitation is auto populated.
Awarded Prime Consultant	Mandatory	The name of the prime consultant firm to whom the contract is awarded is auto populated.
Staffing Contract	Mandatory	Select from the dropdown if this is a staffing contract.
Original Contract Completion Date	Mandatory	From the drop-down calendar, select the original completion date of the contract.
Roster/Open	–	This field is displayed only when the **Selection Type** is **Solicitation**. The value in this field is auto populated indicating whether the solicitation is associated with Roster/Open.
Solicitation Type	–	This field is displayed only when the **Selection Type** is **Solicitation**. The type of selected solicitation is auto populated.

Consultant Estimate ID	Mandatory	The consultant estimate ID with which the contract is associated is auto populated.
Type of Contract	Mandatory	Select if this is a regular or master contract from the dropdown.
Prime Consultant Percent of Contract	–	The prime consultant's percent of the contract is auto populated.
Created Date	–	The contract's creation date is auto populated.
Created By	–	Masterworks will auto populate the user that created this contract.
Last Update Date	–	The contract's last updated date is auto populated.
Last Updated By	–	Masterworks will auto populate the user that last updated this contract.

7.1.3 For Sole Source:

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

Field	Mandatory / Non-mandatory	Description



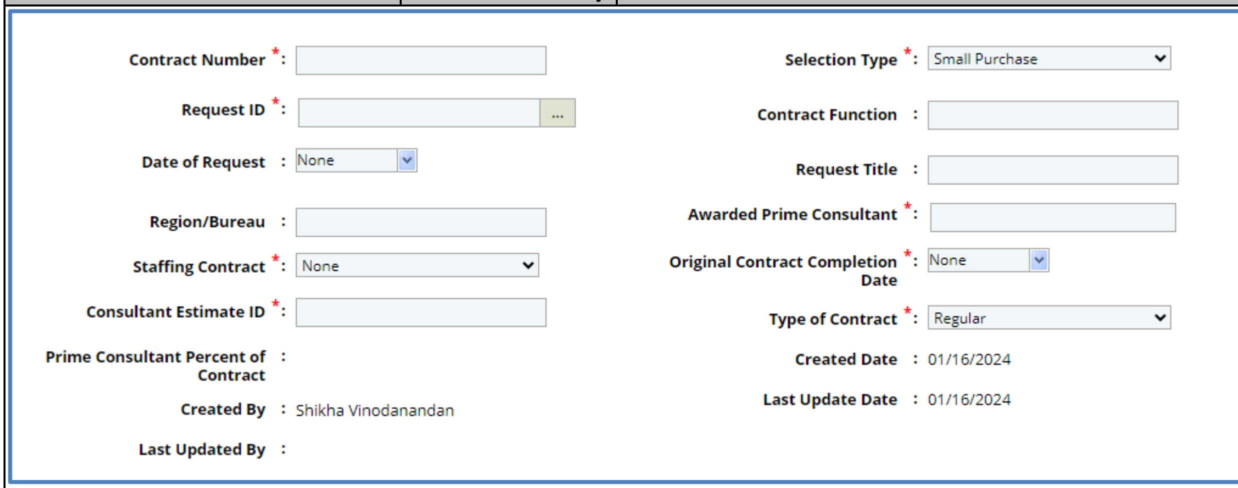
Contract Number	Mandatory	Enter a unique number for the contract.
Selection Type	Mandatory	From the drop-down list, select **Sole Source**.
Request ID	Non-mandatory	To select the Request ID: 1. Click ... The Select Solicitation dialog box is displayed listing all the published solicitations. 2. Select the required solicitation and click Select. The values in the **Request Title** and **Awarded Prime Consultant** fields are auto populated.
Contract Function	–	The contract function of the selected solicitation is auto populated.
Date of Request	–	From the drop-down calendar, select the date of request.
Request Title	–	The title of the request is auto populated.
Region/Bureau	–	The region/bureau of the selected solicitation is auto populated.
Awarded Prime Consultant	–	The name of the prime consultant firm to whom the contract is awarded is auto populated.
Staffing Contract	Mandatory	Select from the dropdown if this is a staffing contract.

Original Contract Completion Date	Non-mandatory	From the drop-down calendar, select the original completion date of the contract.
Consultant Estimate ID	Mandatory	The consultant estimate ID with which the contract is associated is auto populated.
Type of Contract	–	From the drop-down list, select the type of contract.
Prime Consultant Percent of Contract	–	The prime consultant's percent of the contract is auto populated.
Created Date	–	The contract's creation date is auto populated.
Created By	–	Masterworks will auto populate the user that created this contract.
Last Update Date	–	The contract's last updated date is auto populated.
Last Updated By	–	Masterworks will auto populate the user that last updated this contract.

7.1.4 For Small Purchase:

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

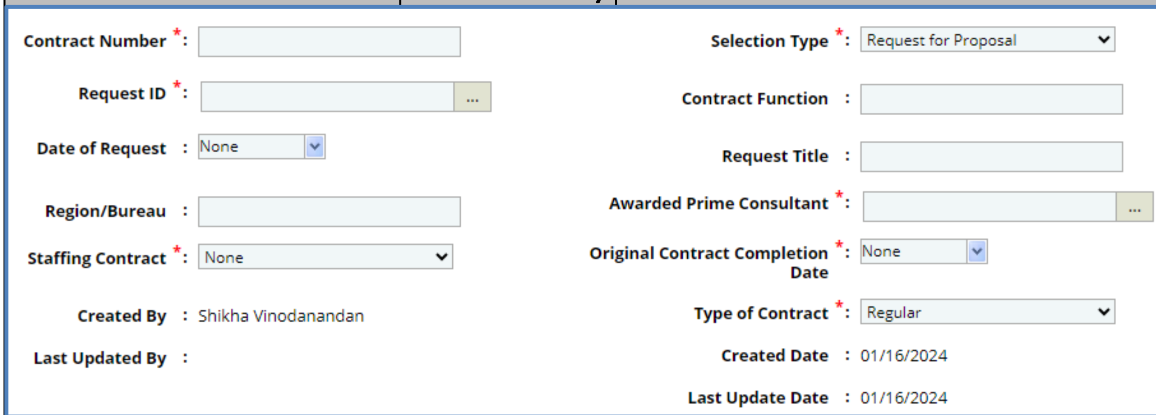
Field	Mandatory / Non-mandatory	Description



Contract Number	Mandatory	Enter a unique number for the contract.
Selection Type	Mandatory	From the drop-down list, select **Small Purchase**.
Request ID	Non-mandatory	To select the Request ID: 1. Click ... The Select Solicitation dialog box is displayed listing all the published solicitations. 2. Select the required solicitation and click Select. The values in the **Request Title** and **Awarded Prime Consultant** fields are auto populated.
Contract Function	–	The contract function of the selected solicitation is auto populated.
Request Title	-	The title of the request is auto populated.
Date of Request	–	From the drop-down calendar, select the date of request.
Region/Bureau	–	The region/bureau of the selected solicitation is auto populated.
Awarded Prime Consultant	–	The name of the prime consultant firm to whom the contract is awarded is auto populated.
Staffing Contract	Mandatory	Select from the dropdown if this is a staffing contract.
Original Contract Completion Date	Mandatory	From the drop-down calendar, select the original completion date of the contract.
Consultant Estimate ID	Mandatory	The consultant estimate ID the contract is associated with is auto populated.
Type of Contract	Mandatory	From the drop-down list, select the type of contract.

7.1.5 For Request for Proposal:

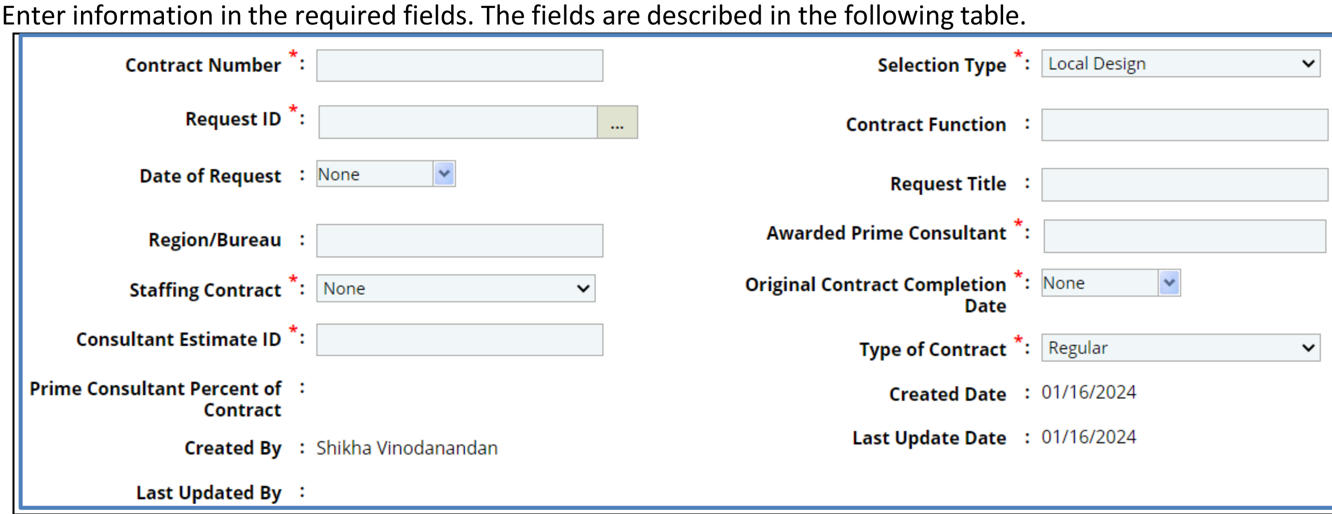
Enter information in the required fields. The fields are described in the following table.



Field	Mandatory / Non-mandatory	Description
Contract Number	Mandatory	Enter a unique number for the contract.
Selection Type	Mandatory	From the drop-down list, select **Request for Proposal**.
Request ID	Mandatory	To select the Request ID: 1. Click ... The Select Solicitation dialog box is displayed listing all the published solicitations. 2. Select the required solicitation and click Select. The values in the **Request Title** field are auto populated.
Contract Function	–	The contract function of the selected solicitation is auto populated.
Request Title	-	The title of the request is auto populated.
Date of Request	–	From the drop-down calendar, select the date of request.
Region/Bureau	–	The region/bureau of the selected solicitation is auto populated.
Awarded Prime Consultant	–	The name of the prime consultant firm to whom the contract is awarded is auto populated.
Staffing Contract	Mandatory	Select from the dropdown if this is a staffing contract.
Original Contract Completion Date	Mandatory	From the drop-down calendar, select the original completion date of the contract.
Type of Contract	Mandatory	From the drop-down list, select the type of contract.

7.1.6 For Local Design:

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



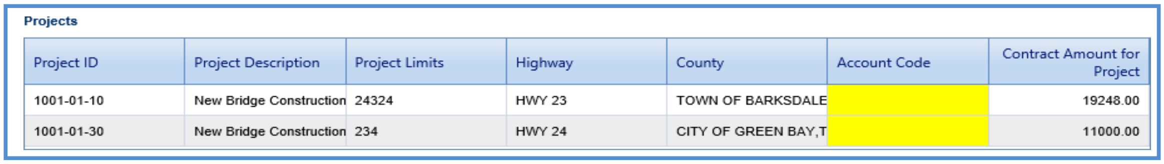
Field	Mandatory / Non-mandatory	Description
Contract Number	Mandatory	Enter a unique number for the contract.
Selection Type	Mandatory	From the drop-down list, select **Local Design**.
Request ID	Non-mandatory	To select the Request ID: 1. Click ... The Select Solicitation dialog box is displayed listing all the published solicitations. 2. Select the required solicitation and click Select. The values in the **Request Title** and **Awarded Prime Consultant** fields are auto populated.
Request Title	Non-Mandatory	The title of the request is auto populated.
Date of Request	–	From the drop-down calendar, select the date of request.
Awarded Prime Consultant	–	The name of the prime consultant firm to whom the contract is awarded is auto populated.
Original Contract Completion Date	Non-mandatory	From the drop-down calendar, select the original completion date of the contract.
Type of Contract	–	From the drop-down list, select the type of contract.

7.1.7 For Construction Fair:

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

Field	Mandatory / Non-mandatory	Description
Contract Number	Mandatory	Enter a unique number for the contract.
Selection Type	Mandatory	From the drop-down list, select **Construction Fair**.
Construction Fair Title	Non-mandatory	To select the Construction Fair title: 1. Click ... The **Select Construction Fair** dialog box is displayed listing all the published solicitations. 2. Select the required solicitation and click **Select**.
Construction Fair Month and Year	–	The month and year of the construction fair is auto populated.
Construction Fair Number	–	The construction fair number is auto populated.
Package ID	Non-mandatory	To select the Package ID: 1. Click ... The Select Solicitation dialog box is displayed listing all the published solicitations. 2. Select the required solicitation and click **Select**. The values in the **Construction Fair Month and Year** and **Construction Fair Number** fields are auto populated.
Region/Bureau	–	The region or bureau of the construction fair is auto populated.
Awarded Prime Consultant	–	The name of the prime consultant firm to whom the contract is awarded is auto populated.
Consultant Estimate ID	–	The consultant estimate ID is auto populated.
Original Contract Completion Date	Non-mandatory	From the drop-down calendar, select the original completion date of the contract.
Type of Contract	–	From the drop-down list, select the type of contract.

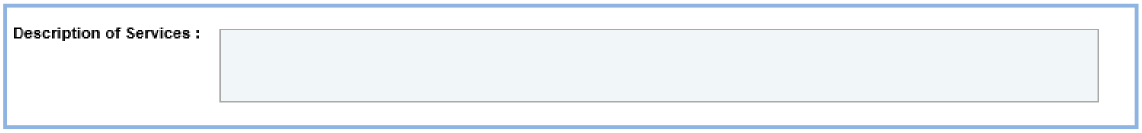
1. In the **Projects** section, the project details for which the consultant estimate is approved for contract is auto populated. Corresponding to a project, click in the **Account Code** column to enter the accounting code for the project.



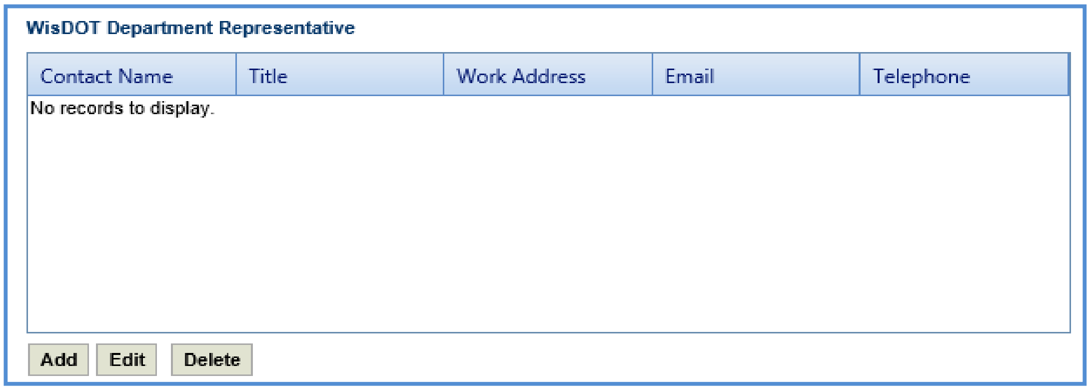
Projects

Project ID	Project Description	Project Limits	Highway	County	Account Code	Contract Amount for Project
1001-01-10	New Bridge Construction	24324	HWY 23	TOWN OF BARKSDALE		19248.00
1001-01-30	New Bridge Construction	234	HWY 24	CITY OF GREEN BAY,T		11000.00

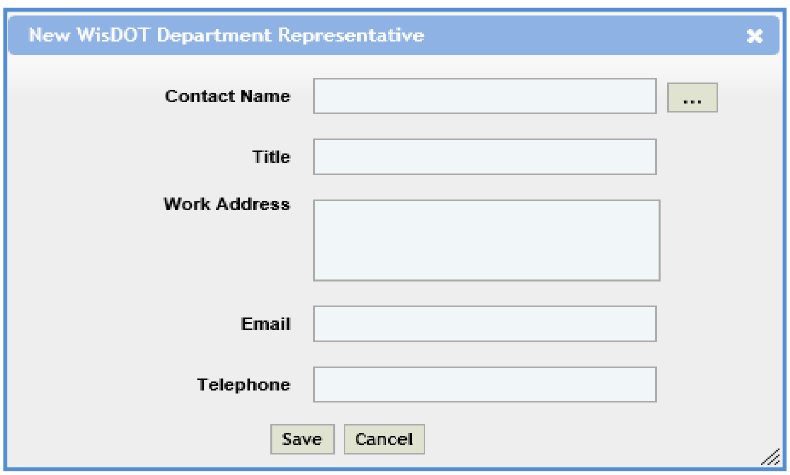
2. In the **Description of Services** section, enter description about the services associated with the contract.



3. In the **WisDOT Department Representative** section, perform the following steps to add WisDOT representatives for the contract.



a. Click **Add.** The **New WisDOT Department Representative** dialog box is displayed.



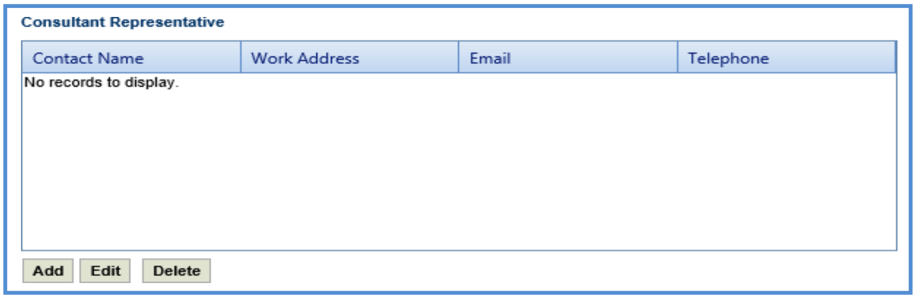
b. Enter information in the required fields. The fields are described in the following table.

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

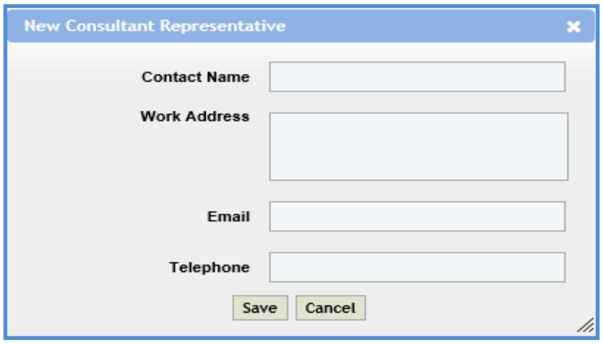
Field	Description
Contact Name	To select a WisDOT contact: 1. Click ... The **Select WisDOT Representative** dialog box is displayed listing all the active users from the list of User Accounts in the enterprise. 2. Select the required contact details and click **Select**. The values in the **Email**, **Work Address,** and **Telephone** fields are displayed.
Title	Enter title of the selected contact.
Work Address	The work address of the selected contact is auto populated.
Email	The e-mail address of the selected contact is auto populated.
Telephone	The telephone number of the selected contact is auto populated.

c. Click **Save**.

4. In the **Consultant Representative** section, perform the following steps to add consultant representatives for the contract.



   a. Click **Add.** The **New Consultant Representative** dialog box is displayed.
   b. Enter information in the required fields. The fields are described in the following table.

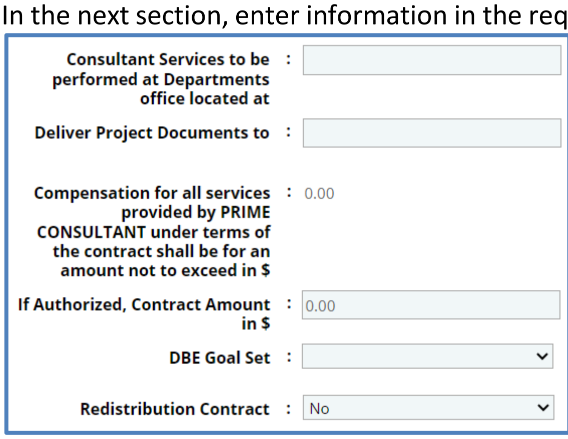


***Note**: All fields described in the below table are non-mandatory.*

Field	Description
Contact Name	Enter the name of the consultant representative.
Work Address	Enter work address of the consultant representative.
Email	Enter e-mail address of the consultant representative.
Telephone	Enter telephone number of the consultant representative.

   c. Click **Save**.

5. In the next section, enter information in the required fields. The fields are described in the following table.



Field	Description
Consultant Services to be performed located at Department's office	Enter the location details of the department office where consultant services are to be performed.
Deliver Project Documents to	Enter the location details where the project documents are to be delivered.
Compensation for all services provided by PRIME CONSULTANT under terms of the contract shall be for an amount not to exceed	The total contract amount of all the projects is auto populated. The break-up of the contract amount based on basis of payment can viewed. For more information, refer Viewing Basis of Payment Details.

If Authorized, Contract Amount	The total contract amount of all the projects and marked as **If Authorized** as **Yes** is auto populated.
Note: *All the contracts that exceed the total value of $3000 must be approved by the Secretary and Governor. The DT 25 form consisting of the contract details is submitted for approval. For more information, refer Submitting D25 form for Approval.*	
DBE Goal Set	From the drop-down list, select **Yes** or **No** to indicate if the project is associated with the contract that has DBE Goal or not. If the selected option is **Yes**, then the **DBE** section is displayed.
Redistribution Contract	From the dropdown, select if this is a redistribution contract.

Note*: When the value for* ***DBE Goal Set*** *is* ***Yes****, then the* ***DBE*** *section is displayed listing the projects and amount associated with DBE based on the DBE details defined on the Solicitation Scope of Service.*

6. In the **Attachments** section, upload images and files relevant to the regular contract.
7. Click **Save**.
8. On the **Regular Contract** list page, select the record that is in the **Draft** stage. In the **Workflow** group, click **Select Actions**, and then click **Submit for Consultant Review**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The record is sent to the consultant for review.
9. Once the record is reviewed by consultant, select the record that is in the **Reviewed by Consultant** stage. In the **Workflow** group, click **Select Actions**, and then click **Submit for Approval**. The **WisDOT – Masterworks** dialog box is displayed.
10. Enter required information and then click **OK.** The record is submitted for approval.

Note*: If the contract is associated with a D25 form, then the D25 form must be approved prior to submitting for approval.*

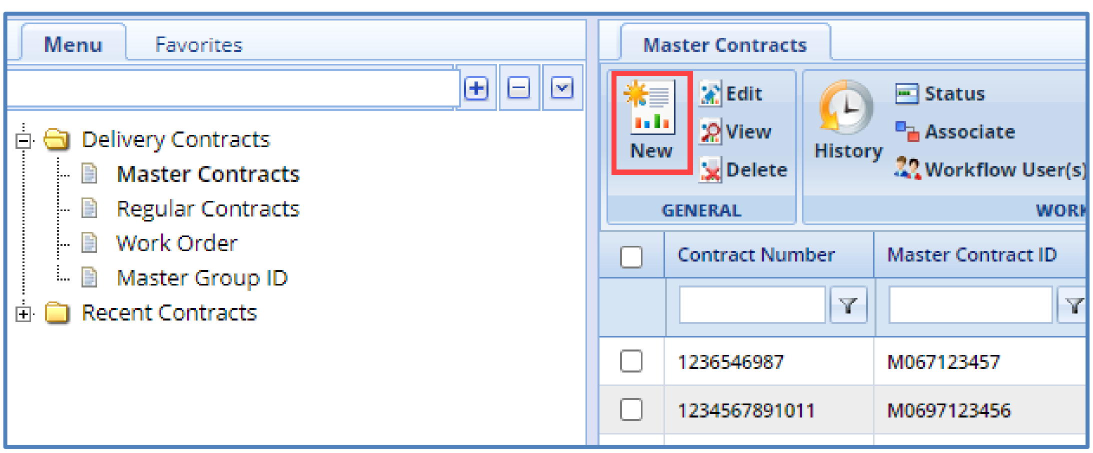
11. Optionally, you can click **Redraft** to redraft the record.

7.2 Creating Master Contracts

The Master Group IDs are created and associated with solicitations of master contract type. To create master group IDs, refer Creating Master Group ID. All the contractors who are shortlisted for Master Contract Type solicitations are awarded with the master contract. The procedure to create master contracts is described.

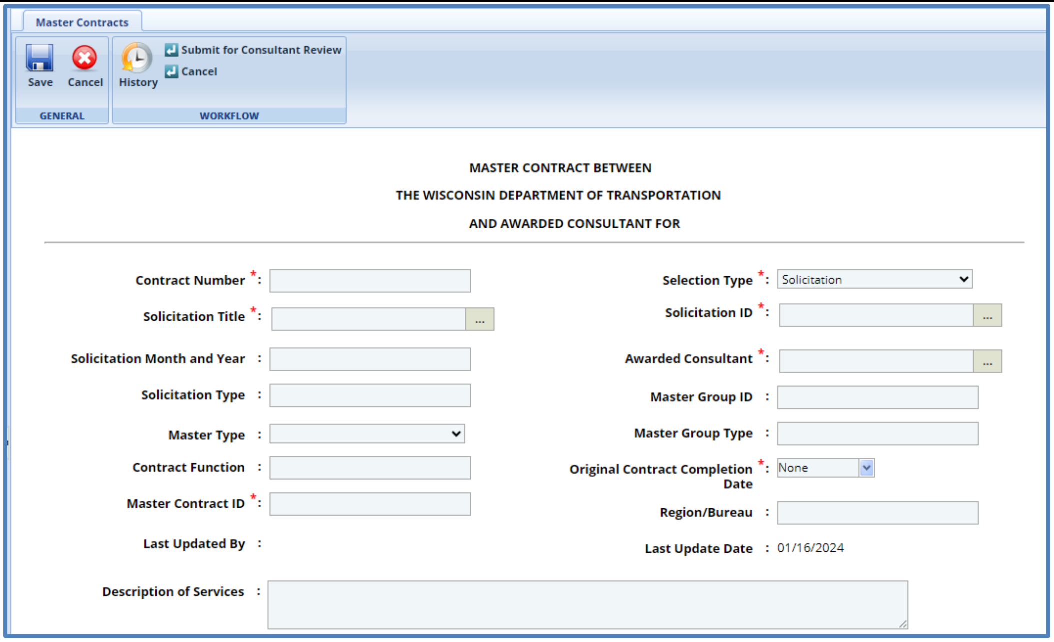
Steps:

1. In the module menu, click **Contracts**. The **Master Contracts** list page is displayed. Alternatively, in the navigation pane, in the **Contracts** folder, click **Master Contracts**.



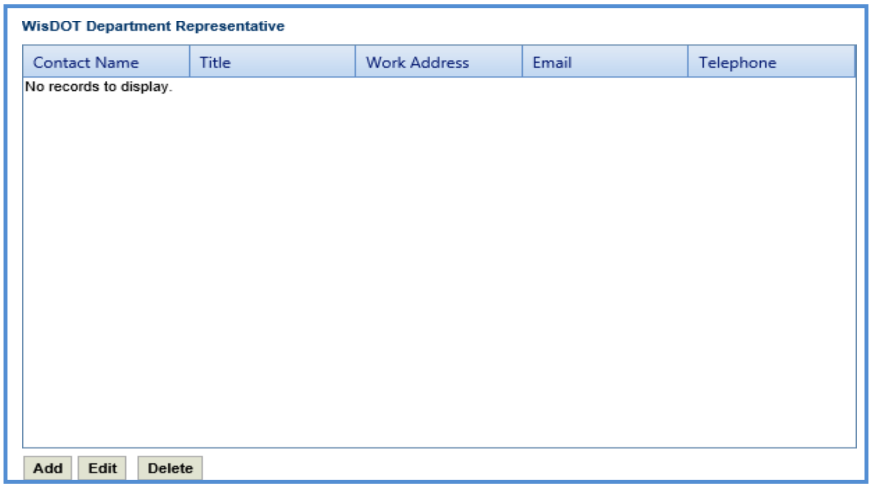
2. Click **New**. The **Master Contracts** details page is displayed.

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

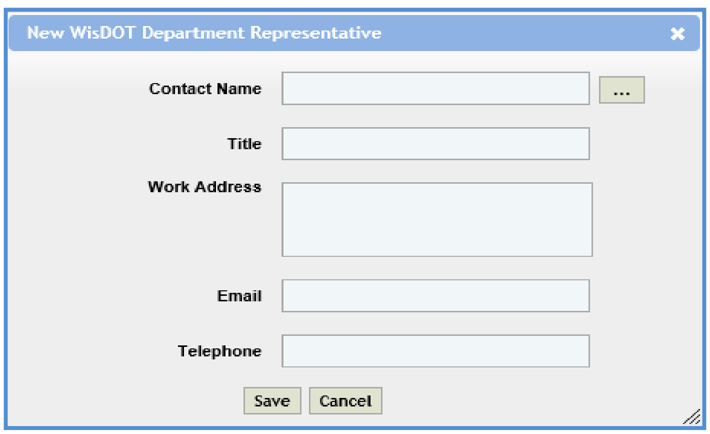
Field	Mandatory / Non-mandatory	Description
		
Contract Number	Mandatory	Enter a unique number for the contract.
Selection Type	Mandatory	Select the solicitation type for this contract.
Solicitation Title	Mandatory	To select the solicitation: 1. Click ... The **Select Solicitation** dialog box is displayed listing all the published solicitations. 2. Select the required solicitation and click **Select**.
Solicitation ID	Mandatory	To select a solicitation: 1. Click ... The **Select Solicitation** dialog box is displayed listing all the solicitations associated with the selected solicitation and for which the consultant estimate is in the **Approved for Contract** stage. 2. Select the required solicitation and click Select. The values in the **Solicitation Month/Year**, **Solicitation Type**, **Contract Function**, **Master Group ID**, and **Master Group Type** fields are auto populated.
Solicitation Month and Year	-	The month and year of the selected solicitation is auto populated.
Awarded Consultant	Mandatory	To select awarded consultant: 1. Click ... . The Select Solicitation dialog box is displayed listing all the consultants who are shortlisted for the solicitation. 2. Select the required solicitation and click Select.
Solicitation Type	-	The type of selected solicitation is auto populated.
Master Group ID	-	The master group ID is auto populated.
Master Type	Non-mandatory	From the drop-down list, select the master type for the contract. For availability of options in the drop- down list, master types must be defined in the **Master Type** catalog of the library.
Master Group Type	Non-mandatory	From the drop-down list, select the required type of master group for the contract. For availability of options in the drop-down list, the master group types must be defined in the **Master Group Type** catalog of the library.

Contract Function	**-**	The contract function is auto populated.
Original Contract Completion Date	Mandatory	From the drop-down calendar, select the original completion date of the contract.
Master Contract ID	Mandatory	Enter a unique ID for the contract.
Region/Bureau	-	The region/bureau is auto-populated.

4. In the **WisDOT Department Representative** section, perform the following steps to add WisDOT representatives for the contract.



a. Click **Add.** The **New WisDOT Department Representative** dialog box is displayed.



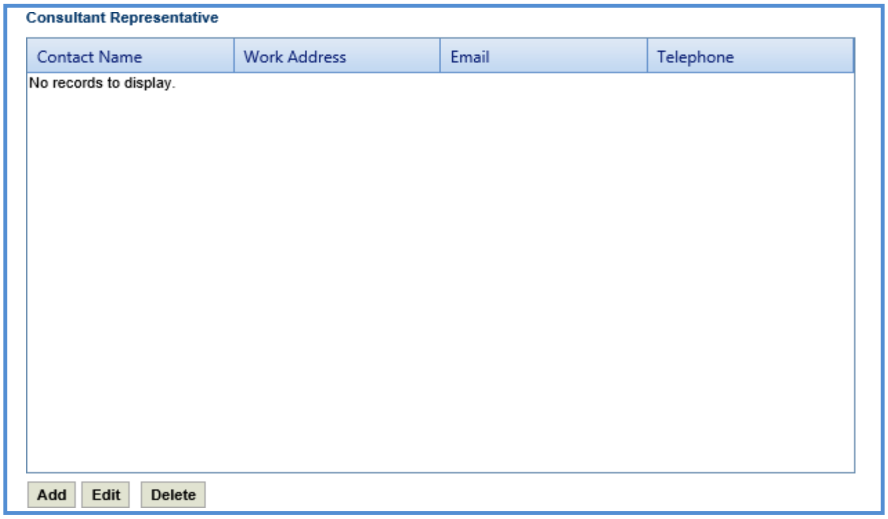
b. Enter information in the required fields. The fields are described in the following table.

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

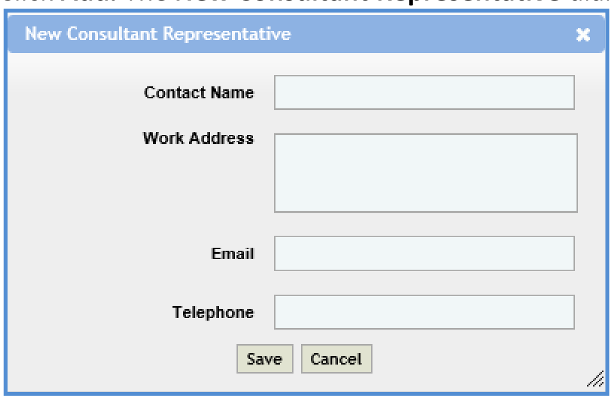
Field	Description
Contact Name	To select a WisDOT contact: 1. Click ... The **Select WisDOT Representative** dialog box is displayed listing all the active users from the list of **User Accounts** in the enterprise database. 2. Select the required contact details and click Select. The values in the Email, Work Address, and Telephone fields are displayed.
Title	Enter title of the selected contact.
Work Address	The work address of the selected contact is auto populated.
Email	The e-mail address of the selected contact is auto populated.
Telephone	The telephone number of the selected contact is auto populated.

c. Click **Save**.

5. In the **Consultant Representative** section, perform the following steps to add consultant representatives for the contract.



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



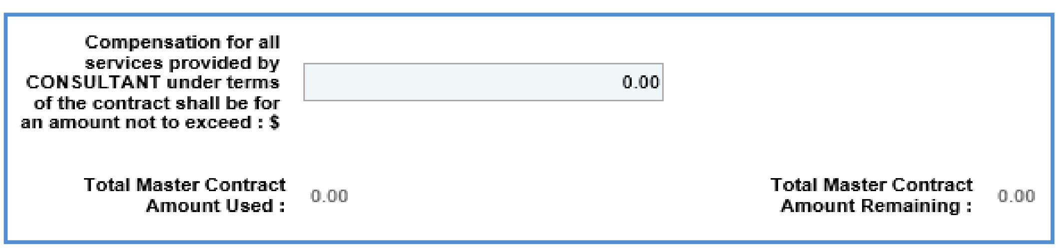
b. Enter information in the required fields. The fields are described in the following table.

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

Field	Description
Contact Name	Enter the name of the consultant representative.
Work Address	Enter work address of the consultant representative.
Email	Enter e-mail address of the consultant representative.
Telephone	Enter telephone number of the consultant representative.

c. Click **Save**.

6. In the **Compensation for all services provided by CONSULTANT under terms of the contract shall be for an amount not to exceed: $** field, enter the total amount of the contract.



a. The values in the **Total Master Contract Amount Used** and **Total Master Contract Amount Remaining** fields are displayed.

b. The value in the **Total Master Contract Amount Used** field is auto calculated and displayed. The total contract amount of all the approved work orders of the selected master contract is displayed.

c. The value in the **Total Master Contract Amount Remaining** field is auto calculated and displayed. The difference of **Compensation for all services provided by consultant under terms of the contract shall be for an amount not to exceed** and **Total Master Contract Amount Used** fields is displayed.

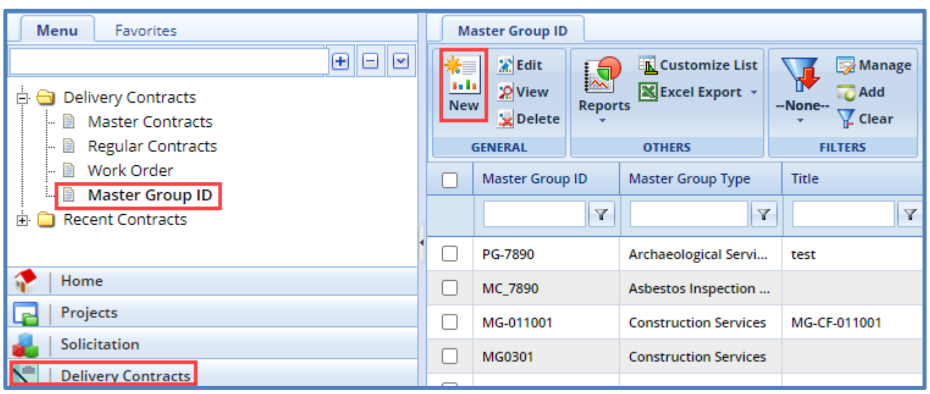
***Note**: All the contracts that exceed the total value of $3000 must be approved by the Secretary and Governor. The DT 25 form consisting of the contract details is submitted for approval. For more information, refer [Submitting D25 form for Approval](#).*

7. In the **Attachments** section, upload images and files relevant to the master contract.
8. Click **Save**.
9. On the **Master contracts** list page, select the record that is in the **Draft** stage. In the **Workflow** group, click **Select Actions**, and then click **Submit for Consultant Review**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The record is sent to the contract specialist for review.
10. A contract specialist reviews the master contract and then in the **Workflow** group, can click **Select Actions**, and then click **Reviewed**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** Optionally, click **Request to Revisit** to revisit the record.
11. Once the record is reviewed, select the record that is in the **Reviewed by Consultant** stage. In the **Workflow** group, click **Select Actions**, and then click **Submit for Approval**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The record is submitted for approval to the contract manager. Optionally, you can click **Redraft** to redraft the record.
12. The contract manager, in the **Workflow** group, can click **Select Actions**, and then click **Approve**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** Optionally, click **Deny** denying the approval for the contract record or click **Redraft** to redraft the contract record.

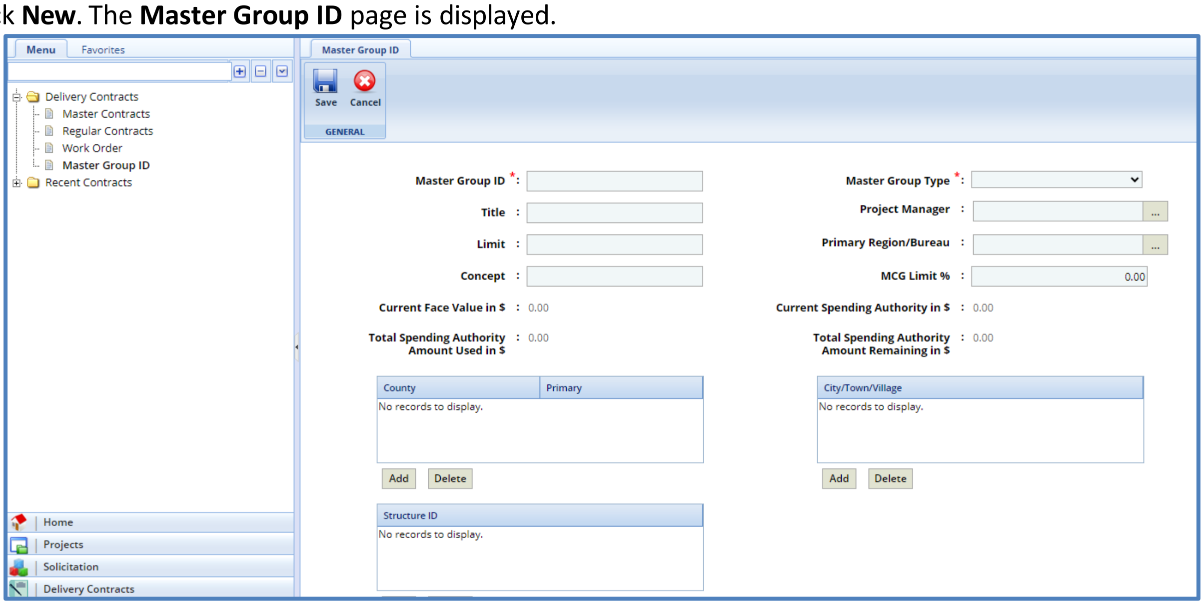
7.2.1 Creating Master Group ID

Master Contract IDs are created and associated with solicitations of Master Contract Type.

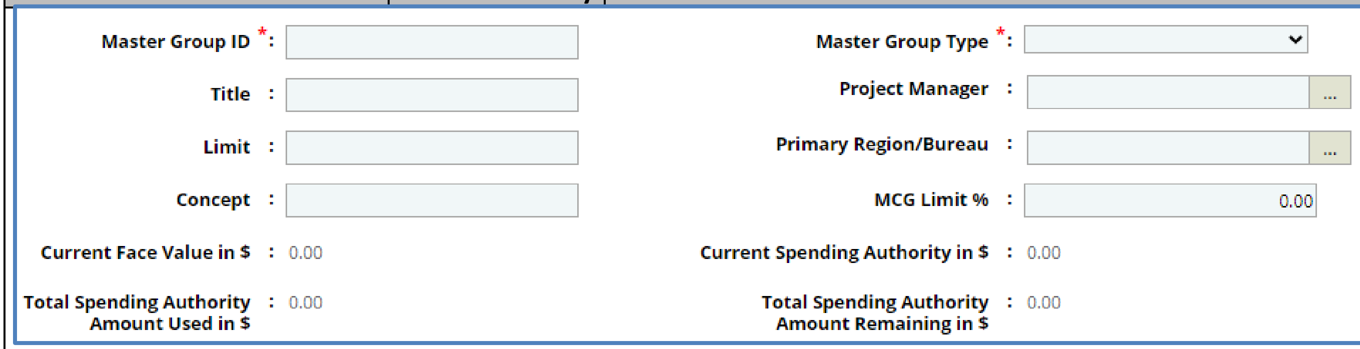
1. In the module menu, click **Delivery Contracts**.
2. In the navigation pane, click **Master Group ID**. The **Master Group ID** page is displayed.

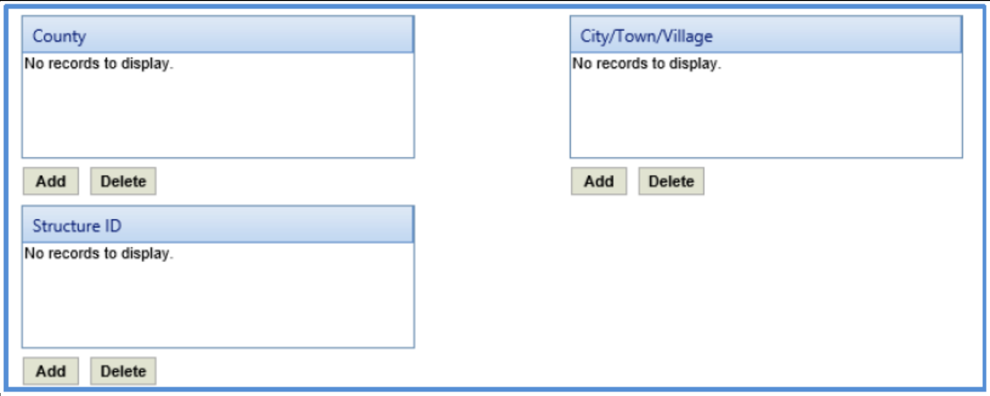


3. Click **New**. The **Master Group ID** page is displayed.



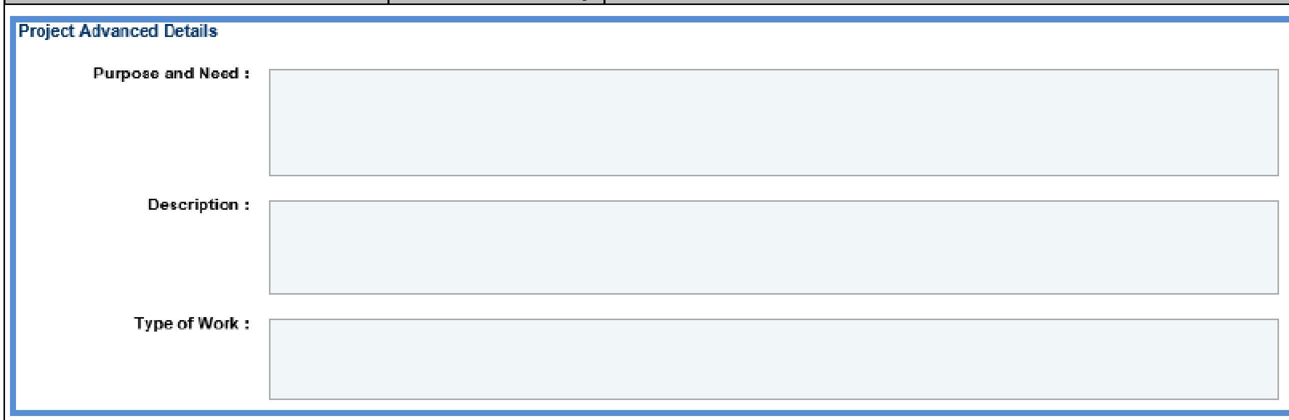
4. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory / Non-mandatory	Description
		
Master Group ID	Mandatory	Enter a unique ID for the master group.
Master Group Type	Mandatory	From the drop-down list, select a type for the master group. For availability of options in the drop-down list, master group types must be defined in the **Master Group Typ**e catalog of the library.
Title	Non-mandatory	Enter a title for the master group ID.
Project Manager	Non-mandatory	To select a project manager for the master group: 1. Click ... and the **Project Manager** dialog box is displayed. The dialog box lists users who are in the **Project Manager** role from the list of **User Accounts** in the enterprise. 2. Select a user and click **Select**.
Limit	Non-mandatory	Enter limit of the master group ID.
Primary Region/Bureau		To select primary region/bureau for the master group: 1. Click ... and the **Region/Bureau** dialog box is displayed. For availability of options in the dialog box, regions/ bureaus must be defined in the **Region-Bureau** catalog of the library. Select a region/bureau and click **Select**.
Concept	Non-mandatory	Enter the concept for the master group ID.
MCG Limit %	Non-mandatory	Enter the MCG limit percentage.
Current Face Value in $	-	The value is auto calculated and displayed. The sum of all the contract values of the approved master contracts associated with the master group ID is displayed.
Current Spending Authority in $	-	The value is auto calculated and displayed. The product of MCG limit percentage and current face value is displayed.
Total Spending Authority Amount Used in $	-	The value is auto calculated and displayed. The sum of contract values of all the approved work order contracts of the selected master contract associated with the master group is displayed.
Total Spending Authority Amount Remaining in $	-	The value is auto calculated and displayed. The difference between the current spending authority value and total spending authority amount value is displayed.

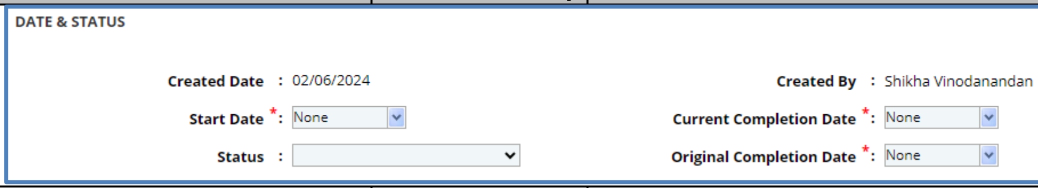


County	Mandatory	To add **County** details for the master group: 1. In the **County** section, click **Add**. The **County** dialog box is displayed. For availability of options in the dialog box, counties must be defined in the **County** catalog of the library. 2. Select the required counties and then click **Select**.
City/Town/Village	Mandatory	To add City/Town/Village details of the selected counties: 1. In the **City/Town/Village** section, click Add. The **City/Town/ Village** dialog box is displayed listing all the cities/towns/villages of the selected counties. For availability of options in the dialog box, cities/towns/villages must be defined in the **City-Town-Village** catalog of the library. 2. Select the required cities/towns/villages and then click **Select**.
Structure ID	Non-mandatory	To add Structure ID details of the master group: 1. In the **Structure ID** section, click **Add**. The **Structure ID** dialog box is displayed. For availability of options in the dialog box, structure IDs must be defined in the **Structure ID** catalog of the library. 2. Select the required structure IDs and then click **Select**.

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

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

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

Field	Mandatory / Non-mandatory	Description
		
Created Date	-	The date when the master group ID was created is auto populated.
Created By	-	The name of the person who created the master group ID is auto populated.
Start Date	Mandatory	From the drop-down calendar, select the commencement date of the master group ID.
Current Completion Date	Mandatory	From the drop-down calendar, select the current completion date of the master group ID.
Status	Non-mandatory	From the **Status** drop-down list, select the current status of the master group ID.
Original Completion Date	Mandatory	From the drop-down calendar, select the original completion date of the master group ID.

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

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

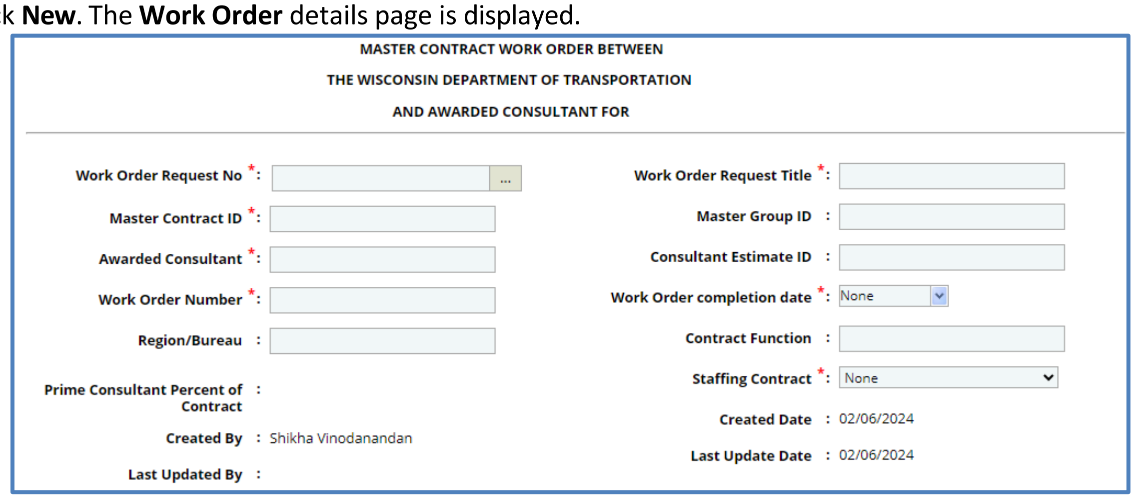
7.3 Creating Work Order Contract

The system allows you to create work order contracts for which the consultant estimate is in the **Approved for Contract** stage.

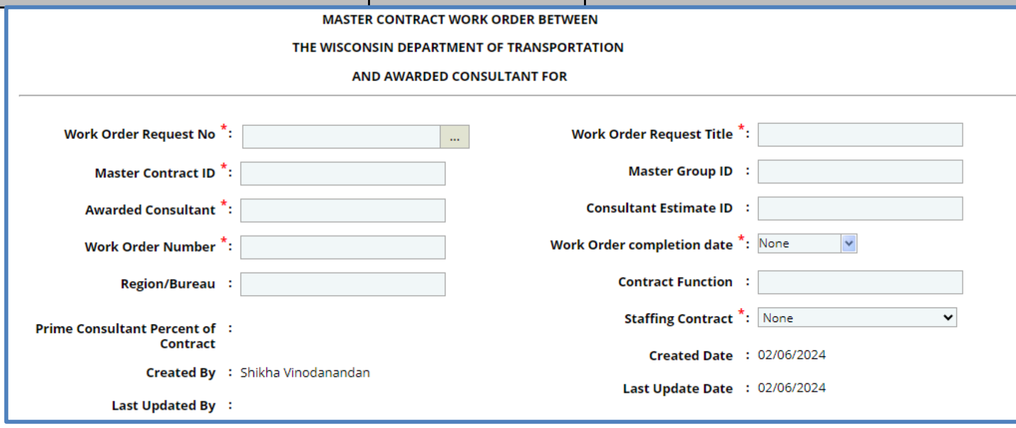
Pre-requisite: The consultant estimate must be in the **Approved for Contract** stage. The procedure to create work order contracts is described.

Steps:

1. In the module menu, click **Delivery Contracts**.
2. In the navigation pane, click **Work Order**. The **Work Order List** page is displayed.
3. Click **New**. The **Work Order** details page is displayed.



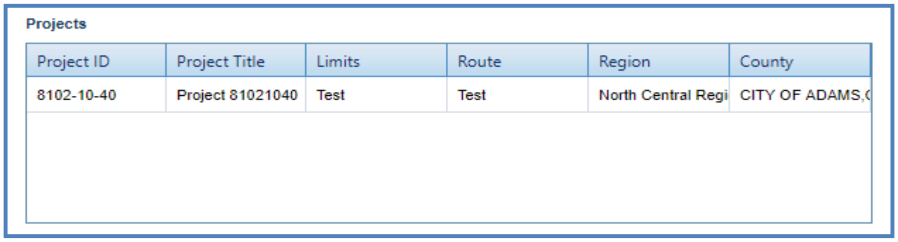
4. Enter information in the required fields. The fields are described in the following table.



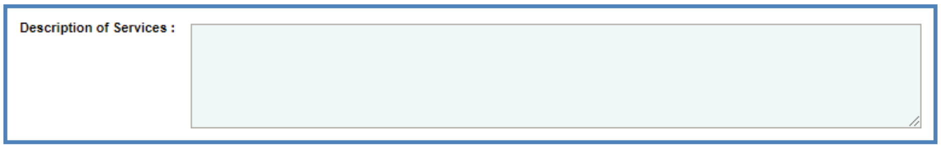
Field	Mandatory / Non-mandatory	Description
Work Order Request No	Mandatory	To select the required work order request number: 1. Click ... .The **Select Work Order Request** dialog box is displayed listing all the work order requests of the master contract for which the consultant estimate is approved for contract. 2. Select the required work order request and click **Select**. The values in the **Work Order Request Title, Master Contract ID, Master Group ID, Awarded Consultant, Consultant Estimate ID, Solicitation ID, Solicitation Month and Year, and Projects** are displayed.
Work Order Request Title	-	The value in this field is auto populated when the **Work Order Request No** is selected. The title of the work order request is displayed.
Master Contract ID	-	The value in this field is auto populated when the **Work Order Request No** is selected. The unique ID of the master contract to which the work order request is associated is displayed.
Master Group ID	-	The value in this field is auto populated when the **Work Order Request No** is selected. The unique ID of the master group to which the work order request is associated is displayed.
Awarded Consultant	-	The value in this field is auto populated when the **Work Order Request No** is selected. The name of the consultant who is assigned with the work order request is displayed.
Consultant Estimate ID	-	The value in this field is auto populated when the **Work Order Request No** is selected. The unique ID of the consultant estimate associated with the work order request is displayed.
Work Order Number	-	The work order number is auto generated when the work order contract record is saved.
Work Order Completion Date	Non-Mandatory	From the drop-down calendar, select the completion date of the work order.
Region/Bureau	-	The region/bureau will be auto populated based on the selected Work Order Request
Solicitation ID	-	The value in this field is auto populated when the **Work Order Request No** is selected. The unique ID of the Solicitation of the master contract associated with the work order request is displayed.
Solicitation Month and Year	-	The value in this field is auto populated when the **Work Order Request No** is selected. The solicitation month and year of the

		master contract associated with the work order request is displayed
Created By	-	Displays the username of the user creating the record.
Created Date	-	Displays the date when the work order contract is created.
Last Updated By	-	Displays the username of the user who last updated the record.
Last Update Date	-	Displays the last time the record was updated.

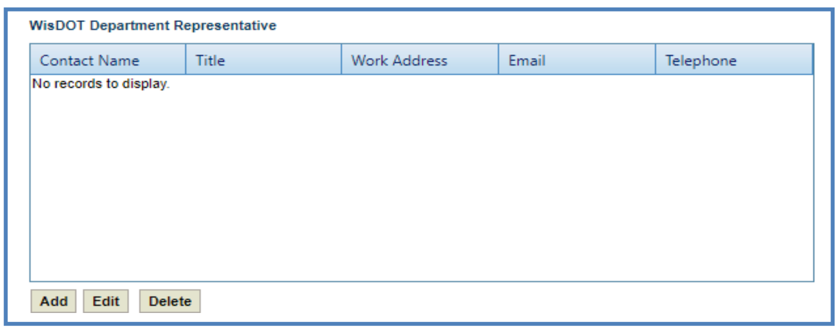
The **Projects** section displays all the projects associated with the selected work order request.



5. In the **Description of Services** section, enter description about the services associated with the contract.



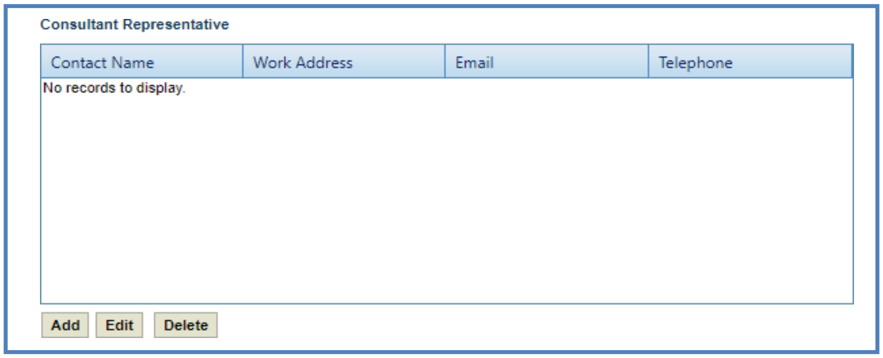
6. In the **WisDOT Department Representative** section, perform the following steps to add WisDOT department representative details.



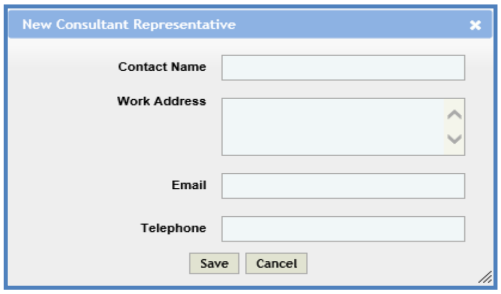
7. Click **Add**. The **New WisDOT Department Representative** dialog box is displayed.

8. In the **Contact Name** field, perform the following steps to select the contact details:
   a. Click ... The **Select WisDOT Representative** dialog box is displayed.
   b. Select the required contact details and click **Select**. The **Work Address**, **Email**, and **Telephone** details of the selected contact are displayed.
   c. In the **Title** field, enter the title of the selected contact.
   d. Click **Save**.

9. In the **Consultant Representative** section, perform the following steps to add consultant representative details.



10. Click **Add**. The **New Consultant Representative** dialog box is displayed.



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

Field	Mandatory / Non-mandatory	Description
Contact Name	Non-mandatory	Enter the name of the consultant representative.
Work Address	Non-mandatory	Enter the work address of the consultant representative.
Email	Non-mandatory	Enter the e-mail address of the consultant representative.
Telephone	Non-mandatory	Enter the telephone number of the consultant representative.

   b. Click **Save**.

11. Provide information in the required fields as described below.

Field	Mandatory / Non-mandatory	Description
Consultant Services to be performed at Departments office located at	Non-mandatory	Enter the location details of the department office where the consultant services are to be performed.
Deliver Project Documents to	Non-mandatory	Enter the delivery details of the project documents.
Compensation for all services provided by CONSULTANT under terms of the contract shall be for an amount not to exceed in $	-	The field displays the total amount of all the projects, defined on the **Consultant Estimate** page in the **Projects (in scope excluding if authorized)** section**.**
***Note**: The total amount displayed in the field includes both prime consultant and sublet consultant projects.*		
If Authorized, Contract Amount in $	-	The field displays the total contract amount of all the projects defined on the **Consultant Estimate** in the **Projects (If authorized)** section.
***Note**: The total amount displayed in the field includes both prime consultant and sublet consultant projects.*		
Redistribution Contract	Non-mandatory	From the drop-down list, select **Yes** or **No** to indicate if this is a redistribution contract.

12. In the **Attachments** section, upload images and files relevant to the construction fair package.
13. Click **Save**. The new **Work Order Contract** is created and is in the **Draft** workflow stage.

7.4 Workflow for Work Order Contract

The workflow table below describes the stages involved in the Work Order Contract.

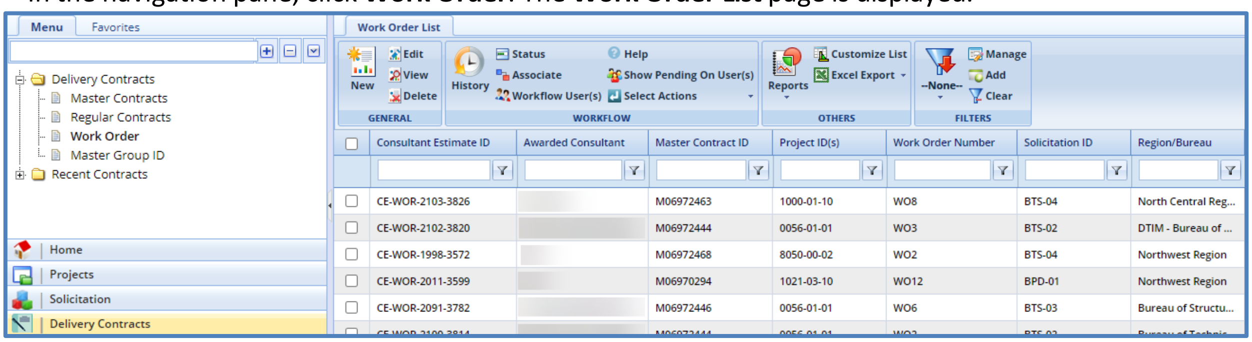
Current Stage	Action	Workflow Status (New Stage)	Comments
Draft	Submit for Consultant Review	Submitted for Consultant Review	The work order contract is submitted to the consultant for review.
Submitted for Consultant Review	Request to Revisit	Draft	–
	Reviewed	Reviewed by Consultant	
Reviewed by Consultant	Redraft	Submitted for Consultant Review	-
	Submit for Approval	Submitted for Approval	
Submitted For Approval	Approve	Approved	-
	Deny	Denied	
Denied	Redraft	Submitted for Approval	-

7.4.1 Viewing Basis of Payment Details of the Work Order Contract

The system allows you to view the break-up cost details of direct labor cost, direct cost, indirect cost, and fixed fee cost that are in scope for each basis of payment associated with a work order contract.

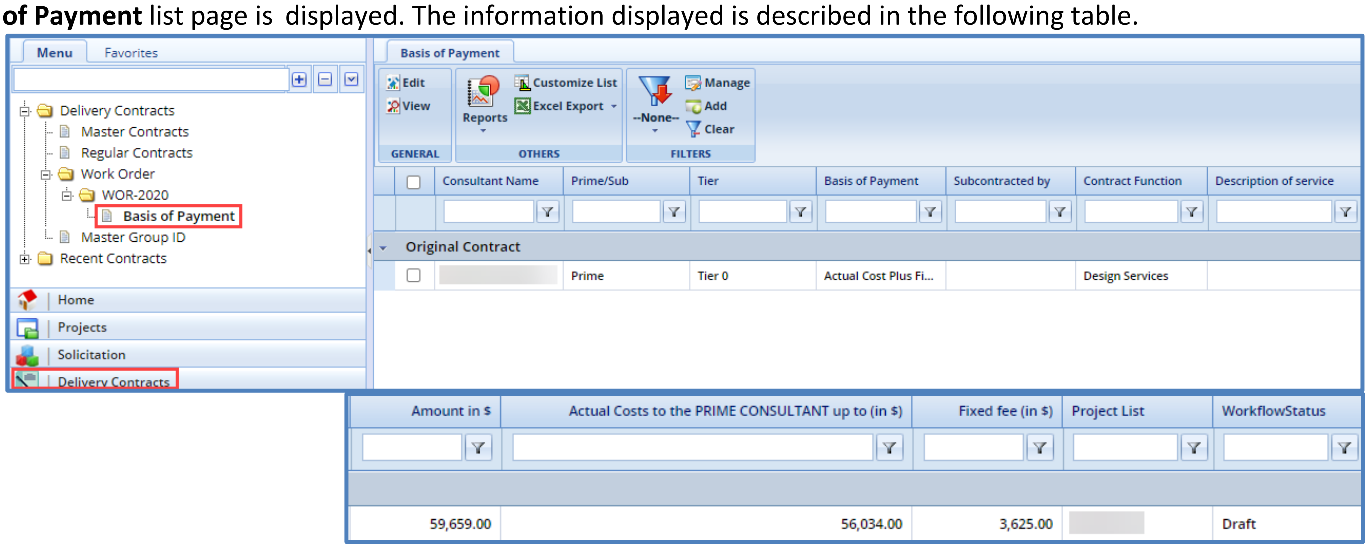
Steps:

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



3. Select a work order for which you want to view the break-up cost based on basis of payments and then click **View** or **Edit**.

4. In the navigation pane, expand the selected **Work Order** folder, and then click **Basis of Payment.** The **Basis of Payment** list page is displayed. The information displayed is described in the following table.



Column	Description
Consultant Name	Indicates the name of the consultant firm.
Prime/Sub	Indicates whether the consultant firm is a prime consultant or a subconsultant firm.
Tier	Indicates the hierarchical level of the consultant. For example, Tier 0 indicates that the consultant firm is a prime consultant, Tier 1 indicates that the consultant firm is a subconsultant firm for prime consultant, and so on.
Basis of Payment	Indicates the basis of payment of the associated cost.
Subcontracted By	If the consultant is a sub, this field will populate the prime consultant.
Contract Function	Indicated the function of this contract.
Description of Service	A brief description of the services provided.
Amount in $	Indicates the total cost associated with direct labor cost, direct cost, indirect cost, and fixed fee for the selected basis of payment.
Actual Costs to the PRIME CONSULTANT up to (in $)	Displays the costs associated with the prime consultant for this contract.
Fixed Fee (in $)	Displays the total fixed fee for this contract.
Project List	Displays the project ID with which this contract is associated with.
WorkflowStatus	Indicated the status of the contract.

***Note**: Select a record and click **View** to view the details of the basis of payment record.*

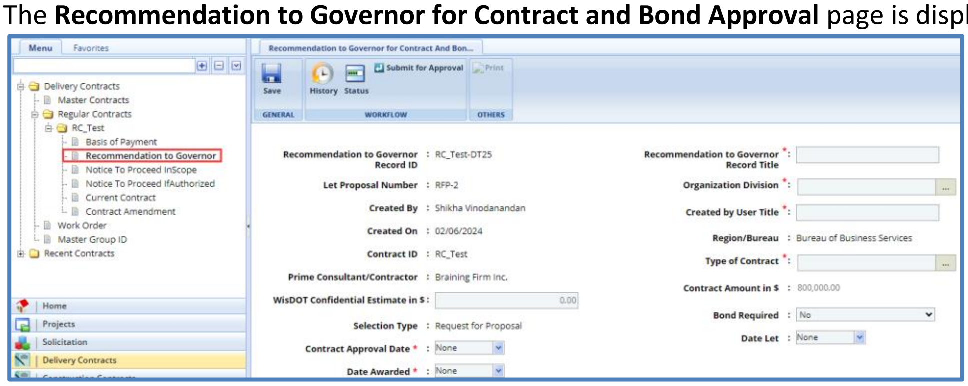
7.5 Submitting DT25 form for Approval

The regular and master contracts that exceed the total contract value of $3000 is approved by the Secretary and Governor. The DT25 form consisting of the contract details that is submitted for approval to the Secretary and Governor.

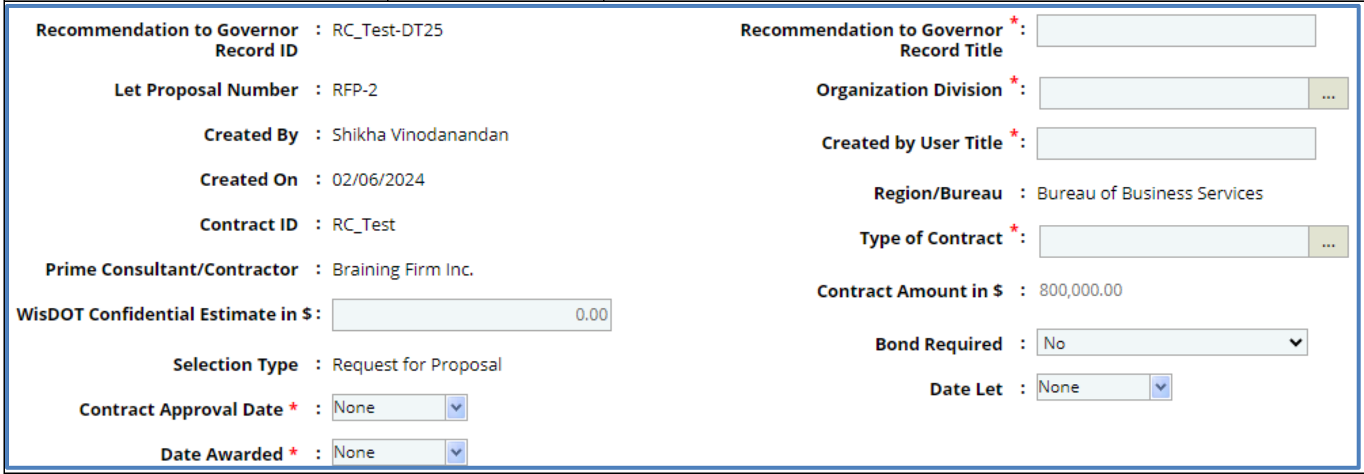
Steps:

1. In the module menu, click **Delivery Contracts**.
2. In the navigation pane, click **Master Contracts** or **Regular Contracts,** whichever has a contract that must be submitted for approval.
3. Select the contract record for which the contract value exceeds $3000 and click **Edit**.

4. In the navigation pane, expand the selected contract record folder, and then click **Recommendation to Governor**. The **Recommendation to Governor for Contract and Bond Approval** page is displayed.



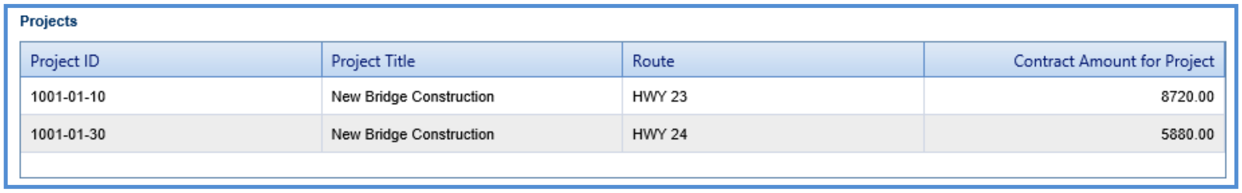
5. Enter information in the required fields. The fields are described in the following table.



Field	Mandatory / Non-mandatory	Description
Recommendation to Governor ID	-	The unique ID of the DT25 record is auto populated.
Recommendation to Governor Record Title	Mandatory	Enter a title for the DT25 record.
Let Proposal Number	-	The LET Proposal Number of the DT25 record is auto populated.
Organization Division	Mandatory	To select the organization division associated with the DT25 record: 1. Click ... and the **Select Organization Division** dialog box is displayed. For availability of options in the dialog box, organization divisions must be defined in the **Organization Division** catalog of the library. 2. Select the required organization division and click **Select**.
Created By	-	The name of the person who has created the DT25 record is auto populated.
Created On	-	The date when the DT25 record was created is auto populated.
Created by User Title	Mandatory	Enter the title of the person who has created the DT25 record.
Contract ID	-	The unique ID of the contract is auto populated.
Region/Bureau	-	The region/bureau is auto populated.
Prime Consultant/Contractor	-	The consultant is auto populated.
Type of Contract	Mandatory	To select the type of contract associated with the DT25 record: 1. Click ... and the **Select Type of Contract** dialog box is displayed. For availability of options in the dialog box, type of contracts must be defined in the **Type of Contract** catalog of the library. 2. Select the required type of contract and click **Select**.
WisDOT Confidential Estimate in $	-	The WisDOT confidential estimate number associated with the project is auto populated.
Contract Amount in $	-	The total contract value is auto populated.
Selection Type	-	The selection type is auto populated.
Contract Approval Date	Mandatory	This field is displayed only for the regular contracts. From the drop-down calendar, select the date when the contract was approved.
Solicitation Month and Year	-	The solicitation month and year is auto populated.
Date Awarded	Mandatory	This field is displayed only for the regular contracts. From the drop-down calendar, select the date when the contract was awarded to the consultant.
Bond Required	Mandatory	From the drop-down list, select Yes or No to indicate if a bond is required for the contract or not.

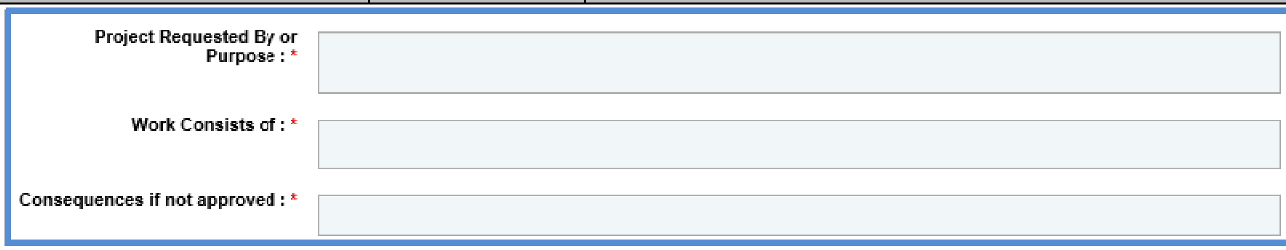
Date Let	Mandatory	This field is displayed only for the regular contracts. From the drop-down calendar, select the let date of the contract.

***Note**: The **Projects** section is displayed only for the regular contracts. The section lists the projects associated with the contract.*



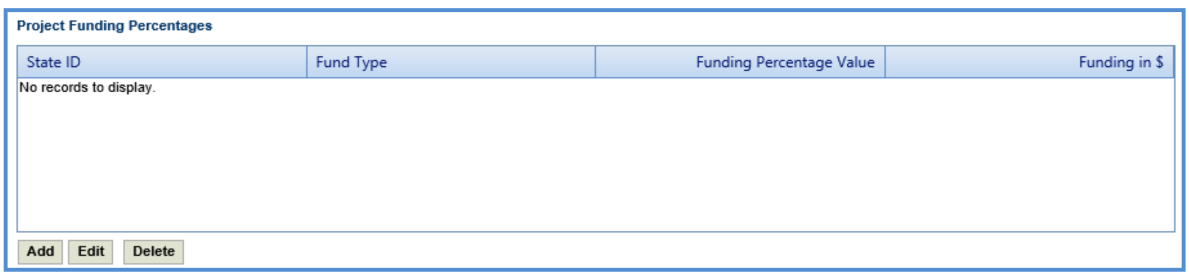
6. Enter information in the fields described below.

Field	Mandatory/ Non-Mandatory	Description

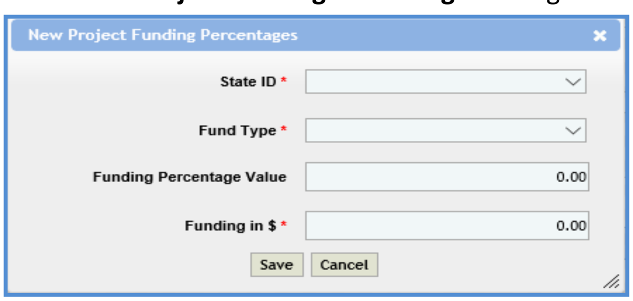


Project Requested by or Purpose	Mandatory	Enter details about the project.
Work Consists of	Mandatory	Enter work details of the contract.
Consequences if not approved	Mandatory	Enter details about the result or effect if the contract is not approved by the Secretary and Governor.

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



a. Click **Add**. The **New Project Funding Percentages** dialog box is displayed.



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

Field	Mandatory/ Non-Mandatory	Description
State ID	Mandatory	From the drop-down list, select the state ID.
Fund Type	Mandatory	From the drop-down list, select the required fund source type. For availability of options in the drop-down list, fund source types must be defined in the **Fund Source Type** catalog of the library.
Funding Percentage Value	Non-mandatory	Enter percentage of the contract value that will be funded by the selected fund type.

Funding in $	Mandatory	Enter the contract amount that will be funded by the selected fund type.

8. Click **Save.**

***Note**: The total of **Funding Percentage Value** should be 100% for each of the projects associated with the selected contract and the **Funding in $** should add to the total **Contract Amount**.*

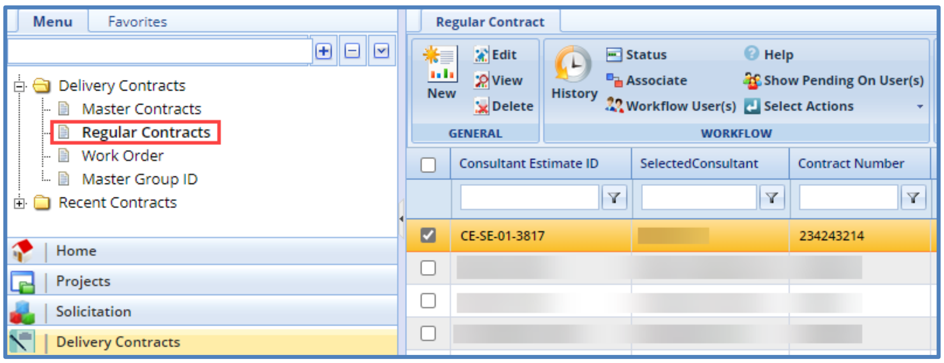
9. In the **Workflow** group, click **Submit for Approval**. The **WisDOT – Masterworks** dialog box is displayed. Enter required information and then click **OK.** The record is sent to the Secretary for approval. Once the Secretary approves the DT25 form, it is sent to the Governor's office for approval. Alternatively, the Secretary can click **Redraft** to redraft the form.

7.6 Viewing Basis of Payment Details

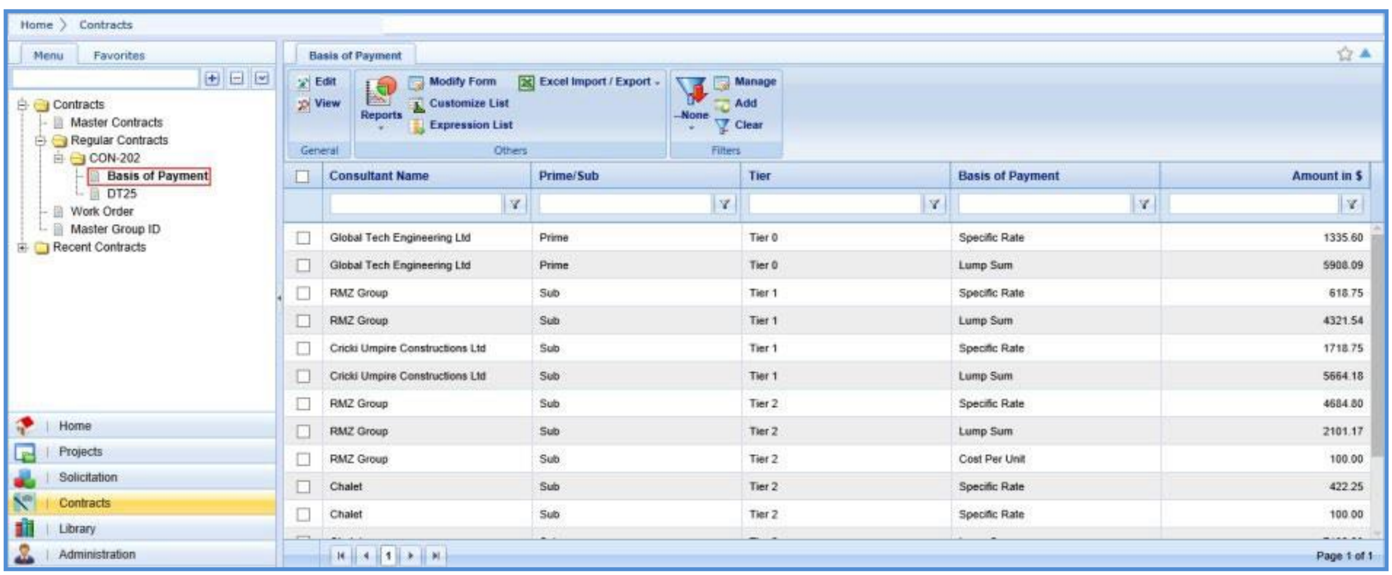
The system allows you to view the break-up cost details of direct labor cost, direct cost, indirect cost, and fixed fee cost that are in scope for each basis of payment associated with a regular contract.

Steps:

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



2. Select a contract for which you want to view the break-up cost based on basis of payments and then click **View** or **Edit**.



3. In the navigation pane, expand the **Regular Contracts** folder, and then in the selected contract folder, click **Basis of Payment.** The **Basis of Payment** list page is displayed listing the break-up of costs based on basis of payment. The information displayed is described in the following table.

Column	Description
Consultant Name	Indicates the name of the consultant firm.
Prime/Sub	Indicates whether the consultant firm is a prime consultant or subconsultant firm.
Tier	Indicates the hierarchical level of the consultant. For example, Tier 0 indicates that the consultant firm is a prime consultant, Tier 1 indicates that the consultant firm is a

	subconsultant firm for prime consultant, and so on.
Basis of Payment	Indicates the basis of payment of the associated cost.
Amount in $	Indicates the total cost associated with direct labor cost, direct cost, indirect cost, and fixed fee for the selected basis of payment.

***Note**: Select a record and click **View** to view the details of the basis of payment record.*

8. Contract Amendment

If there are any changes in approved regular contracts, master contracts, and work orders, the changes can be made by amending the contracts. A user may be negotiating more than one amendment on the same contract at a time. When negotiating, there is not a contract amendment number assigned. Only one Contract Amendment can be created and going through the formal approvals. Once that amendment is "Approved," the next Contract Amendment can be started.

The steps to amending a contract is dependent upon the sort of amendment required. There are four main types of contract amendments.

1. **Update Contract**: The contract needs to be changed for any reason other than updating the completion date or discontinuing the contract. This is the most common type of amendment.
2. **Update Contract Completion Date**: The only item changing on the contract is the completion date.
3. **Cancel Contract**: The contract needs to be discontinued and NO payment has been or will be made to the consultant.
4. **Terminate Contract**: The contract needs to be discontinued and payment has been or will be made to the consultant.

Note: *Terminate Contract is rarely used.*

When the type of amendment is **Update Contract** or **Terminate Contract** a contract amendment estimate is needed. Follow the steps in section **9.1** to create a contract amendment estimate. If the type of contract amendment is Update Contract Completion Date or Cancel Contract, an estimate for the amendment is not needed. Jump to section **9.2** and follow the steps to **Creating a Contract Amendment**.

8.1 Creating and Approving a Contract Amendment Estimate

8.1.1 Creating a WisDOT Contract Amendment Estimate

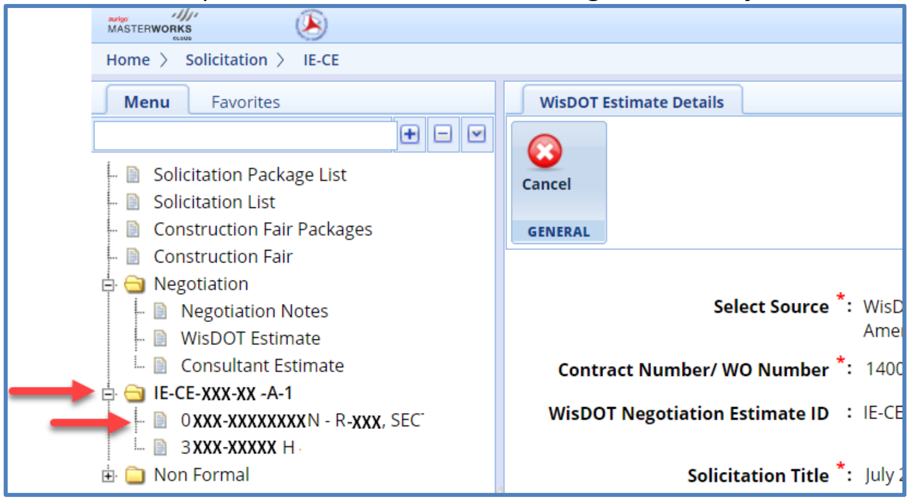
Steps:

1. In the module menu, click **Solicitation**.
2. In the navigation pane, under the **Negotiation** folder, click **WisDOT Estimate**. The **WisDOT Negotiation Estimate List** page is displayed.
3. Select the **New** button. This will display a new tab titled **WisDOT Estimate Details**.
4. From the drop-down menu in the field titled **Select Source**, choose option **WisDOT Estimate for Amendments.**
5. Click the three dots button next to the **Contract Number/WO Number** field. A new window will open. Use the filters as necessary to select the contract that is being amended. Click the **Select** button. This will populate the **WisDOT Estimate Details** form with the associated information.
6. Confirm the **Contract Type** and **Fixed Fee %** fields are correct. Adjust if needed.
7. Verify the auto populated fields are correct. Fill in all required fields that have not been auto populated. Required fields have a red asterisk. Complete all optional fields as needed. See the following table for explanation of fields and actions that aren't auto populated.

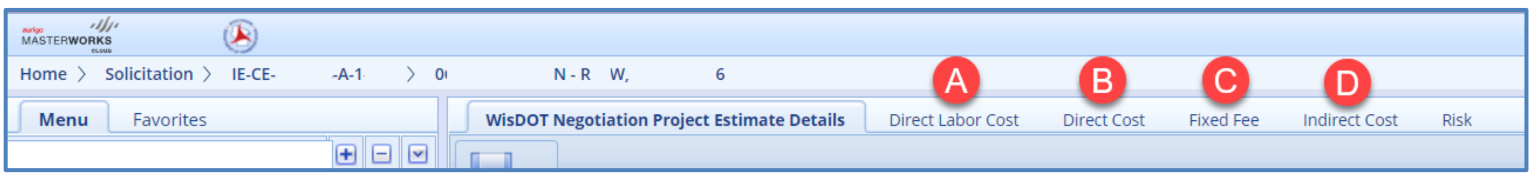
Field	Mandatory / Non-mandatory	Description
WisDOT Negotiation Estimate Title	Mandatory	Type in a unique name for the amendment.
Contract Amendment Reason	Mandatory	Select an **Amendment Reason** by clicking the three dots button next to the field. Use the filters as needed to find the reason and click the **Select** button.
Comments	Optional	Enter in any further notes on why the amendment is needed.

8. Update or Review the Projects sections. Review the **Projects (IN SCOPE EXCLUDING IF AUTHORIZED)** and **Projects (IF AUTHORIZED)** sections. Use the **Add** and **Delete** buttons as necessary to update the information.

9. Select the **Save** button in the tool bar at the top of the screen. The current tab will close and will be navigated back to the **WisDOT Negotiation Estimate List**.
10. Find the amendment estimate that was just created in the list. Select it and click the **Edit** button in the tool bar at the top of the screen.
11. Under the navigation pane, select the plus sign next to the **WisDOT Estimate ID** to expand the folder. Select the **Amendment** file. This will open a new tab titled **WisDOT Negotiation Project Estimate Details**.



12. In the Description field provide a description of services and the reason for the amendment.
13. There are five tabs at the top of the page. Go through each and update the amendment estimate with the desired changes. Follow the steps below to complete this.



NOTE: *If the amendment is to modify an existing Direct Labor Cost task or Direct Cost that already is part of the current contract, select the* ***Modify Current*** *buttons on the appropriate tabs.*

- **Direct Labor Cost**
  i. Modifying an existing task on the current contract (This is the most common)
     1. From the **Direct Labor Cost** tab, select the **New** button, then **Modify Current** from the drop down.
     2. The **Select Tasks** dialog box will open. Check the box next to the task that needs to be modified and click the **Select** button.
     3. Click **Modify Current** (or **Add**, as applicable) under the **Resources in Amendment** table**.** The **Resource** dialog window will open.
     4. Select the resource to be added from the list and click **Select**. The resource will appear in the **Resources in Amendment** table. Click into the table to edit each field highlighted in yellow.
     5. Select **Save & Back** in the tool bar at the top of the page.
  - Adding a task that is not on the current contract for either the prime or the sub

     1. From the **Direct Labor Cost** tab, select the **New** button, then **Add Multiple** from the drop down.
     2. Select the **Add** button. A new window will open. Use the filters as needed to find the desired task to be added. Check the box next to the task and click the **Select** button.
     3. Click **Add** under the **Resources in Amendment** table**.** The **Resource** dialog window will open.
     4. Select the resource to be added from the list and click **Select**. The resource will appear in the **Resources in Amendment** table. Click into the table to edit each field highlighted in yellow.
     5. Select **Save & Back** in the tool bar at the top of the page.
  - For further information on adding direct labor cost tasks, refer to **Adding a direct labor cost task**, on page 81 of this manual.
- **Direct Cost**

1. Follow the steps starting on page 86 of this manual for further instructions on how to add a new direct cost line Item.

- **Fixed Fee**
  i. Follow the steps starting on page 87 of this manual for further instructions on how to add details to the **Fixed Fee** tab.
- **Indirect Cost**
  i. Follow the steps starting on page 88 of this manual for further instructions on how to add details to the **Indirect Cost** tab.

14. Navigate to the **WisDOT Negotiation Project Estimate Details** Tab. Upload documents as needed. Review the page for accuracy. Select the **Save** button in the tool bar at the top of the screen.
15. Return to the **WisDOT Negotiation Estimate List**. Find the amendment estimate in the list and select it. Click **Mark as Current** button in the tool bar at the top of the screen. The consultant estimate can now be created.

8.1.2 Creating a Consultant Contract Amendment Estimate

Steps:

1. In the navigation pane, under the **Negotiation** folder, click **Consultant Estimate**. Select the **New** button. This will display a new tab titled **Consultant Estimate Details.**
2. From the drop-down menu in the field titled **Select Source**, choose option **Consultant Estimate for Amendment Negotiations**.
3. Click the three dots button next to the **Contract Number/WO Number** field. A new window will open. Use the filters as necessary to select the WisDOT amendment estimate that was just created. Click the **Select** button. This will populate the **WisDOT Estimate Details** form with the associated information.
4. Confirm the **Contract Type** and **Fixed Fee %** fields are correct. Adjust if needed.
5. Verify the auto populated fields are correct. Fill in all required fields that have not been auto populated. Required fields have a red asterisk. Complete all optional fields as needed. See the following table for explanation of fields and actions that aren't auto populated.

Field	Mandatory / Non-mandatory	Description
Consultant Estimate Title	Mandatory	Type in a unique name for the amendment.
Negotiation Submission Due Date	Mandatory	From the drop-down calendar, select the amendment estimate should be returned to WisDOT.
Contract Amendment Reason	Optional	Select an **Amendment Reason** by clicking the three dots button next to the field. Use the filters as needed to find the reason and click the **Select** button.
Comments	Optional	Enter in any further notes on why the amendment is needed.

6. Update or review the Projects sections. Review the **Projects (IN SCOPE EXCLUDING IF AUTHORIZED)** and **Projects (IF AUTHORIZED)** sections. Use the **Add** and **Delete** buttons as necessary to update the information.
7. Next to the **DBE Goal on Project** field, select an answer from the drop down. This drop down defaults to No. If the answer is something else (a rare occurrence), contact consultant services for further assistance.
8. Complete the **Attachments** section. This section is optional and should be used to provide supporting documentation to explain the amendment. Use the **Link Document** or **Upload Document** buttons as needed to upload the supporting documentation.
9. Select the **Save** button in the tool bar at the top of the screen, then the **Scope Finalized** button. The estimate has now been sent to the consultant for review. They will receive an email notifying them that there is an item for review in Masterworks.

8.1.3 Reviewing and Approving a Contract Amendment Estimate

Once the amendment estimate has been published by the consultant, the WisDOT user who marked the estimate as "Scope Finalized" will receive an email notification.

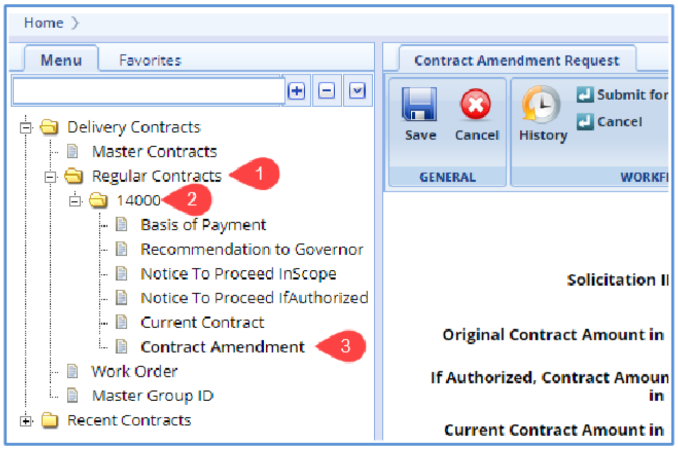
1. Under the **Solicitation** module, open the **Negotiation** folder in the navigation pane by clicking the plus sign next to the folder. Select the **Consultant Estimate** file.
2. Find the newly published consultant amendment estimate in the list and select it so it is highlighted yellow. Click the **Edit** button in the tool bar at the top of the screen. Review and confirm any changes made to the estimate by the consultant.
3. If more changes need to be made, follow the steps on page 200 of this manual. If no further adjustments are needed, navigate back to the **Consultant Estimate List** tab.
4. In the tool bar at the top of the page click **Select Actions**. From the drop down, select one of the following:
   - **Negotiation Complete**
     This is to be used when there is an internal agreement and no further adjustments to the estimate are needed.
   - **Back to Scope Finalized**
     This is to be used when the estimate needs to be adjusted by the consultant again.
   - **Redraft**
     This should be used when adjustments need to be made by WisDOT staff or the negotiations need to be paused.
5. When **Negotiation Complete** has been selected, a new window will open. Add any final notes or upload any final documents as needed. Select **Ok** when finished.
6. Email notifications will be sent to both WisDOT staff and the consultant. The page will refresh.
7. In the tool bar at the top of the screen click the **Select Actions** button. From the drop down, select one of three options.
   - **Approved for Contract**
     To be used when all negotiations are finalized, and a contract amendment should be created.
   - **Send Back to Publish**
     To be used to return the contract amendment to a **Published** status.
   - **Cancel**
     To be used when it is decided that the estimate should be discontinued.
8. When the **Approved for Contract** option is selected a new window will open. The opportunity to leave notes and upload documents is allowed. Add as needed. Select the **Ok** button when finished. Email notifications will be sent to both WisDOT staff and the consultant.

8.2 Creating a Contract Amendment

8.2.1 Creating a Contract Amendment for Updating a Contract Completion Date or Canceling a Contract

Steps:

1. In the module menu, click **Delivery Contracts**.
2. In the navigation pane, under the **Delivery Contracts** folder, click **Regular Contracts**. The **Regular Contract List** page is displayed. If it is a work order or master contract that is being amended, select the appropriate contract type.
3. Find the contract in the list, using the filters as needed. Select the contract needing to be amended and then click **View**.
4. In the navigation pane, select the plus sign next to the **Contract ID** to expand the folder. Select the **Contract Amendment** file. This will open a new tab titled **Contract Amendment Request.**
5. Click **New**. A blank amendment form will populate.



6. Fill in all required fields. Required fields have a red asterisk. Complete all optional fields as needed. See the following table for explanation of fields and actions.

***Note**: The **Select Amendment Type** field determines what other fields populate and if they are required. Although the **Update Contract** and **Terminate Contract** appear as options, they cannot be used at this time.*

Field	Mandatory / Non-mandatory	Description
Select Amendment Type	Mandatory	From the drop down select one of the following: 1. **Update Contract Completion Date:** To be used when only the contract completion date needs to be updated. 2. **Cancel Contract:** To be used when the contract needs to be discontinued and NO payment has been or will be made to the consultant.
Contract Amendment Title	Mandatory	Type in a unique name for the amendment.
Contract Amendment Reason	Optional	Enter a brief description of why an amendment is needed. ***NOTE:*** *This field is auto populated for amendment type Amendment Completion Date.*
New Contract Completion Date	Mandatory	From the drop-down calendar, select the contract amendment date. (If applicable)
Contract Function	Mandatory	This field will auto populate based on the contract function stated on the original contract. Confirm the function listed is correct or uses the following steps to update. 9. Select the three dots next to the field and choose the associated contract function from the list. 10. Click the **Select** button.
Governor's Approval Required	Not Used	This field is currently not in use and should be left unchecked.

7. Complete the **Projects** section. This section will auto populate with the projects associated with the contract. To edit the account code for a project, use the following steps.
   - Select the project line item, then click **Edit**.
   - A new window will open. Click the button with the three dots and select the desired account code. Select **Save**.

Note: *The account code rarely needs to be updated.*

8. Review and edit if needed the **WISDOT Department Representative** section and the **Consultant Representative** sections. These two sections function the same. Each section should populate with the same information from the original contract or most recent amendment. Use the buttons at the bottom of the section to **Add**, **Edit** or **Delete** a contact person.

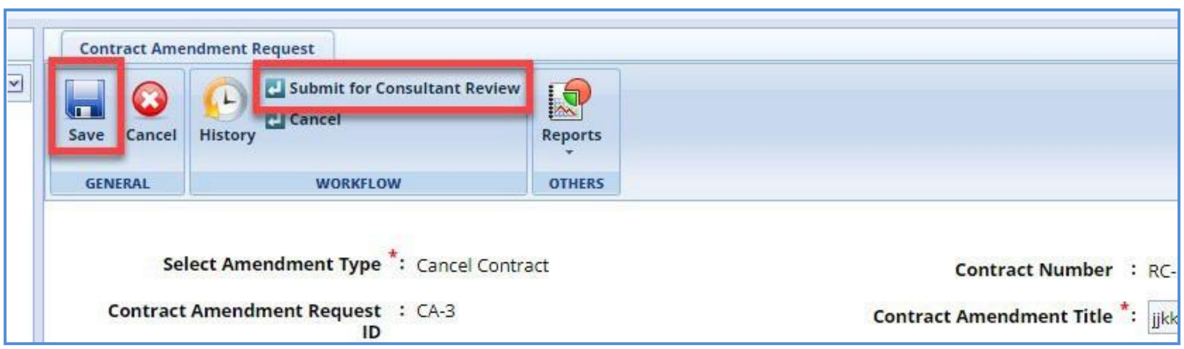
Note: *The **WISDOT Department Representative** and the **Consultant Representative** rarely needs to be updated.*

- To Add a contact person:
  a. Click the **Add** button. This will open a new window.
  b. Click the button with the three dots next to the **Contact Name** field. This will open a new library of contact people. Filter as need be and select the desired representative. If the representative is not listed, contact Consultant Services at WisDOTmasterworks@dot.wi.gov for further assistance.
  c. Click the **Select** button, then the **Save** button.
- To Edit a contact person:
  a. Select the contact person line you wish to edit so it is highlighted. Then click the **Edit** button. This will open a new window.
  b. Click the button with the three dots next to the **Contact Name** field. This will open a new library of contact people. Filter as need be and select the desired representative. Click the **Select** button.
  c. Click the **Save** button.
- To Delete a contact person:
  a. Select the contact person line you wish to delete so it is highlighted. Then click the **Delete** button. This will open a new window.
  b. Click **Okay** to remove the contact person or **Cancel** to leave as is.

6. Fill in the **Comments** box as needed. This space is provided to allow for further explanation of any changes made to the contract contact persons.
7. Complete the **Attachments** section. This section is optional and should be used to provide supporting documentation to explain changes made to the completion date or reason for canceling the contract. Use the **Add**, **Edit**, **View**, and **Delete** buttons as needed to upload the supporting documentation.

Note: *The only uploaded or linked document types that Masterworks currently supports are PDFs.*

8. Select **Save** in the tool bar at the top of the screen to save as a draft or select **Submit for Consultant Review** to send the contract to the consultant contact person for their review.



8.2.2 Creating a Contract Amendment for Updating a Contract or Terminating a Contract

Steps:

1. In the module menu, click **Delivery Contracts**.
2. In the navigation pane, under the **Delivery Contracts** folder, click **Regular Contracts**. The **Regular Contract List** page is displayed. If it is a work order or master contract that is being amended, select the appropriate contract type.
3. Find the contract in the list, using the filters as needed. Select the contract needing to be amended and then click **View**.
4. In the navigation pane, select the plus sign next to the **Contract ID** to expand the folder. Select the **Contract Amendment** file. This will open a new tab titled **Contract Amendment Request.**
5. Click **New**. A blank amendment form will populate.
6. Fill in all required fields. Required fields have a red asterisk. Complete all optional fields as needed. See the following table for explanation of fields and actions.

Field	Mandatory / Non-mandatory	Description
Select Amendment Type	Mandatory	From the drop down select one of the following: • Update Contract

		• Terminate Contract
Consultant Amendment Estimate ID	Mandatory	Click on the button with the three dots next to the field. A new window will open. Select the consultant estimate previously created. Once selected, the form will populate with the associated information.
Contract Amendment Title	Mandatory	Type in a unique name for the amendment.
Contract Amendment Reason	Mandatory	Enter a brief description of why an amendment is needed.
New Contract Current Contract Completion Date	Mandatory	From the drop-down calendar, select the date that the project should be completed by. (If applicable)
Contract Function	Mandatory	This field will auto populate based on the contract function stated on the original contract. Confirm the function listed is correct or use the following steps to update. 1. Select the three dots next to the field and choose the associated contract function from the list. 2. Click the **Select** button.
Governor's Approval Required	Not Used	This field is currently not in use and should be left unchecked.

7. Complete the **Projects** section. This section will auto populate with the projects associated with the contract. To edit the account code for a project, use the following steps.
   - Select the project line item, then click **Edit**. A new widow will open.
   - Click the button with the three dots and select the desired account code. Select **Save**.

Note: *The account code rarely needs to be updated.*

8. Review and edit if needed the **WISDOT Department Representative** section and the **Consultant Representative** sections. These two sections function the same. Each section should populate with the same information from the original contract. Use the buttons at the bottom of the section to **Add**, **Edit** or **Delete** a contact person.

Note: *The **WISDOT Department Representative** and the **Consultant Representative** rarely needs to be updated.*

- To Add a contact person:
  a. Click the **Add** button. This will open a new window.
  b. Click the button with the three dots next to the **Contact Name** field. This will open a new library of contact people. Filter as need be and select the desired representative. If the representative is not listed, contact Consultant Services at WisDOTmasterworks@dot.wi.gov for further assistance.
  c. Click the **Select** button and then click the **Save** button.

- To Edit a contact person:
  a. Select the contact person line you wish to edit so it is highlighted. Then click the **Edit** button. This will open a new window.

  b. Click the button with the three dots next to the **Contact Name** field. This will open a new library of contact people. Filter as need be and select the desired representative. Click the **Select** button.
  c. Click the **Save** button.

- To Delete a contact person:
  a. Select the contact person line you wish to delete so it is highlighted. Then click the **Delete** button. This will open a new window.
  b. Click **Okay** to remove the contact person or **Cancel** to leave as is.

9. Review the **DBE Goal Set field**. This is auto populated. If this field needs to be adjusted, contact consultant services for further assistance. This is a rare occurrence.
10. Fill in the **Comments** box as needed. This space is provided to allow for further explanation of any changes made to the contract contact persons.
11. Complete the **Attachments** section. This section is optional and should be used to provide supporting documentation to explain changes made to the contract or reason for terminating the contract. Use the **Add**, **Edit**, **View**, and **Delete** buttons as needed to upload the supporting documentation.

Note: *The only uploaded or linked document types that Masterworks currently supports are PDFs.*

12. Select **Save** in the tool bar at the top of the screen to save as a draft or select **Submit for Consultant Review** to send the contract to the consultant contact person for their review.

8.3 Reviewing and Approving a Contract Amendment

Steps:

1. When the notification email is received that the consultant has reviewed the contract amendment, navigate to **Delivery Contracts** in the module menu.
2. In the navigation pane, under the **Delivery Contracts** folder, click **Regular Contracts.** The **Regular Contract List** page is displayed. If it is a work order or master contract that is being amended, select the appropriate contract type.
3. Find the contract in the list, using the filters as needed. Select the contract needing to be amended and then click **View.**
4. In the navigation pane, select the plus sign next to the **Contract ID** to expand the folder. Select the **Contract Amendment** file. This will open a new tab titled **Contract Amendment Request**.
5. In the tool bar at the top of the screen, click the **Select Actions** button. Select one of two options from the drop down.
   a. **Redraft**
   To be used if the consultant is requesting a change or if any other change needs to be made.
   b. **Submit for Approval**
   To be used by the WisDOT Contract Specialist, when the amendment is deemed correct and the submission timing is correct, they will submit **for Approval.**
6. Once the contract has been submitted for approval, the page will refresh. In the tool bar at the top of the screen, click the **Select Actions** button. Select one of three options from the drop down.
   a. **Approve**
   To be used when the contract amendment is finalized, and no further actions need to be taken on it.
   b. **Redraft**
   To be used if further adjustments need to be made before the contract amendment should be finalized.
   c. **Cancel**
   To be used if the contract amendment should be discontinued.
7. When the contract amendment is in the **Approved** status, the contract amendment process is complete.

9. Generating Reports

You can generate various reports that comprise information of various projects and enterprise reports that comprise information on various modules. You can view selected information on the reports using filters. Additionally, you can generate reports in different formats and print these reports. Availability of reports to generate and the information displayed in the reports are based on the roles assigned to the user, and the projects the user is invited to.

9.1 Enterprise Reports

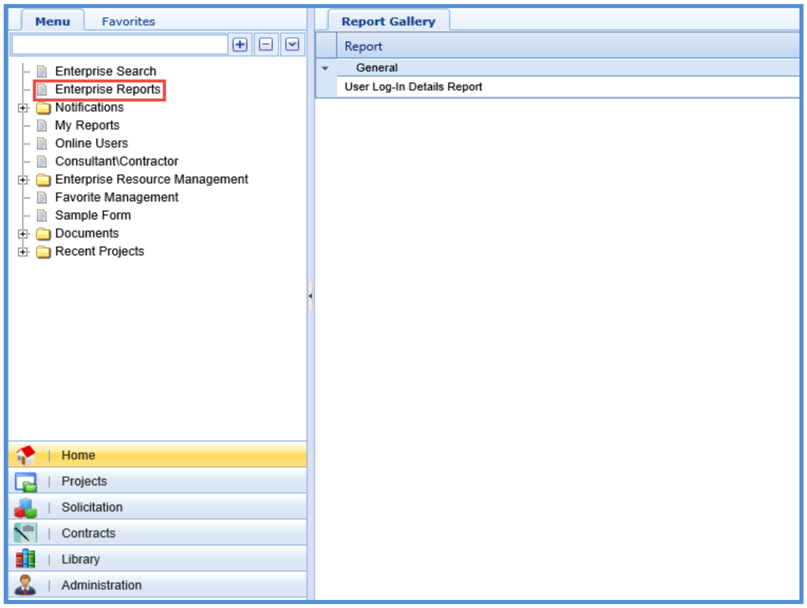
You can generate enterprise level reports that comprise information of various projects. You can view selected information using filters and generate reports in multiple report formats and print options.

Prerequisites

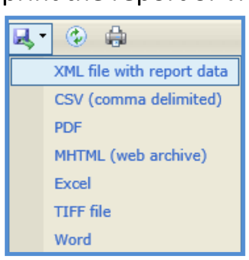
- You are invited to projects.
- You are invited to projects in the roles that have access permissions to the report.

Steps:

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



2. In the navigation pane, click **Enterprise Reports**. The **Report Gallery** page is displayed listing the reports that can be generated.
3. Double-click the required report.
4. Select the filter criteria to generate the report.
5. Click **View** Report. The report is displayed.
6. To print the report or view the report in various other formats, click **Export**, and then click the required option.



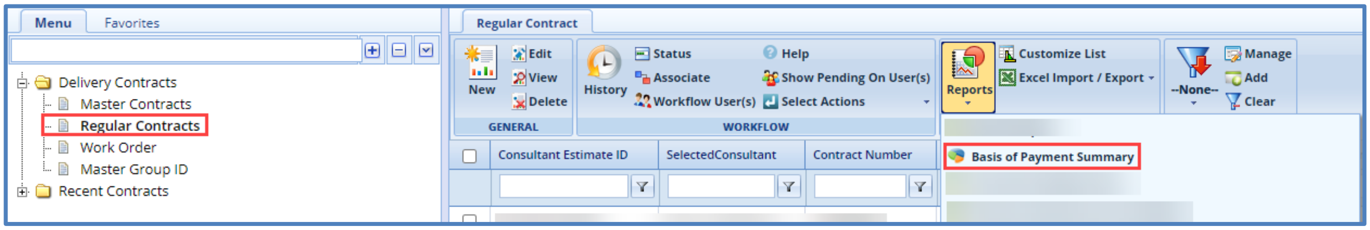
9.2 Current Reports Available

You can generate contract reports that contain detailed information of that particular contract. You can view selected information using filters and generate reports in multiple report formats and print options.

Below is the workflow to access the Basis of Payment Summary Report, which all other report workflows mimic.

Steps:

1. Select the **Delivery Contracts** module. Select **Regular Contracts**.
2. Select the contract for which you want to run the report.
3. Click **Reports** and then **Basis of Payment Summary**.



The following reports are available within the designated modules, all can be downloaded as PDF or Excel files.

Module	Report Name	Cover Page	Basis Of Payment Summary (Original)	Basis Of Payment Summary (Amends)	Basis Of Payment Summary (Orig + Amends)	Contract Summary Cost Lines (Orig + Amends)
Delivery Contracts	Basis Of Payment Summary				X	
Delivery Contracts	Contract Summary Cost Line Report					X
Delivery Contracts	Current Contract Details And Full Negotiation Summary	X				
Delivery Contracts	Full Negotiation Report					
Delivery Contracts	Original Contract Details	X	X			
Delivery Contracts	Original Contract Report	X	X			
Delivery Contracts	Original Contract With Supporting Documents	X	X			
Delivery Contracts	Total Contract	X			X	
Delivery Contracts	Total Contract With Negotiation	X			X	
Delivery Contracts	Total Full Negotiation Report					
Delivery Contracts/Amendment	Amendment Details With Supporting Documents	X		X		
Delivery Contracts/Amendment	Amendment Report	X		X		

Module	Report Name	Standard Provisions	Special Provisions	Supporting Documents	Full Negotiation Report (Original)	Full Negotiation Report (Original + Amends)
Delivery Contracts	**Basis Of Payment Summary**					
Delivery Contracts	**Contract Summary Cost Line Report**					
Delivery Contracts	**Current Contract Details And Full Negotiation Summary**					
Delivery Contracts	**Full Negotiation Report**				**X**	
Delivery Contracts	**Original Contract Details**					
Delivery Contracts	**Original Contract Report**	**X**	**X**			
Delivery Contracts	**Original Contract With Supporting Documents**	**X**	**X**	**X**		
Delivery Contracts	**Total Contract**	**X**	**X**	**X**		
Delivery Contracts	**Total Contract With Negotiation**	**X**	**X**	**X**		**X**
Delivery Contracts	**Total Full Negotiation Report**					**X**
Delivery Contracts/Amendment	**Amendment Details With Supporting Documents**	**X**	**X**	**X**		
Delivery Contracts/Amendment	**Amendment Report**	**X**	**X**			

9.3 Other Reports

You can generate reports with different views for all the pages in Masterworks. You can use filters to view specific information on reports. In addition to customized reports, two standard reports are available:

- List Page Report displays the list of all the records on the selected page.
- Details Report displays all the details of the selected record on a page.

Steps:

- To generate a customized report, perform the following steps:
  1. On the required list page, in the **Others** group, click **Reports**.
  2. Select the report that you want to generate.
- To generate a list page report, perform the following steps:
  1. On the required list page, in the **Others** group, click **Reports**.
  2. Click **List Report**.
- To generate a details report, perform the following steps:
  1. On the required list page, select the required form record.
  2. In the **Others** group, click **Reports**.
  3. Click **Details Report**.

10. Attachments

10.1 Attaching a File to a Form

You can attach files to a form. You can also link a file in the document management folders to a form.

Steps:

- To upload files to a form, perform the following steps in the **Attachments** section:
  1. Click **Add**. The **New Attachments** window appears.
  2. Click **Upload Document**. The **Choose File to Upload** dialog box is displayed. To upload a single file, click the required file.
  3. Alternatively, to upload multiple files, press CTRL, and then click the required files.
  4. Click **Open**. The files are uploaded to the form and are displayed in the attachment grid.
  5. In the **Title** column, enter the titles for the files attached.

- To link files in the Masterworks **Documents** folders to a form, perform the following steps:
  1. In the **Attachments** section, click **Link Document**.
  2. From the **Folder** drop-down box, select the required folder where the files exist. The list of files in that folder are displayed.
  3. From the list of files, select the required files.
  4. Click **OK**.
  5. The files are linked to the form and are displayed in the attachment grid. In the **Title** column, enter the titles for the linked files.

10.2 Accessing Attached Files

Files attached to a form can be accessed from the list page of the form.

Steps:

1. From the navigation tree, click the required form. The form list page is displayed.
2. In the tool bar, in the **Other** group, click **Attachments**. The attachments of all the forms are listed.